TRINITY ACCOUNTING PRACTICE • CLIENT GUIDE

How to invite Trinity Accounting Practice as an Adviser on Xero

A five-step walkthrough for granting us secure Adviser access to your Xero organisation.

> Giving us Adviser access lets our team prepare your accounts, lodge with the ATO, and support you in real time — without ever needing your password. You stay in control: you can update or remove our access at any time from within Xero. The whole process takes about three minutes.

Before you start

- [ ] You can sign in to Xero as the **Subscriber** or as a user with *Manage users* permission.
- [ ] You have the correct Xero organisation selected (check the name in the top-left).
- [ ] You have a few minutes to complete the steps and confirm we receive the invite.
- [ ] You're ready to book a short remote-access session afterwards for bank feeds and any training.

What you'll be granting

The **Adviser** role gives our team the full access required for accounting and tax work — including reports, lock dates, and publishing — plus the **Manage users** permission so we can administer access on your behalf. We will *not* tick **Payroll admin** unless you ask us to also manage payroll.

Questions or stuck along the way?

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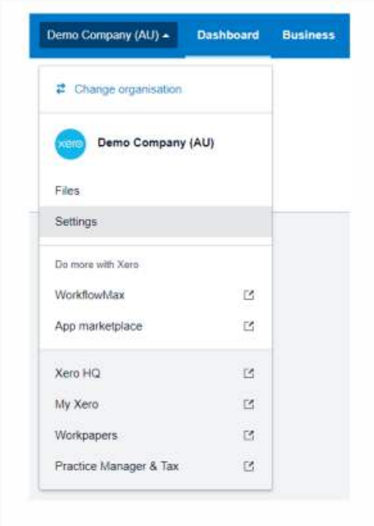
Step-by-step

1 Open your Xero organisation and go to Settings

Sign in to Xero and make sure you're in the correct organisation. In the top-left, click your **organisation name** to open the menu, then click **Settings**.



The organisation menu in the top-left of Xero, with Settings selected.

2 From Organisation settings, click Users

On the **Organisation settings** page, under the *General* column on the left, click **Users**.

Organisation settings — the Users link sits under the General column.

3 Invite a new user and enter our details

Click **Invite a user**, then enter the following exactly:

- **First name:** Ramy
- **Last name:** Hanna
- **Email:** ramy@trinitygroup.com.au

