



# Master XERO Insights

## NDA TRAINING TASMANIA

RTO Provider : 60034

**Course Cost** - \$375

**Duration** - 1 Day

### Locations

- Hobart
- Launceston
- Ulverstone

### Course Dates

Course dates can be found on the training calendar on the NDA website. If you can't find a suitable date, email: [bookings@nda.com.au](mailto:bookings@nda.com.au)

### Private Training

This training can be delivered as a private course for your organisation and can be customised for your needs. The training can be delivered either on-site or at NDA premises.

Please contact us for further information and to be provided with a quote.

### More Information

Phone: 03 6334 4910

Email: [bookings@nda.com.au](mailto:bookings@nda.com.au)

Web: [www.nda.com.au](http://www.nda.com.au)

BOOK

ENQUIRE

WEBSITE

### Unit Code/s\*:

BSBFIN401 – Report on financial activity

### Course Objectives

This course is designed for current users of MYOB who wish to extend their knowledge and learn more about the customising and exporting aspects of MYOB.

### Learning Outcomes

#### Customising XERO

- Preferences

#### Security

- Administrator Password
- Creating a New User
- Signing In
- User Maintenance

#### Custom Fields

- Custom Lists, fields, identifiers and price levels
- Assigning Custom Fields
- Setting and assigning item Levels
- Filters and reports using custom fields

#### Petty Cash

- Setting up for Petty Cash
- Raising a Float
- Accounting for Petty Cash

#### Jobs

- Creating a Job Structure
- Detail and header Jobs
- Using Jobs and checking status
- Reimbursable Expenses

#### Fixed Assets

- Fixed assets
- Fixed asset register
- Purchasing a Fixed Asset
- Recording Depreciation

- Selling and writing off an Asset
- Asset Revaluation
- Fixed Liabilities - Loans
- Loan Repayments

#### XERO And Microsoft Office

- Letters
- Default Letter Templates
- Modifying a Default Template
- Creating a New Template
- Sending a Bulk Letter
- Sending an Individual Letter
- Mailing Labels
- Exporting to Excel

#### End of Year

- Stock Take Adjustment Accounts
- Performing Stock Take Adjustments
- Depreciation
- Bad Debts
- Prepayments
- Pro Rata Prepayment Adjustment
- Accrued Expenses
- Closing A Financial Year
- Start of Year Adjustments

#### Customising Forms

- Creating and customising forms
- Manipulating objects
- Adding A New Data Field
- Saving the Form

### Optional Assessment - \$195 per unit

This course is part of a nationally recognised training program. Participants who successfully complete the optional assessment component of this course will receive a Statement of Attainment for the unit of competency aligned to the training course.

Exercises and activities completed during the course will be used as evidence towards unit competency.

Participants who choose not to be assessed will receive a Certificate of Attendance.