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,

Demo Company (US) 🔺	Dashboard
₽ Change organisation	A
Demo Company	r (US)
Files	
Settings	უ
Do more with Xero	
Payroll powered by Gusto	þ
WorkflowMax	Ľ
App marketplace	
Hubdoc	
Xero HQ	Ľ
My Xero	Ľ
Workpapers	Ľ
Practice Manager	Ľ -

2. then click **Users**.

Demo Company (US) 🔻	Dashboard	Business	Accounting	Projects	Contacts
	Org	ganization se	ettings		
	(General			
		Organization de Address, logo and	e <mark>tails</mark> I basic financial info	rmation	
	l	Users Add, remove or m	odify users of this c	organization	
	(C urrencies Manage the curre	ncies your business	suses	
	(Connected App Add and manage	s third party connecti	ons to Xero	

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

st name	Last name
	A
	Give them access to:
Projects	
Allow this user to acc	cess Projects. There may be a per active user cost.
Learn more	
Business and a	ccounting
How much access	do they need?
Invoice only	Standard Advisor Read only
Invoice only	Standard Advisor Read only
This role has full a	Standard Advisor Read only
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First Name: Access Last Name: Access Email address: <u>access@firm.ai</u>

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