

Top tips to become a Xero Hero

Making the most of Contact Groups

There are many great features of xero contacts but often they are overlooked and under used. If set up correctly, contacts can be a dynamic tool, which gives up to date information on customers and suppliers, and not just an address book.

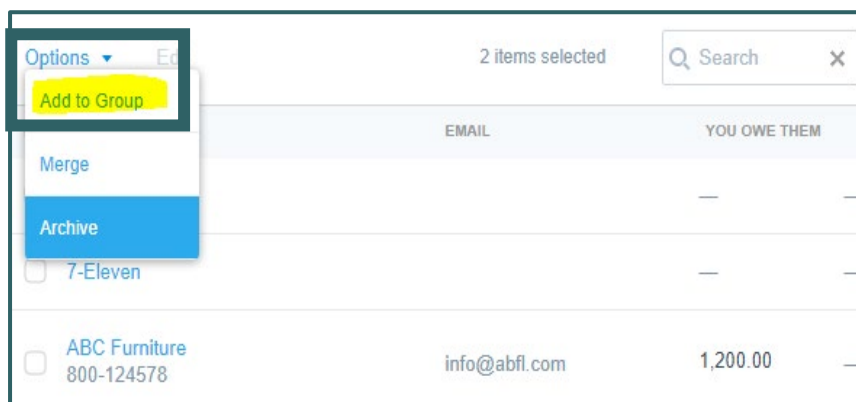
Contact Groups

Contacts can be organised into groups that have something in common. For example, customers could be grouped together by sales rep. This would then mean that reports, such as the aged receivables report, could then be run for each sales rep, detailing the balances of the customers only they deal with.

Creating a new group

1. In the **Contacts** menu, select **All contacts**.
2. Select the checkboxes next to the contacts you want to add to the group.
3. Click **Options**, then select **Add to Group**.
4. Click **Add to a new group**.
5. Name your contact group.
6. Click **Save**, then click **Add**.

You can also add a contact to a group from within the contact record by selecting **Add to Group** from the **Options** dropdown menu.



Adding a contact to an existing group

Once groups have been set up, a new contact can be added by selecting the checkbox next to the contact, clicking **Options**, then select **Add to Group**. Then select the checkbox of the group you want the contact to be added to.

Setting up multiple contact groups

A contact can be added to more than one group, so you could set up various groups depending on your needs. An example of this would be grouping customers by sales rep for reporting purposes and then setting up additional customer groups for invoice purposes such as those who are invoiced monthly and those who are invoiced on an ad hoc basis.

Moving a contact to another group

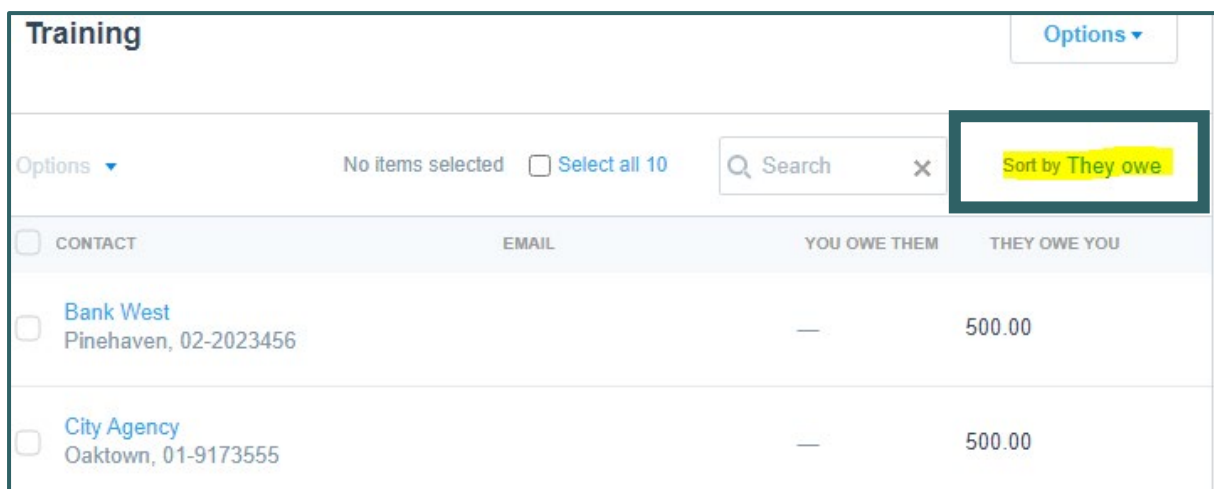
1. In the **Contacts** menu under **Groups**, select the custom group you want to move the contact **from**.
2. Select the checkbox next to the contact you want to move.
3. Click **Options**, then select **Move**.
4. Under Contact groups, select the checkbox of the group you want to move your contact **to**, or click **Move to a new group** to create a new group.
5. Click **Move**.

