



XERO

A large, light grey watermark of the paysetra. logo is visible in the background, centered behind the main text.

USER

GUIDE

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1. ACCOUNT CREATION IN XERO

1. Go to <https://www.xero.com/signup>
2. Enter your first name.
3. Enter your last name.
4. Enter your email address.
5. Enter your phone number.
6. Select United States of America as your location.
7. Click the Next: Confirmation button.



Start a 30-day free trial

Join over 4.4 million subscribers using Xero to power their business.

- ✓ No credit card required
- ✓ 24/7 online support
- ✓ Cancel any time

First name

Last name

Email



Phone

PK ▼ +92

Location

United States ▼

I've read and agreed to the terms of use, privacy notice and offer details:

[Terms of use](#), [privacy notice](#), and [offer details](#).

Don't send me discounts or other useful messages from Xero

Next: Confirmation

8. Open your email inbox and verify your Xero account.
9. Set your password to complete the registration process.

Confirmation

Hi Paysetra! Confirm your email and start using Xero.

We sent an email to paysetrauser@yopmail.com.

Next steps

1. Verify your account

Click on the link in the email to verify your account.

2. Start using Xero

Log in to Xero and start exploring features.



2. LOGGING IN TO THE XERO PORTAL AND CREATING A NEW CUSTOMER

1. Go to <https://login.xero.com/identity/user/login>
2. Enter your email address.
3. Enter your password.
4. Click the Login button.



Log in to Xero

'@gmail.com
.....

Log in

[Forgot password?](#) [Can't log in?](#)

5. After a successful login, on the Dashboard, click Contacts in the header menu.
6. From the dropdown, click Customers.
7. On the Customers screen, click the New Contact button.

The screenshot shows the Xero dashboard for 'AIRBUS XERO NEW'. The top navigation bar includes 'Home', 'Sales', 'Purchases', 'Reporting', 'Accounting', 'Tax', 'Contacts', and 'Projects'. The 'Contacts' menu is open, showing options for 'All contacts', 'Customers', and 'Suppliers'. The 'Customers' option is highlighted with a red box. Below the navigation, there are sections for 'Business bank account', 'Total cash in and out', and a bar chart showing 'Invoices' and 'Overdue' amounts. A 'Setup Guide' button is visible in the bottom left corner.

The screenshot shows the 'New contact' screen in Xero. The top navigation bar is the same as in the previous screenshot. Below the navigation, there are tabs for 'All', 'Customers', 'Suppliers', 'Archived', 'Groups', and 'Smart lists'. The 'New contact' button is highlighted with a red box. The main content area features an illustration of hands holding a tablet with a plus sign and a person icon, followed by the heading 'Make the most of contacts in Xero'. Below this, there is a list of bullet points describing the benefits of using contacts, a link to 'Learn more about contacts', and a 'Watch video [1:41]' button. At the bottom, there is a search bar for contacts and a 'Setup Guide' button.

8. On the Add Contact screen, enter the Contact Name.
9. Enter the First Name.
10. Enter the Last Name.
11. Enter the Email Address.
12. Enter the Phone Number.



13. Enter the Billing Address (Note: The billing address must be located in the United States of America).
14. Enter the Shipping Address (Note: The shipping address must be located in the United States of America).
15. Click the Save and Close button.

The screenshot shows the Xero 'Add contact' form. The top navigation bar includes 'xero', 'AXN', and menu items: Home, Sales, Purchases, Reporting, Accounting, Tax, Contacts, and Projects. The 'Contacts' menu is active. Below the navigation bar, the page title is 'Contacts' and the sub-header is 'Add contact'. The form is divided into two main sections. The top section, 'Contact details', includes a sidebar with 'Contact details', 'Addresses', 'Financial details', and 'Tax details'. The main area contains fields for 'Contact name (required)' (filled with 'Cessna Xero Customer') and 'Account number'. A note below the account number field states: 'Add a unique account number to identify, reference and search for the contact.' The bottom section, 'Primary person', includes a sidebar with 'Contact details', 'Addresses', 'Financial details', and 'Tax details'. The main area contains fields for 'First name' (filled with 'CESSNA') and 'Last name' (filled with 'XERO'), an 'Email' field (filled with 'cessnaxerocustomer@yopmail.com'), and a '+ Add another person' link. The 'Business information' section includes a 'Phone number' field with a dropdown for the country code (filled with '+92') and a close button 'X'.



