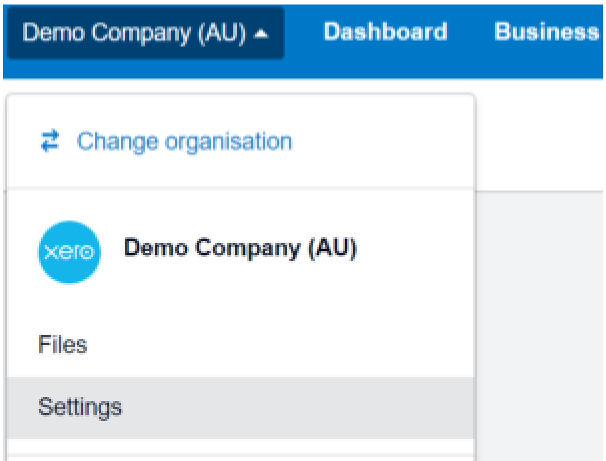
Invite Prescott into your Xero File

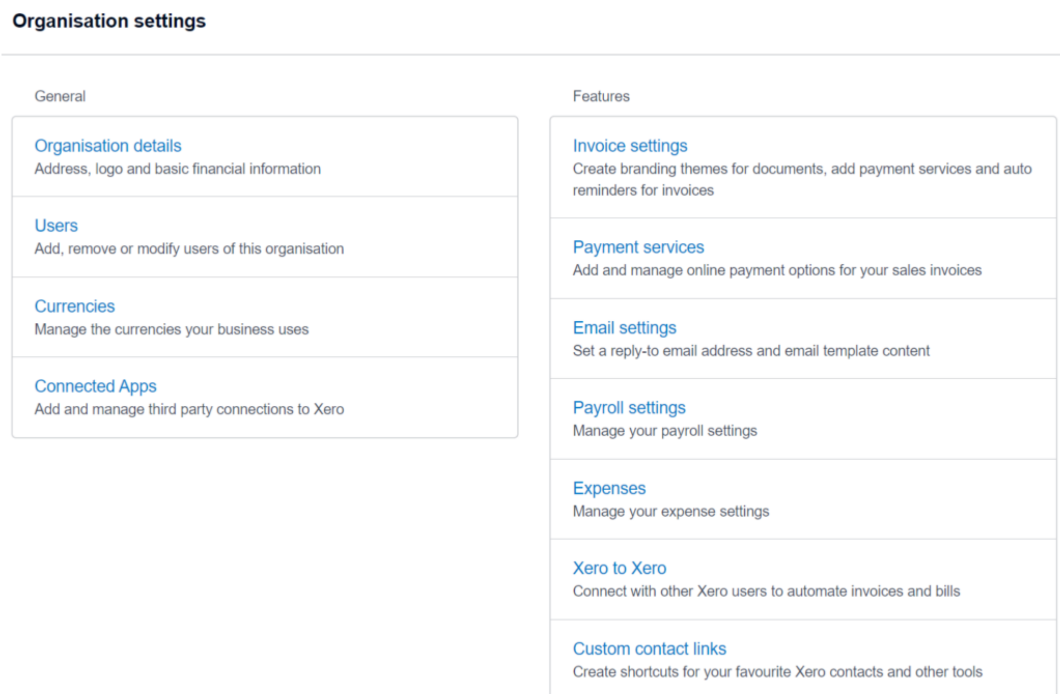
To allow us to help you with your business, we need access to your Xero file with **Adviser** and **Manage User** permissions.

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

1. Open your Xero file
2. Click on your Organisation name then go to **Settings**



3. Click on **Users**, then **Invite User**



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

Prescott

Last name

Solutions

Email

xero@prescottsolutions.com.au

Give them access to:

- [ ] **Projects**

Allow this user to access Projects. There may be a per active user cost.
Learn more

- [ ] **Expenses**

Allow this user to access Expenses. There may be a per active user cost.
Learn more

- [x] **Payroll admin**

Allow this user full payroll access, including preparing and posting pay runs and payroll reporting

- [x] **Business and accounting**

How much access do they need?

Invoice only | Standard | **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 details held for customers and suppliers
Reports	✓
Publish reports	✓
Set lock dates	✓
Submit BAS	[ ] Can send tax obligations to the government directly from Xero
Edit settings	✓
Manage users	[x] Can invite new users, edit user roles, and delete users

Cancel | Add a personal message | Send invite

5. Lastly, click **Send Invite**