

# Setting up your Xero account and trial organisations

## Contents

Setting up your Xero account and trial organisations .....	1
Contents .....	1
Introduction .....	2
Setting up and activating your Xero account .....	3
Step 1: Creating your Xero account .....	3
Step 2: Look around .....	5
Multi-factor authentication (MFA) .....	6
What is MFA? .....	6
Do I need to have MFA? .....	6
I am only signing up for the 30-day free trial, do I still need to set up MFA? .....	6
How do I set up MFA? .....	6
Setting up MFA using your smartphone .....	6
Setting up MFA using Authy for desktop or laptop .....	7
Managing your trial organisations .....	8
Step 1: Go to My Xero .....	8
Step 2: Your trial organisations .....	9
Step 3: Creating more trial organisations .....	10
Starting an activity again .....	12
Giving your facilitator access .....	13
Xero's Demo Company .....	15

## Introduction

As you work through the following exercise remember:

- You will be using a **trial company** and files for made-up companies.
- You will be using a 30-day trial license with Xero, so will need to complete your work on each organisation you set up, within the trial period.
- Make sure that when you add an organisation, it includes your name.
- Make sure you enter the correct dates for each transaction so you can find them later.
- Open another window in your browser to use when you work in Xero so you can see the instructions in the learning activity at the same time.
- You will need to set up multi-factor authentication to use your Xero account and will need a mobile phone and a back-up email address.

**If you need help accessing your Xero account or organisations, please contact Xero support:**

<https://www.xero.com/nz/about/contact/>

## Setting up and activating your Xero account

If you already have a Xero account and want to use that, you can skip this part. Jump ahead to ***Managing your trial organisations***.

### Step 1: Creating your Xero account

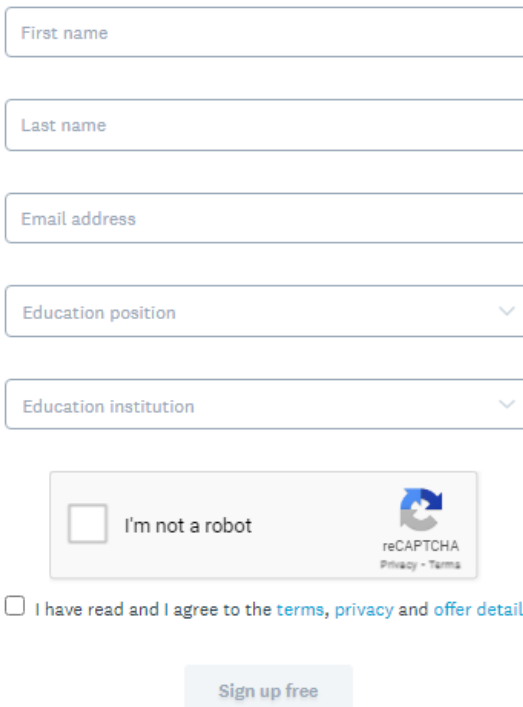
1. Go to <https://www.xero.com/nz/campaigns/teaching-accounting-form/>

Using this form means you will be recognised as a student and should receive fewer marketing emails from Xero.

2. Use your **own name, education position, institute** and your **eCampus email address** to register. Read and agree to the terms, privacy, and offer details, and sign up.

### Register for a free Xero trial

Teachers, students, and businesses can try Xero free for 30 days. After this time, the trial account is locked and you can begin a new trial.




The registration form consists of several input fields and a checkbox. The fields are: 'First name', 'Last name', 'Email address', 'Education position' (a dropdown menu), and 'Education institution' (a dropdown menu). Below these fields is a checkbox labeled 'I'm not a robot' with a reCAPTCHA logo to its right. Below the checkbox is a line of text: 'I have read and I agree to the [terms](#), [privacy](#) and [offer details](#)'. At the bottom of the form is a 'Sign up free' button.

3. Follow the instructions from Xero to complete your account set-up.
4. When prompted, add a business using the following details:

- Business name: **Education Trial**
- Industry: **Higher education**
- Do you have employees? **Yes**

Select **Start Trial**. You have now created a trial organisation called **Education Trial**.



**Add your business**

Business name

Industry

Country

Time zone: (UTC+12:00) Auckland, Wellington ▼

Do you have employees?

