

Category	Task	Frequency
Client Setup	Create contact in Xero	Once
Client Setup	Set client currency to AUD	Once
Invoicing	Issue invoice with zero-rated VAT	Each invoice
Invoicing	Add detailed service description & period	Each invoice
Invoicing	Include foreign bank details if needed	Each invoice
Bank & Payment	Connect or upload bank account in Xero	Monthly
Bank & Payment	Match receipts with invoices in AUD	Monthly
Exchange Rate Tracking	Record actual exchange rate used by bank	Monthly
Expense Recording	Enter local expenses with input VAT	Ongoing
Expense Recording	Categorize expenses properly (e.g., Software, Subscriptions)	Ongoing
Reports	Generate Profit & Loss report	Monthly
Reports	Generate VAT Summary report	Monthly
Reports	Run Aged Receivables report	Monthly
Reports	Download Bank Reconciliation Summary	Monthly
Reports	Export General Ledger report	Quarterly
Compliance Docs	Save client contracts/SOWs	Once
Compliance Docs	Save export invoices	Each invoice
Compliance Docs	Save bank remittance advices	Each payment
Compliance Docs	Keep scanned input VAT bills	Each bill
Compliance Docs	Store tax return filings	Quarterly