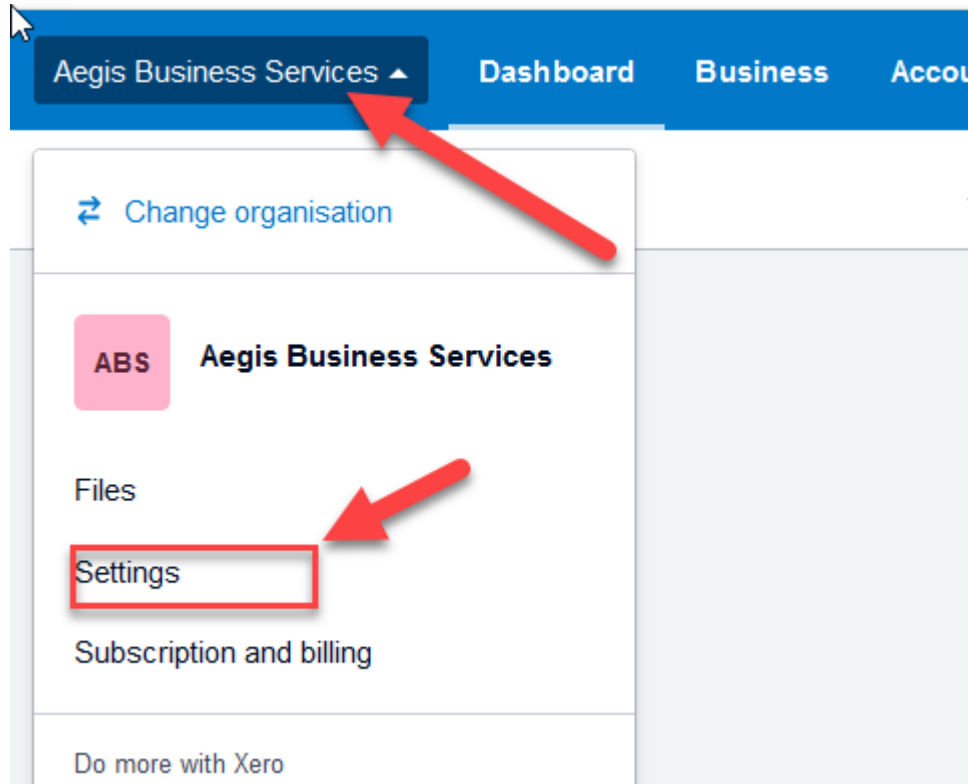


# Procedure- Xero

## To Invite Aegis Business Services as a User

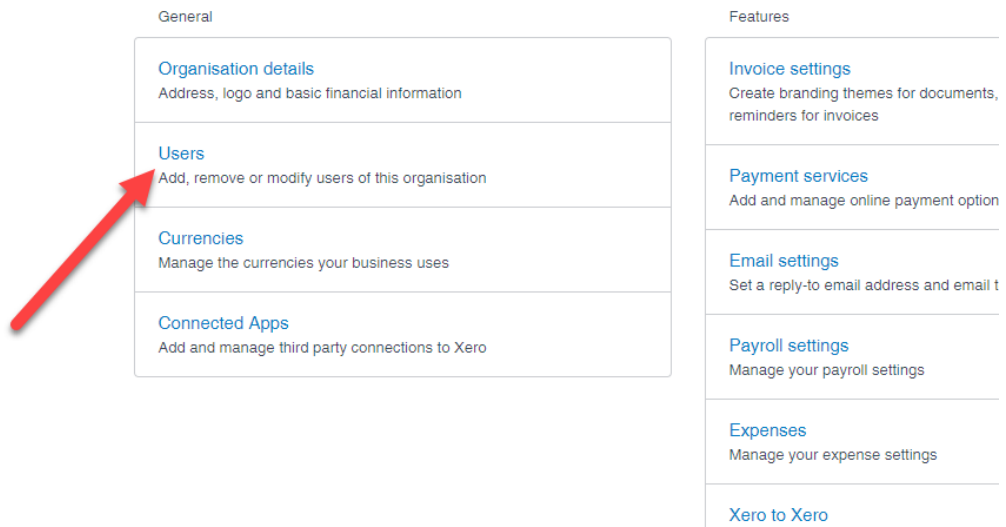
In a browser window (Chrome is best), log into Xero.

