



# XBert | Time to take the first step!

Follow these easy steps to set up your XBERT account so that you stay a step ahead in business and enjoy all the benefits of AI-powered business alerts and process management.

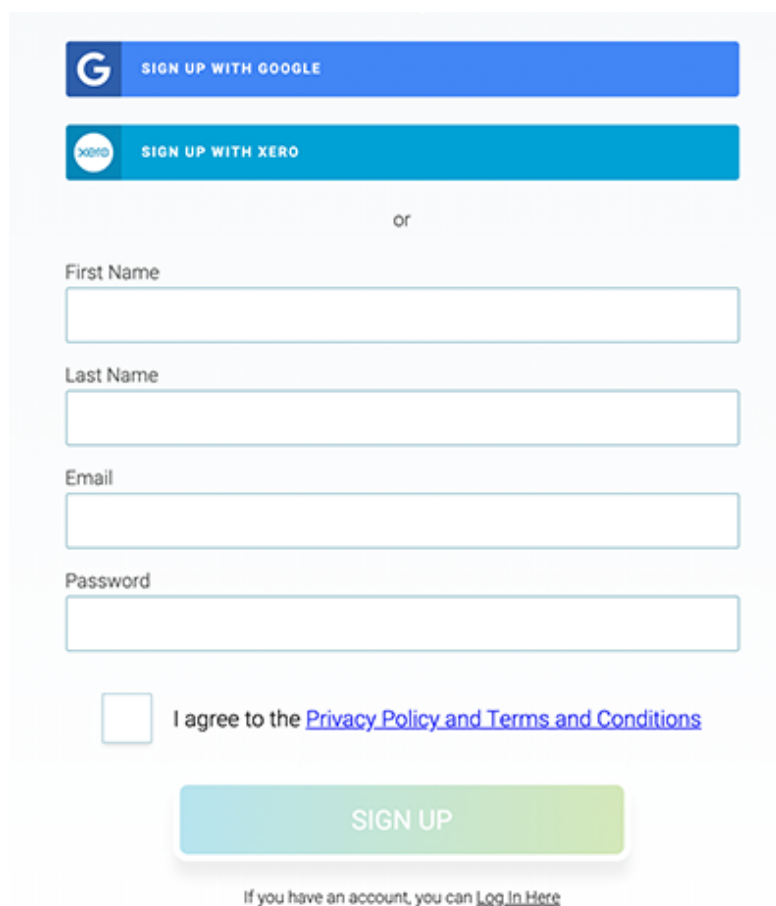
This guide is for those looking to set up a single business on XBERT. If you are a bookkeeper, accountant, advisor, franchisor or own several businesses, please read our [guide on creating an XBERT CONNECT account](#). XBERT CONNECT is perfect for those who need to manage multiple businesses efficiently from one dashboard.

When you sign up, you start your no-obligation, free trial. Once your trial is over, we'll ask you for credit card details to continue using XBERT.

## Create your XBERT account

Step 1. Sign up to XBERT by filling in your details and creating a password. Please read our Privacy Policy and Terms and Conditions. Once you've done this, agree to the policy and terms, then click **SIGN UP** to move to the next step.

*TIP - You can also sign up using your Xero account or social connector login credentials.*



The sign-up form is presented within a light gray rectangular frame. At the top, there are two horizontal buttons: a blue one with a white 'G' icon and the text 'SIGN UP WITH GOOGLE', and a teal one with a white 'xero' logo and the text 'SIGN UP WITH XERO'. Below these is the word 'or' in a small, gray font. The form then contains four input fields, each with a label to its left: 'First Name', 'Last Name', 'Email', and 'Password'. Below the 'Password' field is a checkbox followed by the text 'I agree to the [Privacy Policy and Terms and Conditions](#)'. At the bottom of the form is a large, rounded rectangular button with a green-to-teal gradient and the text 'SIGN UP' in white. Below the button, centered, is the text 'If you have an account, you can [Log In Here](#)'.

Step 2. You'll be asked what type of business you have. If you have a single business, select **CREATE SINGLE BUSINESS ACCOUNT**. XBert CONNECT is perfect for bookkeepers, accountants and owners who need to manage multiple businesses. For an XBert CONNECT account, select **CREATE MULTI CONNECT PORTAL**. For more information, you can read our step-by-step guide on creating a CONNECT account [here](#).

