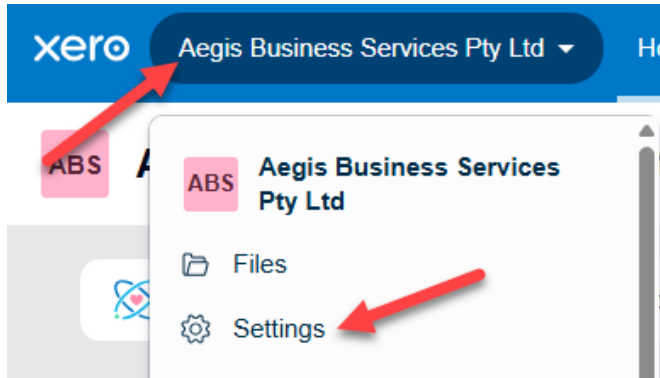


# Procedure- Xero

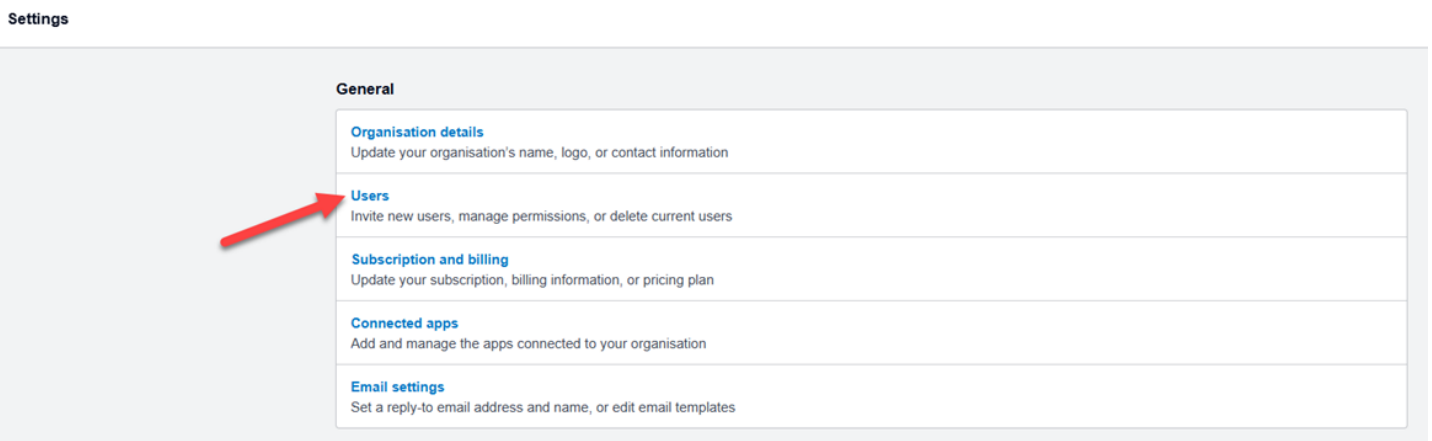
## To Invite Aegis Business Services as a User

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

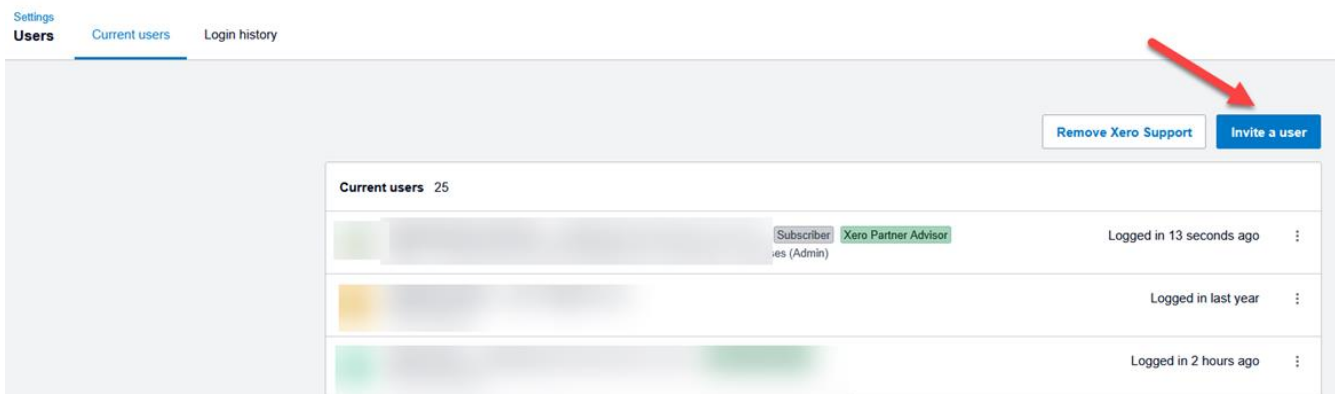
Click on the name of your organisation to access the dropdown, and choose Settings:



Then choose Users:



Then invite a user



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 “Projects” “Expenses” “Payroll Admin” if you have these features.

