

Top tips to become a Xero Hero

Did you know that you can select accounts that you wish to monitor closely to show on your dashboard?

By selecting a handful of accounts that you wish to monitor closely to appear on your dashboard, you can see the data that is most meaningful to you each time you log into Xero.

The selected accounts will appear under your 'Account watchlist'. For example:

Account	This month	YTD
Advertising & Marketing (400)	2,870.00	11,581.46
Entertainment-100% business (420)	0.00	31.66
Purchases (300)	5,552.00	6,802.00
Sales (200)	516.67	19,329.78

When you click on the **account name** or **amount**, it will take you to the detailed information behind the figures.

How do I select accounts to show on the dashboard?

1. Go to your 'Chart of accounts' by clicking *Accounting* → *Advanced* → *Chart of accounts*
2. Click the name of the account you want to select under *Account Type*
3. Tick the *Show on dashboard* box
4. Hit *Save*

How do I deselect an account so that it no longer shows on the dashboard?

1. Go to your 'Chart of accounts' by clicking *Accounting* → *Advanced* → *Chart of accounts*
2. Click the name of the account you want to deselect from *Account Type*
3. Untick the *Show on dashboard* box
4. Hit *Save*

Edit Account Details

Account Type
Revenue

Code
A unique code/number for this account (limited to 10 characters)
200

Name
A short title for this account (limited to 150 characters)
Sales
[+ add Reporting Name](#)

Description (optional)
A description of how this account should be used
Income from any normal business activity

Tax
The default tax setting for this account
20% (VAT on Income)

Show on Dashboard Watchlist
 Show in Expense Claims
 Enable payments to this account

How account types affect your reports

Profit & Loss	Balance Sheet
Income	Current Assets
Revenue	Current Assets
Sales	Inventory
Less Cost of Sales	Prepayments
Direct Costs	Plus Bank
GROSS PROFIT	Bank Accounts
Plus Other Income	Plus Fixed Assets
Other Income	Fixed Assets
Less Expenses	Plus Non-current Assets
Expenses	Non-current Assets
Depreciation	TOTAL ASSETS
Overheads	Less Current Liabilities
NET PROFIT	Current Liabilities
	Less Non-current Liabilities
	Liabilities
	Non-current Liabilities
	NET ASSETS
	Equity
	Equity
	Plus Net Profit
	TOTAL EQUITY

Save **Cancel**

You can also modify where accounts appear in your reports using [Customised Report Layouts](#)

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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