WHAT TYPE OF BUSINESS ARE YOU?

You are a single business owner looking to stay a step ahead.

If you own multiple businesses or manage client businesses, you should create an XBert CONNECT account instead.

**CREATE SINGLE BUSINESS ACCOUNT**

You are an accounting or bookkeeping advisor, franchisor, or a multiple business owner.

XBert CONNECT allows you to add multiple business organisations and manage them efficiently from one dashboard. [Learn more.](#)

**CREATE MULTI CONNECT PORTAL**

Step 3. So that we can best help you, tell us your role within the business you are creating an XBert account for. If you are a bookkeeper employed by the business, please choose **Business Bookkeeping Team**. If you are engaged by the owner to manage this business' books and have your own bookkeeping business, please select **External Bookkeeping/Finance Team**.

SELECT YOUR ROLE WITHIN THIS BUSINESS

To help better identify you please select your role within this business

Business Owner

Business Management Team

**Business Bookkeeping Team**

External Bookkeeping / Finance Team

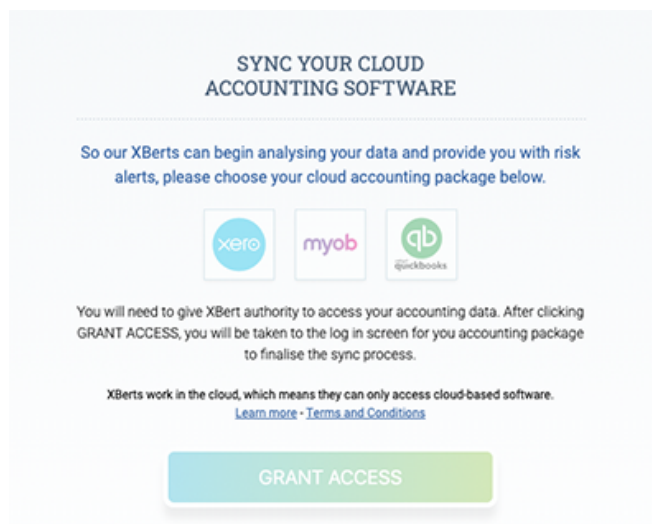
Accountant

Other

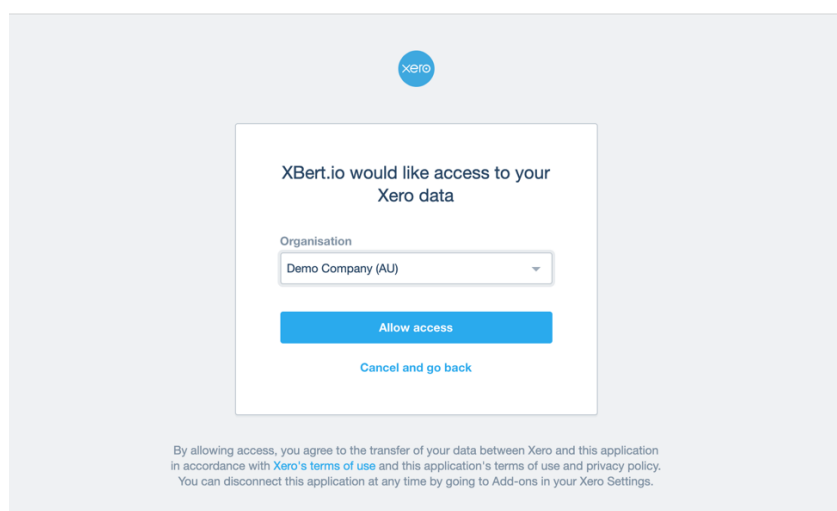
**NEXT**

Step 4. You'll be prompted to sync your cloud accounting software\*. Select your software provider, then click on **GRANT ACCESS**, 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 and has been added to the Xero app marketplace as an approved Add-On Partner. MYOB and QuickBooks integrations are coming soon.*



Step 5. Select the business organisation, if you have multiple, that you want to integrate with XBert and click the **Allow access** button.



