Xero

options.

Users can easily import contact and invoice information from third-party applications when setting up Xero. Tax and discount information is also entered during the setup process. Xero offers multi-currency capability, with users able to establish a default currency for each contact/customer, as well as create invoices and statements in a variety of currencies. Xero can also accept payments in a variety of currencies as well.

Xero offers easy invoice customization capability, including a variety of templates that can be utilized as needed. Users can also import invoices directly from Microsoft Word if desired.

Users can easily offer customer quotes, with the ability to see if quotes have been viewed. Once a quote is accepted, it can be easily converted into an invoice, with the ability to add, edit, or delete details as needed.

Users can easily send invoices in bulk to numerous customers, and repeating invoices can be set up by creating a template, then choosing the repeating frequency, which can be weekly or monthly. A corresponding payment option can also be included, allowing users to charge customer cards for recurring fees such as dues and subscriptions. Users can delete the repeating invoice option by choosing the transactions, then clicking on the delete option. Users can also save related documents to any invoice created in Xero, including repeating invoices.

Xero offers an automatic invoice reminder option that sends an email to customers when their invoice is due or past due. Users can opt to send up to five email reminders, based on the criteria established when setting up the invoice reminder option.

Users can easily create customer statements in Xero, with two types of statements

payment services including Authorize.Net, BPAY, PayPal, Stripe, WorldPay, and others.

The Xero Sales Dashboard offers users an excellent summary of all sales and invoicing activity, including a summary of both current and past due invoices. Users can also access a variety of accounts receivable and invoicing reports including the Customer Invoice Report, the Aged Summary Receivables Report, and the Receivable Invoice Summary Report. All reports offer drill-down capability, and can be viewed on screen, customized as needed, printed, saved as a PDF, or exported to Microsoft Excel or Google Sheets.

There is no separate time and expense tracking, though users can easily invoice any related time or expenses when preparing an invoice.

Xero is a completely integrated application, with all features working together. The product also offers integration with over 500 third-party apps as well.

Available at a new, lower cost, Xero is best suited for small businesses, as well as accounting professionals that offer bookkeeping and accounting services to their clients. The Starter version of Xero is currently available for $9.00 per month, the Standard edition is now $30.00 and the Premium edition remains at $70.00. All editions include unlimited user capability as well as free product support and free product upgrades.

2018 Overall Rating – 4.75 Stars

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