Xero setup checklist for nonprofits

Tracking & Categories

○ Have you set up tracking categories by programme, grant, or region?
○ Are tracking categories applied consistently across transactions?
○ Do your reports include tracking-based breakdowns?

Invoicing & Accounts Receivable

○ Are you using repeating invoices?
○ Are invoice templates branded and set up with all required info?
○ Do you attach funding agreements to grant invoices?

Budgeting & Cashflow

○ Have you uploaded your budget into Xero (not just Excel)?
○ Are you comparing budget vs actuals by month and by programme?
○ Do you run cash flow forecasts regularly?

Reconciliation & Bank Rules

○ Are bank rules set up for recurring transactions?
○ Are transactions matched regularly?
○ Have you reviewed your bank rules in the last quarter?

CRM & System Integrations

○ Is your CRM synced with Xero?
○ Can multiple teams access shared data?
○ Are donor payments automatically matched to Xero transactions?

Reports & Performance Tracking

○ Are you using Business Snapshot for at-a-glance reporting?
○ Have you customised your snapshot view?

Project Tracking

○ Are you using Xero Projects to monitor costs?
○ Can you track time and expenses by staff or event?
○ Do you regularly review project profitability or sustainability?

Bonus Features

○ Are you using Batch Payments to pay multiple suppliers in one go?
○ Do you use ApprovalMax or another tool to manage invoice approvals?

Next Step: Book a free session with our Xero specialists.