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Mary Girsch-Bock • Jul. 19, 2017

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Xero

800-411-XERO

www.Xero.com

From the [July 2017 Reviews of Nonprofit](#) and Fund Accounting Systems.

Xero is a great fit for very small nonprofits that are looking to track limited funds or grants. While the application can be customized to suit the needs of a nonprofit, its strength lies in small business accounting functionality.

Xero offers complete online accessibility, with the product available in three versions; Starter, Standard, and Premium, with each edition offering increased product functionality. The chart of accounts is provided by default when a user signs

up for Xero, with limited customization capability provided, though users can

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Organizations can create multiple budgets in Xero by accessing the Budget Manager function. Users can also track budget totals, and can set up budgets both with and without tracking. Budgets can be created from scratch, or can be based on an existing budget. Only one overall budget can be created per organization, but secondary budgets can be created if desired. Budget data can also be imported from other applications if necessary.

Limited donation tracking is available, and users can manage donors through the contact feature. Grants can be tracked individually in Xero, but there is no true grant management capability.

Xero supports an unlimited number of users, with each user assigned a specific role that details exactly what features that particular role has access to.

Xero offers comprehensive dashboard reporting, as well as standard financial reporting capabilities. Performance reports, cash reports, and statement of cash flows reports are also available, as are detailed transaction reports. Reports can be customized, though customization options are limited. All Xero reports can be exported to Excel, Google Sheets, or saved as a PDF. Xero is a complete accounting system, with all modules designed to work together for complete system integration. Xero also offers integration with an extensive list of apps that are designed to increase product functionality considerably, though nonprofit apps are limited to just three. Xero also integrates with Office 365 and users can connect Xero to Gmail if desired.

Xero offers numerous help and support options including access to the Help Center, which offers various options including a Getting Started option, which guides new users through initial system setup. The Resources Center offers access to Small Business Guides, access to the Business Help Center, training courses, and videos.

Free product support is included in the cost of the subscription, and is available 24/7,

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and also includes payroll for up to 5 employees. The Premium version of Xero runs \$70.00 per month and offers unlimited invoice and quote processing, along with payroll for up to 10 people. Xero offers a free, 30-day trial that users can download without a credit card and try out the system prior to purchasing.

2017 Rating – 4.25 Stars

Accounting

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