Add billing address ✕

Attention

Address

City	State
South Lake Tahoe	CA

Zip code	Country
96150	USA

tra.



Financial details

Tax details

Default settings

Sales defaults

Purchase defaults

Setup Guide

Addresses

📍 Billing address ⋮

777 Los Angeles Ave
South Lake Tahoe, 96150
CA
USA

📦 Delivery address ⋮

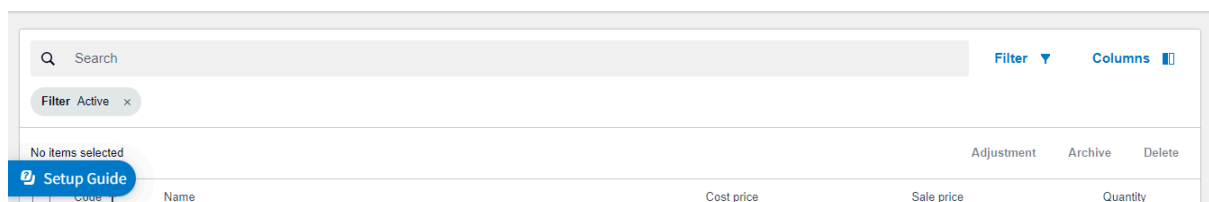
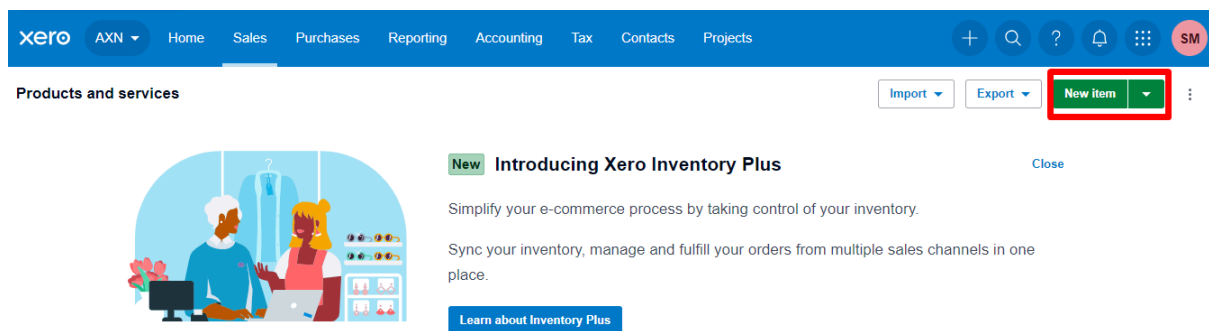
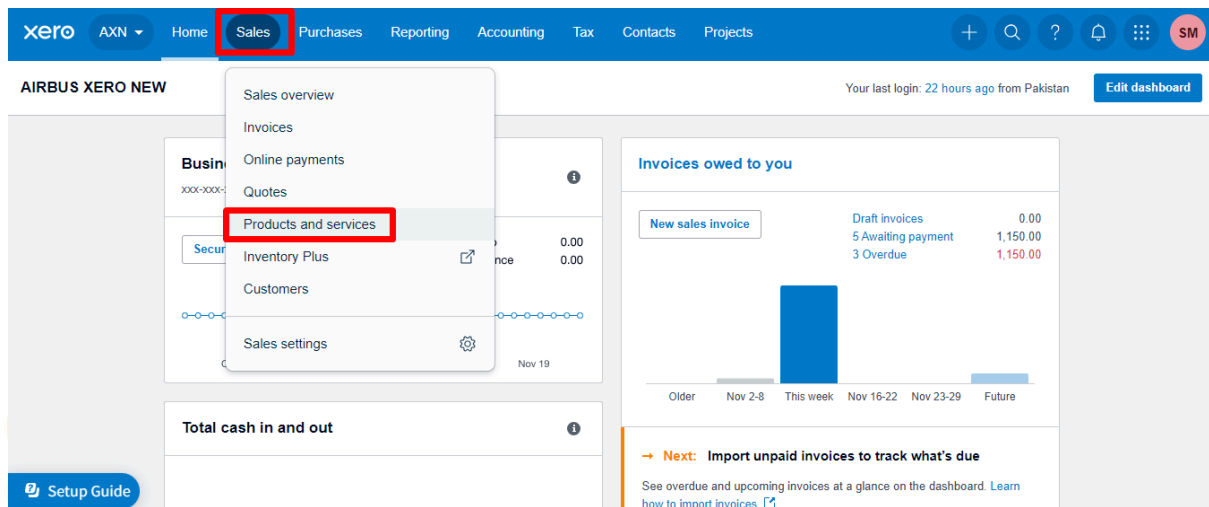
777 Los Angeles Ave
South Lake Tahoe, 96150
CA
USA

