RESOURCE GUIDE

Xero Basics Made Simple

A simple guide to using Xero with confidence — from finding your way around the dashboard to reconciling your everyday transactions.

ACCOUNTING SERVICES
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Bookkeeping support built for local businesses — Karratha & the Pilbara

> Hi, I'm Thilini! If Xero still feels a little unfamiliar, you're not alone — most business owners feel that way at the start. This guide walks you through the basics in plain English, so day-to-day bookkeeping feels easy rather than overwhelming.
>
> There's no such thing as a silly question, so if anything here doesn't quite make sense, just reach out and I'll talk you through it. **— Thilini**

1 Finding Your Way Around the Dashboard

When you log in to Xero, the Dashboard is your home base. It gives you a quick, at-a-glance snapshot of how your business is tracking, without needing to dig through menus.

On the Dashboard you'll usually see:

- **Bank accounts** — your current balance for each account, updated automatically once your bank feed is connected
- **Invoices owed to you** — who still needs to pay you, and how overdue they are
- **Bills you need to pay** — what's coming up so nothing gets missed
- **A simple cash flow snapshot** — money in versus money out over recent weeks

> **HANDY TIP**
>
> You can rearrange or hide Dashboard panels to show what matters most to you — look for the "Edit Dashboard" option in the bottom corner.

2 Connecting Your Bank Feeds

A bank feed is what lets Xero automatically pull in your transactions each day, so you're not manually typing anything in. Once it's set up, it just runs quietly in the background.

1. Go to **Accounting > Bank Accounts**
2. Select **Add Bank Account** and search for your bank
3. Follow the prompts to securely link your account
4. Your recent transactions will start appearing within a day or two

> **HANDY TIP**
>
> If you're not sure which account to connect, or run into any trouble linking your bank, this is exactly the kind of thing I'm happy to help set up for you. See our "Connecting Your Bank to Xero" guide for the full walkthrough.

3 Reconciling Your Transactions

"Reconciling" sounds technical, but it simply means matching up the transactions that land in Xero from your bank with what they actually were — a sale, a bill payment, a fuel purchase, and so on. It's how Xero (and your BAS!) stays accurate.

1. Go to **Accounting > Bank Accounts** and click **Reconcile** on the relevant account
2. For each transaction, Xero will often suggest a match — check it looks right
3. If there's no suggested match, choose the correct category (e.g. Fuel, Office Supplies) or match it to an invoice or bill
4. Click **OK** to confirm — that transaction is now reconciled

> **HANDY TIP**
> Try to reconcile a little and often — ten minutes a week beats a big backlog right before BAS time, and it's much easier to remember what a transaction was while it's still fresh.

4 Sending Invoices & Getting Paid

Getting paid on time starts with a clear, professional invoice. Xero makes this quick once you've got the hang of it.

1. Go to **Business > Invoices** and select **New Invoice**
2. Add your customer, the item or service, and the amount
3. Double-check the due date, then click **Approve** and **Send**
4. Xero can send automatic reminders for you if an invoice runs overdue

> **HANDY TIP**
> Turning on online payments (like a "Pay Now" button) on your invoices is one of the easiest ways to get paid faster — ask me if you'd like a hand setting this up.

5 Recording Bills & Expenses

Keeping your bills and receipts up to date in Xero means your numbers — and your BAS — stay accurate, and nothing gets forgotten or paid twice.

- Go to **Business > Bills to Pay** to enter a new bill
- Snap a photo of receipts on the go and upload them so nothing gets lost in the glovebox
- Make sure each bill is coded to the right category — this is one of the areas I regularly help clients tidy up

6 Simple Reports to Keep an Eye On

You don't need to be an accountant to get value from Xero's reports. A few simple ones are worth a regular glance:

Report	What it tells you
Profit & Loss	What you've earned versus what you've spent over a chosen period
Balance Sheet	A snapshot of what your business owns and owes at a point in time
Aged Receivables	Who owes you money, and how overdue it is
Aged Payables	What you owe, and when it's due

You'll find these under **Accounting > Reports**. If a number ever looks off, that's always worth flagging with me rather than guessing.

7 A Few Handy Habits

- **Set up bank rules** for regular transactions (like rent or subscriptions) so they categorise themselves automatically
- **Reconcile weekly** rather than saving it all up — little and often is much less stressful
- **Keep receipts as you go**, even a quick phone photo, rather than chasing them later
- **Ask early, not late** — a quick question now is always easier to sort out than an EOFY surprise

Need a hand?

This guide covers the basics, but you don't have to figure it all out alone. Whether it's setting up your Xero file properly from the start or getting your books back on track, I'm here to help.

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