

FROM THE DASHBOARD, CLICK NEW SALES INVOICE

INPUT CONTACT NUMBER (+ TYPE TO CREATE CONTACT)

xero

DCG

Home

Sales

Purchases

Reporting

Payroll

Accounting

Contacts

Projects

+

?

🔍

🔔

⋮

SM

Sales overview > Invoices

New invoice

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.

VISA

MasterCard

AMERICAN EXPRESS

Apple Pay

Google Pay

Add online payments

Set up invoice template

Skip for now

Add details

Contact

Issue date

Due date

Invoice number

Type to create contact

2L

24 Locks

7

7-Eleven

AW

Abby & Wells

AF

ABC Furniture

Trish Rawlings • info@abfl.com

BW

Bank West

BC

Basket Case

BC

Bayside Club

Bob Partridge • secretarybob@bsclub.co

BW

Bayside Wholesale

BB

Berry Brew

BF

Boom FM

BP

Brunswick Petals

CCC

Capital Cab Co

CF

Carlton Functions

CA

Castro, Anthony

canthony@gmail.com

CC

Central Copiers

Online payments

+ Add

None

Currency

United States Dollar

	Disc.	Account	Tax rate	Tax amount	Region	Project

Subtotal

0.00

Total tax

0.00

Total

0.00

Send via Xero Network

Select a contact to send via Xero Network

SAVE CONTACT DETAILS

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.

[Add online payments](#)

Set up invoice template

[Skip for now](#)[Add details](#)

Contact

CA Castro, Anthony x

Issue date

28 Sep 2025

Due date

12 Oct 2025

Invoice number

INV-0031

Update contact details

[Cancel](#)[Save](#)

Contact name (required)

Castro, Anthony

Email

canthony@gmail.com

Country

Area

Phone number

17737064493

Delivery address

[Edit all address fields](#)

125 N State St Chicago, Illinois United States x

☒ Use as billing address

Online payments

[Manage](#)

Currency

United States Dollar

	Disc. ⓘ	Account	Tax rate	Tax amount	Region	Project	

Subtotal 0.00

Total tax 0.00

Total 0.00

History and notes

[Add note](#)☐ Send via Xero Network

This contact is not set up to receive invoices via Xero Network

THEN INPUT OTHER INFORMATION (ISSUE DATE, DUE DATE)

INPUT ITEMS (+ CREATE NEW ITEM)

86% of customers say the

Add online payments to your in

Set up invoice template

Contact

CA Castro, Anthony

Reference



Amounts are

Tax exclusive

Item Description

BAG

Invalid item

Add row ▾

1 of the table cells has invalid data

Columns (0 hidden) ▾

History and notes

Add online payments

Add details

Dollar ▾

Project

0.00

0.00

0.00

Add note



Send via Xero Network

This contact is not set up to receive invoices via Xero Network

New item



Code (required)

00001

Name

BAGS

☐ 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

Description

BAGS

Save & duplicate

Save



THEN CLICK APPROVE

THEN CLICK APPROVE

Sales overview > Invoices

Invoice INV-0031Awaiting payment

Preview

Print PDF

Add payment

Invoice approved

Create another invoice

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.

VISA

MasterCard

Discover

Apple Pay

Google Pay

Add online payments

Set up invoice template

Skip for now

Add details

☐ Sent

Contact

Castro, Anthony

125 N State St

Chicago, Illinois

United States

Issue date

28 Sep 2025

Due date

12 Oct 2025

Invoice number

INV-0031

Online payments

PayPal

Manage

Branding theme

Standard

Amounts are tax exclusive

Item	Description	Qty.	Price	Disc.	Account	Tax rate	Tax amount	Region	Project	Amount USD
00001	BAGS	2	1000.00		200 - Sales	Tax on Goods (8.75%)	175.00			2000.00
Subtotal										2,000.00
Total State Tax 4.5%										90.00
Total City Tax 4.25%										85.00
Total										2,175.00

Columns (0 hidden)

