

Tips and shortcuts

This article is for everyone who uses Xero

Overview

- Use some of our handy keyboard and date shortcuts or the inbuilt calculator to save time in Xero.

General tips



Here are some general tips to help you get around Xero quickly and easily.

Quick Xero login	Speed up logging into Xero. Save the login web address below as a browser or desktop bookmark so you can quickly access the Xero login page. https://login.xero.com/
View multiple pages	View multiple pages in your Xero organisation at the same time using tabs: <ul style="list-style-type: none">• To open a link in a new tab on a PC, right-click on a link and select Open a new Tab.• To open a link in a new tab on a Mac, hold down the Command key and click on the link. Don't use tabs to view multiple Xero organisations.
View multiple organisations	If you need to view multiple Xero organisations at the same time, open each organisation in a different browser. For example, open one in Chrome and the other in Safari. If you don't use separate browsers, your changes might save to the wrong organisation. Using different browsers ensures each organisation has its own separate data session.
Multiple concurrent users	Multiple users can work in Xero at the same time, and on the same items. If more than one user is working on an item at the same time, whoever saves last has their changes retained.

Favourite reports, advanced settings or features	Favourite a report or add features and settings to the Accounting menu .
Xero desktop shortcut	<p>Add a shortcut to the Xero login page to your desktop. Go to the Xero login page, drag the Xero icon in the URL or web address onto your desktop.</p> <p>Now you can click the desktop icon to go directly to the Xero login page.</p>
Search for contacts when entering transactions	<p>Use Xero's advanced contact search when you're entering transactions. Enter at least 3 key letters of your contact's name.</p> <p>You can also search for the primary contact person for your contact's organisation.</p>
Use payment references	Enter the cheque or transaction number in the payment Reference field when you're recording the invoice or bill payment.
Reconciliation adjustment	When you're reconciling your bank account, if an amount is slightly under or overpaid, make a minor adjustment so the amounts match.
Unreconcile & fix items reconciled incorrectly	Unreconcile or delete an account transaction .
Reconcile multiple items	During bank reconciliation, reconcile a statement line to multiple transactions .
Pay to an account that's not a bank account	Enable payments to an account .
Add account codes from transactions	<p>Add chart of account codes when you enter an invoice or bill. Click the account field in the transaction, then select Add a new account.</p> <p>For manual journals or spend and receive money, click Add next to the account field.</p>
Copy and edit an invoice	Copy an invoice or bill from one you've already created. All fields automatically populate with the original information you entered. You can edit the invoice or bill as necessary.
Find deleted or voided invoices	<ol style="list-style-type: none"> 1. In the Business menu, select Invoices. 2. Click Search and select the Include Deleted & Voided checkbox. 3. Add other search criteria to find a specific invoice, then click Search.
Find deleted or voided bills	<ol style="list-style-type: none"> 1. In the Business menu, select Bills to pay. 2. Click Search. 3. For Type, select All including deleted & voided. 4. Add other search criteria to find a specific bill, then click Search.

<p>Repeating invoice</p>	<p>Use repeating invoices or bills to pay regular bills or send regular invoices to customers.</p> <p>Set up a template, then Xero automatically creates the transaction according to the frequency and status you choose.</p>
<p>Tax rate for customer or supplier</p>	<p>To always use a specific tax rate on invoices or bills for a specific customer or supplier, edit their contact details and set the rate to use. This overrides the default tax rate set for the account, but you can change this when creating the transaction.</p>
<p>Expense claim codes</p>	<p>Limit the account codes that show when entering expense claims. From the Accounting menu, select Chart of accounts. Edit each account and either select or clear the Show in expense claims checkbox.</p>
<p>Report against budget</p>	<p>In some of Xero's reports you can compare actual income and expenditure against budgeted figures. Enter a budget, then show the budget on reports such as the Profit and Loss report and Budget Variance report.</p>
<p>Invoice/bill/payment summary for a contact</p>	<p>View a list of invoices, bills and payments for a particular contact on their contact record. Under Activity tab, you can see a record of all transactions to or from that contact.</p>
<p>Customise report layout</p>	<p>Use a custom layout to change the default layout of some reports.</p> <p>Apply the layout to other organisations you have in Xero or set it as the default for all users in your organisation.</p>
<p>Google Sheets</p>	<p>If you use Gmail, set up your account to access Google Sheets. You can then export any Xero report to Google Sheets and edit, save or share it.</p>
<p>Publish reports</p>	<p>Publish any of Xero's reports to keep a copy of it in Xero. You can run reports for any date but if you publish a report, it's kept as a static copy in PDF or spreadsheet format on the Published tab.</p> <p>You can also save PDF or Excel reports to your computer and email from there if required.</p>
<p>Tracking categories</p>	<p>Use Xero's tracking categories to enter transactions and report on different divisions of your business.</p>
<p>Log directly into My Xero</p>	<p>Log directly into My Xero, rather than defaulting to the last organisation you were in.</p> <p>Click your initials or profile image, click Account, then under Settings, select My Xero.</p>

Shortcuts for navigating Xero



Date entry shortcuts



Xero's inbuilt calculator



Xero has an inbuilt calculator that allows you to calculate amounts as you create transactions.

When you enter a calculation in a field, then press **Enter** or **Tab** on your keyboard, Xero calculates the result.

Description	Qty	Unit Price	Disc
Golf balls	3.00	29.95+1.5	

The calculator is available in the **Quantity**, **Unit Price** and **Disc %** fields in transactions, and the **Debit** and **Credit** fields in manual journals. In new invoicing, discount percentages are calculated automatically, so the calculator isn't available.

The basic arithmetic functions you can use are:

Function	Key	Example
Add	+	495.12+56.89
Subtract	-	112.33-16
Multiply	*	49.95*1.15
Divide	/	560/.33
Group	()	(25.95*.75)+10

What's next?

Use search to find [contacts and transactions](#) or [sales and purchase transactions](#) more efficiently in Xero.

Was this page helpful?

Yes

No