

Choose the right clients to bring into your single client record

Use the tool in Xero HQ (XHQ) to complete step two and create your single client record.

Follow this guide to identify where you have client information that needs to be kept. This will help you make the right selection when you complete the 'select clients' part of the tool.

Start here

Do you have any client records or client information in Xero Practice Manager (XPM) (or Xero Tax in AU) which you need to keep?

Answer YES if your practice:

- Has a client sync and actively uses XPM or AU Tax
- Has ecosystem integrations with XPM
- Has connected XPM to your practice's Xero organisation to import or export invoices.
- Is based in AU/NZ and has created client tax returns
- Uses XPM as the source of truth for client information

Tip!

Client information includes tax information and returns, but it doesn't include data from the Xero organisation - you'll link the organisation in a separate step in the tool

Have ecosystem integrations with XPM (or Tax for AU)?

We highly recommend you choose to keep All clients from Practice Manager (& Tax for AU) only.

If you complete the guide and are certain you need to follow a different path, you will have duplicates which may flow into integrations before you can merge them.

If you must choose records from both systems, consider whether it is possible to temporarily disable your integration while you merge duplicates, ensuring that you always select the client that came from XPM as the winner.

No

Yes

Do you have any client records, or information within client records, that are only in XHQ which you need to keep?

Answer YES if your practice:

- Is based in the UK and has completed personal tax returns through XHQ
- Does not have an active client sync from XHQ to XPM and captures some client information in XHQ (eg. For use of Ask, XHQ holds email addresses that are different to those held in XPM)
- Does have an active sync with XPM but wants to keep information in XHQ other than Name, Display Name, Date of Birth, Email and Business Structure that is not already in XPM

Yes

Which of these options best describes your practices situation?

There are specific fields with client information unique to XHQ which have been edited and need to be kept.

There are client records in XHQ which are not in XPM (or AU Tax) that need to be kept

CHOOSE

All clients from Xero HQ

For practices using XHQ that have only recently started to use XPM and haven't yet stored client information in there.

CHOOSE

All clients from Practice Manager (& Tax for AU)

For practices that use XPM (or AU Tax) with no clients or client information in XHQ that needs to be kept.

CHOOSE

Selection of clients from Practice Manager (& Tax for AU) and Xero HQ

Then use the checkboxes in the next screen to select **all** clients from both systems.

For practices who've captured some information about a client in XHQ that is different to what is captured in XPM (or AU Tax) and need to combine it to ensure all information on a client moves over.

CHOOSE

Selection of clients from Practice Manager (& Tax for AU) and Xero HQ

Then use the checkboxes in the next screen to select the relevant client from either system.

For UK practices using Xero Tax who need to keep client records in XHQ linked to personal tax.

For practices with client records in XPM (or AU Tax) AND Xero HQ that need to be kept. (E.g. the client doesn't exist in the other system and needs to be kept.)

Tip!

XPM records will be available in the archive after the single client record is created.

Tip!

Make sure you link Xero organisations with the XPM clients.

For UK practices it is important to ensure you see client tax obligations in XHQ

For AU/NZ practices we'll link all organisations attached to synced clients or that have a tax return.

XHQ records will be available in the archive after the single client record is created.

Tip!

It's likely there will be duplicates. Once you have a single client record go to XHQ and **merge** the duplicates to combine client information into one record.

Select to keep the client with the name and business information you need to retain.

Tip!

There may be duplicates from the chosen records in each system. Once you have a single client record go to XHQ and merge the duplicates to combine client information into one record.

Select to keep the client with the name and business information you need to retain.

Finished