Cancel **Save & close**



3. CREATING A NEW ITEM IN THE XERO PORTAL

1. On the Dashboard, click Sales in the header menu.
2. From the Sales dropdown, select Products and Services.
3. On the Products and Services screen, click the New Item button.





4. Enter the Item Code.
5. Enter the Item Name.
6. Enter the Sales Price.
7. Select the applicable Tax option (if any), otherwise, select None.
8. Click the Save button.

New item ×

Code (required) Name

Track inventory item

Track the quantity and value of stock on hand. This option is suitable for organisations with less than 4,000 products or services, who purchase items before they are sold, and who calculate the average cost of items. [Learn more about tracked inventory](#)

Purchase

Add item to bills, purchase orders, and other purchase transactions

Sell

Add item to invoices, quotes, and other sales transactions

Sale price Sales account Tax rate



Sell

Add item to invoices, quotes, and other sales transactions

Sale price

5,000.00

Sales account

▼

Tax rate

None ▼

Description

Aircraft Wings

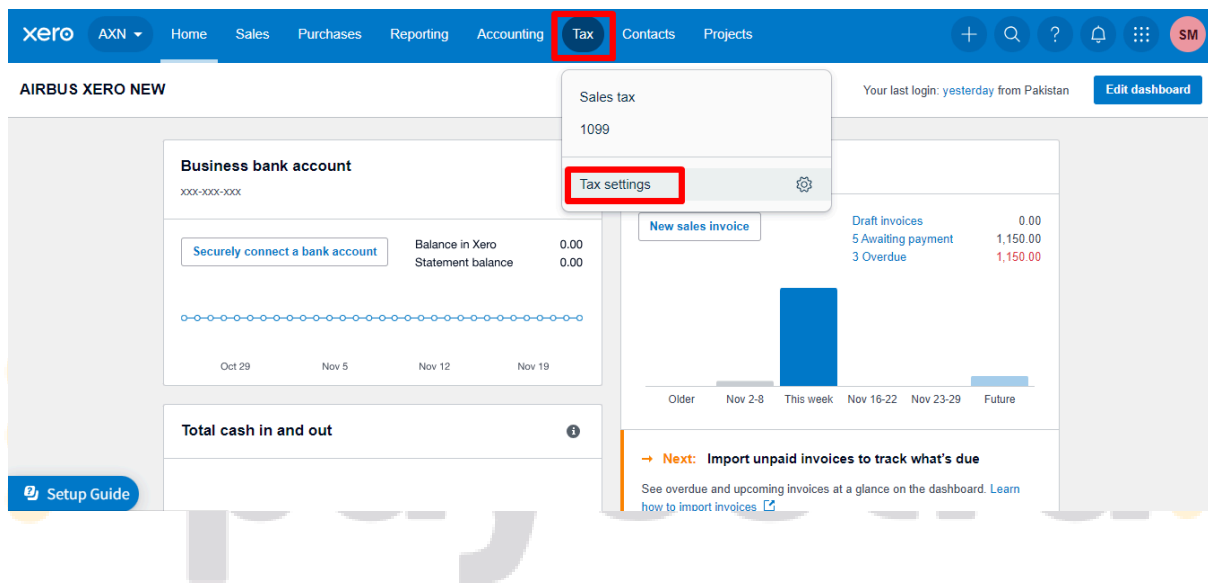
Save & duplicate

Save

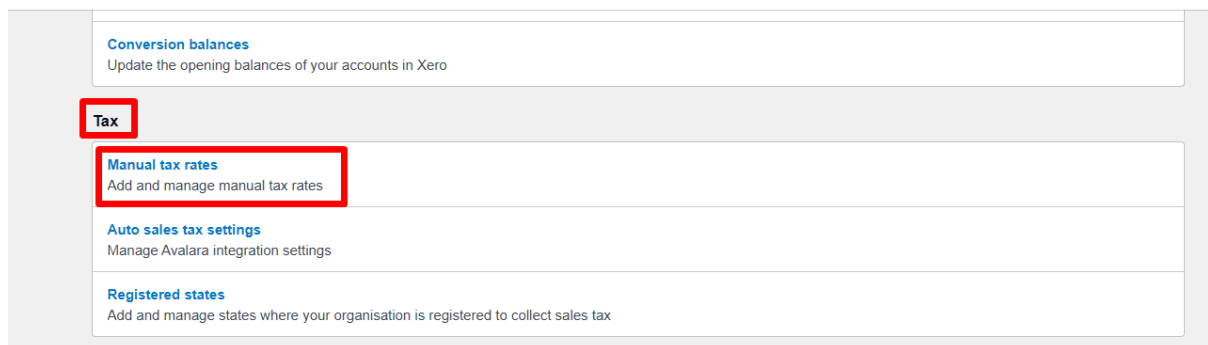


4. CREATING A NEW TAX IN THE XERO PORTAL

1. On the Dashboard, click Tax in the header menu.
2. From the Tax dropdown, select Tax Settings.
3. On the Tax Settings screen, scroll down to the Tax section and click Manual Tax Rates.
4. On the Manual Tax Rates screen, scroll down and click the New Tax Rate button.



Settings





Getting Started with Tax Rates Hide Getting Started

Account	Tax Rate	Amount

