HOW TO INVITE TRINITY ACCOUNTING PRACTICE AS AN ADVISOR ON XERO

1. Log in to your organisation on Xero then click on your Organisation name then go to Settings & Click on Users

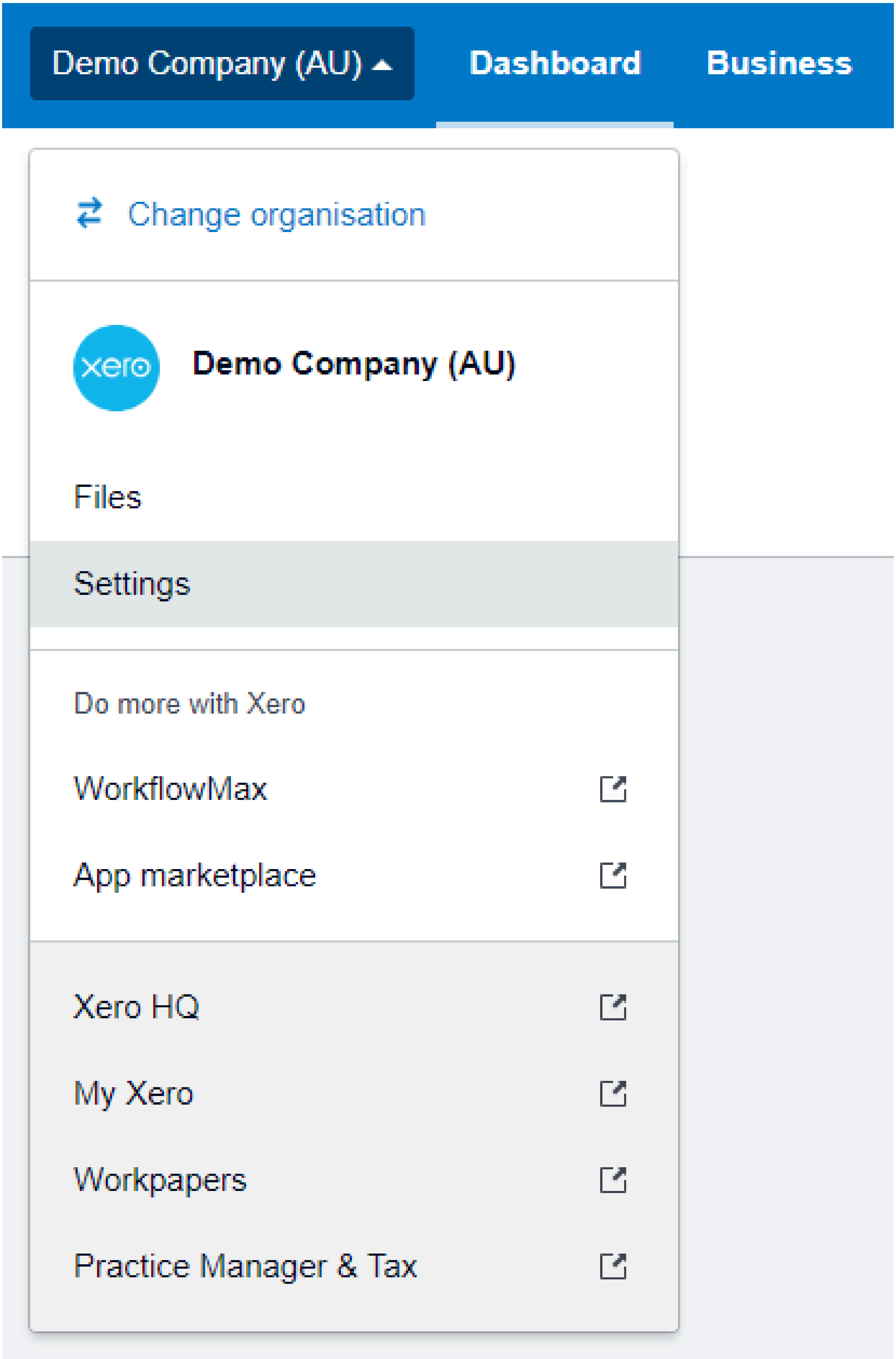
2. Click 'Invite a User' to enter details for a new user. Entre Ramy Hanna for the name and ramy@trinitygroup.com.au as the email address

3. Select Business and Accounting and choose the Adviser role, then tick 'Manage Users'

4. Press Continue and send an Invite

5. Then we need to arrange a time for remote access to set up your bank feeds and provide any additional training required

Video Link Here


Demo Company (AU)
Dashboard
Business
Change organisation
Demo Company (AU)
Files
Settings
Do more with Xero
WorkflowMax
App marketplace
Xero HQ
My Xero
Workpapers
Practice Manager & Tax

Organisation settings

General

Organisation details
Address, logo and basic financial information

Users
Add, remove or modify users of this organisation

Currencies
Upgrade your subscription to enable multiple currencies
Upgrade

Connected Apps
Add and manage third party connections to Xero

Features

Invoice settings
Create branding themes for documents, add payment services and auto reminders for invoices

Payment services
Add and manage online payment options for your sales invoices

Email settings
Set a reply-to email address and email template content

Payroll settings
Manage your payroll settings

Xero to Xero
Connect with other Xero users to automate invoices and bills

Custom contact links
Create shortcuts for your favourite Xero contacts and other tools

Enter their details

First name

Ramy

Last name

Hanna

Email

ramy@trinitygroup.com.au

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	☐	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

Cancel | Add a personal message | Send invite