Attach files

History and notes

Add note

CREATE ANOTHER INVOICE

Sales overview > Invoices

Invoice INV-0031 Awaiting payment

Preview Print PDF Add payment

Invoice approved

Create another invoice

86% of customers say they prefer to pay via credit and debit card

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VISA

MasterCard

AMERICAN EXPRESS

Apple Pay

Google Pay

Add online payments

Set up invoice template

Skip for now

Add details

☐ Sent

Contact

Issue date

Due date

Invoice number

Online payments

Branding theme

Castro, Anthony

28 Sep 2025

12 Oct 2025

INV-0031

PayPal

Standard

125 N State St

Chicago, Illinois

United States

Manage

Amounts are tax exclusive

Item	Description	Qty.	Price	Disc.	Account	Tax rate	Tax amount	Region	Project	Amount USD
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Subtotal										2,000.00
Total State Tax 4.5%										90.00
Total City Tax 4.25%										85.00
Total										2,175.00

Columns (0 hidden)

Attach files

History and notes

Add note

Send via Xero Network

Sales overview > Invoices

Invoice INV-0031 Awaiting payment

Preview Print PDF Add payment

Invoice approved

Create another invoice

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VISA

MasterCard

AMERICAN EXPRESS

Apple Pay

Google Pay

Add online payments

Set up invoice template

Skip for now Add details

☐ Sent

Contact

Castro, Anthony
125 N State St
Chicago, Illinois
United States

Issue date

28 Sep 2025

Due date

12 Oct 2025

Invoice number

INV-0031

Online payments

PayPal
Manage

Branding theme

Standard

Amounts are tax exclusive

Item	Description	Qty.	Price	Disc.	Account	Tax rate	Tax amount	Region	Project	Amount USD
00001 BAGS	BAGS	2	1000.00		200 - Sales	Tax on Goods (8.75%)	175.00			2000.00
Columns (0 hidden) Attach files										
Subtotal										2,000.00
Total State Tax 4.5%										90.00
Total City Tax 4.25%										85.00
Total										2,175.00

History and notes

Add note

Send via Xero Network

FROM THE PURCHASES, SELECT SUPPLIERS THEN CLICK (NEW CONTACT)

INPUT INFORMATION

Contacts

Add contact

Contact details

Addresses

Financial details

Default settings

Sales defaults

Purchase defaults

Contact details

Contact name (required)

RAIN MIRANDA

Account number

00001

Add a unique account number to identify, reference and search for the contact.

Primary person

First name

Last name

RAIN

MIRANDA

Email

abc@gmail.com

Additional people

+ Add another person

Business Information

Phone number

Country

Area

Number

X

+ Add phone number

Website

THEN CLICK SAVE

INPUT CONTACT NUMBER (+ TYPE TO CREATE CONTACT)

THEN INPUT OTHER INFORMATION (DATE, DUE DATE)

INPUT ITEMS (+ CREATE NEW ITEM)

xero
DCG
Home
Sales
Purchases
Reporting
Payroll
Accounting
Contacts
Projects
+
Q
?
🔔
SM

Purchases overview > Bills to pay >

New Bill

3 errors occurred for the following reasons:

- Due Date cannot be empty
- Account must be valid.
- Tax rate must be valid.

From	Date	Due Date	Reference		Total
RAIN MIRANDA	28 Sep 2025	10 Oct 2025			1000.00

Account No.00001

USD United States Dollar

Amounts are Tax Inclusive

Item	Description	Qty	Unit Price	Account	Tax Rate	Region	Amount USD
00001: BAGS	BAGS	2.00	500.00	300 - Purchases	Tax on Purchases (8.25%)		1,000.00

Add a new line Assign expenses to a customer or project

Subtotal1,000.00
Includes Tax 8.25%76.21
TOTAL 1,000.00

Save
Approve
Cancel

History & Notes
Add Note

THEN CLICK APPROVE

View Bill



Bill approved

[Add another bill](#)

Awaiting Payment

[Print PDF](#)[Bill Options](#)

From Account No. Date Due Date
RAIN MIRANDA 00001 28 Sep 2025 10 Oct 2025
No address
[Add address](#)

Total
1,000.00

Amounts are: **Tax Exclusive**

Item Code	Description	Quantity	Unit Price	Account	Tax Rate	Region	Amount USD
00001	BAGS	2.00	461.89	Purchases	Tax on Purchases		923.79

Subtotal 923.79

Total State Tax 4.25% 39.26

Total City Tax 4% 36.95

TOTAL 1,000.00

Make a payment

Amount Paid Date Paid Paid From Reference ☐ Pay by cheque [Add Payment](#)

History & Notes

Approved by Susette Miranda on 28 Sep 2025 at 5:44AM
From RAIN MIRANDA for 1,000.00.