Every transaction line item you enter into Xero needs a Tax Rate. The Tax Rates you use will depend on the location of your organization. Tax Rates can have multiple Tax Components. For instance, you can have an item that is charged a Tax Rate called "Tax on Goods (8.75%)" that has two components: a State tax of 7.75% and a Local tax of 1%.

You can generate reports on any Tax Rate and Tax Components.

If you need to report on income separately to expenses, or capital purchases separately to expenses, then you should create a separate Tax Rate for each.

- [View more help for Tax Rates](#)



Delete No items selected

<input type="checkbox"/>	Name	Tax Rate	Accounts using this Tax Rate
<input type="checkbox"/>	NEW TAX	1%	0
<input type="checkbox"/>	Sales Tax on Imports	0%	0
<input type="checkbox"/>	Tax Exempt	0%	57
<input type="checkbox"/>	Tax From XERO	5%	0
<input type="checkbox"/>	Tax on Purchases	0%	0
<input type="checkbox"/>	Tax on Sales	0%	1



5. Enter the Tax Name.
6. Enter the Tax Component Name.
7. Enter the Tax Percentage.
8. Click the Add a Component button (Note: This step is optional if you want to add more than one component to the tax).
9. Enter the Second Tax Component Name.
10. Enter the Second Component Tax Percentage.
11. Click the Save button.



Add New Tax Rate



Tax Rate Display Name

The name as you would like it to appear in Xero (limited to 50 characters)

Airport Tax

Tax Components

Runway Tax

5 %



Compound (apply to taxed subtotal)

Parking Tax

1 %



Compound (apply to taxed subtotal)

Add a Component

Total tax rate

6.00 %

Save

Cancel



5. CREATING A NEW INVOICE IN THE XERO PORTAL

1. On the Dashboard, click Sales in the header menu.
2. From the Sales dropdown, select Invoices.
3. On the Invoices screen, click the New Invoice button.