☐ Yes

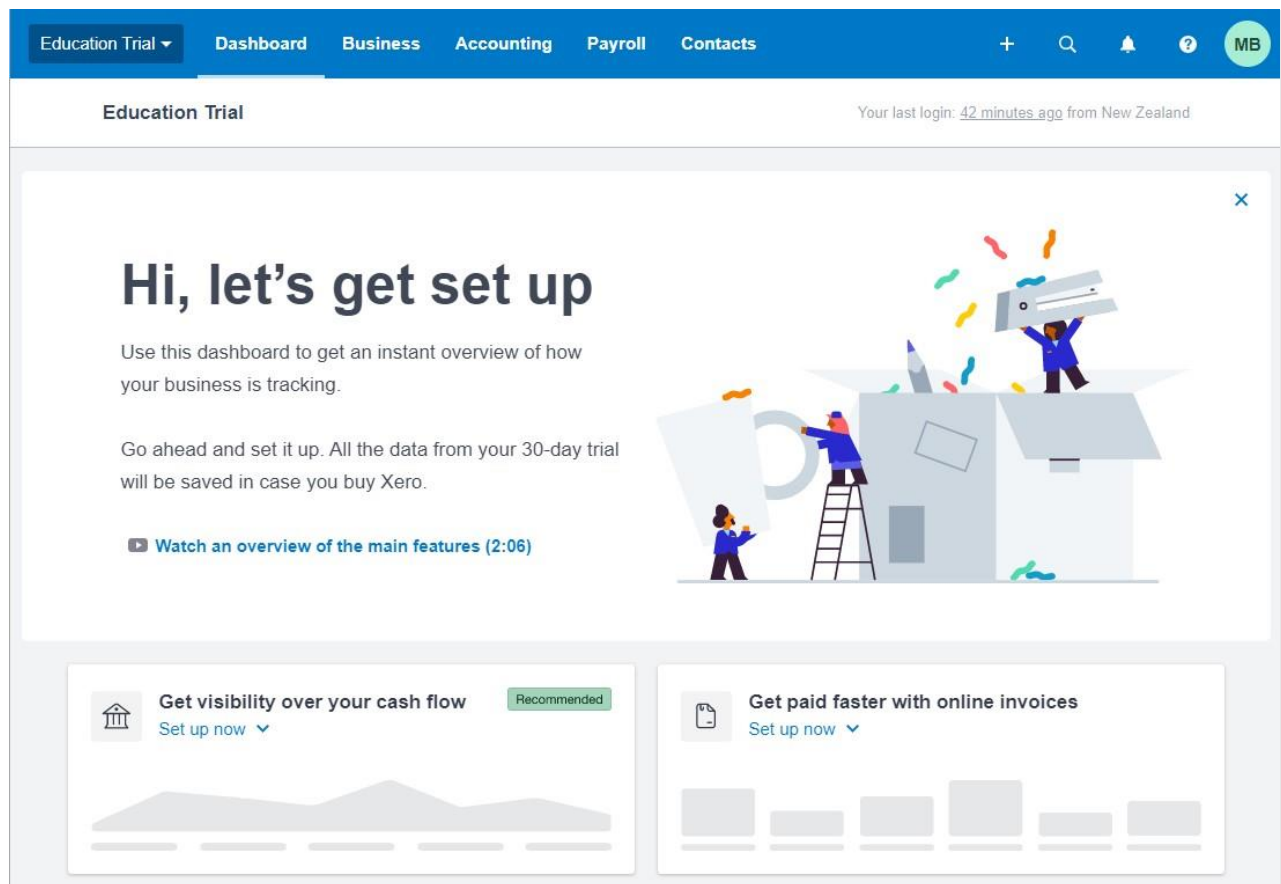
☐ No, it's just me

Are you registered for GST?

☒ Yes, calculate GST on my transactions

## Step 2: Look around

The Xero dashboard screen will now appear and you can take the opportunity to look around.



## Multi-factor authentication (MFA)

### What is MFA?

An additional layer of security is designed to reduce the risk of cyberattacks, hacking, and to keep your data safe.

### Do I need to have MFA?

Yes, you need MFA to access your account.

### I am only signing up for the 30-day free trial, do I still need to set up MFA?

Yes, everyone who uses Xero is required to set up and use MFA.

### How do I set up MFA?

Follow the process outlined on this page. If you need additional help, access the links provided. To learn more about MFA check out this video: [MFA for security at Xero](#). Alternatively, click here to learn more about [MFA and Xero](#).

