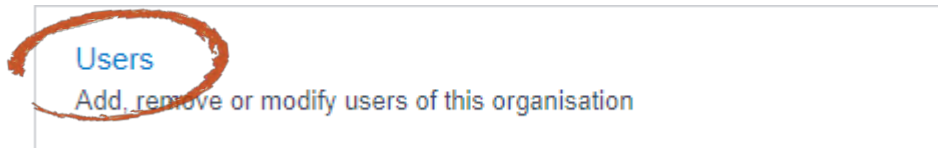


# Maximise your XERO File

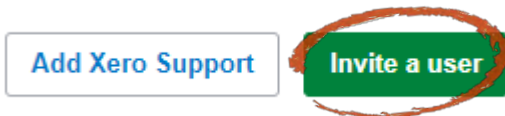


## How to ensure your HSPlus Advisor is using your XERO file to its full potential:

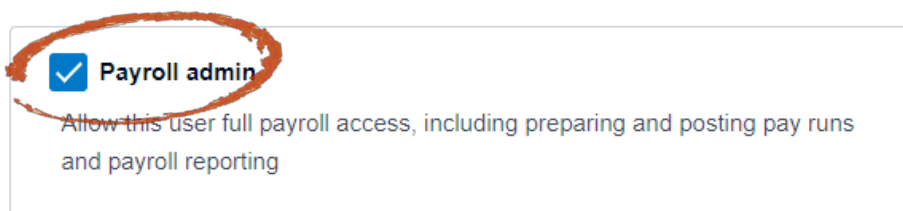
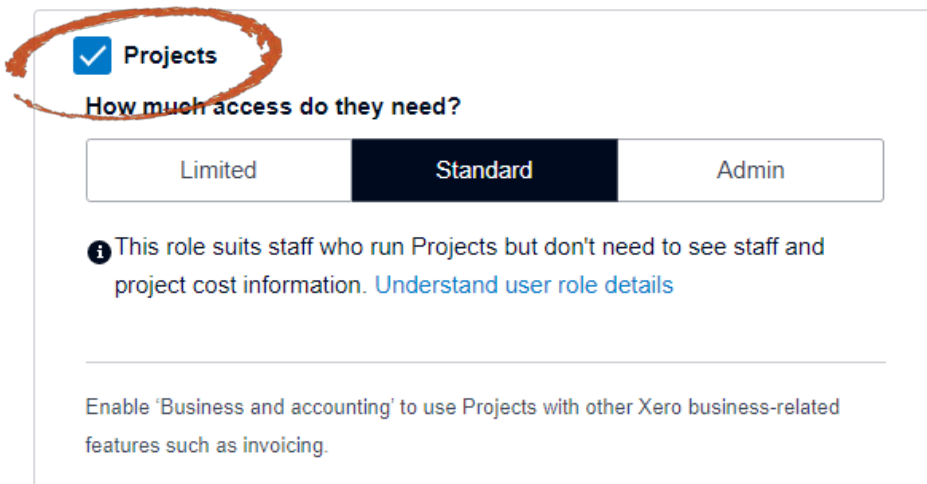
1. Select the drop-down menu by clicking on your business name in the top left corner
2. Go to 'Settings'
3. From the Organisation Settings Menu, select 'Users':



4. Select 'Invite a user':



5. Enter your HSPlus Advisor's Name and Email Address and 'Give them access to' the following items:



6. Under 'Business and accounting' select the following items:

**Business and accounting**

How much access do they need?

Invoice only   Standard   **Adviser**   Read only

**i** This role has full access and includes advanced accounting features. It's ideal for accountants and bookkeepers. [Understand user role details](#)

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Sales and purchases

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Bank accounts and balances

Bank account admin  Can add and edit bank account details held for customers and suppliers

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Reports

Publish reports

Set lock dates

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

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Edit settings

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

7. 'Send invite' and you are done! Your HSPlus Advisor now has full access to your XERO file.



*If you require any assistance updating your XERO user settings, please do not hesitate to contact your HSPlus Advisor.*