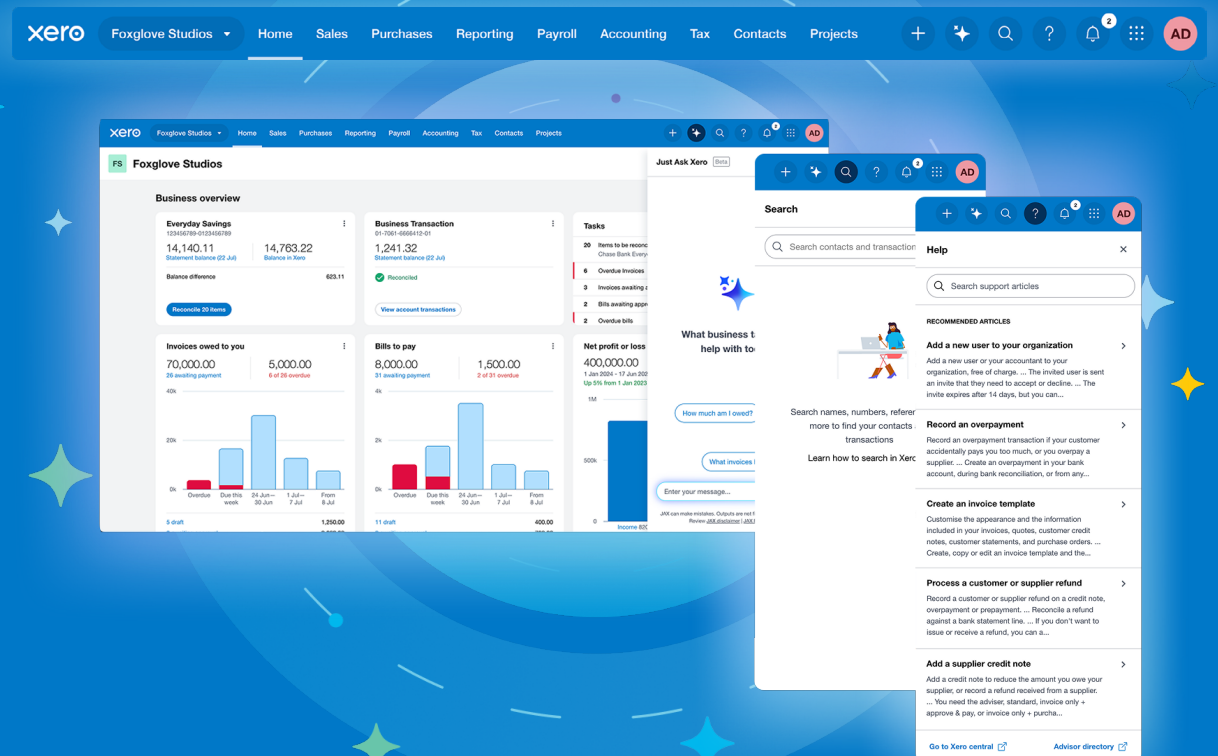




# Your guide to Xero's refreshed navigation

Introducing Xero's reimagined navigation for quick and easy access to valuable information and actionable insights.



