

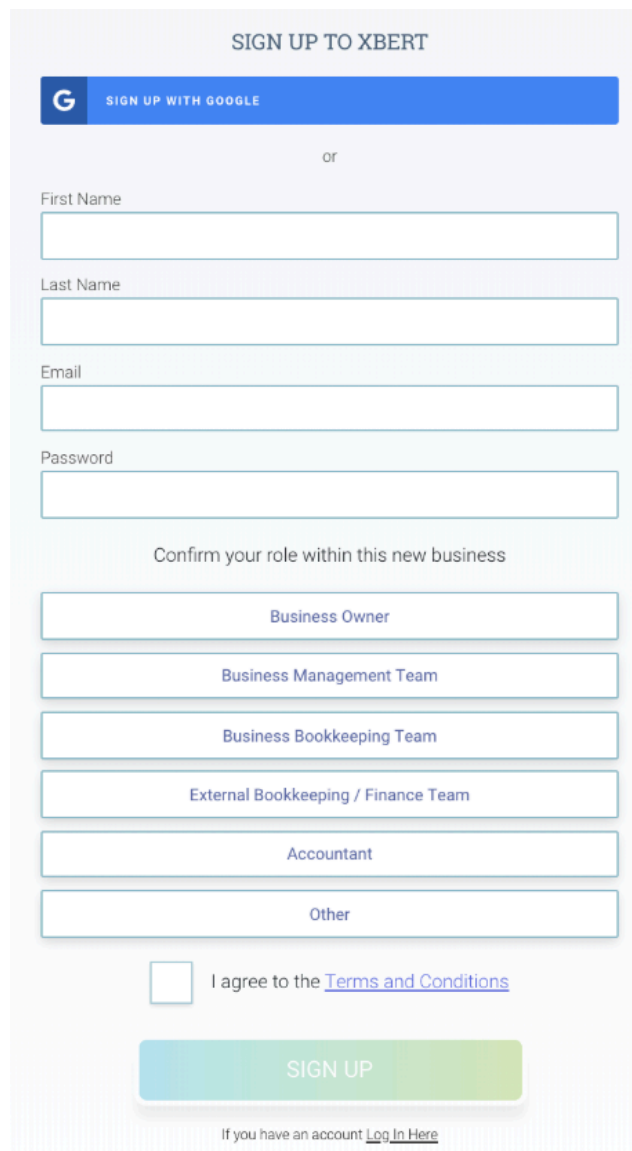
TIME TO TAKE THE FIRST STEP!

Your guide to getting set up on XBert.

So that our XBerts can help you stay a step ahead in business, follow these three easy steps.

Step 1. Sign up to XBert by filling in your account information so that we know who you are, and how we can best help. Once you've done this, click the 'SIGN UP' button to move to the next step.

TIP - You can also use your social connectors to sign up.



The image shows a web form titled "SIGN UP TO XBERT". At the top, there is a blue button with a white "G" logo and the text "SIGN UP WITH GOOGLE". Below this, the word "or" is centered. The form then contains four input fields: "First Name", "Last Name", "Email", and "Password". Below these fields is a section titled "Confirm your role within this new business" which contains six buttons: "Business Owner", "Business Management Team", "Business Bookkeeping Team", "External Bookkeeping / Finance Team", "Accountant", and "Other". Below the role selection is a checkbox followed by the text "I agree to the [Terms and Conditions](#)". At the bottom of the form is a large green button with the text "SIGN UP". Below the "SIGN UP" button, there is a link that says "If you have an account [Log In Here](#)".

