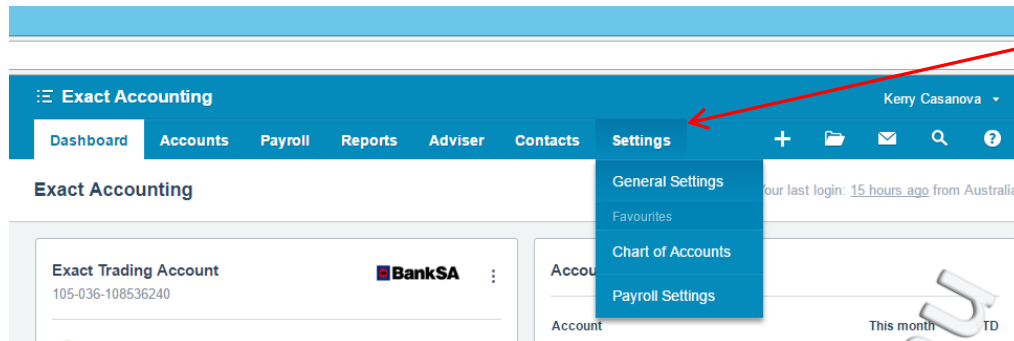


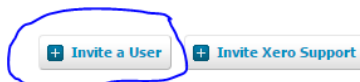
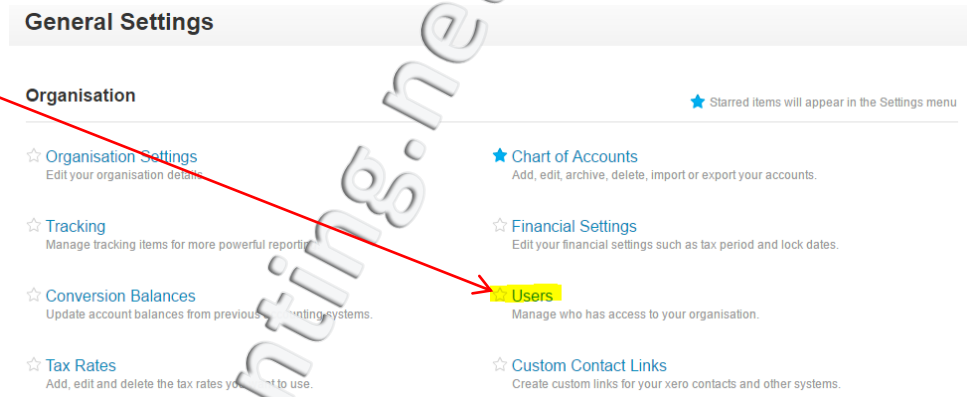
How to invite a new user into your Xero



1. In your menu bar across the top of the Xero page click on the **“Settings”** menu

Then click on **“General Settings”**

2. Click on **“Users”**



3. Click on the **“Invite User”** button


4. Complete the Names and email boxes for the details of the new user you want to add, and then click the **Continue** button on the bottom right hand corner.

	Bank reconciliation	Invoices	Edit settings	View reports	Publish reports	Lock dates
<input type="radio"/> None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="radio"/> Read Only	<input type="checkbox"/>	<input type="checkbox"/> Read only	<input type="checkbox"/>	<input type="checkbox"/> Read only	<input type="checkbox"/>	<input type="checkbox"/>
<input type="radio"/> Invoice Only	<input type="checkbox"/>	<input type="checkbox"/> Draft only	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="radio"/> Standard	<input type="checkbox"/> Non Cash Coding	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> All Reports	<input type="checkbox"/>	<input type="checkbox"/>
<input type="radio"/> Adviser	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Manage Users Allow this user to add and remove users and change permissions
 Payroll Admin Allow this user full payroll access, including preparing & posting pay runs and payroll reporting
 Contact Bank Account Admin Allow this user to add and edit bank account details held for customers and suppliers

Understand user role details

Invite a User

What's this? 

Personalise invitation and send

In order to give Kerry Casanova access to Exact Accounting they need to accept an email invitation from you.

The invitation that will be emailed is shown here and can be changed before being sent.

Email message

Hello Kerry,

Exact Accounting would like you to access their account at Xero. Exact Accounting uses Xero to help manage their business.

Send Invite

5. Click the **“Send Invite”** button.

An email will be sent to the address you put in and the recipient than needs to accept that invitation to be able to access your Xero records.