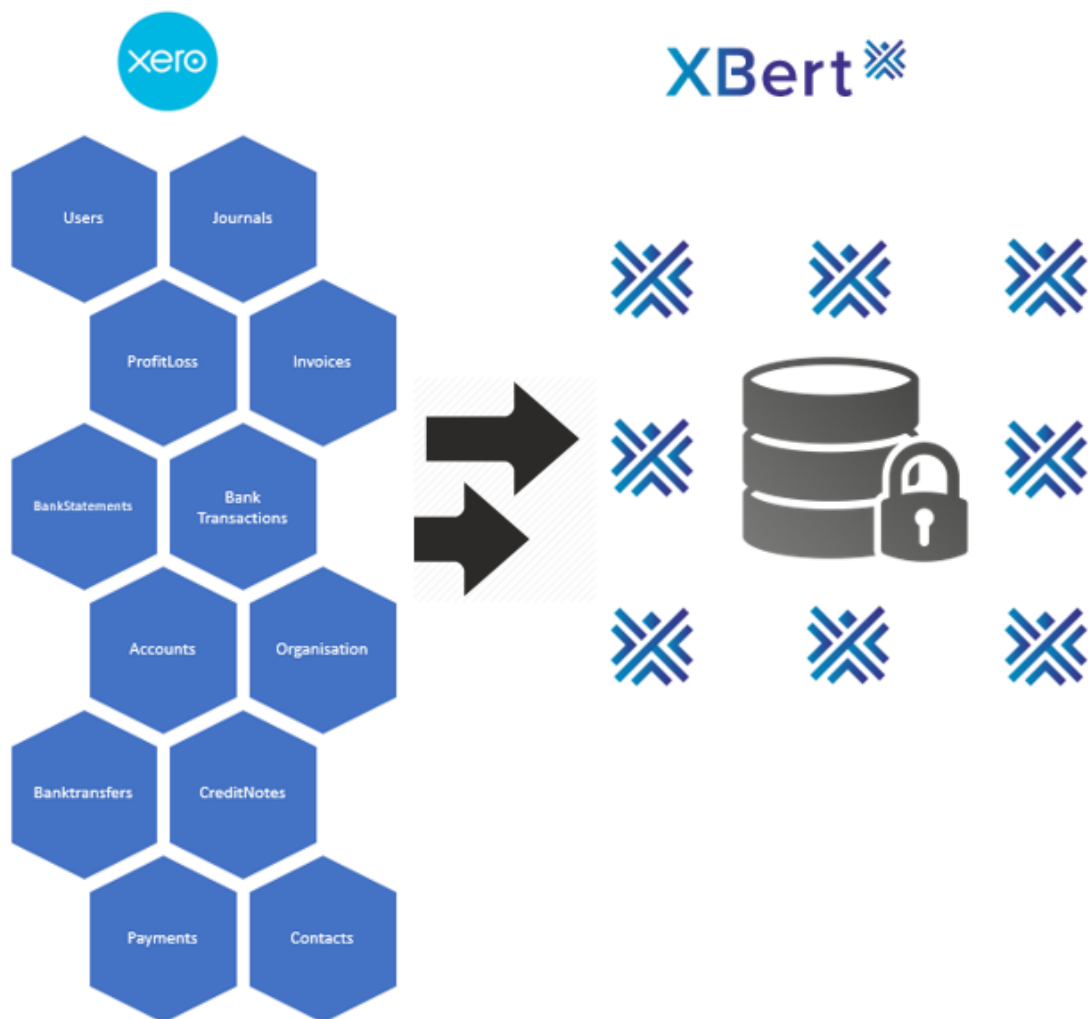
**That's it!**

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. Within minutes, XBert will have completed the analysis and you'll know how much money is at risk in your business, what those risks are and how to resolve them.

You are now on your way to detecting anomalies, patterns, and errors in your books, seeing up-to-date business snapshots, resolving risk, saving time and saving money!

Contact us if you need any help by [submitting a request](#), or use the **Help** box found at the bottom of the page.

## 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. Use the deep links to the relevant entry in your cloud accounting software to easily and quickly resolve the risks that XBert detects.

[VISIT XBERT SITE](#)

[LOG IN TO XBERT](#)