

Provide Temporary Access to your Xero account

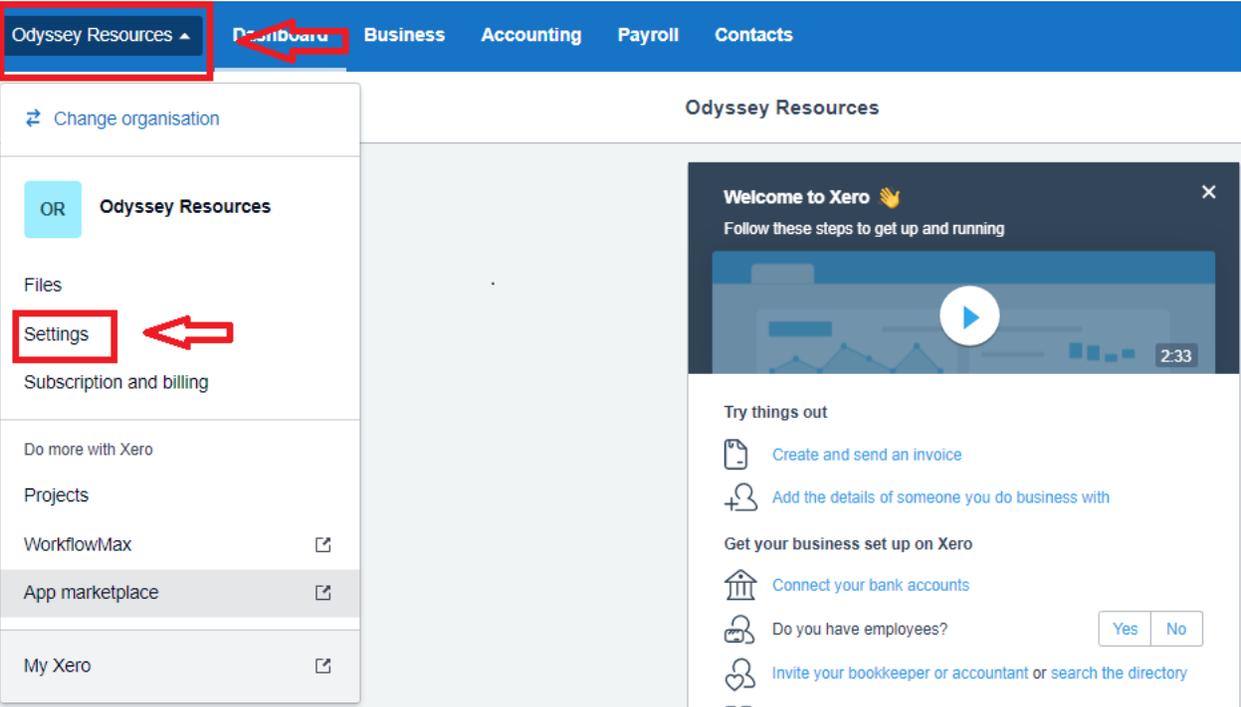
Why do this?

As Odyssey cannot login directly to your Xero account using your login details, we require temporary access to your Xero account in order to import your data from Xero to QuickBooks Online. You can revoke this access once the conversion is complete.

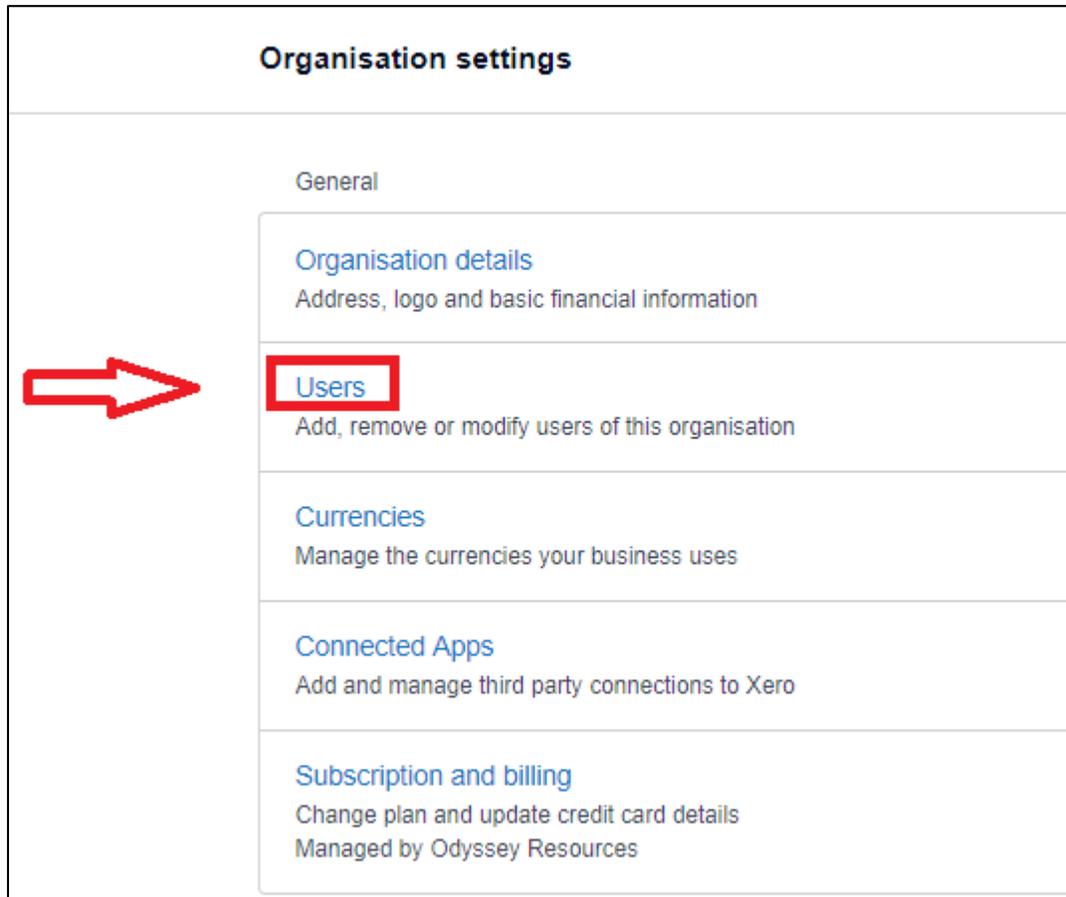
NOTE: You need **Manage Users** permission to invite new users to your Organization. If you can't invite users, ask someone with Manage Users permission to update your user role.

