

How to Invite Your Accountant to Xero

Inviting your accountant to your Xero file is free and secure. This gives your accountant access to review your bookkeeping, assist with reporting, and provide accounting support.

ACCOUNTANT DETAILS TO ENTER	
User	Amie S Fisher
Email	amie@demeter.net.au

Step-by-Step Instructions

Step	Action	Details
1	Log in to Xero	Log in to your Xero account, then click your organisation name in the top-left corner of the screen.
2	Open Settings	From the drop-down menu, select Settings.
3	Go to Users	Under the General section, click Users.
4	Invite a new user	Click the Invite a user button.
5	Enter accountant details	Enter Amie S Fisher as the user and amie@demeter.net.au as the email address.
6	Select access level	Tick Business and Accounting, then assign the Advisor role. This provides the access needed to review accounts, assist with reports and complete accounting work.
7	Set additional permissions	If required, select Bank Account Admin and/or Manage Users. If you are unsure, please check with your accountant first.
8	Send the invitation	You may add a short message if you wish. Click Send invite.

What Happens Next

Amie will receive an email invitation from Xero with a secure link to access your Xero organisation. The invitation must be accepted within 14 days. If it expires, you will need to resend it.

Checklist

- ☐ User entered as **Amie S Fisher**
- ☐ Email entered as **amie@demeter.net.au**
- ☐ The Advisor role has been selected
- ☐ Any required additional permissions have been selected
- ☐ The invitation has been sent

Once complete, please let us know that the invitation has been sent.