[Show History \(2 entries\)](#)[Add Note](#)

CREATE ANOTHER BILL

Xero

DCG

Home

Sales

Purchases

Reporting

Payroll

Accounting

Contacts

Projects

SM

Purchases overview

Bills to pay

View Bill

✔

Bill approved

Add another bill

Awaiting Payment

From

Account No.

Date

Due Date

RAIN MIRANDA

00001

28 Sep 2025

10 Oct 2025

No address

Add address

Item Code	Description	Quantity	Unit Price	Account	Tax Rate	region	Amount USD
00003	Lotion	5.00	10.00	Cost of Goods Sold	Tax Exempt		50.00

Subtotal

50.00

Total No Tax 0%

0.00

TOTAL

50.00

Make a payment

Amount Paid

Date Paid

Paid From

Reference

☐ Pay by cheque

Add Payment

History & Notes

Approved by Susette Miranda on 28 Sep 2025 at 5:46AM

From RAIN MIRANDA for 50.00.

Show History (2 entries)

Add Note

FROM THE DASHBOARD, CLICK ACCOUNTING AND BANK RECONCILIATION

The screenshot shows the Xero Accounting dashboard. The top navigation bar includes 'xero', 'DCG', 'Home', 'Sales', 'Purchases', 'Reporting', 'Payroll', 'Accounting' (highlighted), 'Contacts', and 'Projects'. On the right are icons for adding, searching, help, notifications, and a user profile 'SM'.

Bank accounts

Connect your bank account to Xero so transactions flow in automatically

[Watch how to add and connect bank and credit card accounts](#)

See our step-by-step guide to [adding a bank account in Xero](#)

[Add Bank Account](#) [Transfer Money](#) [Bank Rules](#) [Uncoded Statement Lines](#)

What's this?

Business Bank Account

090-6007-006543 [Manage Account](#)

8,315.64
Statement Balance
21 Sep 2025

1,760.54
Balance in Xero

[Reconcile 27 items](#)

April May June July August September

☒ Show account on Dashboard [Change order](#)

Business Savings Account

121314-121314 [Manage Account](#)

0.00
Statement Balance
No transactions imported

No transactions imported
[Import a bank statement to get started](#)

☒ Show account on Dashboard [Change order](#)

CLICK RECONCILE 27 ITEMS

MATCH TRANSACTIONS

THEN CLICK RECONCILE

THEN CLICK RECONCILE

What's this?
Review your bank statement lines...

Options ▾

8 Sep 2025 Ridgeway University 0025 More details	Spent	Received 6,187.50
---	-------	----------------------

OK

Match>Create*Transfer*Discuss*Find & Match

31 Aug 2025
Ridgeway University
Ref: INV-0025

Spent

Received
6,187.50

Options ▾

11 Sep 2025 City Limousines 0006-PART More details	Spent	Received 100.00
---	-------	--------------------

Match

Discuss *

Find & select matching transactions below

1. Find & select matching transactions ?

☐ Show Spent Items

☒ Show USD items only

Search by name or reference

CITY

Search by amount

Go

Clear search

Date	Name ↓	Spent	Received
☒ 21 Jul 2025	City Limousines		250.00
☐ 7 Aug 2025	City Limousines		216.50 USD
☐ 10 Aug 2025	City Limousines		21.70 USD
☐ 16 Sep 2025	City Limousines		703.63 USD
☐ Select all on this page			

Showing 1 - 4 of 4

Split transaction

Split this transaction if you need to record a part payment.