STEP 1: Go to Xero login page: <https://go.xero.com> and sign in to your Xero account using your user ID and Password.

STEP 2: On your homepage, click on your **Organisation/Company** name, select **Settings**, then click **Users**.



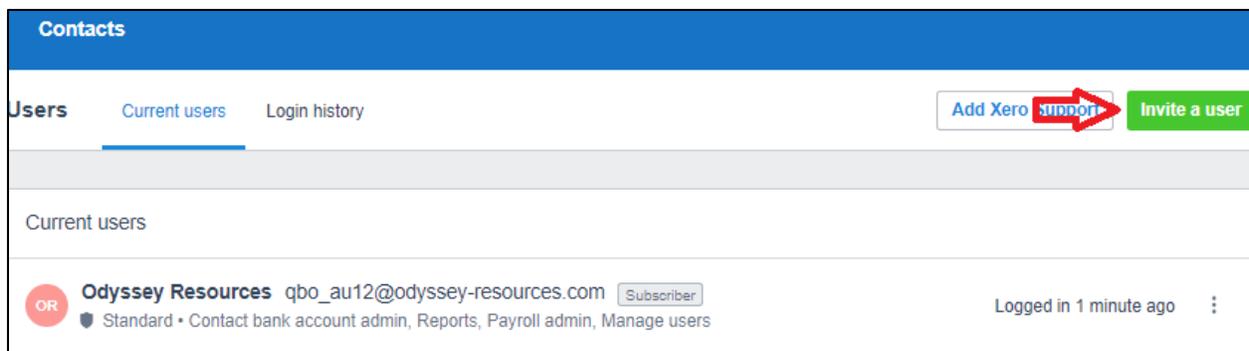
STEP 3: On the setting page, click on **Users** then **Invite User** button as below:



Organisation settings

General

- [Organisation details](#)
Address, logo and basic financial information
- Users**
Add, remove or modify users of this organisation
- [Currencies](#)
Manage the currencies your business uses
- [Connected Apps](#)
Add and manage third party connections to Xero
- [Subscription and billing](#)
Change plan and update credit card details
Managed by Odyssey Resources



Contacts

Users Current users Login history

Add Xero **Invite a user**

Current users

OR **Odyssey Resources** qbo_au12@odyssey-resources.com Subscriber

Standard • Contact bank account admin, Reports, Payroll admin, Manage users

Logged in 1 minute ago

STEP 4: Enter Odyssey's details as below:

Enter their details

First name	Last name
<input style="width: 90%;" type="text" value="Odyssey"/>	<input style="width: 90%;" type="text" value="Resources"/>

Email

Note: Do NOT use the above sample email. Please use the email address indicated on the email you received from Odyssey

Give them access to:

Projects

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

Payroll admin

Allow this user full payroll access, including preparing and posting pay runs and payroll reporting

Business and accounting

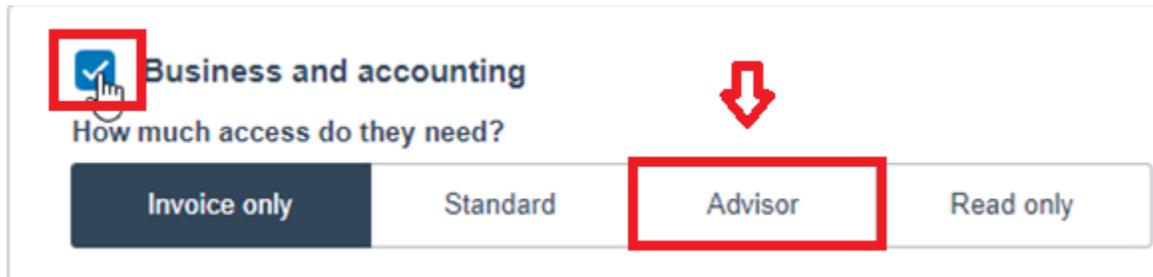
Allow this user to access any or all of invoicing and bills, bank accounts, reports, settings, manage users

Cancel

Add a personal message

Send invite

STEP 5: Tick on “**Business and Accounting**” and select “**Advisor**” role.



The screenshot shows a user interface for selecting a role. At the top, there is a checkbox labeled "Business and accounting" which is checked and highlighted with a red square. Below this, the text "How much access do they need?" is displayed. Underneath, there are four buttons: "Invoice only", "Standard", "Advisor", and "Read only". The "Advisor" button is highlighted with a red square, and a red arrow points down to it from above.

STEP 6: Click “**Send Invite**”

That’s all you need to do at this stage!

Once your data has been moved across, you’ll receive another email from us explaining how to check everything’s transferred correctly and revoke access if you’re happy.