

The
'APPY HOUR[®]

with Liz & Heather

www.theappyh Hour.com

xero

Xero Training with My Task LMS

Deep Dive Into:



MY TASK LMS
LEARNING REDEFINED



Meet your Hosts

The
'APPY HOUR[®]
with Liz & Heather
www.theappyhour.com



Heather Satterley

Director of Education and Media, Woodard

Liz Scott

CEO, Liz Scott Training & Consulting



Chris Haugen

Chief of Operations

- Onboarding Manager for CPA Firms
- 14 years in the Accounting Industry



MY TASK LMS
LEARNING REDEFINED

Proposals



Approval Workflow



Practice Management



Accounts Payable



Inventory



Outsourcing



Training



THANK YOU 2025 SPONSORS!

THANK YOU TO OUR CHAMPAGNE LEVEL SPONSOR



Agenda

- **Welcome!**
- **My Task LMS is in the HOUSE!**
- **Xero Training**
- **My Task LMS Experience**

DIVE INTO XERO TRAINING WITH

xero



MY TASK LMS
LEARNING REDEFINED

Xero Training with My Task LMS


The screenshot displays the My Task LMS interface. At the top, the logo reads "MY TASK LMS LEARNING REDEFINED". The user is logged in as "A. Hour | Instructor" and has access to "Messages" and "Help". A search bar is present. The main content area is titled "Home" and features a search bar for courses. Below this is a grid of course cards. The first row includes "Accounting 000 - Welcome to your Learn...", "Accounting 001 - Introduction to Bookke...", and "Accounting 002 Overview". The second row includes "Accounting 100 - Payroll Overview", "Accounting 101 (Xero)", and "Accounting 201 (Xero)". The third row includes "Accounting 301 (Xero)", "Accounting 401 (Xero)", and "Accounting 501 - Final Tip for Success". The fourth row includes "Trainer 003 - Trainer Guide - Xero Answe...". To the right of the grid is a sidebar with navigation options: "Courses", "Groups", "Conferences" (with a link to "Add conference"), "Discussions" (with a link to "Add discussion"), and "Calendar" (with a link to "Add event").

Xero Training Accounting 101

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A. Hour | Instructor | Messages | Help | Search

Home / Accounting 101 (Xero)



Accounting 101 (Xero)

Throughout this course you will learn the basics of monthly bookkeeping and creating financial statements. For this test we will assume that you have a fixed asset program outside of Xero to calculate monthly depreciation. You will need access to... [more](#)

[View as Learner](#) [...](#) [🔒](#)

🔊 Accounting Overview and Timeline for Course1623426019254.webm

SECTION 1 - CREATING A NEW CLIENT IN XERO

- 📄 Creating Client in Xero
- 📄 Setting up a new client in Xero
- 📄 Business Client Interview Form.pdf
- ▶ Creating Client In Xero
- ▶ Adding Bank Accounts In Xero
- 📄 Add Bank Accounts into Xero
- ▶ Importing Chart of Accounts into Xero
- 📄 Import Client Chart of Accounts
- ▶ Manually Adding Accounts Into Xero
- 📄 Modify Client Chart of Accounts
- ▶ Accounting Training Instructions Overview (CC)

Content

58 units · 0 inactive

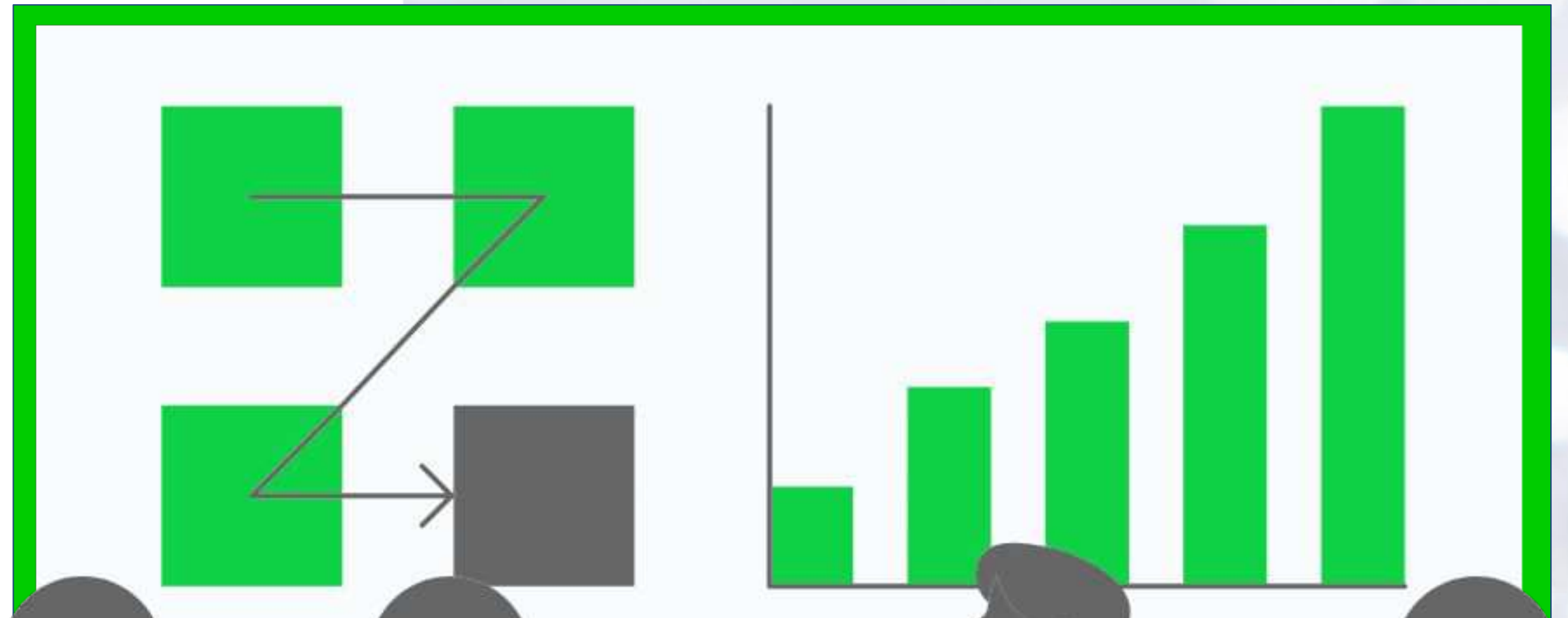
Files

12 files

Reports

Team Training Resources

- Loss of Time
- Loss of Resources
- Loss of Productivity





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Questions?



Join the Xero Slack Forum!

*Interactive Training, Real-Time Tips
& Encouragement*

Live Progress Check-in Dates are:



April 25th, 2025 1:00 PM EST



May 16th, 2025 1:00 pm EST



June 13th, 2025 1:00 pm EST



July 11th, 2025 1:00 pm EST



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Upcoming Episodes

04/22/25 Firm Spotlight using Client Hub
05/13/25 Deep Dive using Client Hub
05/20/25 Accounting Today LIVE

FIRM SPOTLIGHT



Client Hub

April 22th, 2025 4:00 PM EST

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