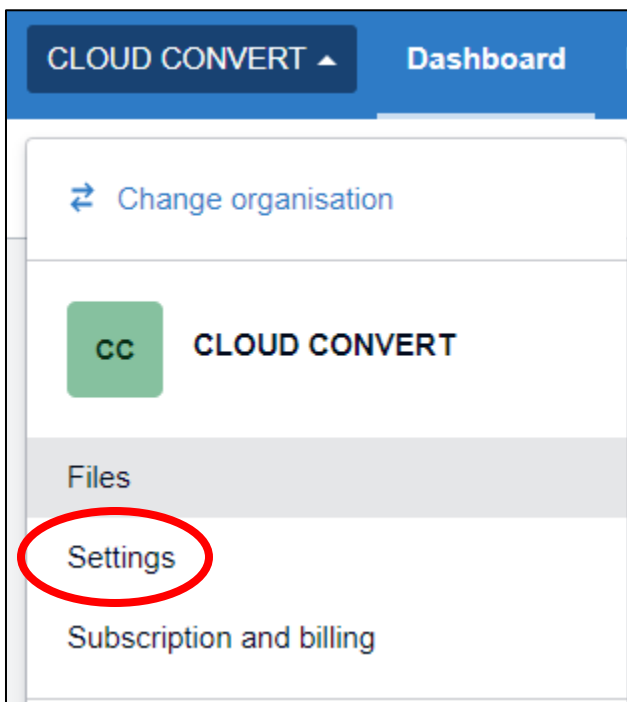


HOW TO invite Cloud Convert as an Adviser on Xero

- 1) Log in to your Xero account [here](#).
- 2) Access the organisation you would like us to convert from the "My Xero" screen.
- 3) Click on the company name on the top-left corner:




- 4) Select "Settings" from the drop-down menu:



- 5) Under "Organisation settings", select "Users"

Organisation settings

General

Organisation details Address, logo and basic financial information
Users Add, remove or modify users of this organisation
 Currencies Upgrade Upgrade your subscription to enable multiple currencies
Connected Apps Add and manage third party connections to Xero
Subscription and billing Change plan and update credit card details Managed by CloudConvert Conversion team

- 6) At the top-right of the screen, select "Invite a user"

[Add Xero Support](#) [Invite a user](#)

7) Add Cloud Convert with Adviser rights by entering the below details and selecting the below options:

Enter their details

First name Last name

Email

Give them access to:

Projects

Allow this user to access Projects. There may be a per active user cost. [Learn more](#)

Business and accounting

How much access do they need?

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

Edit settings

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

8) Select "Send invite"