## Invite Prescott into your Xero File

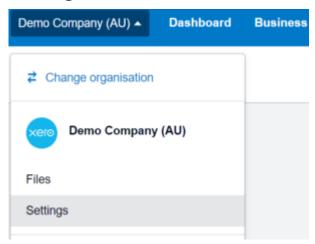
To allow us to help you with your business, we need access to your Xero file with **Adviser** and **Manage User** permissions.

Simply follow the steps below, and we'll be connected in no time!

1. Open your Xero file

Organisation settings

Click on your Organisation name then go to Settings



3. Click on Users, then Invite User

## General Features Organisation details Invoice settings Address, logo and basic financial information Create branding themes for documents, add payment services and auto reminders for invoices Users Payment services Add, remove or modify users of this organisation Add and manage online payment options for your sales invoices Currencies Manage the currencies your business uses Set a reply-to email address and email template content Connected Apps Payroll settings Add and manage third party connections to Xero Manage your payroll settings Expenses Manage your expense settings Xero to Xero Connect with other Xero users to automate invoices and bills Create shortcuts for your favourite Xero contacts and other tools

4. Enter **Prescott Solutions** and

xero@prescottsolutions.com.au, then select the
permissions below

- Payroll Admin
- Business and Accounting choose Adviser and don't forget to tick Manage Users

| Enter their details   |  |
|---|--|
| First name  | Last name  |
| Prescott  | Solutions  |
| 110000  |  |
| Email   |  |
| xero@prescottsolutions.com.au   |  |
| Give them access to:  |  |
| Projects  Allow this user to access Pro Learn more  | jects. There may be a per active user cost.                                  |
| Expenses  Allow this user to access Expenses. There may be a per active user cost.  Learn more  |  |
| Payroll admin  Allow this user full payroll access, including preparing and posting pay runs and payroll reporting                            |  |
| Business and accounting How much access do they need?   |  |
| Invoice only Stand  | dard Adviser Read only   |
| This role has full access and includes advanced accounting features. It's ideal for accountants and bookkeepers. Understand user role details |  |
| Sales and purchases   | ~  |
| Bank accounts and balances  | ~  |
| Bank account admin  | Can add and edit bank account<br>details held for customers and<br>suppliers |
| Reports   | ✓  |
| Publish reports   | ~  |
| Set lock dates  | ~  |
| Submit BAS  | Can send tax obligations to the government directly from Xero                |
| Edit settings<br>Manage users   | Can invite new users, edit user roles, and delete users                      |
| Cancel  | Add a personal message Send invite   |

Cancel

5. Lastly, click **Send Invite**