Balance

USD 250.00

Part payment

100.00

Remaining amount

USD 150.00

Split

Cancel

2. View your selected transactions. Add new transactions, as needed.

New Transaction ▾

☒ 21 Jul 2025	City Limousines	INV-0006 P/O 9711	250.00
---	-----------------	---------------------	--------

3. The sum of your selected transactions must match the money received. Make adjustments, as needed.

Adjustments ▾

Subtotal

USD 250.00

Must match money received: USD 100.00

USD 250.00

Total is out by: -150.00

Reconcile

Cancel

MATCH PAYMENT BY THE ACTUAL AMOUNT OF PAYMENT ONLY

Options ▾

11 Sep 2025
City Limousines
0006-PART
[More details](#)

Spent

Received
100.00

OK

Match

Discuss *

21 Jul 2025
City Limousines

Spent

Received
100.00

1. Find & select matching transactions ?

☐ Show Spent Items

☒ Show USD items only

Search by name or reference

CITY

Search by amount

Go

Clear search

Date	Name ↓	Reference	Spent	Received
☒ 21 Jul 2025	City Limousines	INV-0006 P/O 9711	Unsplit	100.00
21 Jul 2025	City Limousines	INV-0006 P/O 9711		150.00
☐ 7 Aug 2025	City Limousines	INV-0012 P/O 9711		216.50 USD
☐ 10 Aug 2025	City Limousines	INV-0017 Book		21.70 USD
☐ 16 Sep 2025	City Limousines	INV-0024 P/O 9711		703.63 USD
☐ Select all on this page				Showing 1 - 4 of 4

2. View your selected transactions. Add new transactions, as needed.

New Transaction ▾

☒ 21 Jul 2025	City Limousines	INV-0006 P/O 9711	100.00

3. The sum of your selected transactions must match the money received. Make adjustments, as needed.

Adjustments ▾

Subtotal

USD 100.00

Must match money received: USD 100.00

USD 100.00

✓ Totals match

Reconcile

Cancel

THEN CLICK RECONCILE

RECONCILIATION FOR ADVANCE DEPOSIT

Review your bank statement lines...

...then match with your transactions in Xero

Options ▾

12 Sep 2025
Jakaranda Maple Systems
DEPOSIT ADV
[More details](#)

Spent

Received
2,000.00

Match

Discuss

Find & select matching transactions below

1. Find & select matching transactions - 0 transactions selected

2. View your selected transactions. Add new transactions, as needed. ?

Received as

Direct Payment ▾

From

Date

Reference

Jakaranda Maple Systems

12 Sep 2025 ▾

USD United States Dollar

Amounts are

Tax Inclusive ▾

Item	Description	Qty	Unit Price	Account	Tax Rate	Region	Amount USD
::	DEPOSIT ADV	1.00	2,000.00				2,000.00
::							
::							
::							
::							

Add a new line

+ Add new account...

Expenses

300 - Purchases

310 - Cost of Goods Sold

400 - Advertising

404 - Bank Fees

408 - Cleaning

412 - Consulting & Accounting

...

2,000.00

0.00

2,000.00

Save Transaction

Cancel

Region

Transaction Date

Transaction Reference

Options ▾

20 Sep 2025
Majestic Contracting
Sublet RM2031
[More details](#)

Spent

Received
450.00

OK

Match

Discuss

20 Sep 2025
Majestic Contracting

Spent

Received
450.00

1. Find & select matching transactions ?

☐ Show Spent Items

☒ Show USD items only

Search by name or reference

MAJESTIC

Go

Clear search

Search by amount

Date	Name ↓	Reference	Spent	Received
☒	20 Sep 2025	 Majestic Contracting		450.00 USD

☐ Select all on this page

2. View your selected transactions. Add new transactions, as needed.

New Transaction ▾

☒	20 Sep 2025	 Majestic Contracting		450.00 USD
-------------------------------------	-------------	--	--	------------

3. The sum of your selected transactions must match the money received. Make adjustments, as needed.

Adjustments ▾

Subtotal

USD 450.00

Must match money received: USD 450.00

USD 450.00

✓ Totals match

Reconcile

Cancel

DCG ▾
Home
Sales
Purchases
Reporting
Payroll
Accounting
Contacts
Projects
+ 🔍 ? 🛎️ ⋮
SM

emo Company (Global)

Your last login: last week from Philippines [Edit dashboard](#)

any to learn how Xero works.

