



Xero

Quick start guide

Welcome to Xero! We've set everything up for you — your role is simple:

- Connect your bank feed
- Send us your receipts
- Keep your bank feed authorised

We take care of all bookkeeping, VAT, and categorisation.

1. Log In

1. Open the email invitation from us
2. Click Accept Invite
3. Create your password
4. Log in to Xero

You will land on the dashboard

2. Connect Your Bank Feed (Web Only – First Time)

⚠ You cannot do the first bank connection in the app. It must be done on a web browser (desktop/laptop).

Steps:

1. Log in to Xero on a web browser
2. On the Dashboard, find the box titled Add Bank Account
3. Search for your bank
4. Click Connect Bank Feed
5. Log in to online banking & approve the connection

Which start date should you choose?

➡ We recommend selecting the start of your financial year so we receive a complete, clean set of transactions to work from. (If you're unsure, please ask us!)

Your transactions will begin importing automatically.

📌 We handle all categorising and reconciling for you.

3. Connecting Additional Bank Accounts

If you have more than one business account (card, savings, PayPal, merchant accounts etc.), you can connect those too.

Go to Accounting → Bank accounts → Add Bank Account → Get bank feeds

4. Reauthorize Every 90 Days (App or Web)

Banks require you to re-approve your feeds every 90 days.

In the App:

- Open Xero → tap your bank account
- If required, you'll see Reconnection Needed
- Follow the prompts

On the Web:

- Dashboard → click the account
- Click Reconnect Bank Feed
- Follow the instructions

This syncs automatically into Xero.

5. Uploading Receipts — Xero Files Inbox Only

We use Files → Inbox as your central storage area for all receipts, invoices, statements, and documents.

Please do NOT:

- ✗ create Bills
- ✗ attach receipts to bank transactions
- ✗ create spend/receive money transactions

We do all bookkeeping for you.

You can upload 3 ways:

A) Upload directly in Xero (web)

1. Go to Business (business name in top left) → Files
2. Open the Inbox
3. Drag & drop your files or click Upload to Files Inbox (top right)

B) Upload from the Xero mobile app

1. Open Xero
2. Tap Menu (≡) → Files
3. Tap Inbox
4. Tap the + symbol → take a photo or choose photo from library

C) Email documents straight to Xero

Every business has its own upload email address.

To find it:

1. Go to Business (business name in top left) → Files → Inbox
2. Click Email to Files Inbox (top right): Click 'copy' to copy your unique email address
3. Save this as a contact in your emails called Xero Files Inbox

Forward any receipt, invoice or PDF to this address and it will appear automatically in Files → Inbox.

6. Using Apron to Snap Receipts (for clients using Apron)

Some clients prefer to capture receipts using Apron — that works perfectly with our system.

Apron allows you to:

- ✓ Snap receipts
- ✓ Upload PDFs
- ✓ Store documents
- ✓ Forward documents elsewhere (depending on your plan)

How to use Apron to capture receipts:

1. Open the Apron app
2. Go to Expenses or Receipts
3. Snap a photo or upload from your phone
4. Save it

7. Please Don't Change Settings - We maintain all system settings for you

Xero has a wealth of other recourses. Select a link to skip straight to that section:

- [Create invoices for your customers](#)
- [Add and approve Supplier bills](#)
- [Bank Feeds](#)
- [Give your accountant access](#)
- [Expenses & Mileage claims](#)

Need Help?

We're here to support you.

✉ info@pbtaccountancy.co.uk

☎ 01242 357766