Click on the name of your organisation to access the dropdown, and choose Settings:



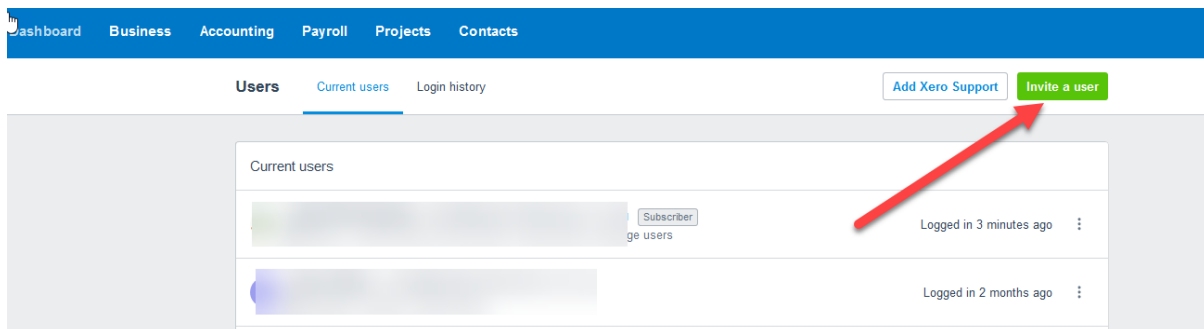
Then choose Users:

### Organisation settings



The screenshot shows the 'Organisation settings' page. On the left, under the 'General' section, there are four items: 'Organisation details' (Address, logo and basic financial information), 'Users' (Add, remove or modify users of this organisation), 'Currencies' (Manage the currencies your business uses), and 'Connected Apps' (Add and manage third party connections to Xero). A red arrow points to the 'Users' section. On the right, under the 'Features' section, there are five items: 'Invoice settings' (Create branding themes for documents, reminders for invoices), 'Payment services' (Add and manage online payment option), 'Email settings' (Set a reply-to email address and email t...), 'Payroll settings' (Manage your payroll settings), and 'Expenses' (Manage your expense settings). At the bottom of the Features section is 'Xero to Xero'.

