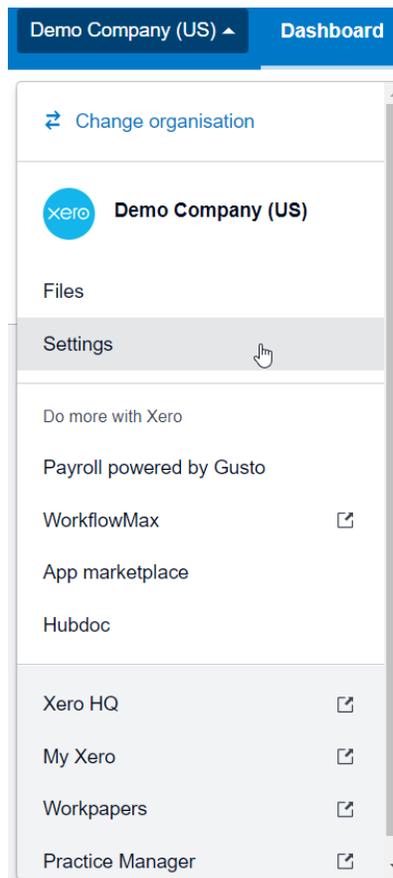
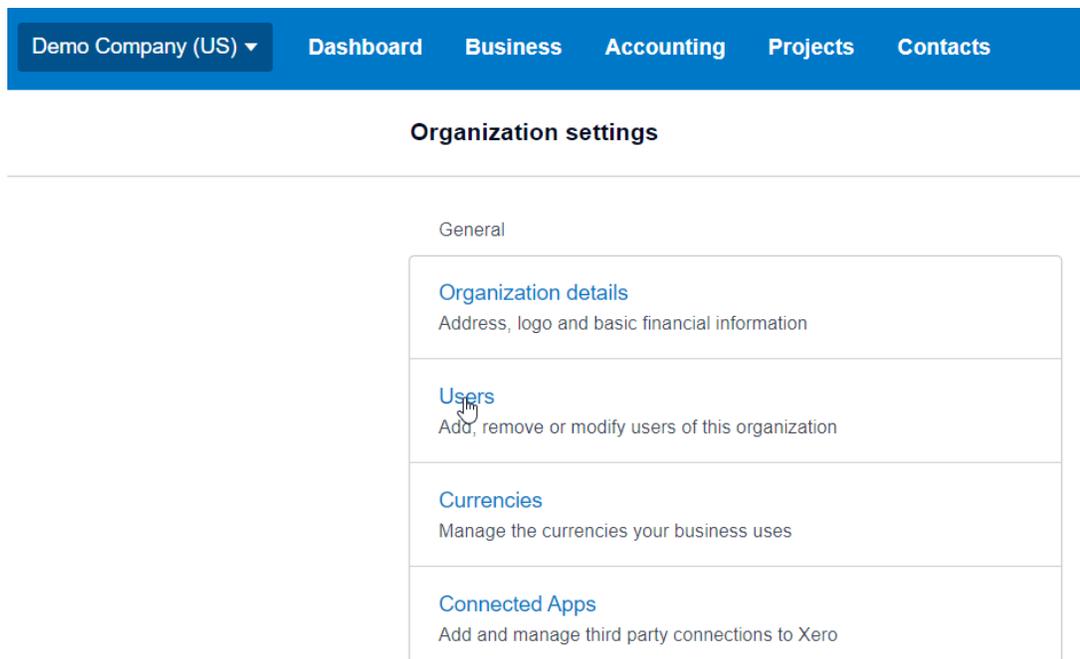


Add a new user to organization/Xero accounts (go over each Xero account if more than 1)

1. Click on the organization name, select **Settings**,



2. then click **Users**.



3. Click **Invite a user**.

Users Current users Login history

Add Xero Support

Invite a user

4. Enter the new user's first name, last name, and email address. The email address you send the invite to will be the user's login email address.
5. Select ADVISOR under Business and Accounting, and check off Manage User

Enter their details

First name

Last name

Email

Give them access to:

Projects
Allow this user to access Projects. There may be a per active user cost. [Learn more](#)

Business and accounting

How much access do they need?

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 ✓

Edit settings ✓

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

First Name: **Access**

Last Name: **Access**

Email address: access@firm.ai

6. (Optional) Click **Add a personal message**, then enter an email message. Click **Send Invite**