## Setting up MFA using your smartphone

**Step 1:** Log into your Xero account with your username and password.

**Step 2:** Read the information on MFA, then click **Set up multi-factor authentication**.

**Step 3.** Select an authentication app – if you already have access to an authentication app you can use that or you can use the **Xero Verify** app. To use the Xero verifier app on your phone:

- Go to the App Store or Google Play
- Search for and install **Xero Verify**
- Allow app access to your camera to scan the QR code on the Xero desktop (laptop/PC/Mac)
- If using an iOS device, you will be asked to confirm that you want to receive push notifications and select **OK**
- Xero verify is now set up on your device

**Step 4.** Return to the Xero desktop and click **Continue** once you have scanned the code.

**Step 5.** Add a backup email – this should be different from the email you use to log in to Xero.

**Step 6.** Click **Continue**.

**Step 7.** You will receive a confirmation email to the backup email you provided.

**Step 8.** Return to Xero and enter the code provided in the confirmation email.

Your MFA is now complete. For step-by-step instructions and additional information, watch the [Getting started with MFA – Using Xero Verify for authentication](#) video. For instructions on using Google Authenticator, watch [this video](#).

## Setting up MFA using Authy for desktop or laptop

**Step 1:** Log into your Xero account with your username and password.

**Step 2:** Read the information on MFA, then click **Set up multi-factor authentication**.

**Step 3:** Select **Use my own app** option and:

- Download the Authy desktop app (<https://authy.com/download/>). Select the desktop direct download option, then use the drop-down menu to select Windows or Mac
- Once the app is downloaded and installed, open the app and enter the country code (+64) and phone number. Click enter
- Enter your email address, then select how to receive your verification code
- Enter the 6 digit verification code
- Click the plus sign in the middle of the screen to add an Authy account

**Step 4:** You will be prompted to enter a code from your Xero account

**Step 5:** Return to Xero and select **Enter key**.

**Step 6:** Copy and paste the key from Xero into Authy, then click **Add account**.

**Step 7:** Give the account a name e.g. Xero MFA and select the key colour you want to use.

**Step 8:** Select the 6-digit option from 'token length' then click **Save**.

**Step 9:** Authy will then start to generate a six-digit code that refreshes every 30 seconds.

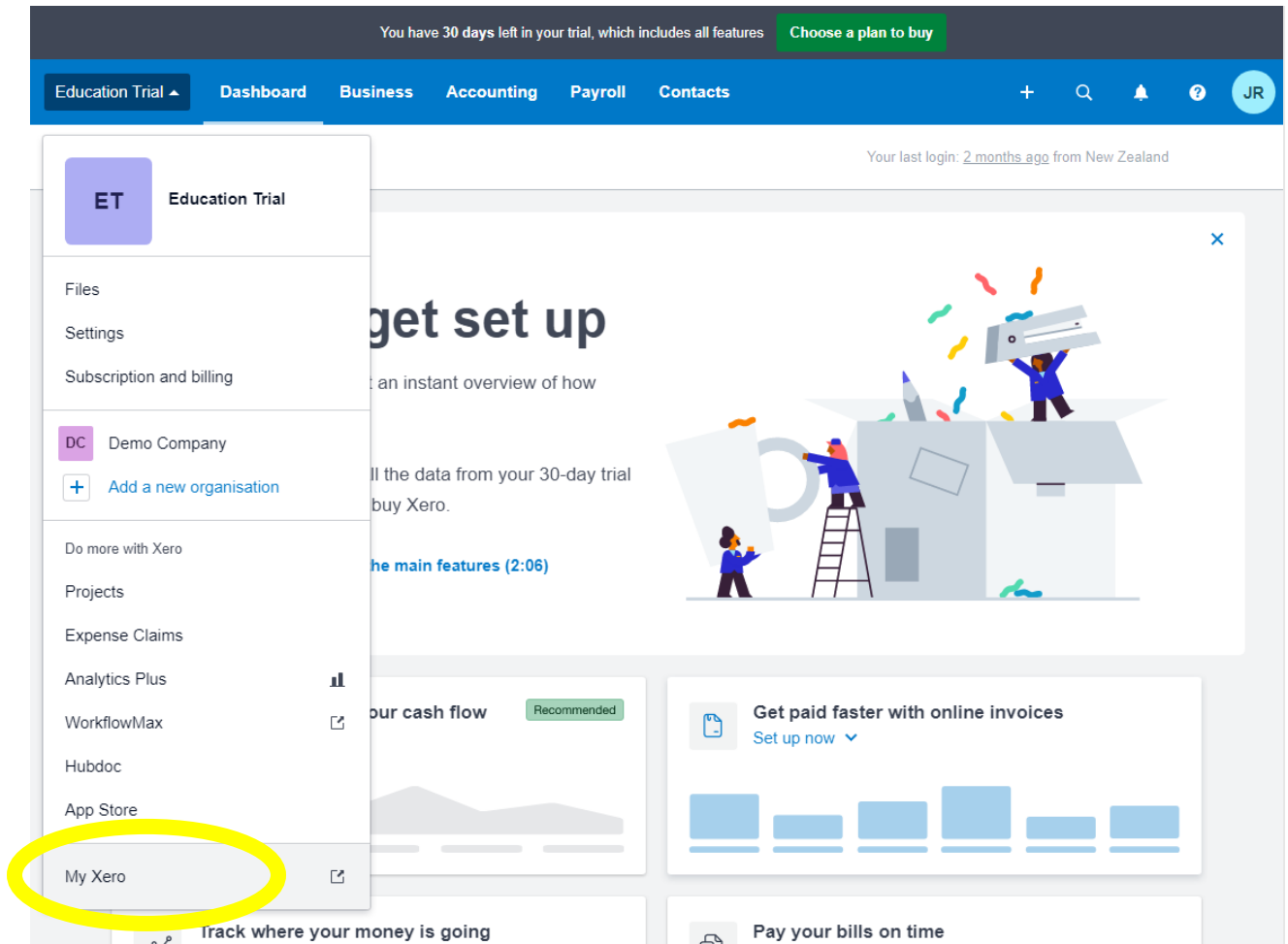
**Step 10:** Return to Xero and enter the 6-digit authentication code generated by Authy and click Continue. Complete the setup by following steps 5 – 8 under the heading **Setting up MFA using your smartphone**.

