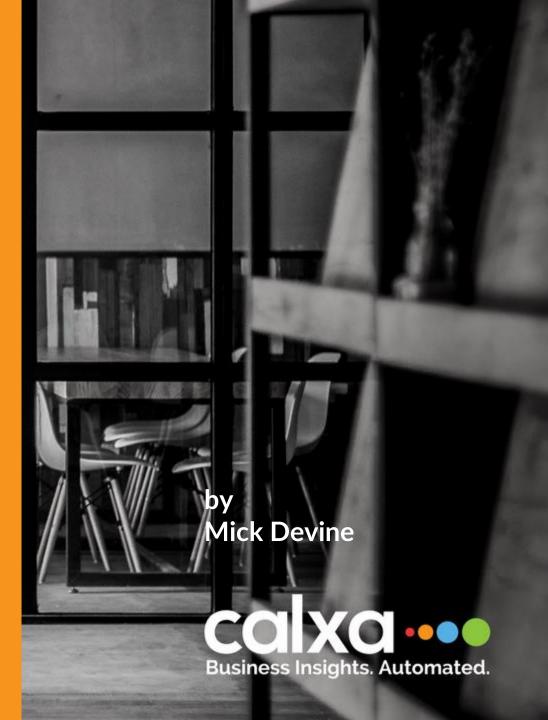
BUDGETING AND REPORTING IN XERO

When is it enough and when do you need more?



Agenda

- Budgeting in Xero
 - What is to like?
 - When do you need more?
- Reporting in Xero
 - What is to like?
 - When do you need more?

Budgeting in Xero

Where Xero Budgeting works

Xero Budgets - Pro

1. By Tracking Category



2. Multiple versions



3. Monthly Budgets



4. Many years



When you need better budgeting

Xero Budgets - Cons

1. No Bulk Updater



2. Complex versions



3. Drivers in formulas



4. Limited Views



Reporting in Xero

What to like about Xero reports

Xero Reports - Pro

1. Flexible Layout



2. Formulas in layouts



3. Drill down



4. Save customisations



When you need more from reports

Xero Reports - Cons

1. No Report Packs



2. Limited KPIs



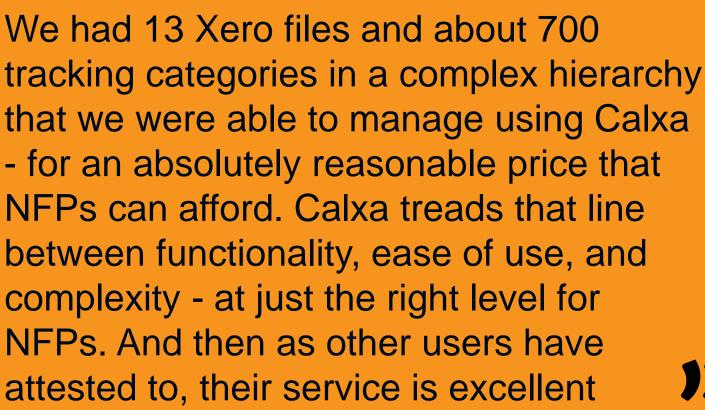
3. Historical only



4. No Styling









Jay Mendoza, Scouts NSW

https://apps.xero.com/au/app/calxa/reviews









This is such great software. It has turned what used to be a really tedious process producing customised not-for-profit reports into a simple, quick process. The flexibility to report easily on lots of different budgets is brilliant for a charity with multiple income streams, and being able to see all that consolidated just by a simple click to change settings is way simpler than all the old spreadsheets I used to maintain and spend hours cross-referencing.

Helen Agosti, Collections Trust, UK

Ask for help!

Talk to Connecting Up/Tech Soup for donations and discounts

