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**Mary Girsch-Bock** • Apr. 23, 2016



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- Integration with more than 450 third party programs
- App adds more convenience for mobile professionals

### **Potential Limitations**

- Comprehensive capabilities and deep integrations may require training

Xero Practice Manager, from Xero Online Accounting, is designed to be used by accounting firms in conjunction with their client's use of Xero Online Accounting. Seamless integration between the two products allows firms to manage clients, workflow, and track WIP all from one central dashboard.

### **Basic Product Functions/Features: 4.5 Stars**

Xero Practice Manager uses an intuitive dashboard that is the starting point for managing all client information. Options such as Dashboard, Clients, Jobs, Business, and Reports quickly take the user directly to the desired function. Tabs to the left of the screen allow users to quickly enter time, enter a cost, or enter a new job. From this menu, users can also access My Jobs, which will quickly list all current jobs that have been entered into the system.

### **Time Management Capabilities: 4.5 Stars**

Entering timesheet information is easy, with users able to choose the appropriate date, specific job and/or task that the time should be applied to, the actual time, and any notes for future reference. A weekly summary at the bottom of the time sheet interface also displays a weekly summary of all time entered for that specific time period. Users can also opt to enter time using a weekly timesheet, again by selecting the job or task. For those wishing to enter flat rate costs, the Enter a Cost option provides users with the option to select a job, quantity, unit cost, supplier, whether the cost is billable, and any notes. Time can be recorded to both a job and an

employee, and pre-determined time increments can be set up in the system for easy

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employee that completed the task. Users can also set up custom billing rates, with those rates set up across three options; Staff-Specific, Client-Specific, and Job-Specific. Recurring monthly billing can also be handled in Xero, as can monthly fixed fee billing. Invoicing a client is simple, with data easily shared between Xero Practice Manager and Xero Accounting.

Xero Practice Manager comes with a good selection of reports, including Invoice Analysis Reports, Performance Reports, Time Reports, and Work in Progress Reports. The Report Builder allows users to create and publish custom reports, including the ability to create custom data exports, build a custom report, or publish a report that can be shared with staff.

### **Management Features: 4.25 Stars**

Performance reports offer management and partners the ability to quickly review vital firm performance data such as the Monthly Job Profit Report and the Staff Write up Report. Other management tools available include a KPI Dashboard, that looks at firm performance based on key metrics, and the Productivity Dashboard, the provides managers with an overview of staff performance measured against capacity and productivity. All reports can be saved as a PDF, printed, emailed directly to a client, or exported to Excel or in a CSV file format.

### **Integration & Data Management: 4.75 Stars**

Cloud-based, Xero Practice Manager offers easy integration with Xero's complete line of accounting and related products, but also integrates with over 450 business apps to increase program functionality tremendously. A mobile app that is compatible with both iOS and Android devices provides remote users with easy access to time entry as well as accessibility to included management tools.

### **Help/Support/Training: 4.5 Stars**

Xero Practice Management offers solid help functionality, with users able to quickly

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converting from QuickBooks to Xero.

## 2016 Overall Rating: 4.5 Stars

Firm Management

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