CHECKLIST · TECHNOLOGY

Xero lets you give staff just the access their job needs

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digitaladvisors.com.au/journal/xero-user-permissions-roles-november/

- [ ] **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.

NOTES

General information only, not legal, tax or financial advice. Check the full story and its sources before acting.