

CHECKLIST · AI AT WORK

Xero's books can now answer questions inside Google Gemini

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- ☐ **Look for Xero in Gemini's Connectors list.** On gemini.google.com, open Customise, then Connectors. Google says the apps listed vary by account type, device and country.
 - ☐ **Check Keep activity is on if you use the web or iPhone.** Google says Connected Apps aren't available on gemini.google.com or iOS when Keep activity is off.
 - ☐ **Reconcile and code transactions before relying on answers.** Xero says Gemini reads the books as they stand, so drafts and uncoded items shape what it tells you.
 - ☐ **Read every confirmation prompt before approving.** Xero says invoices, payment reminders and other changes run only after you confirm them.
 - ☐ **Practices: decide which staff may connect client files.** One sign-in connects the whole client portfolio, so agree who can use it before anyone links the practice login.
 - ☐ **Check your Gemini privacy settings.** Xero's no-training commitment covers Xero data; your Gemini settings govern Google's handling of the chat.
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