SIGN UP TO XBERT

or

First Name

Last Name

Email

Password

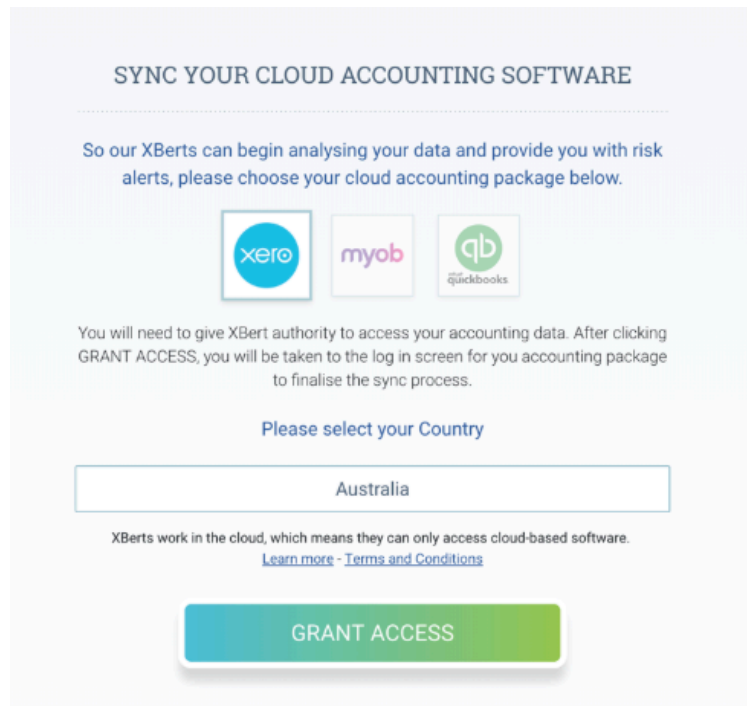
Confirm your role within this new business

☐ I agree to the [Terms and Conditions](#)

If you have an account [Log In Here](#)




Step 2. You'll be prompted to sync your cloud accounting software*. Select your software provider, then click on the 'GRANT ACCESS' button, which will take you to your software provider's site to allow XBert the authority to read and analyse your data.

**Currently, XBert integrates with Xero using Australian tax rates and has been added to the Xero app marketplace as an approved Add-On Partner. MYOB and Quickbooks integrations are coming soon.*



SYNC YOUR CLOUD ACCOUNTING SOFTWARE

So our XBerts can begin analysing your data and provide you with risk alerts, please choose your cloud accounting package below.

You will need to give XBert authority to access your accounting data. After clicking GRANT ACCESS, you will be taken to the log in screen for you accounting package to finalise the sync process.

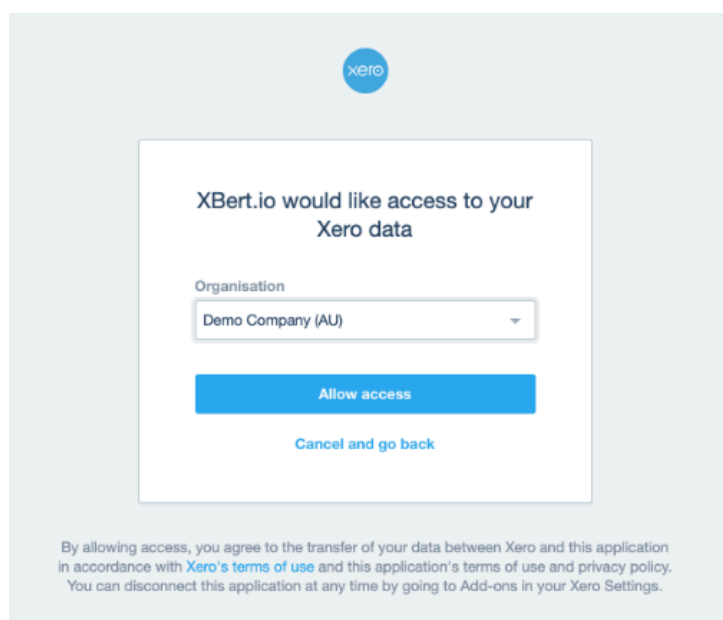
Please select your Country


Australia

XBerts work in the cloud, which means they can only access cloud-based software.
[Learn more](#) - [Terms and Conditions](#)

GRANT ACCESS

Step 3. Select the organisation, if you have multiple, that you want to integrate with XBert and click the 'Allow access' button.





