



Xero **Payroll Training**

Overview:

This one day **Xero** payroll course is designed to build and develop the skills necessary to effectively use payroll features within **Xero**. Whether you are a business owner managing your own business or an accountant or bookkeeper managing a number of clients.

Learning Outcomes:

At the completion of this course you should be able to:

- work with the payroll features of **Xero**
- understand payroll settings
- add new employees
- understand leave entitlements
- set up and approve timesheets
- conduct pay runs
- work with payroll reports
- have an understanding of your payroll obligations

Target Audience:

This course is designed for users who wish to learn how to set up and use the payroll features in **Xero Accounting Software**, including setting up a payroll and employees, conduct pay runs, leave entitlements and timesheets, conducting a pay run and generating payroll reports.

Prerequisites:

This course assumes participants have a practical understanding of **Xero** accounting software in the workplace.

Duration:

1 Day

Computer Training Options

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computer training options

Xero

Payroll Training

Payroll Settings

- Understanding Payroll Settings
- Understanding Organisation
- Organisation Tab (Setup)
- Understanding Calendars
- Adding a Pay Calendar
- Understanding Holidays
- Understanding Payslips
- Understanding Superannuation
- Adding a Superannuation Fund
- Understanding Pay Items
- Adding an Earnings Rate
- Adding a Deduction Type
- Adding a Reimbursement Type
- Adding a Leave Type

Adding Employees

- Adding an Employee
- Adding Personal Details
- The Employment Tab Explained
- Completing the Employment Tab
- The Taxes Tab Explained
- Completing the Taxes Tab
- The Bank Accounts Tab Explained
- The Pay Template Explained
- Pay Template - Adding an Earnings Line
- Pay Template - Adding a Deduction Line
- Pay Template - Adding a Super Line
- Pay Template - Adding a Reimbursement Line
- The Opening Balances Tab Explained
- The Notes Tab Explained
- My Payroll

Leave Entitlements

- Understanding Leave Entitlements
- Adding Opening Leave Balances
- Adding Leave Accruals (Enter Rate Method)
- Adding Leave Accruals (Fixed Amount Method)
- Adding Leave Accruals (Variable Method)
- Adding Leave Applications
- Approving Leave Applications
- Rejecting Leave Applications

Timesheets

- Understanding Timesheets
- Adding a Timesheet
- Save a Timesheet as a Template
- Adding a Timesheet (Using Template)
- Approving a Timesheet
- Reverting an Approved Timesheet
- Deleting an Approved timesheet

Conducting a Pay Run

- Understanding Pay Runs
- Commencing a Pay Run
- Pay Run Summary Screen
- Making Changes during a Pay Run
- Posting a Pay Run
- Sending Pay Slips
- Reconciling a Pay Run

Payroll Reports

- Understanding Payroll Reports
- Run a Payroll Report
- View & Filter Payroll Reports (Grouping)
- View & Filter Payroll Reports (Hide Columns)
- View & Filter Payroll Reports (Filter)
- Export Payroll Reports
- Print Payroll Reports

Payroll Obligations

- Understanding Payroll Obligations
- Paying PAYG Withholding
- Paying Superannuation
- Generate the Superannuation Accruals Report
- Paying Deductions
- Reconciling Obligation Payments
- Generating Payment Summaries

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