The screenshot shows the Xero portal dashboard. The 'Sales' menu item in the top navigation bar is highlighted with a red box. A dropdown menu is open, and the 'Invoices' option is also highlighted with a red box. Below this, the 'Invoices' page is shown, with the 'New Invoice' button highlighted with a red box. The page displays a table of existing invoices with the following data:

Number	Ref	To	Date	Due Date	Paid	Due	Status	Sent
CN-0006		AIRBUS CUSTOMER NEW	Nov 6, 2025		0.00	(100.00)	Awaiting Payment	
INV-0005		Talha Bm	Nov 5, 2025	Nov 8, 2025	0.00	50.00	Awaiting Payment	
INV-0004		AIRBUS SECONDD CUSTOMER	Nov 5, 2025	Nov 10, 2025	0.00	1,000.00	Awaiting Payment	
INV-0003		Talha Bm	Nov 5, 2025	Nov 8, 2025	0.00	100.00	Awaiting Payment	
INV-0002		AIRBUS CUSTOMER NEW	Nov 5, 2025	Nov 23, 2025	5,000.00	0.00	Paid	
INV-0001		AIRBUS CUSTOMER NEW	Nov 5, 2025	Nov 30, 2025	0.00	100.00	Awaiting Payment	

4. For the new invoice, select the Contact Name, which corresponds to the Customer Name.
5. Enter the Invoice Due Date.



6. Select the Item.
7. Select the Account.
8. Select the Tax Rate.
9. On the header, expand the Approve and Email button dropdown.
10. From the dropdown, click Approve.

Contact: CXC Cessna Xero Customer | Issue date: Nov 11, 2025 | Due date: Nov 30, 2025 | Invoice number: # INV-0007 | Reference:

Online payments: Set up online payments | Currency: United States Dollar | Amounts are: Tax exclusive

Item	Description	Qty.	Price	Disc.	Account	Tax rate	Tax amount	Project	Amount USD
Hydraulic System	Hydraulic System	1	400.00		AX1 - AIRBUS XERO ACCOUNT	Airport Tax (6%)	24.00		400.00
Subtotal									400.00
Total sales tax									24.00
Total									424.00

Buttons: Add row, Columns (0 hidden), Attach files, Setup Guide

Navigation: Home, Sales, Purchases, Reporting, Accounting, Tax, Contacts, Projects

Sales overview > Invoices | Edit invoice INV-0007 | Draft | All changes saved as draft | Preview | Save & close | **Approve & email**

86% of customers say they prefer to pay via credit and debit card. Add online payments to your invoices. Get paid up to twice as fast.

Set up invoice template

Contact: CXC Cessna Xero Customer | Issue date: Nov 11, 2025 | Due date: Nov 30, 2025 | Invoice number: # INV-0007 | Reference:

Online payments: Set up online payments | Currency: United States Dollar | Amounts are: Tax exclusive

Item	Description	Qty.	Price	Disc.	Account	Tax rate	Tax amount	Project	Amount USD
Hydraulic System	Hydraulic System	1	400.00		AX1 - AIRBUS XERO ACCOUNT	Airport Tax (6%)	24.00		400.00

Dropdown menu options: Approve (Ctrl-Alt-A), Approve & add another (Ctrl-Alt-O), Approve & get link, Approve & print PDF (Ctrl-Alt-R)

Buttons: Setup Guide



xero AXN Home Sales Purchases Reporting Accounting Tax Contacts Projects + ? ? ? ? ? SM

Sales overview >
Invoices

New Invoice New Repeating Invoice New Credit Note Send Statements Import Export Invoice Reminders: Off Online Payments

All Draft (0) Awaiting Approval (0) Awaiting Payment (0) Paid Repeating

7 items Search

Number	Ref	To	Date	Due Date	Paid	Due	Status	Sent
INV-0007		Cessna Xero Customer	Nov 11, 2025	Nov 30, 2025	0.00	424.00	Awaiting Payment	



6. MAKING A PAYMENT FOR AN INVOICE IN THE XERO PORTAL

1. On the Dashboard, click Sales in the header menu.
2. From the Sales dropdown, select Invoices.
3. Select and click on the Invoice you want to pay.
4. In the Invoice Details screen, click the Add Payment button.