You can test out features without worrying about making mistakes.

company ↗

Business Bank Account

090-8007-006543

[Reconcile 4 items](#)

Avg 31 Sep 7 Sep 14 Sep 21 Sep 28

Business Savings Account

121314-121314

No transactions imported

[Import a bank statement](#)

Total cash in and out

April May June July August September

Account watchlist

Account	This month	YTD
Advertising (400)	2,309.47	9,657.05
Entertainment (420)	0.00	1,553.60
Inventory (630)	0.00	0.00
Sales (200)	3,887.60	25,293.18

→ Next: Add budgets to account categories

Use budgets to track your spending against your goals

[Add budgets](#) [Skip](#)

Invoices owed to you

New sales invoice

2 Draft invoices	1,100.00
11 Awaiting payment	5,428.41
5 Overdue	1,054.83

Older 21-27 Sep This week 5-11 Oct 12-18 Oct Future

Bills you need to pay

PROFIT AND LOSS REPORTING

+

Q

?

B

⋮

SM

Xero

DCG

Home

Sales

Purchases

Reporting

Payroll

Accounting

Contacts

Projects

Reports

Profit and Loss

★

Minimise

<

Xero standard report

Profit and Loss

Common formats

Budget Variance

Current and previous 3 months

Current financial year by month

Current financial year by month – actual and budget

Month to date comparison

Year to date comparison

Compare Region

Learn more

Learn how to create a custom report

Date range: This month

1 Sept 202530 Sept 2025

Compare with

None

Compare tracking categories

None

Filter

More

Update

Profit and Loss

Demo Company (Global)

For the month ended 30 September 2025

	Sep 2025
Trading Income	
Other Revenue	450.00
Sales	3,887.60
Total Trading Income	4,337.60
Cost of Sales	
Cost of Goods Sold	50.00
Purchases	1,949.77
Total Cost of Sales	1,999.77
Gross Profit	2,337.83
Operating Expenses	
Advertising	2,309.47
Bank Fees	30.00
Consulting & Accounting	29.00
Freight & Courier	105.50
General Expenses	296.94
Light, Power, Heating	100.32
Motor Vehicle Expenses	380.00
Office Expenses	190.75
Rent	1,091.22
Telephone & Internet	50.00
Travel - National	308.56
Total Operating Expenses	4,891.76
Net Profit	(2,553.93)

OPTIONS REQUIRED:

33 items Search									
Number	Ref	To	Date	Due Date	Paid	Due	Status	Sent	
INV-0033		 Santos, Abbigail	28 Sep 2025	5 Oct 2025	0.00	21.65	Awaiting Payment		
INV-0032		 Smith, John	28 Sep 2025	5 Oct 2025	0.00	324.75	Awaiting Payment		
INV-0031		 Castro, Anthony	28 Sep 2025	12 Oct 2025	0.00	2,175.00	Awaiting Payment		

Purchases overview >

Bills

All

Draft

Awaiting approval

Awaiting payment 13

Paid

Repeating

New bill

36 items 5,146.12 USD							
View	From	Status	Reference	Date	Due date	Paid	Due
	RAIN MIRANDA	Awaiting payment		28 Sept 2025	10 Oct 2025	0.00	250.00
	RAIN MIRANDA	Awaiting payment		28 Sept 2025	10 Oct 2025	0.00	50.00
	RAIN MIRANDA	Awaiting payment		28 Sept 2025	10 Oct 2025	0.00	1,000.00

Bank accounts



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Hide Help

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- Add Bank Account
- Transfer Money
- Bank Rules
- Uncoded Statement Lines

What's this?

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090-9007-006543

Manage Account

8,315.64

Statement Balance

21 Sep 2025

3,615.64

Balance in Xero

Reconcile 4 items

April

May

June

July

August

September

Show account on Dashboard

Change order

Business Savings Account

121314-121314

Manage Account

0.00

Statement Balance

No transactions imported

No transactions imported

Import a bank statement to get started

Show account on Dashboard

Change order

Reports

Profit and Loss



- Minimise <
- Xero standard report
- Profit and Loss
- Common formats
- Budget Variance
- Current and previous 3 months
- Current financial year by month
- Current financial year by month – actual and budget
- Month to date comparison
- Year to date comparison
- Compare Region
- Learn more
- Learn how to create a custom report

Date range: This month

1 Sept 202530 Sept 2025

Compare with

None

Compare tracking categories

None

Filter

More

Update

Profit and Loss

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For the month ended 30 September 2025

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Operating Expenses	
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