

BUDGETING AND REPORTING IN XERO

When is it enough and when do you need more?

by
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calxa 
Business Insights. Automated.

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?

01

Budgeting in Xero

02

Where Xero Budgeting works

Xero Budgets - Pro

1. By Tracking Category



2. Multiple versions



3. Monthly Budgets



4. Many years



03

**When you need
better budgeting**

Xero Budgets - Cons

1. No Bulk Updater



2. Complex versions



3. Drivers in formulas



4. Limited Views



04

Reporting in Xero

05

What to like about Xero reports

Xero Reports - Pro

1. Flexible Layout



2. Formulas in layouts



3. Drill down



4. Save customisations



06

**When you need
more from reports**

Xero Reports - Cons

1. No Report Packs



2. Limited KPIs



3. Historical only



4. No Styling





“ We had 13 Xero files and about 700 tracking categories in a complex hierarchy that we were able to manage using Calxa - for an absolutely reasonable price that NFPs can afford. Calxa treads that line between functionality, ease of use, and complexity - at just the right level for NFPs. And then as other users have attested to, their service is excellent ”

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!

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