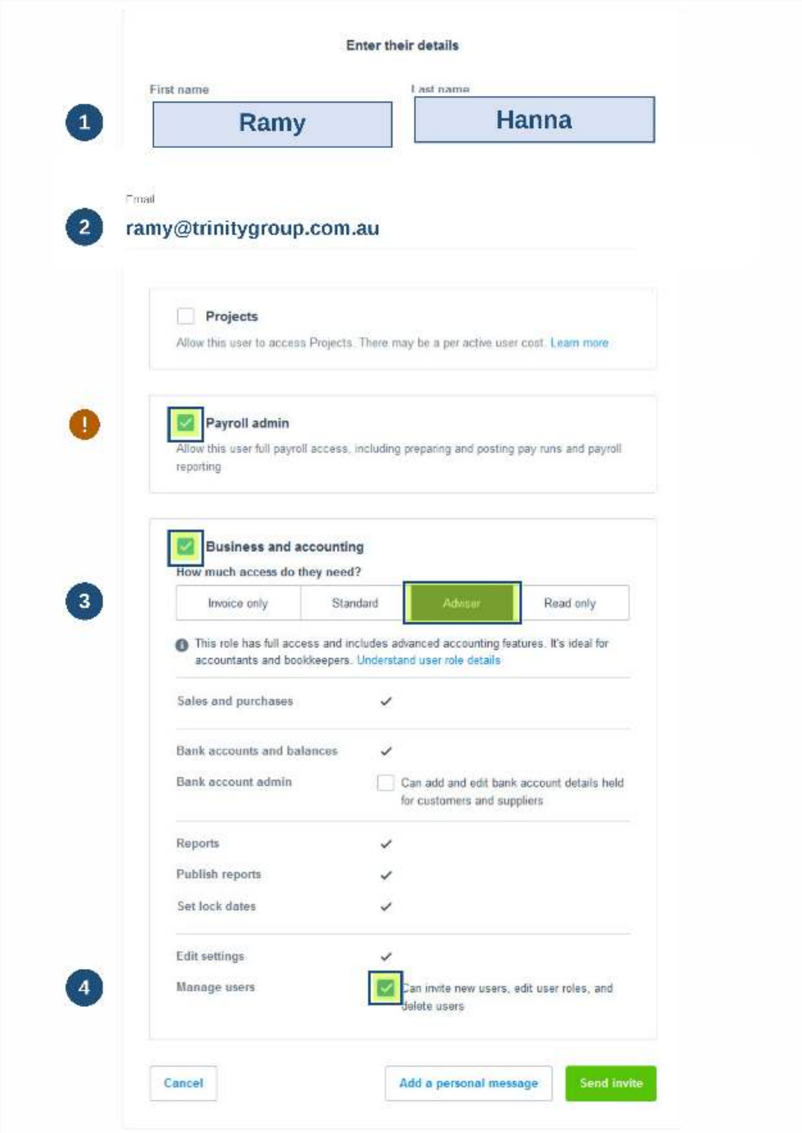
> **Tip:** Please double-check the email address. A single-character typo will send the invite to the wrong inbox and Xero won't flag it.

4 Set the access level to Adviser and tick Manage users

Under **Give them access to**:

1. Tick **Business and accounting**.
2. For "How much access do they need?", choose **Adviser**.
3. At the bottom of the same section, tick **Manage users** — this lets us help you administer Xero access in future.
4. Only tick **Payroll admin** if we have agreed to look after your payroll. Otherwise leave it unticked.

> **Note:** The *Adviser* role automatically includes Sales & purchases, Bank accounts & balances, Reports, Publish reports, Set lock dates, and Edit settings. You don't need to tick those separately.



The invite form with Trinity-branded callouts. ***1*** *Name · **2** Email · **3** Adviser · **4** Manage users · **!** Only tick Payroll admin if agreed.*

5 Press Continue, then Send invite

Click **Continue** to review, then **Send invite**. Xero will email the invitation to us automatically — there's nothing further you need to do at this point.

What happens next

Once you've sent the invite, we'll:

1. Accept the invitation, usually within one business day.
2. Email you to confirm we're connected and to arrange a short **remote-access session** to set up your bank feeds and any additional training you'd like.
3. Begin work on your file based on the scope we've agreed.

PREFER TO WATCH A VIDEO?

Watch the walkthrough on YouTube

Frequently asked questions

Do I need to share my Xero password?

No. The Adviser invitation gives our team our own secure login linked to our Trinity email — you never share your password.

Can I remove or change Trinity's access later?

Yes, at any time. Go to *Settings* → *Users*, click our name, and either change the role or click *Delete user*.

Will this affect my Xero subscription cost?

No. Adviser users don't change your Xero subscription tier. Projects access is the only paid add-on on the invite screen, and we don't require it unless you ask us to use Projects.

I can't see the "Invite a user" button — what now?

You're likely signed in as a user without *Manage users* permission. Ask the Xero Subscriber for your organisation (often the business owner) to either complete these steps or grant you Manage users access first.

I sent the invite but haven't heard back — should I resend?

Please give us one business day. If you have not heard from us by then, email us at ramy@trinitygroup.com.au and we will check the invite arrived.

Get in touch

If anything in this guide is unclear, or you would like us to walk you through it on a quick screen-share, please reach out.

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Trinity Accounting Practice has been supporting Australian businesses with accounting, tax, and Xero advisory since 2003.