

CHECKLIST · TECHNOLOGY

Xero lets you give staff just the access their job needs

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- ☐ **Open the Users page in Xero.** See the role and permissions each person has, and what you can now set for them.
 - ☐ **Hide bank balances and feeds from Standard users who don't need them.** This setting has been available since July 2026.
 - ☐ **Give staff who only raise purchase orders the Purchase Orders only role.** It arrives in November 2026, so check back if it isn't there yet.
 - ☐ **Set up Australian timesheet approvers with the approve permission once it arrives in November.** It needs Xero's new timesheet experience, not classic Timesheets.
 - ☐ **Tell your bookkeeper about the renamed roles.** Advisor is now Administrator and Read Only is now Viewer, so old instructions may use names that no longer appear.
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