Settings > Users  
Invite a user

**Personal details**

First name Aegis	Last name Business Services
Email xero@aegisbusinessservices.com.au	

**Permissions**

**Projects**  
How much access do they need?  

Limited	Standard	Admin
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Enable 'Business and accounting' to use Projects with other Xero business-related features such as invoicing.  
 ⓘ This role has the same access to Projects as Standard and includes staff and project cost information. It's ideal for business owners and admin staff. [Learn more about user roles](#)

**Expenses**  
How much access do they need?  

Submitter	Approver	Admin
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ⓘ Can manage expenses settings for the organization as well as approver role abilities. [Learn more about user roles](#)

**Payroll admin**  
Allow this user full payroll access, including using payroll and accessing payroll reporting. [Read about Payroll](#)

**Business and accounting**  
How much access do they need?  

Invoice only	Standard	Advisor	Read only
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ⓘ This role has full access and includes advanced accounting features. It's ideal for accountants and bookkeepers. [Learn more about user roles](#)

Sales and purchases

Products and services New  View, create/edit and adjust stock  
This user can adjust, add, edit, delete, import, view, and export inventory items

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

Submit BAS  Can send tax obligations to the government directly from Xero

Edit settings

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

**Personalize the invite**

Add a message

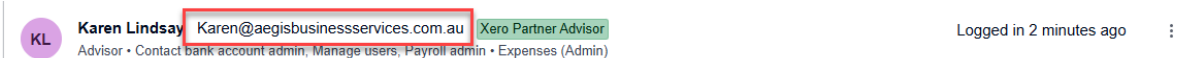
Click send invite, and on the next screen with the email template, just click Send Invite

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?

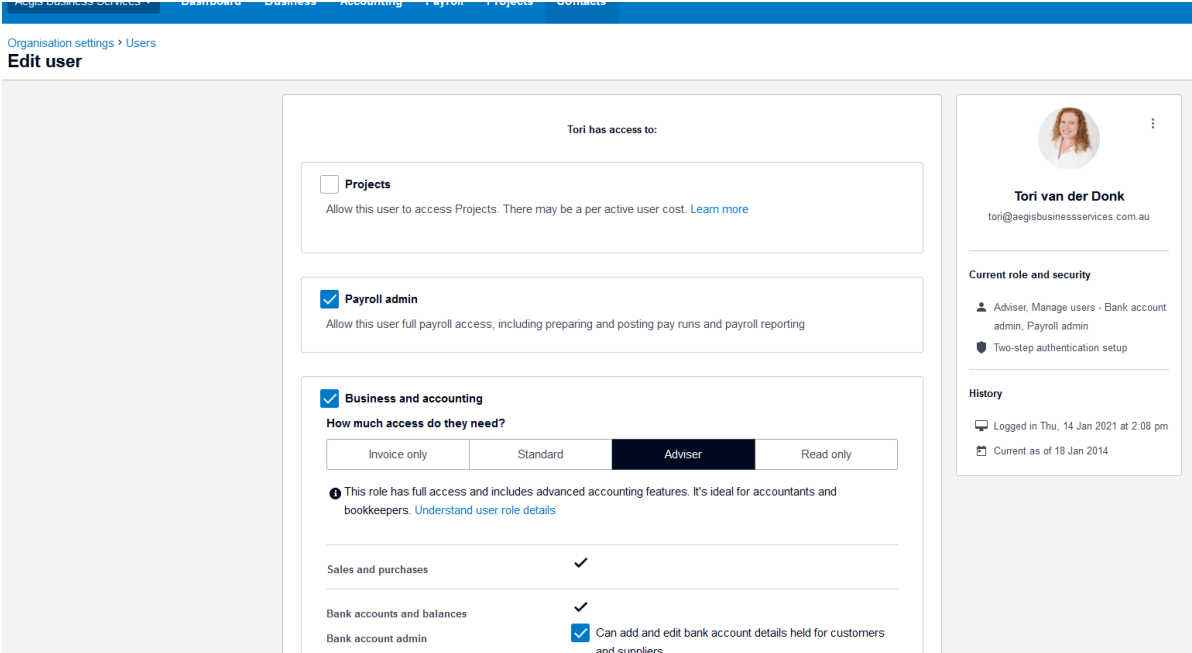
If you have a user who's name you do not recognise, go to Settings Users and check the email address' domain.



KL **Karen Lindsay** Karen@aegisbusinessservices.com.au Xero Partner Advisor  
Advisor • Contact bank account admin, Manage users, Payroll admin • Expenses (Admin) Logged in 2 minutes ago

If the domain is @aegisbusinessservices.com.au, then it is one of our 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:



Organisation settings > Users  
**Edit user**

Tori has 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	<b>Adviser</b>	Read only
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  - 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

**Tori van der Donk**  
tori@aegisbusinessservices.com.au

**Current role and security**

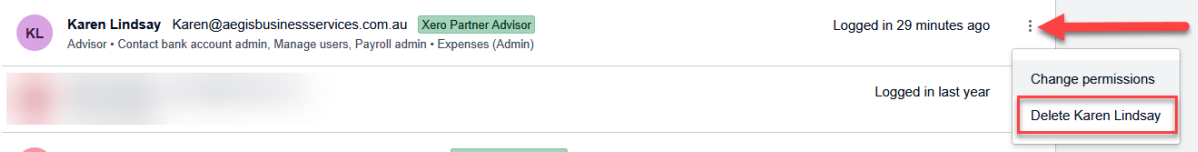
- Adviser, Manage users - Bank account admin, Payroll admin
- Two-step authentication setup

**History**

- Logged in Thu, 14 Jan 2021 at 2:08 pm
- Current as of 18 Jan 2014

## How do I Delete a User?

If you need to delete a user from having access to your Xero file go to Settings / Users and click on the 3 vertical dots next to the name of the person.



The screenshot shows a user management interface. The first user listed is Karen Lindsay, with email Karen@aegisbusinessservices.com.au and role Xero Partner Advisor. Her last login was 29 minutes ago. A red arrow points to the three vertical dots menu icon next to her name. A dropdown menu is open, showing two options: 'Change permissions' and 'Delete Karen Lindsay', with the latter option highlighted by a red box. The second user's name is blurred.

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