XBert.io would like access to your Xero data

Organisation
Demo Company (AU)

Allow access

[Cancel and go back](#)

By allowing access, you agree to the transfer of your data between Xero and this application in accordance with [Xero's terms of use](#) and this application's terms of use and privacy policy. You can disconnect this application at any time by going to Add-ons in your Xero Settings.

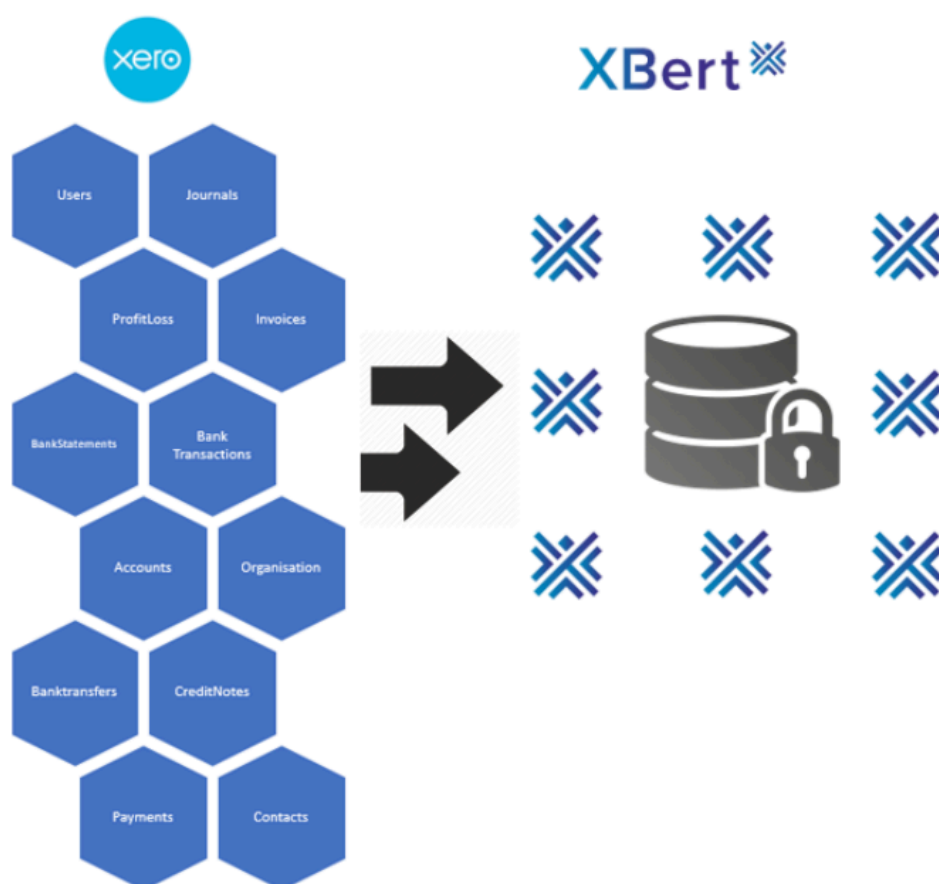
That's it!

XBert is now connected and will start analysing your associated cloud accounting data, securely storing it on our encrypted database. XBERT syncs every hour but only reads your data and can't make any changes.

You are now on your way to detecting bookkeeping errors, seeing up-to-date business snapshots, reducing risk, and saving money!

Contact us if you need any help by [submitting a request](#), or chatting with us using the zendesk chat feature found below.

“What does this integration do?”



How do you do this?

Once integrated, XBERT is authorised for read-only access, i.e. the syncing is one-way. We read the records such as Bank Transactions, Contacts, and Invoices that XBERT can analyse to best help you detect errors, anomalies, and business patterns. We never update any of your accounting data and securely store only the information we need to provide you with the relevant XBerts.