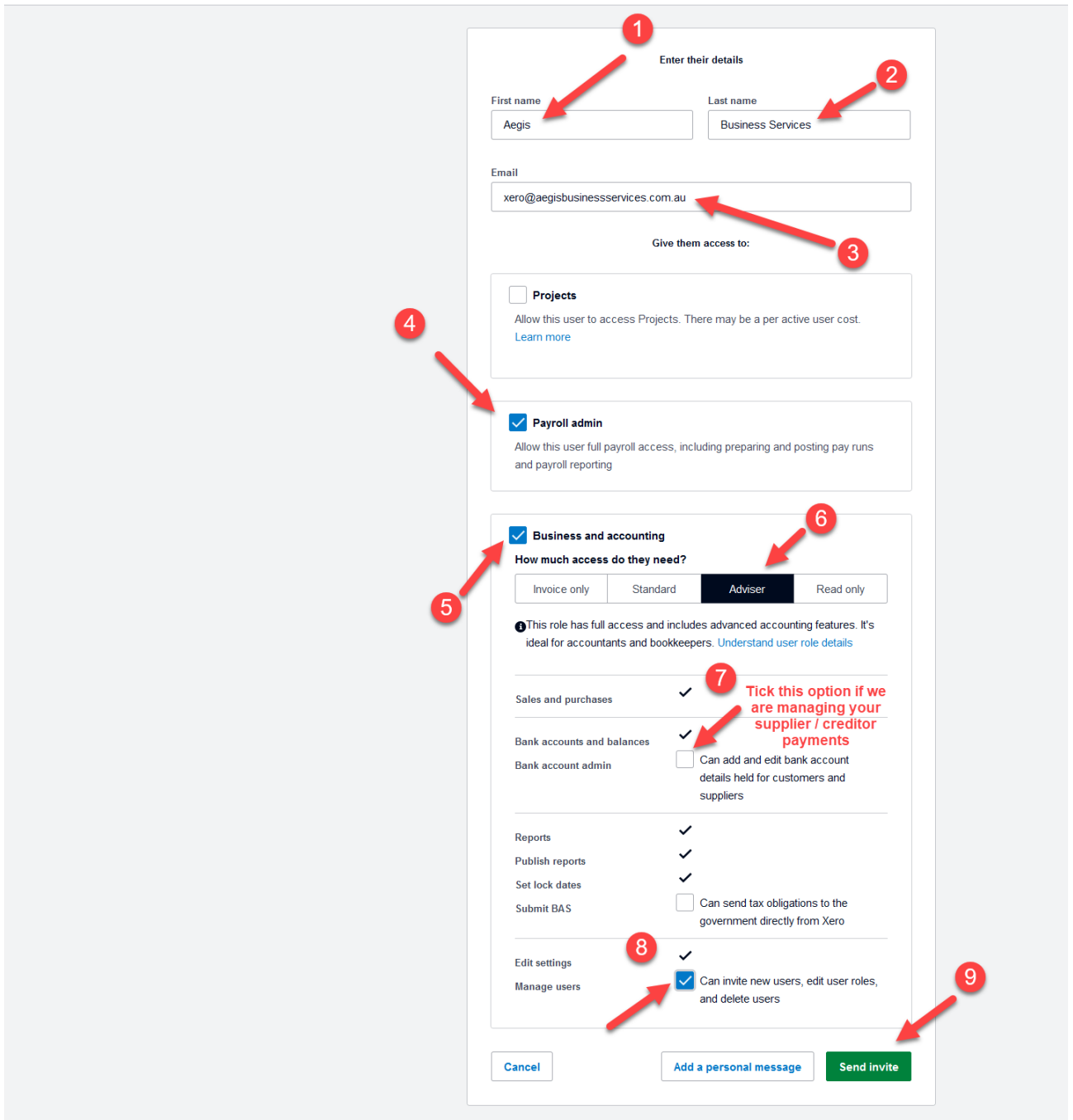
Then invite a user



The screenshot shows the 'Users' page. At the top, there is a navigation bar with 'Dashboard', 'Business', 'Accounting', 'Payroll', 'Projects', and 'Contacts'. Below the navigation bar, there are tabs for 'Users', 'Current users', and 'Login history'. On the right side, there are two buttons: 'Add Xero Support' and 'Invite a user'. A red arrow points to the 'Invite a user' button. Below the buttons, there is a table titled 'Current users' with two rows of user information. The first row shows a user with a 'Subscriber' role and 'Logged in 3 minutes ago'. The second row shows a user with 'Logged in 2 months ago'.

Then add "Aegis Business Services" (email: [xero@aegisbusinessservices.com.au](mailto:xero@aegisbusinessservices.com.au)), as an advisor, with manage user's permission. Also tick "Payroll Admin" if you have payroll.

**Invite a user**



**Enter their details**

1 First name: Aegis 2 Last name: Business Services

3 Email: xero@aegisbusinessservices.com.au

**Give them access to:**

4  **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?**

5 Invoice only Standard **Adviser** Read only 6

7  Tick this option if we are managing your supplier / creditor payments

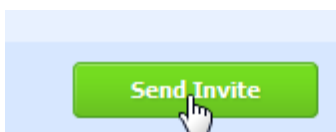
8  Can add and edit bank account details held for customers and suppliers

9  Can send tax obligations to the government directly from Xero

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

Buttons: Cancel Add a personal message Send invite


Click send invite, and on the next screen with the email template, just click Send Invite



We will then accept the invite and, via our practice management software, give access to our staff who will be working on your Xero file.