# Contents



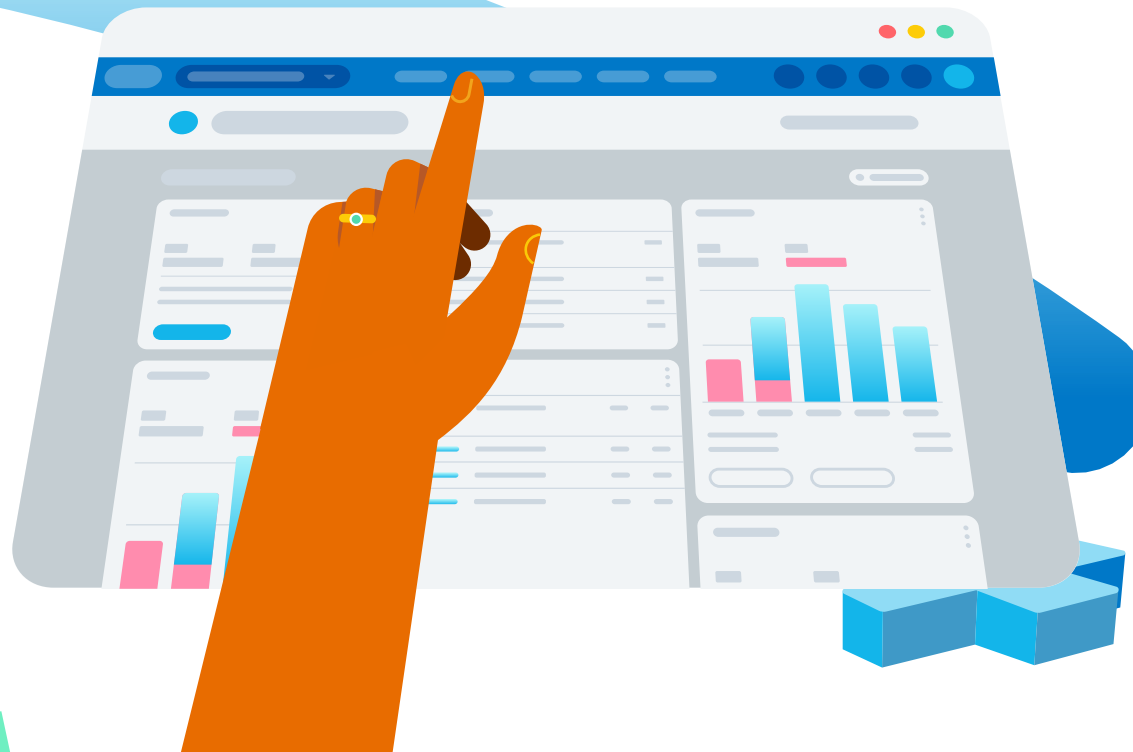
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# What's changed?

The refreshed navigation makes it **easier** to find what you're looking for, move from one task to the next, with simpler labels and logical groupings.

Please note your navigation may vary from what's shown based on your region, plan and permissions.

[Click here to view the video](#)



# Refreshed navigation

xero

Foxglove Studios

Home

Sales

Purchases

Reporting

Payroll

Accounting

Tax

Contacts

Projects

+

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AD

FS

Foxglove Studios

Business overview

Everyday Savings

123456789-0123456789

14,140.11

Statement balance (22 Jul)

14,763.22

Balance in Xero

Balance difference623.11

Reconcile 20 items

Business Transaction

01-7061-6666412-01

1,241.32

Statement balance (22 Jul)

Reconciled

View account transactions

Invoices owed to you

70,000.00

26 awaiting payment

5,000.00

6 of 26 overdue

40k

20k

0k

Overdue

Due this week

24 Jun—30 Jun

1 Jul—7 Jul

From 8 Jul

5 draft

1,250.00

Bills to pay

8,000.00

31 awaiting payment

1,500.00

2 of 31 overdue

4k

2k

0k

Overdue

Due this week

24 Jun—30 Jun

1 Jul—7 Jul

From 8 Jul

11 draft

400.00

Tasks

20 Items to be reconciled

Chase Bank Every

6 Overdue Invoices

3 Invoices awaiting approval

2 Bills awaiting approval

2 Overdue bills

Net profit or loss

400,000.00

1 Jan 2024 - 17 Jun 2024

Up 5% from 1 Jan 2023

1M

500k

0

Income 2024

Search

Search contacts and transactions

🔍

Search contacts and transactions

👤

📧

📄

📅

📊

📝

🔍

🔔

⋮

Search names, numbers, references and more to find your contacts and transactions

