



Xero:

You will notice we have sent over access to your Xero account. You can now begin to use this software to invoice your customers. In order to make sure the system is correctly set up for you I will need a few more bits of information to add to the basic invoice template

I will need the following:

-Logo (If applicable)

-Business Bank Details that customers should pay to

-Business Payment terms (Do you require immediate payment, 7 days, 30 Days etc)

Please see the link below to a simple 'How to' Guide to producing invoices via Xero.

https://www.youtube.com/watch?v=wm48OWObU_4

Xero does also have a mobile app you can now download to invoice your clients on the go. Please visit your App Store to download this.



Receipt Bank:

You will also notice you have been sent a link to create your account with Receipt Bank, this is the app in which you can photograph your receipts for business expenditure on the go and they will then automatically be imported into your Xero accounting software. This means you will never miss an expense!

Again please see below a link to a basic how to guide to using this Mobile App to store your receipts

<https://www.youtube.com/watch?v=vSLflaT2ZNY>

This are the basic first steps, if you have any problems at all using these we would be more than happy to arrange an appointment in the office to go over the steps to ensure you are using them correctly.

Please contact Olivia on 0113 229 3000