



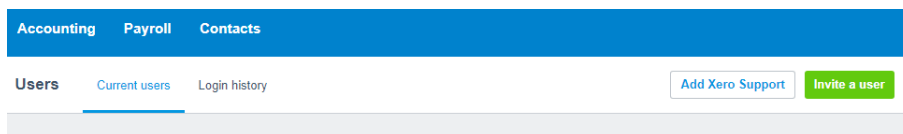
The Peak Partnership
BUSINESS ADVISERS



CONNECT WITH XERO. INVITE YOUR PEAK ADVISER INTO YOUR BUSINESS.

Welcome to cloud accounting with your Xero software. Now your Peak advisers 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**.
- 2 Click on **Users** under **Organisation settings**.
- 3 Review your list of Users and delete any Users who should no longer have access to your files.
- 4 Click on the green **Invite a user** button at the top right of the menu (see Diagram 1 below).



- 5 On the **Enter their details** screen, enter the details as shown in Diagrams 2 and 3 below.

Enter their details

First name: Peak
Last name: Partnership
Email: email@peakpartnership.com.au

Give them access to:

- Projects
- Payroll admin**
- Business and accounting**

How much access do they need?

Invoice only | Standard | **Adviser** | Read only

Permissions:

- 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:
- 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

- 6 Click the green **Send invite** button at the bottom right of the screen.