Your MFA is now complete. For step-by-step instructions and additional information, watch the [Getting started with MFA - Using Authy for authentication on a desktop or laptop](#) video.

## Managing your trial organisations

### Step 1: Go to My Xero

Go to **My Xero** by clicking the menu at the top left of the screen. This will take you to a list of your organisations.



## Step 2: Your trial organisations

If you have just set up a Xero account following the steps above, you have already set up your first trial organisation, **Education trial** and it will be listed here in **My Xero**.

You will create additional organisations to complete your exercises and assessments when prompted in your course (see the next step for how to do this). All your organisations will be listed here in **My Xero**.

Click on the name of an organisation to enter it and start making changes.

**Important: Each organisation will be available for 30 days, after which you will no longer be able to access it.**

Access tools and advice to help your business through COVID-19. Go to the **Business continuity hub**.

← Go back to Education Trial

My Xero ▾ Home Subscriptions & Billing Settings

🔔 ? JR

## My Xero

Hi Learner, you last logged into [Education Trial](#) today at 10:11 AM

### Organisations

Name ▲	Last viewed	Access	Subscription
<a href="#">Education Trial</a>		<a href="#">Standard</a> Manage users	<a href="#">Pay Now</a>   <a href="#">Info</a>   <a href="#">Cancel</a> In Trial

**Run another business?**

[Add an organisation](#)

Try the Demo Company (NZ) Have a play, try out new features and get familiar with Xero. [Reset](#) or [Change Country](#)