The screenshot shows the Xero dashboard for 'AIRBUS XERO NEW'. The 'Sales' menu is open, and 'Invoices' is highlighted. The dashboard includes a navigation bar with 'Home', 'Sales', 'Purchases', 'Reporting', 'Accounting', 'Tax', 'Contacts', and 'Projects'. A summary card for 'Invoices owed to you' shows a bar chart and a table with the following data:

Category	Count	Amount
Draft invoices	0	0.00
5 Awaiting payment	5	1,150.00
3 Overdue	3	1,150.00

The screenshot shows the 'Invoices' page in Xero. The page title is 'Invoices' under 'Sales overview'. There are buttons for 'New Invoice', 'New Repeating Invoice', 'New Credit Note', 'Send Statements', 'Import', 'Export', 'Invoice Reminders: Off', and 'Online Payments'. The status filters are 'All', 'Draft (0)', 'Awaiting Approval (0)', 'Awaiting Payment (6)', 'Paid', and 'Repeating'. A table of invoices is displayed with the following data:

Number	Ref	To	Date	Due Date	Paid	Due	Status	Sent
INV-0007		Cessna Xero Customer	Nov 11, 2025	Nov 30, 2025	0.00	424.00	Awaiting Payment	
CN-0006		AIRBUS CUSTOMER NEW	Nov 6, 2025		0.00	(100.00)	Awaiting Payment	
INV-0005		Talha Bm	Nov 5, 2025	Nov 8, 2025	0.00	50.00	Awaiting Payment	
INV-0004		AIRBUS SECOND CUSTOMER	Nov 5, 2025	Nov 10, 2025	0.00	1,000.00	Awaiting Payment	
INV-0003		Talha Bm	Nov 5, 2025	Nov 8, 2025	0.00	100.00	Awaiting Payment	
INV-0002		AIRBUS CUSTOMER NEW	Nov 5, 2025	Nov 23, 2025	5,000.00	0.00	Paid	
INV-0001		AIRBUS CUSTOMER NEW	Nov 5, 2025	Nov 30, 2025	0.00	100.00	Awaiting Payment	



xero AXN Home Sales Purchases Reporting Accounting Tax Contacts Projects

Sales overview > Invoices

Invoice INV-0007 Awaiting payment Preview Print PDF Add payment

86% of customers say they prefer to pay via credit and debit card
Add online payments to your invoices. Get paid up to twice as fast.

Set up invoice template Skip for now Add details

Sent

Contact	Issue date	Due date	Invoice number	Online payments	Branding theme
Cessna Xero Customer 777 Los Angeles Ave South Lake Tahoe, CA 96150 USA	Nov 11, 2025	Nov 30, 2025	INV-0007	None Get set up now	Standard

[Setup Guide](#) Amounts are tax exclusive

5. On the Payments screen, enter the amount in the Amount Paid textbox.
6. Select the Account.
7. Click the Add button.

Add payment ×

Amount paid

424.00

Date paid

Tue, Nov 11, 2025

Account

6040 Bank Service Charges ▼

Reference

Cancel

Add



xero AXN Home Sales Purchases Reporting Accounting Tax Contacts Projects

Sales overview
Invoices

New Invoice New Repeating Invoice New Credit Note Send Statements Import Export Invoice Reminders: Off Online Payments

All Draft (0) Awaiting Approval (0) Awaiting Payment (5) Paid Repeating

Number	Ref	To	Date	Due Date	Paid	Due	Status	Sent
INV-0007		Cessna Xero Customer	Nov 11, 2025	Nov 30, 2025	424.00	0.00	Paid	
CN-0006		AIRBUS CUSTOMER NEW	Nov 6, 2025		0.00	(100.00)	Awaiting Payment	
INV-0005		Talha Bm	Nov 5, 2025	Nov 8, 2025	0.00	50.00	Awaiting Payment	
INV-0004		AIRBUS SECOND CUSTOMER	Nov 5, 2025	Nov 10, 2025	0.00	1,000.00	Awaiting Payment	
INV-0003		Talha Bm	Nov 5, 2025	Nov 8, 2025	0.00	100.00	Awaiting Payment	
INV-0002		AIRBUS CUSTOMER NEW	Nov 5, 2025	Nov 23, 2025	5,000.00	0.00	Paid	
INV-0001		AIRBUS CUSTOMER NEW	Nov 5, 2025	Nov 30, 2025	0.00	100.00	Awaiting Payment	

7 items Search

Setup Guide

