

Top tips to become a Xero Hero

Did you know that there are some great shortcuts you can use in Xero? Here's our favourite five

1) The Magnifying Glass

To do a search in Xero, click on the **magnifying glass** in the top right and corner of the screen as shown below.



Once you have clicked on the **magnifying glass**, you can search for anything by typing in the narrative or use the drop-down arrow to narrow down the results into a particular category. Xero will list the results of your search, click onto the one you want and it will take you straight to the transaction.

2) Use Xero's inbuilt calculator

When inputting data into Xero you can perform basic calculations using the + - * and / keys on your computer. This saves time moving from screen input to calculator. As seen in the example below, simply enter a calculation into a field and press **Enter** or **Tab** on your keyboard – Xero calculates the results.

Description	Qty	Unit Price	Disc
Golf balls	3.00	29.95+1.5	

Want to know the net value? Type in 'gross value *5/6' into the field and press **Enter**.

3) View multiple pages in Xero

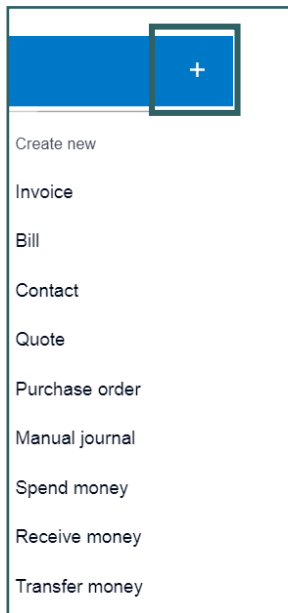
You can view multiple pages in your Xero Organisation at the same time by using **tabs**.

- If using a PC, right click on the link you want to open and select '**Open a new tab**'
- To open a link in a new tab on a Mac, hold down the **Command** key and click on the link.

This makes it easier to go back to the original screen you were on and saves wasting paper printing each report.

4) Use the add icon

The add icon '+' seen below in the top right-hand corner of the screen provides a '**quick link**' to creating various tasks in Xero.



5) Set Reports as Your Favourites

You should have the reports that you look at often set up so that when you click on the '**Accounting**' Tab at the top of your screen they appear on your list.

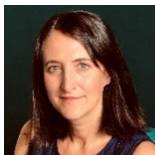
To set a report as a favourite, as can be seen in our example below, click on **Accounting > Reports**. It will then give you a list of all reports available. By clicking on the **star** on the left of a report, it will add it onto your list of quick links.

Accounting	
☆ Account Transactions	New
☆ Bank Reconciliation Summary	
☆ Blank Report	New
☆ Cash Validation Customer Report	New
☆ Contact Transactions - Summary	New
☆ Duplicate Statement Lines	New
☆ Foreign Currency Gains and Losses	
☆ General Ledger	
☆ Journal Report	
★ Trial Balance	New
∨ More reports	

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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