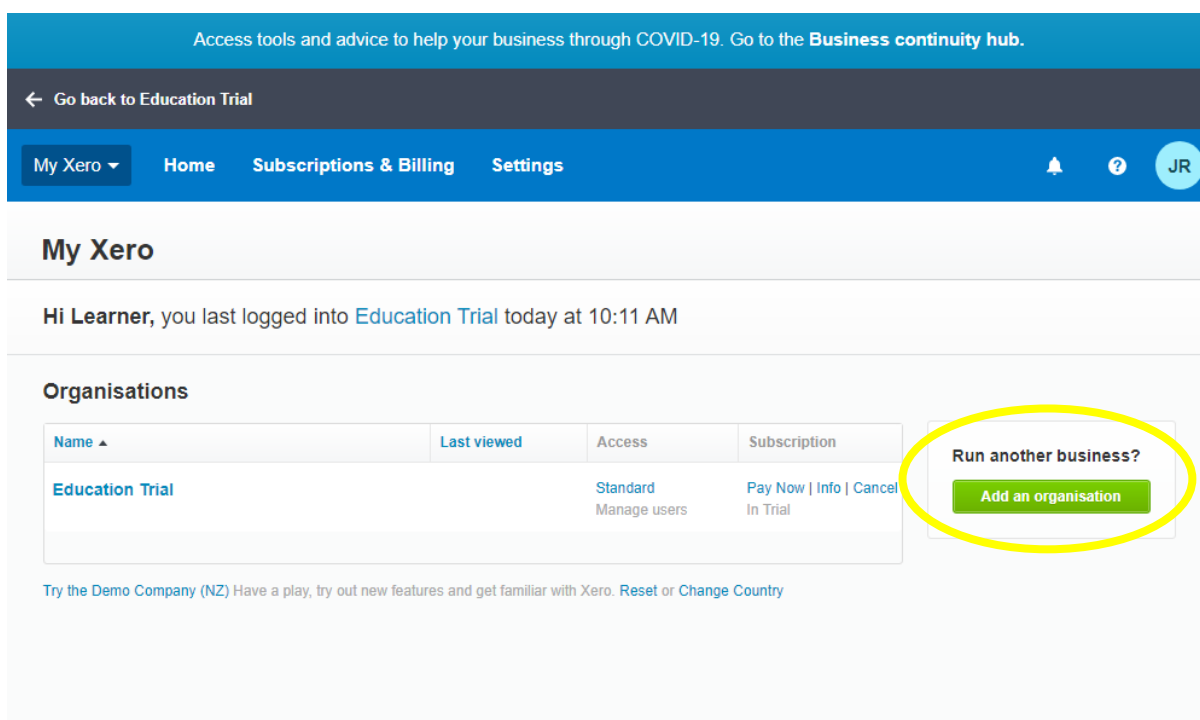
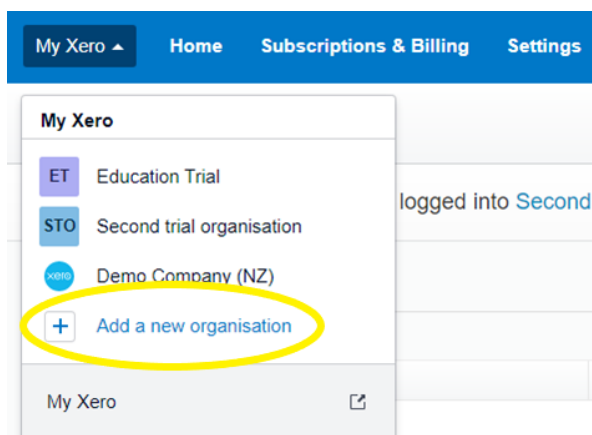
### Step 3: Creating more trial organisations

You can create a new organisation for each new exercise or assessment, or if you want to start over.

Remember that each organisation is only available for 30 days, so do not create one until you are ready to start the exercise or assessment.

Under **My Xero** in the menu, click **Add a new organisation**.

Alternatively, in **My Xero**, you can use the green **Add an organisation** button.



Enter business details as appropriate for the activity or assessment and click **Start trial**.

This new organisation will be added to the list under **My Xero**.

### Add your business

Business name

Industry

eg: professional services, construction, retail

Country

New Zealand ▼

Time zone: (UTC+12:00) Auckland, Wellington ▼

Do you have employees?

☐ Yes

☐ No, it's just me

Are you registered for GST?

☒ Yes, calculate GST on my transactions

Buy now

Start trial

## Starting an activity again

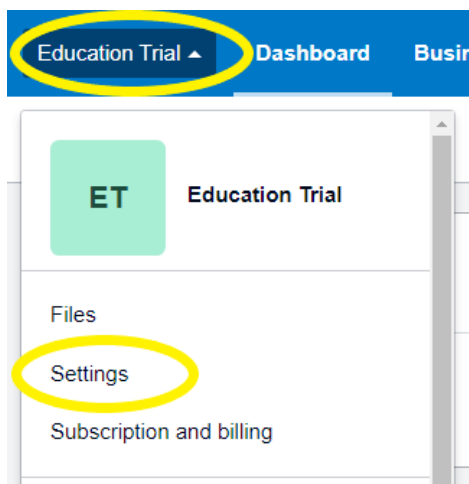
If you want to restart or redo an activity, you can do this by creating a new trial organisation and starting again there. See [Managing your trial organisations: Step 3: Creating more trial organisations](#).

eCampus is not able to provide any type of 'reset' if you encounter problems with your Xero account or organisations.

