



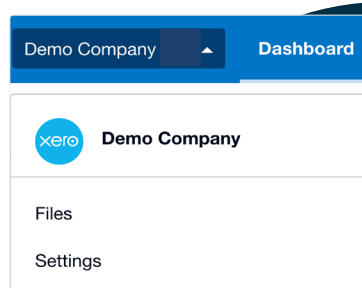
Invite your advisor into your Xero organisation

Follow these simple steps to invite your advisor into your Xero subscription. This will allow them to perform accounting tasks on your behalf.



Go into settings to invite users

1. Visit login.xero.com, and log into your Xero account.
2. Click on the organisation name, select Settings, then click Users.
3. Click the 'Invite a user' button.



Click on your organisation name to see the drop down, then select Settings

Invite a user

Click the 'Invite a user' button to add your advisor

Enter your advisors details and send the invite

1. Enter your advisors details including their name and email address.
2. Select the 'Business and accounting' check box. Select the 'Payroll admin' check box if your advisor needs full payroll access too.
3. Select Advisor user role. This will provide full access, including advanced accounting features.
4. Select the 'manage users' check box.
5. Click the 'Send invite' button to invite your advisor into your Xero organisation.

Payroll admin
Allow this user full payroll access, including preparing and posting pay runs and payroll reporting. [Read about Payroll](#) (?)

Business and accounting

How much access do they need?

Invoice only	Standard	Advisor	Read only
--------------	----------	----------------	-----------

i This role has full access and includes advanced accounting features. It's ideal for accountants and bookkeepers. [Learn more about user roles](#) (?)

Sales and purchases

Bank accounts and balances

Bank account admin Can add and edit bank account details held for customers and suppliers

Reports

Publish reports

Set lock dates

Edit settings

Manage users Can invite new users, edit user roles, and delete users

Find out more about adding new users at [Xero Central](#)