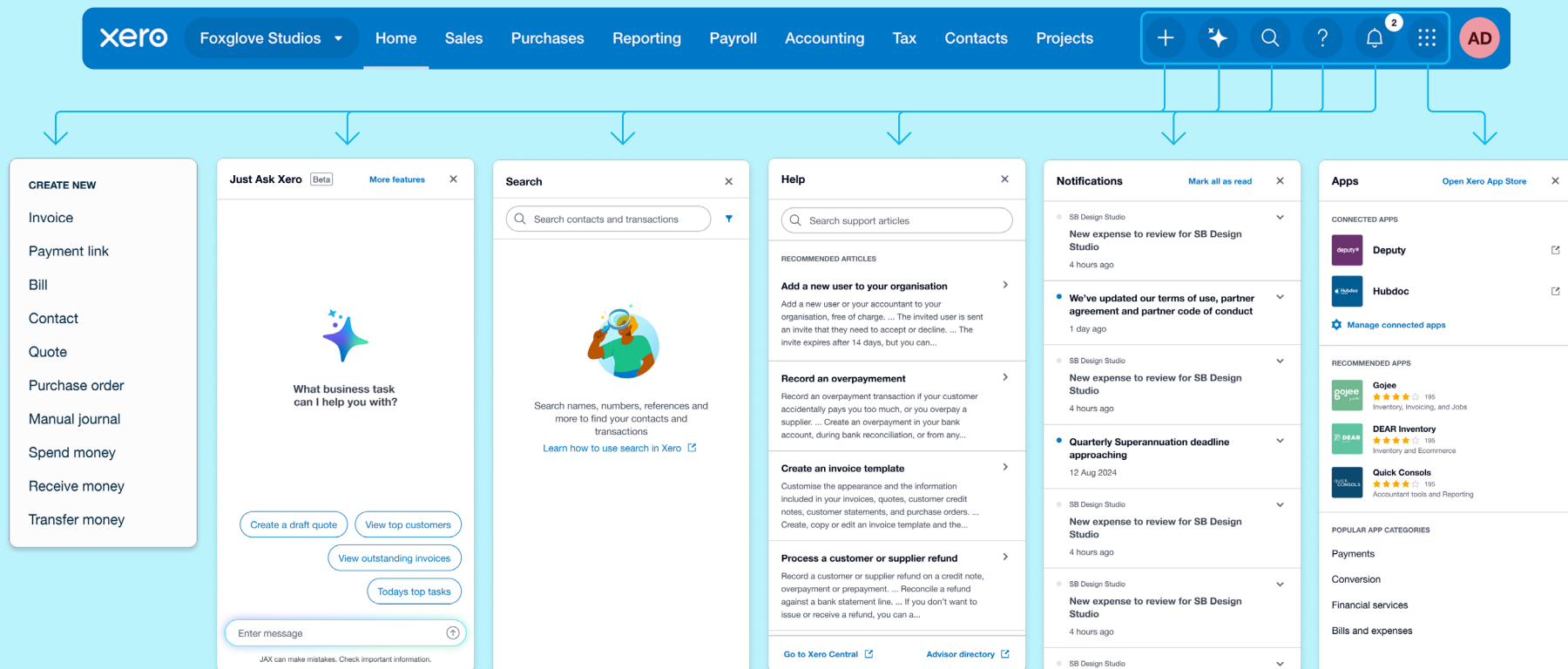
Learn how to search in Xero

4



# New and improved right-hand panel

The new and improved right-hand panel puts essential tools like JAX (your AI business companion), search, help, notifications, and apps at your fingertips. Now, you can access what you need, when you need it, for a more fluid and uninterrupted workflow.



# Sales and Purchases now in the top navigation

To better match how you work, you'll now find separate sections for Sales and Purchases, so you can move between tasks more efficiently.



Please note your navigation may vary from what's shown based on your region, plan and permissions.

# Sales (new)

Sales is now in the main navigation, with its own drop down so you can get to your sales tasks faster.

The **Customers** option quickly takes you to the customers section of the **Contacts** menu

## Sales

Sales overview

Invoices

Progress payments

Payment links

Online payments

Quotes

Products and services

Inventory plus



Customers

Sales settings



Use the **Sales settings** option to access the sales section of the new settings page

# Purchases (new)

Purchases is now in the main navigation, with it's own drop down so you can get to your purchases tasks faster.

The **Suppliers** option quickly takes you to the suppliers section of the **Contacts** menu

## Purchases

Purchases overview

Bills

Purchase orders

Expenses

Suppliers

Purchases settings



Use the **Purchases settings** option to access the purchases section of the new settings page

# Reporting (new)

We've moved Reporting to the main navigation to give you faster access to powerful new insights, including Analytics Powered By Syft.



## STANDARD USER

### Reporting

All reports	
ANALYTICS POWERED BY SYFT	
Dashboards	
Cash flow manager	
Visualisations	
FAVOURITE REPORTS	
Account Transactions	
Aged Payables Summary	
Aged Receivables Summary	
Balance Sheet	
Profit and Loss	
ANALYTICS	
Short-term cash flow	
Business snapshot	
Reporting settings	

The new **Reporting settings** options takes you to the reporting section of the new settings page

## ADVISOR USER


### Reporting

All reports	
ANALYTICS POWERED BY SYFT	
Dashboards	
Cash flow manager	
Visualisations	
FAVOURITE REPORTS	
Account Transactions	
Aged Payables Summary	
Aged Receivables Summary	
Balance Sheet	
Profit and Loss	
ADVISER REPORTS	
Business Finance Advisor Pack	
Company - Annual Accounts	
ANALYTICS	
Short-term cash flow	
Business snapshot	
Reporting settings	

# Payroll

Manage payroll with confidence and ease by accessing it from the menu. You can save time and reduce errors by automating calculations and staying compliant with local regulations, freeing you up to focus on growing your business.



