Getting Started with Xero JAX – Build Confidence Fast

What JAX is good at today (NZ)

- Understanding your current cash position
- Analysing recent cash inflows and outflows
- Seeing who owes you money and what's overdue
- Explaining numbers in plain English
- Speeding up admin like invoices and quotes

What JAX can't do (yet)

- Create formal cash-flow forecasts
- Project future bank balances
- Replace budgeting or advisory tools

How to start using JAX with confidence

1. Start with "now" questions (not future ones)
2. Ask about trends over past weeks or months
3. Use JAX to explain reports you already trust
4. Keep prompts simple and specific
5. Treat JAX as insight, not advice

POPULAR QUESTIONS TO ASK JAX (NZ)

Cash & money right now

- What's my current cash position?
- How has my cash flow changed over the last 3 months?
- Summarise my cash inflows and outflows for the last 30 days

Who owes me money?

- What unpaid invoices do I have?
- Who are my most overdue customers?
- How much money am I owed right now?

Understanding performance

- Why is my profit different from my cash?
- Show my gross profit trend for the last year
- How does last quarter compare to the same time last year?

Admin shortcuts

- Create an invoice for $X to [customer], due [date]
- Show me all overdue invoices
- Draft a quote for [job or customer]