

HOW TO ADD EPITELEO BOOKKEEPING TO YOUR XERO FILE



EPITELEO BOOKKEEPING

1. Log in to Xero and open the drop-down menu by clicking on your business name in the top left corner

2. Select 'Settings'

3. From the Organisation Settings page select 'Users'

4. Click the 'Invite a user' button

Add Xero Support

Invite a user

5. Enter your Advisor's name (Hannah Langlois) and email address (hannah@epiteleobookkeeping.com) and tick the following options

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

Advertiser

Read only

i 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

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 'Send Invite' and you are done!

Add a personal message

Send invite

Epiteleo Bookkeeping

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