

# INVITE US TO BE YOUR XERO ADVISOR

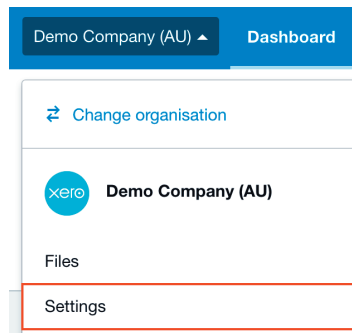
Thank you for engaging with AustAsia Accounting Services Pty Ltd. The next step is to invite us to become your Xero Adviser. As a Xero Certified Advisor and Partner we are fully qualified to manage all of your book keeping, tax and business processes. This saves time, reduces errors and lowers overall costs.

As your Xero Adviser we will:

- Review your financials in real time, managing the growth of your business and/or investments
- Ensure your Xero information and settings are in order
- Ensure your business and/or investments adhere to all compliance requirements

Inviting us to become your Xero advisor is easy. Simply follow the five steps outlined below.

1. In your Xero file, click on your **Xero entity name** on the top right of the menu bar, and select **Settings** from the dropdown menu.



2. In the **Organisation Settings** menu, select **Users**.

## Organisation settings

General

### Organisation details

Address, logo and basic financial information

### Users

Add, remove or modify users of this organisation

### Currencies

Manage the currencies your business uses

### Connected Apps

Add and manage third party connections to Xero

3. In the **Users** menu, select **Invite a user**.

**Users**   [Current users](#)   [Login history](#)

[Remove Xero Support](#)

[Invite a user](#)

4. In the **Invite a User** menu, please enter the details below in the corresponding fields:

First Name: Simon

Last Name: Chesson

Email: bookkeeping@austasiagroup.com

Please tick **Payroll Admin** (this allows us to assist you with any payroll related matters)

Please tick **Business and accounting**, and select **Adviser**, then tick the following checkbox below.

- Bank account admin (this allows us to add and edit bank account details for customers and suppliers depending on your Xero subscription, and services required from AustAsia Accounting Services Pty Ltd).
- Manage users (this allows us to manage our practice staff access).

Then, click **Send invite**.

[Organisation settings](#) > [Users](#)  
**Invite a 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](#)

**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

ⓘ 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	<input checked="" type="checkbox"/> Can add and edit bank account details held for customers and suppliers
Reports	✓
Publish reports	✓
Set lock dates	✓
Submit BAS	<input checked="" type="checkbox"/> Can send tax obligations to the government directly from Xero
Edit settings	✓
Manage users	<input checked="" type="checkbox"/> Can invite new users, edit user roles, and delete users

Cancel

Add a personal message

Send invite

If you require any assistance, please don't hesitate to ask. We're here to help.

#### **Important information and disclaimer**

This publication has been prepared by AustAsia Accounting Services Pty Ltd (Registered Tax Agent No 7587 3005).

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# How can we help you?



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