Remove a contact from a contact group

1. In the **Contacts** menu, select **All contacts**.
2. Click on the contact you want to remove from the group to open their contact record.
3. Under **Groups**, click **Remove from group**.
4. Select the group you'd like to remove the contact from and click **Remove** to confirm.

Viewing your contact groups

When in contacts, click on the group on the left- hand side that you want to review. Only the contacts in that group will be displayed and you can then sort the list in an order to suit you



CONTACT	EMAIL	YOU OWE THEM	THEY OWE YOU
<input type="checkbox"/> Bank West Pinehaven, 02-2023456		—	500.00
<input type="checkbox"/> City Agency Oaktown, 01-9173555		—	500.00

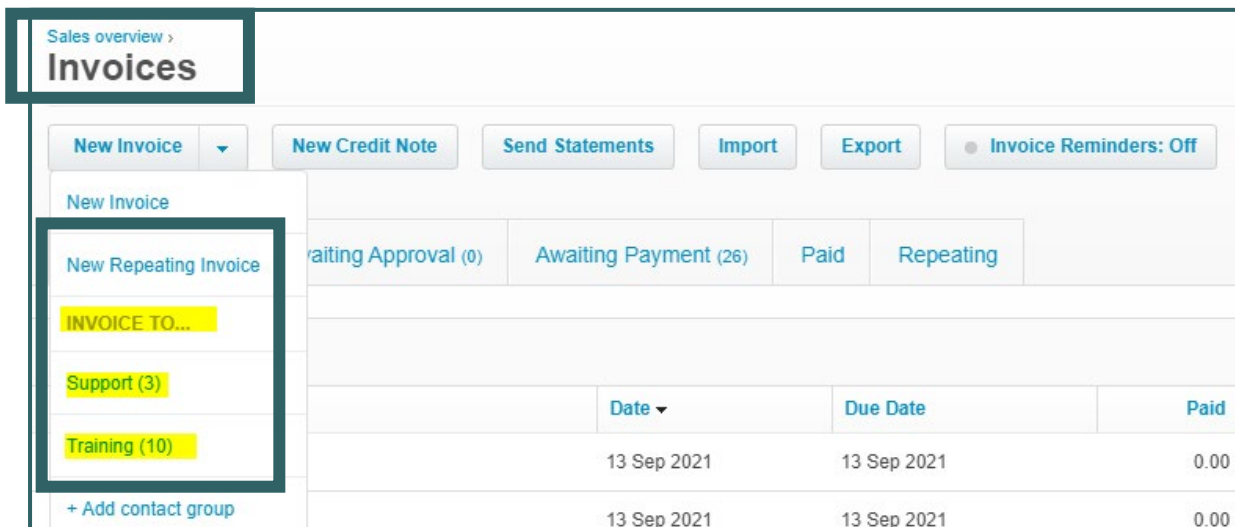
Reports for your contact group

Receivable and payables reports can be run separately for each contact group. To do this:

1. Select the report you want.
2. Click on **Filter**
3. Under columns select **filter** and enter the contact group name
4. Click **Apply filter**
5. Select **Update**

Bulk invoicing

Invoices can be sent in bulk – this is handy for customers with common invoicing needs such as those with subscriptions. Once a contact group has been set up, when you go into **Business>Invoices** you will have the option to invoice to a contact group



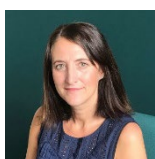
The screenshot shows the Xero 'Invoices' page. At the top, there are buttons for 'New Invoice', 'New Credit Note', 'Send Statements', 'Import', 'Export', and 'Invoice Reminders: Off'. Below these is a dropdown menu for 'New Invoice' which is open, showing options for 'New Repeating Invoice', 'INVOICE TO...', 'Support (3)', and 'Training (10)'. The 'INVOICE TO...' option is highlighted in yellow. Below the dropdown is a table with columns for 'Awaiting Approval (0)', 'Awaiting Payment (26)', 'Paid', and 'Repeating'. The table has a header row with 'Date', 'Due Date', and 'Paid' columns. The first row shows '13 Sep 2021' for both Date and Due Date, with a 'Paid' value of '0.00'. The second row shows '13 Sep 2021' for both Date and Due Date, with a 'Paid' value of '0.00'.

So by entering the invoice details once, invoices will be created for multiple contacts.

Looking for more top tips?

As a platinum Xero partner, we are well placed to advise on all aspects of the software. We match our clients' needs with cutting-edge technology and a dedicated chartered accountant to deliver pro-active management of finances. Our aim is to take the hassle out of your finances, helping you save time, make money and grow your business.

If you are looking for further advice as to how to get more out of your Xero subscription, contact **Cathy Samuel** to discuss our training and support packages.



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