

## Xero 1

# The Dashboard

This article explains the parts of the Dashboard.



## **Xero 1 The Dashboard**

### **Left-hand Side of the Dashboard**

The left-hand side of the dashboard contains the panels for the bank accounts. There needs to be a bank account panel for every bank account that holds business-related funds.

Usually there will be the operating account, and perhaps a GST savings account.

There may also be a credit card account, and possibly a Paypal account.

The idea is that all accounts where business transactions originate need to be seen in the bank accounts area of the dashboard.

See over/

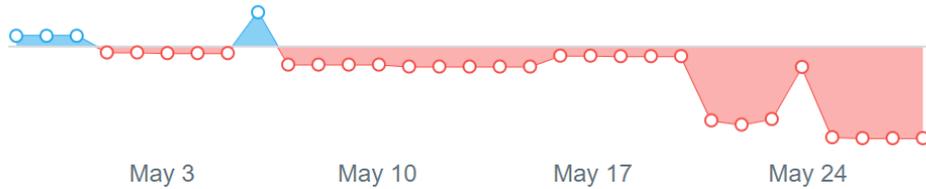
### Business Bank Account

306-234-12345678



Reconcile 28 items

Balance in Xero (9,081.58)  
Statement balance (May 26) 4,242.62



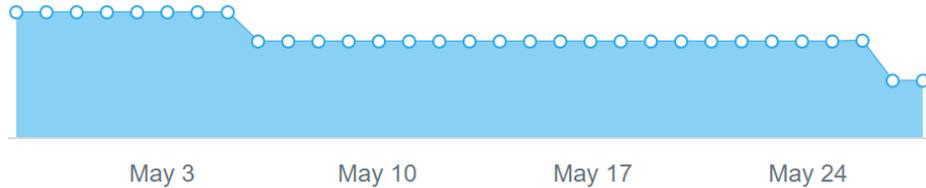
### Business Savings Account

306-234-12345679



✓ Reconciled

Statement balance (May 27) 6,878.28



## Inside the bank account panels

Selecting the three vertical dots (epsilon) on the top right-hand side of a panel opens the menu for the bank account. This is where you can delve deep into the account – all transactions, the bank statements, reconciliation, the bank rules that have been created to run on the account and of course new transactions to add.

A very helpful resource.

<b>Find</b>	<b>New</b>	<b>Reconcile</b>
Account Transactions	Spend Money	Reconcile Account
Bank Statements	Receive Money	Bank Rules
	Transfer Money	Reconciliation Report
		Import a Statement

Business Bank Account 306-234-12345678

**Reconcile 28 items**

**Reconciling your bank transactions starts by clicking here:**

Clicking on the blue “reconcile” button opens up the bank account to display two columns, where transactions as per the bank feed appear on the left, and the information needed to accept and classify them into Xero is on the right. You need to make decisions here.

The screenshot shows the Xero reconciliation interface with two columns of transactions. The left column contains bank feed transactions, and the right column contains transactions from Xero. Each transaction has an 'Options' dropdown menu with various actions.

Bank Feed Transaction	Amount	Xero Transaction	Amount
20 May 2020 Truxton Property Management Rent More details	1,181.25	21 May 2020 Payment: Truxton Property Management	1,181.25
21 May 2020 City Limousines 1002-Part More details	100.00		

Buttons shown: Match, Create, Transfer, Discuss, Find & Match, OK, SAVE, Discuss \*

## **Right-hand Side of the Dashboard**

Also seen on the Dashboard are four other panels. They are:

- Account watchlist – displays this month vs this year balances of nominated accounts
- Invoices owed to you – displays a summary of unpaid sales invoices
- Bills you need to pay – displays a summary of unpaid bills
- Expense Claims – a method of inputting transactions that need to be reimbursed.

These summary panels provide a quick “snapshot” of your business today, according to what’s been entered into Xero.

If some or none of these panels are of value, you don’t need to see them. The Dashboard can be edited and you can remove panels you don’t want to see.

See over/

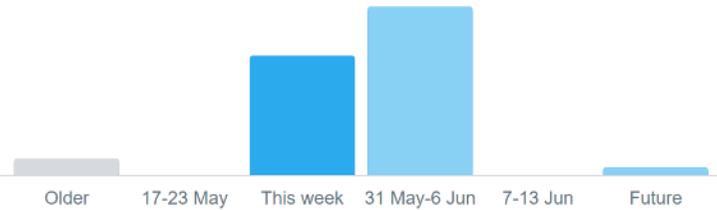
### Account watchlist

Account	This month	YTD
Inventory (630)	0.00	0.00
Office Expenses (453)	129.93	1,425.92
PAYG Withholdings Payable (825)	3,014.00	9,042.00
Sales (200)	12,720.05	45,151.05

### Invoices owed to you

[New sales invoice](#)

4 Draft invoices	2,200.00
10 Awaiting payment	16,006.55
3 Overdue	7,097.50



### Bills you need to pay

[New bill](#)

1 Draft bill	115.20
11 Awaiting payment	8,507.78
4 Overdue	2,326.29

