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Mary Girsch-Bock • Mar. 21, 2017

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Xero – www.xero.com

From the March 2017 [review of Invoice Management systems](#).

Xero is well suited for small business owners; offering flexibility with its anytime/anywhere accessibility, as well as the availability of three product editions, making it suitable for the smallest business.

The sales dashboard in Xero offers invoice details, including the number of draft invoices entered into the system, as well as those awaiting payment. Users can opt to set up online payment for their customers or accept payment via cash, check or credit card, then entering the payment information directly in each invoice.

The product offers excellent invoice customization capability, with users able to use

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able to choose from 7 days overdue, 14 days overdue or 21 day overdue. Users can also choose to include a link to a PDF copy of the invoice for email recipients to access. Reminders can be turned off for any customers that users do not want to send a reminder to.

Xero allows users to import contact and invoice information from other applications using a .csv file format. Both tax and discount information can be set up when setting up a contact, or the contact can be added on the fly if desired. Users can also choose a particular invoice theme when setting up new contacts, and multi-currency functionality allows users to set up a default currency, as well as any additional currency that the business will accept. Default due dates can be set up in contacts as well.

Xero also offers users the ability to create an invoice from an existing quote by simply clicking the Accepted status under the quote option, then clicking on the Create Invoice option. Users can also create recurring invoices by creating a template that allows Xero to automatically create, save and email recurring invoices as specified on the template.

Users can save relevant documents to any invoice, including recurring invoices.

The Xero Sales Dashboard offers users a comprehensive view of all business activity, including a summary of draft invoices, along a summary of both current and past due invoices. The customer invoice report provides business owners with a detailed list of invoices, with the option to choose filters such as date range and invoice status. The report contains drill-down capability which allows the user to review details about any invoice listed in the report. All Xero reports can be viewed on screen, printed, saved as a PDF, or exported to Excel or Google Sheets.

Xero is a fully integrated product, with all functions designed to work together.

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2017 Overall Rating – 4.75 Stars

Accounting • Technology

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