BEST PRACTICE, TIPS, AND COMMON PITFALLS
WHAT WE’LL COVER

- Making effective use of notifications
- Streamlining your job and task templates
- Optimising your invoicing process
- Getting the most from Report Builder
- A recap of the latest features
Notifications

- **Assigned to work on a job**
  
  Friday, 24 March - Jon Winter has assigned you to work on job J000026 - Annual Accounts - 2016 for Rogue Traders.

- **Change in Job State**
  
  Wednesday, 17 May 11:59 - Jon Winter has changed the state of the job J000024 - Annual Accounts - 2016 for Cyberdyne Systems Ltd to - Completed.

- **Actual time exceeds estimate time**
  
  Monday, 6 March - The time worked on job J000022 - Annual Accounts 2017 for Immobiliare Limited has exceeded 50% of the estimated time.
Let’s take a look
Invoicing
Benefits of invoicing out of blue Xero

- Bulk email
- Online invoicing
- Payment gateways
- Automatic invoice reminders
Let's take a look
Some different looking invoices
Some different looking invoices

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**TAX INVOICE**

Multitasking Company Ltd  
123 Main Street  
Auckland

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount NZD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Accounts - 2016</td>
<td>1,000.00</td>
</tr>
<tr>
<td>Preparation of the financial statements and tax returns for the year</td>
<td></td>
</tr>
<tr>
<td>Finalise Accounts</td>
<td>400.00</td>
</tr>
<tr>
<td>General Phone Queries</td>
<td>40.00</td>
</tr>
<tr>
<td>Company Annual Return</td>
<td>180.00</td>
</tr>
<tr>
<td>Completion and filing of Annual Return with Companies Office</td>
<td></td>
</tr>
<tr>
<td>Tax Return</td>
<td>500.00</td>
</tr>
<tr>
<td>Preparation of Company Tax Return (IR4)</td>
<td></td>
</tr>
<tr>
<td>Tax Queries</td>
<td>80.00</td>
</tr>
<tr>
<td>Client Meeting</td>
<td>300.00</td>
</tr>
<tr>
<td>Annual meeting to discuss financial statements and tax</td>
<td></td>
</tr>
<tr>
<td>Photocopying</td>
<td>5.00</td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td><strong>2,520.00</strong></td>
</tr>
<tr>
<td><strong>GST 15%</strong></td>
<td><strong>375.75</strong></td>
</tr>
<tr>
<td><strong>TOTAL GST 15%</strong></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL Nzd</strong></td>
<td><strong>2,880.75</strong></td>
</tr>
</tbody>
</table>

Due Date: 17 May 2017

Invoices are due within 14 days as stated. Early payment is appreciated. Payment can be made using the "Pay now" button on the online invoice. Alternatively, we accept bank transfers into the following account:

ASB: 12-1324-1234567-01
Some different looking invoices
Some different looking invoices
Some different looking invoices

**SALES INVOICE**

Genco Pura Olive Oil Company  
Attention: Vito  
10 Mott Street  
Little Italy

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount NZD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Accounts - 2016</td>
<td>1,200.00</td>
</tr>
<tr>
<td>Preparation of the financial statements and tax returns for the year.</td>
<td></td>
</tr>
</tbody>
</table>

Subtotal 1,200.00

**TOTAL GST 15%** 180.00

**TOTAL NZD** 1,380.00

**Due Date: 9 Jun 2017**

Invoices are due within 14 days as stated. Early payment is appreciated.
Payment can be made using the "Pay Now" button on the online invoice. Alternatively, we accept bank transfers into the following account:

ASB 12-1234-1234567-01
Some different looking invoices

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**SALES INVOICE**

**Genco Pura Olive Oil Company**  
Attention: Vito  
10 Mott Street  
Little Italy

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**Winter & Associates**  
1 Watt Street  
Parnell  
Auckland 1010  
NEW ZEALAND

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**Description** | **Amount NZD**
--- | ---
Annual Accounts - 2016  | 1,200.00
*Preparation of the financial statements and tax returns for the year*  |  
| **Subtotal**  | **1,200.00**

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**Due Date: 9 Jun 2017**

Invoices are due within 14 days as stated. Early payment is appreciated.

Payment can be made using the "Pay Now" button on the online invoice. Alternatively, we accept bank transfers into the following account:

ASB 12-1234-1234567-01
Job and task templates
Let's take a look
Some Quick Tips
RECAP OF RECENT UPDATES
Recent updates

• E-sign
• Bulk email of payment letters
• Updates to IR10
• Tax access
• Multiple transfers
• Android app
E-sign
Bulk email tax payment letters
Small improvements to IR10
Tax access
Multiple transfers of tax refunds
Improvements to mobile
What resources are available?
Resources

- Help Centre
- Support
- Xero U
- XPC team
Beautiful accounting software

www.xero.com