



INVITE YOUR PEAK ADVISER TO JOIN YOUR BUSINESS. CONNECT WITH XERO.

Welcome to online accounting with Xero. Now your advisers at The Peak Partnership can work with you on your accounts in real-time, so your financial data is always up-to-date. But before we can start working collaboratively with you, we need your permission to access your live information.

- 1 Click on your **Organisation Name** in the top left corner and then select **Settings** from the dropdown.
- 2 Under **General**, click on **Users**.
- 3 Click on the blue **New User** button. 
- 4 Enter the new user's first name, last name and email address. To enable your Peak adviser as a new user, use **Peak** for First name, **Partnership** for Last name and **email@peakpartnership.com.au** for Email address.
- 5 Under **Role**, select the relevant user role for the user. For your adviser at The Peak Partnership, it's best to select **Administrator**. Make sure we have **Full access** to all items, except **Xero Me**.
- 6 Click the blue **Send invite** button and you have a new user who can access your Xero file. 

Permissions

Select the role most suited to this user. You can edit permissions for certain features.

Role

 Administrator

Permissions		Settings	
Sales	Full access 	Feature	
Purchases	Full access 	Users	☒
Reporting	Full access 	Files	☒
Payroll	Full access 	Connected apps	☒
Accounting	Full access 		
Tax	Full access 		
Contacts	Full access 		
Projects	Full access 		
Settings	Full access 		
Employee access			
Xero Me	No access 		

Make sure this checkbox is ticked 