

Xero Projects

All Projects

New Projects – to create a new project

- Contact (from contacts list)
- Project Name
- Deadline
- Estimate Cost

New project



Options within a project

Tasks

- Task Name
- Chargeable
- Rate per hour
- Estimated hours

Expenses

- Expense Name
- Unit Cost
- Quantity
- Chargeable
- Unit Price

Time

- Amount of time
- Date
- Project
- Task
- Description

Invoices

Time Entries – Review time in bulk

Staff Time Overview – View or produce a report showing staff time to projects

Staff Cost Rates – Review and edit staff cost rates

Entering Expense Claims

From a computer

Business > Expense Claims > New Expense

Fill in the relevant information of the transaction. If you have a receipt you can either upload it or drag and drop

- Amount of transaction
- Description (optional)
- Spent at - where you spent the money
- Spent on – date of transaction
- Account – expense account to be coded to
- Tracking category (if relevant)
- Assign to customer
- Label (if relevant)

From the app

Login to Xero expenses app

+ Symbol

Take a photo of the receipt or press No receipt

Fill in relevant details required

Paying Expense Claims

Once you have entered all the information you can save as a draft, submit for approval or approve it. This will then create a transaction under your items to pay.

Either paying from bank account:

1. Make the payment for the claim
2. When the payment shows, match this to the expense claim

Or claim as capital introduced:

1. Find the expense claim in Business > Bills to Pay
2. At the bottom is a Make a Payment section. Fill this in and ensure the Paid From is Capital/Funds Introduced

Make a payment			
Amount Paid	Date Paid	Paid From	Reference
200.00	27 Nov 2018	970 - Owner A Funds Intr	Expense paid priv

[Add Payment](#)