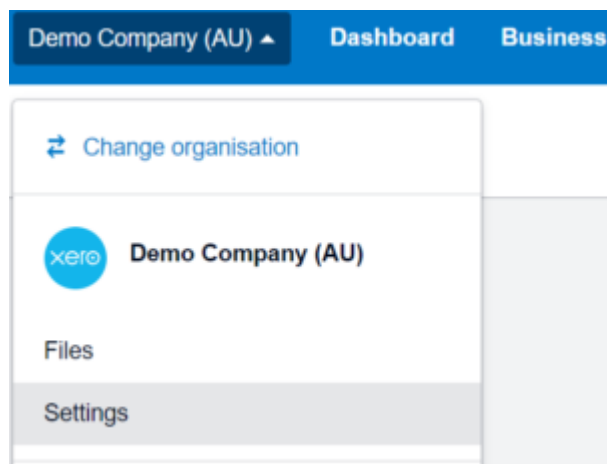


Invite Prescott into your Xero File

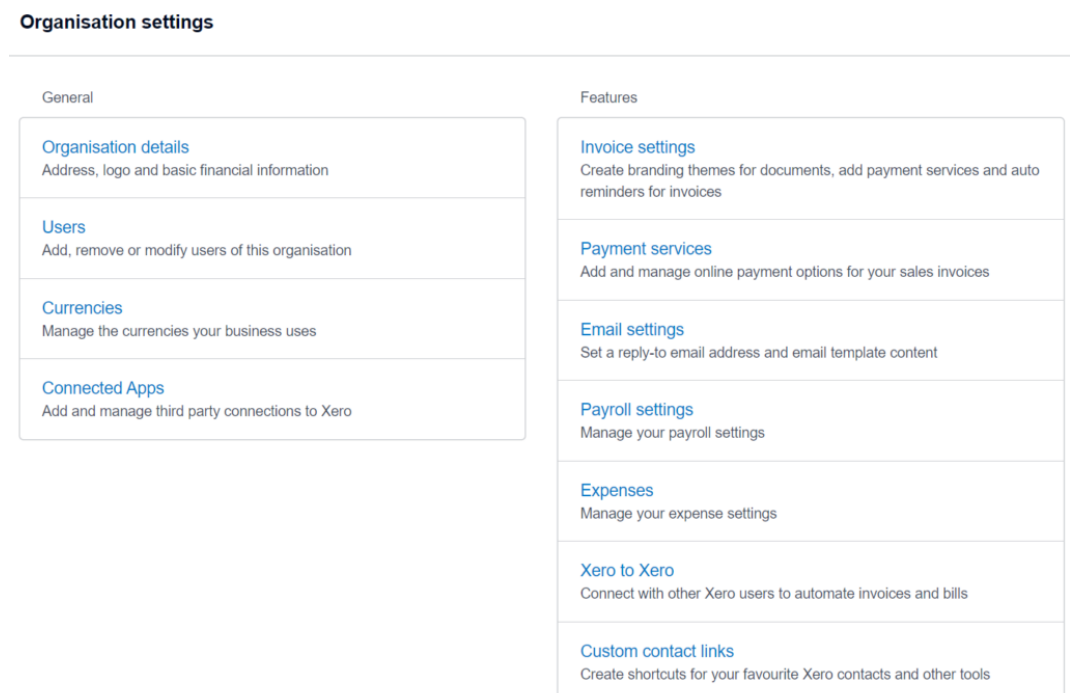
To allow us to help you with your business, we need access to your Xero file with **Adviser** and **Manage User** permissions.

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](#)

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

Standard

Adviser

Read only

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

Cancel

Add a personal message

Send invite

5. Lastly, click **Send Invite**