

How do I set up my Accountant on Xero?

1. Log into your Xero account:
Website: <https://login.xero.com/>

2. Click on your business name in the top left-hand corner. From the dropdown menu, select **Settings**.

3. Select Users (under the General Section)

4. Select **Invite a User**

5. Enter in your Accountant or Bookkeepers:
a) First name
b) Surname
c) Email Address

NOTE: Double check with your Accountant / Bookkeeper which email address they use to log into Xero, as this has to be the email address entered.

6. Select **Business and accounting** and choose **Advisor**

NOTE:

If you use **Projects** and/or **Payroll**, please tick these as well. Ticking manage users will give the new user ability to invite new users, for example employees.

7. Add a message (optional)
8. Click **Send Invite**

After you have completed all the above steps, your accountant or bookkeeper will receive an email with the invitation link. They will need to accept the invitation so that they can access your Xero. This access is provided immediately.