

Society of St Vincent de Paul Southwest Texas Council – Conferences

Standard Operating Procedure	Xero – Steps to Opening Xero Software	Revision Date: 1/26/2021
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Overview

Xero is software that allows you to keep track of your income and expenses in SVdP. It is designed to work best with downloads from your bank, which allows you to see the balance of your account on a daily basis and not have to wait for the End of the Month Bank Statement. You can assign a category to your expenses as they come in from the bank. If you do not use a bank that works with Xero no problem, you are still able to enter your transactions manually and manually reconcile your bank statement at the end of the month. Using a bank feed saves you a few extra steps.

By using Xero, you can eliminate the Monthly Financial Reporting requirement of SW SVdP Central Council. The Central Accounting Office will be able to pull your reports from Xero. It can also be used to look up records during audits and eliminate having to request paper copies of receipts from the Conferences. Using Xero, you can scan and upload backup receipts or W-9's, and connect the documents to the particular transaction.

Logging Into Xero (Pronounced Zero but spelled with an “X”)

1. This software is stored in **“The Cloud”**, which means you can access it from anywhere using a device such as a computer, Tablet, iPhone, iPad or other type device.
 - a. If you do not have a computer or other device, please contact your District President and he/she can help you obtain one from the SW SVdP Central Council.
2. If your Conference decides to use the Xero software, SW SVdP Central Council will issue you a **User Name (or email) and Password** to log into your account.
 - a. This information allows you to log into your account only, other conferences will not be able to view your information, and you will not be able to see other conference's information.
3. You will also need to have an Internet connection. Once again if you do not have access to the Internet, please contact your District President to see if he or she can assist you in this matter.
4. Xero works best with **Google Chrome**, so please use this browser.
5. Go to **“Google Chrome”** and type in **Xero.com**
6. This will bring you to the **Xero Website**
7. Look to the far right of the screen and you will see **“Login”**
8. A screen will come up asking for your **email and password**. You will enter the Login information provided to you by the SW SVdP Central Council for **Xero**.
9. Once you Login you will see the **Xero Dashboard**.
10. You will see the following items on the **“Dashboard”**
 - a. **The Name of your Conference (i.e., Good Shepherd, etc.)**
 - b. **Dashboard**
 - c. **Business**
 - d. **Accounting**
 - i. You will be using this tab for a good number of things (see appropriate Standard Operating Procedure (SOP) for instructions)
 - e. **Contacts** - This is where all the names of companies you pay or donor's names are stored along with address, phone number, etc. You can also upload W-9's to connect to a particular company.
11. At this point you will be ready to begin recording your transactions using the steps outlined in the **SOP's** you will receive with this training.
 - a. **Steps to Opening Xero Software SOP**
 - b. **New Spend Money - Add a Transaction SOP**
 - c. **Receive Money SOP**
 - d. **Reconciling SOP**
 - e. **Tracking Categories SOP**

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- f. **Add Contact SOP**
- g. **Gift Cards and Vouchers SOP**
- h. **Non-Cash Accounting (monthly)**