 **AUS**

Payroll

Payroll overview

EMPLOYEE MANAGEMENT

Employees

Leave

Timesheets

PAYROLL PROCESSING


Pay employees


Superannuation

Single Touch Payroll

ADMINISTRATION

Payroll history

Payroll settings 

 **UK**

Payroll

Payroll overview

EMPLOYEE MANAGEMENT

Employees

Leave

Timesheets


PAYROLL PROCESSING


Pay employees

Pension filings

RTI filings

Taxes and filings

Payroll settings 

 **NZ**

Payroll

Payroll overview

EMPLOYEE MANAGEMENT

Employees


Leave


Timesheets

PAYROLL PROCESSING

Pay employees


Taxes and filings


Payroll settings 


 **US**


Payroll


GUSTO

Dashboard 

Run payroll 

Time off 

Reports 

Integration settings 

Please note your navigation may vary from what’s shown based on your region, plan and permissions.

# Accounting

Access features and tools to prepare your books ready for period end. We've added a new option for Bank rules so it's easier to view and manage bank rules in Xero.

We've added a new option for **Bank rules** so it's easier to view and manage them

## STANDARD USER

### Accounting

#### BANKING

Bank accounts

Bank rules

#### ACCOUNTING TOOLS

Chart of accounts

Fixed assets

Manual journals

Accounting settings



The new **Accounting settings** option takes you to the accounting section of the new settings page

## ADVISOR USER

### Accounting

#### BANKING

Bank accounts

Bank rules

#### ACCOUNTING TOOLS

Chart of accounts

Fixed assets

Manual journals

Find and recode

Assurance dashboard

History and notes

Accounting settings



# Tax (new)

We've moved tax functions into their own regional menus, each with their own permission settings, to make them easier to find.



## Tax

Activity Statement

Taxable Payments Annual Report

Tax settings

## Tax

Sales tax

1099

Tax settings

## Tax

VAT Returns \*

CIS Contractor

CIS Subcontractor (CIS Suffered)

Tax settings

We've added a new **Tax settings** option that takes you to the tax section of the new settings page

\* You'll see Partnership tax in this menu if you've enabled it

Please note your navigation may vary from what's shown based on your region, plan and permissions.



# Contacts

We've added a new Contacts settings option that takes you to the contacts section of the settings page.

## Contacts

All contacts

Customers

Suppliers

### GROUPS

VIP customers

Top customers

Contacts settings



The new **Contacts settings** option takes you to the contacts section of the new settings page

# Projects

Save time and focus on what's important by quickly accessing Projects from the Projects menu.

## Projects

All projects

Time entries

Staff time overview

Projects settings



The new **Projects settings** option takes you to the projects section of the new settings page

# A new home for settings

Settings are now available in all drop down menus, and on a centralised settings page that you can access from the organisation menu.

The screenshot displays the Xero web interface. The top navigation bar includes the Xero logo, a dropdown menu for 'Foxglove Studios', and various functional tabs: Home, Sales, Purchases, Reporting, Payroll, Accounting, Tax, Contacts, Projects, and a series of utility icons (plus, star, search, help, notifications, and a user profile icon labeled 'AD').

The main content area is titled 'Settings'. It is divided into two sections: 'General' and 'Sales'. The 'General' section contains five sub-sections: 'Organisation details' (Update your organisation's name, logo, or contact information), 'Users' (Invite new users, manage permissions, or delete current users), 'Subscription' (Update your subscription, billing information, or pricing plan), 'Connected apps' (Add and manage the apps connected to your organisation), and 'Email settings' (Set a reply-to email address and name, or edit email templates). The 'Sales' section contains two sub-sections: 'Invoice settings' (Manage default settings, invoice reminders, and branding themes) and 'Online payments' (Add and manage payment options for customers to pay you online).

A callout box on the left side of the screenshot highlights the 'Settings' option within the 'Foxglove Studios' dropdown menu. The menu also lists 'Files', 'Subscription and billing', 'Demo Company', 'Add new organisation', 'My Xero', and a 'DO MORE WITH XERO' link.

Settings are now available in **one** place



Please note your navigation may vary from what's shown based on your region, plan and permissions.



*your* business  
supercharged