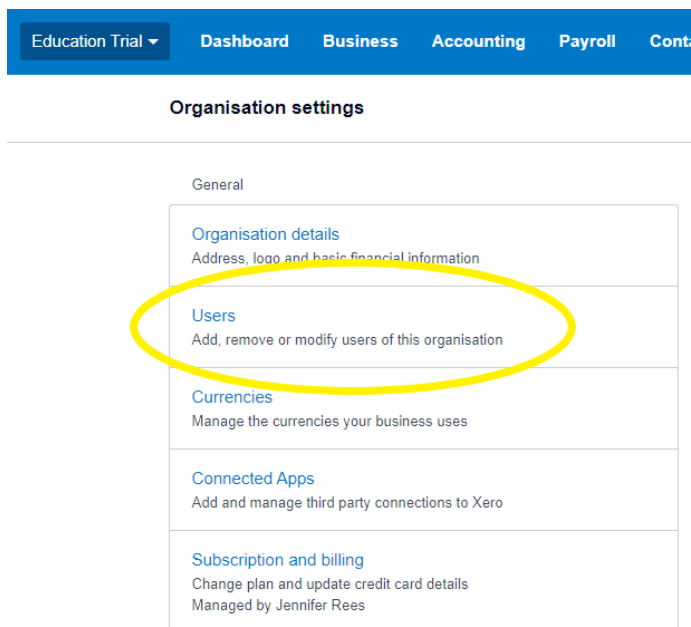
## Giving your facilitator access

In a real business you can invite people, such as your Accountant and Bank Manager, to see parts of your accounts in Xero. You can manage this by giving them 'permissions.' If you want, you can invite your Facilitator to access your organisation to help you with your course activities.

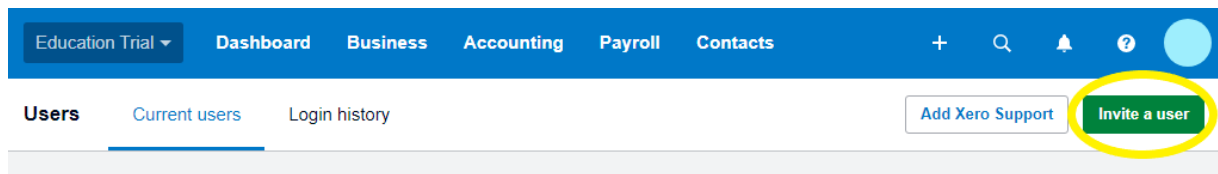
**Step 1:** Go to the organisation you want to give access to and click on **Settings**



**Step 2:** Click on **Users**



**Step 3: Click Invite a user**



**Step 4: Enter your Facilitator's name and email**

**Step 5:** Select the **Business and accounting and/or Payroll** checkbox (depending on your course) and click on **Adviser**

**Step 6: Add a personal message** and include:

- Your name
- The name of your course

**Step 7:** Send the invite

## Xero's Demo Company

Your Xero account also gives you access to a free demo company (the little blue link within My Xero which is shown here). This is a fictional working example of a business using Xero with all of the financial data such as invoices and bank transactions already available. You can have a look around and make changes without breaking anything!

If you do make changes and want to reset the demo, the next images show how you can do this.

This is only necessary if you change something in the demo company and want to revert it. Click **Reset** and then **Reset demo**.

Name ▲	Last viewed	Access	Subscription
Education Trial		Standard Manage users	Pay Now   Info   Cancel In Trial

Try the Demo Company (NZ) Have a play, try out new features and get familiar with Xero. **Reset** or Change Country

Access tools and advice to help your business through COVID-19. Go to the [Business continuity hub](#).

← Go back to Education Trial

My Xero ▼ Home Subscriptions & Billing Settings

Hi Learner, you last logged into Education Trial today at 10:11 AM

Organisations

Name ▲					
Education Trial					

Try the Demo Company (NZ) Have a play, try out n

**Reset Demo**

Are you sure you want to reset the demo? If you reset the demo company, any changes you made will be lost.

**Reset demo** Cancel

**Run another business?**

Add an organisation