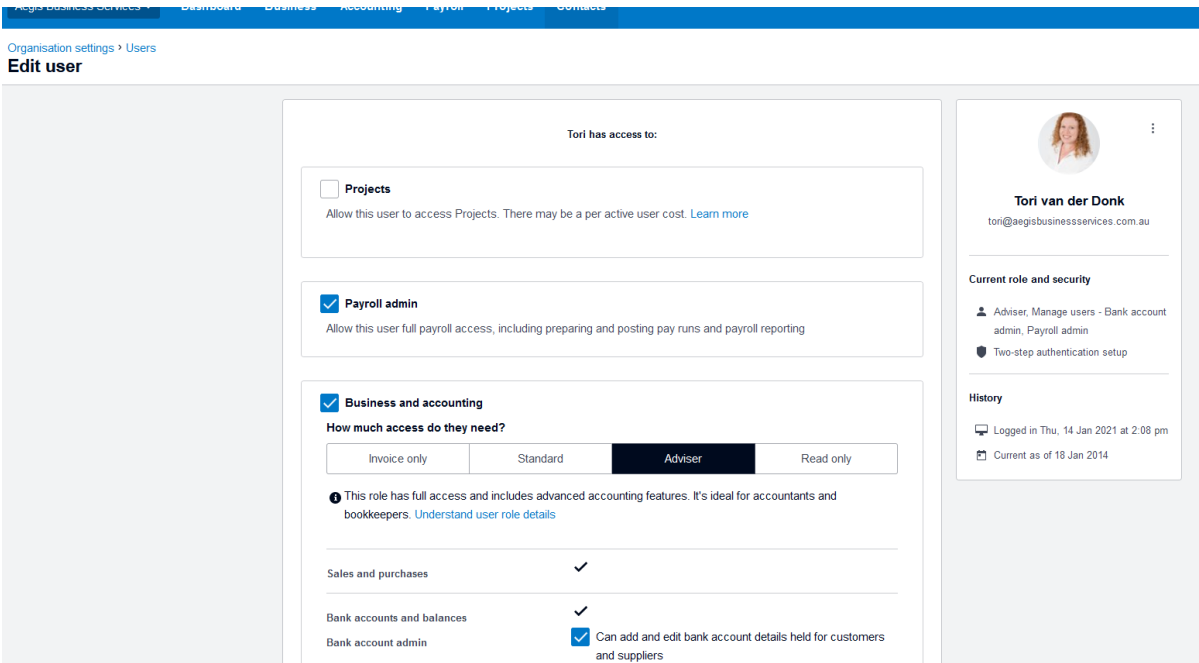
## Who is this user on my Xero file?

If you have a user who's name you do not recognise, go to Settings Users and check the email address' domain.



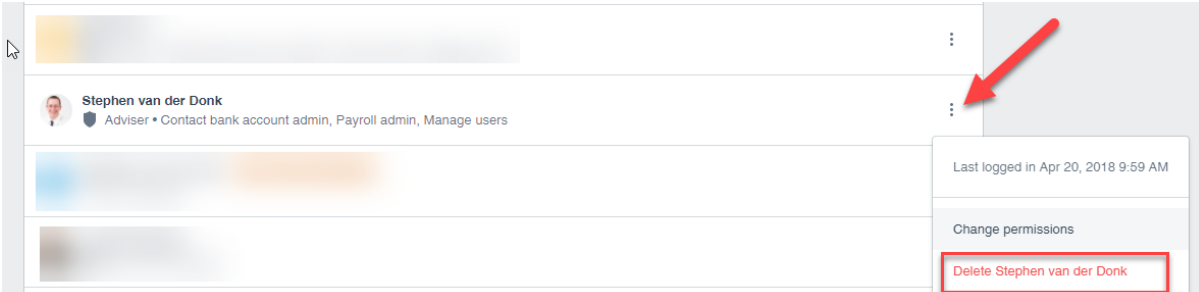
If the domain is @aegisbusinessservices.com.au, then it is one of our staff. If the domain is the same as your accountant, then it will be one of your accountant's staff. We provide access to a couple of our staff so our senior staff can review the file prior to BAS lodgements, and to provide coverage in times of staff absence.

You can drill into a user to find out more information or to change their access level:



## How do I Delete a User?

If you need to delete a user from having access to your Xero file (including Aegis Business Services staff if our contract is terminated), go to Settings / Users and click on the 3 vertical dots next to the name of the person.



Click on Delete User to remove that person's access to your Xero file.