

Top tips to become a Xero Hero

Did you know you can sort your outstanding bills onto payment schedules?

This is different to a 'due date' in that it is the date when you want to pay them and not when the supplier is asking for payment by.

Once a planned payment date is added to a bill, Xero adds the payment amount and date to a schedule of planned payments. This makes it easier to monitor upcoming payments and cashflow.

Once planned payment dates are used, you can simply click onto 'Bills' and 'Awaiting Payments'. By selecting from the payment date tab, you will be able to see the list of bills you have planned to pay on that date.

The screenshot shows the Xero 'Bills' interface. At the top, there are buttons for 'New Bill', 'New Credit Note', 'Import', 'Export', and 'Create bill from email'. Below these are tabs for 'All', 'Draft (0)', 'Awaiting Approval (0)', 'Awaiting Payment (12)', 'Paid', and 'Repeating'. The 'Awaiting Payment (12)' tab is selected and circled. Below the tabs is a 'Schedule of Planned Payments' table. The table has a column for 'All' and a row for '11 Jul 2020' with a value of '349.08' highlighted in yellow. Another row shows '18 Jul 2020' with a value of '1,207.03'. Arrows point from the circled 'Awaiting Payment (12)' tab to the circled '11 Jul 2020' row in the table.

Schedule of Planned Payments	
All	11 Jul 2020 349.08
	18 Jul 2020 1,207.03

To add a payment date to an individual bill

1. In the **'Business menu'** select **'Purchases overview'**.
2. Under **'Bills'** click **'Awaiting payment'**.
3. Move your cursor to the **'Planned Date'** column of the bill you want to add a date to and click **'Add date'**.

Due Date	Planned Date
21 Jun 2020	
11 Jun 2020	
8 Jun 2020	




4. The payment date is added to the bill and the payment amount and date appear in the **'Schedule of Planned Payments'**.

You can also add a payment date to multiple bills at once

1. Select the **'Purchases Overview'** in the **'Business menu'**.
2. Under **'Bills'** click **'Awaiting Payment'**.
3. Select the checkboxes for all bills that you wish to apply the same planned payment date.
4. Click **'Schedule payments'** and select the payment date for the bills.
5. The payment date is added to the bills and the payment amount and date appear in the **'Schedule of Planned Payments'**.

To change or delete a planned payment date

1. In the **'Business menu'** select **'Purchases overview'**.
2. Under **'Bills'** click **'Awaiting payment'**.
3. Move your cursor to the **'Planned Date'** column of the bill you want to change or delete a payment date for and a plus, minus and remove icon will appear

From	Date ▾	Due Date	Planned Date
Capital Cab Co	23 Aug 2016	30 Sep 2016	30 Sep 2016   

4. Clicking the + or - icon will change the payment date by a day, while the x icon will remove the scheduled payment date

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 **Ryan Alderson** to discuss our training and support packages.



Ryan Alderson
Lead Cloud & Digital Specialist
DD: 0161 926 0493
ra@haroldsharp.co.uk

