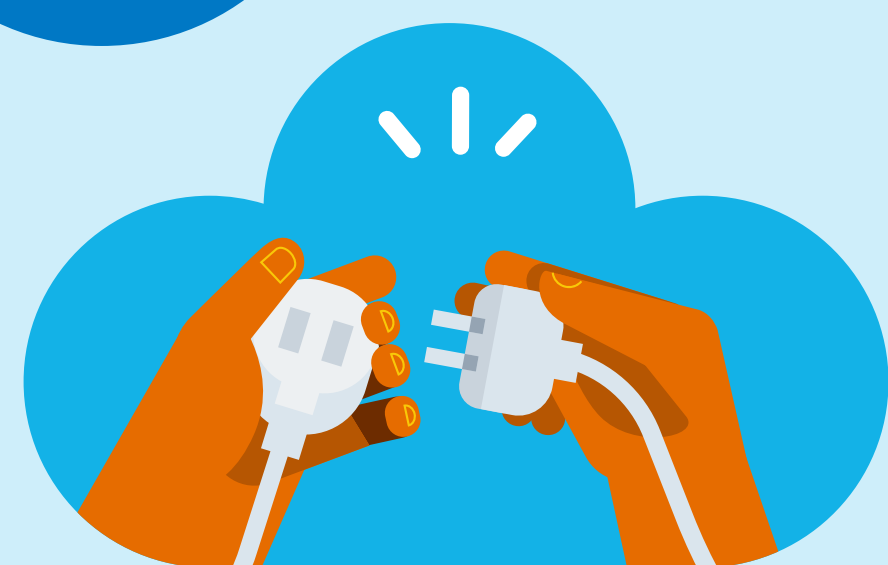


# Your guide to moving to a single client record

The single client record means that Xero HQ and Xero Practice Manager (XPM) (or AU Xero Tax) share the same client data so you can work more efficiently. See your single client record status in Xero HQ at the top of your client list. [See your status](#)



# 1



## Connect or confirm accounts

**Action:** Create a connection between Xero HQ and XPM/Tax, or confirm an existing connection by clicking on your status at the top of your Xero HQ client list.

**Who?** The master admin, with access to the XPM/Tax account. (To create a new connection they also need manage staff and system settings privilege in XPM.)

[Follow the steps](#)

[Watch video](#)

### Things to know:

If you have 10 or less records in either Xero HQ or XPM/Tax, Xero may do step 2. Just review a maximum of 10 duplicates when you see 'Complete'.

If you have an active sync between Xero HQ and XPM/Tax, it will be switched off soon. Confirm your connection to ensure new clients flow into both Xero HQ and XPM/Tax once the sync is disabled.

If the existing connection isn't right, change it to the correct XPM/Tax. This is permanent and can't be undone.

If you don't use XPM/Tax, you'll be able to select 'No account' to let us know. We'll set you up with a single client record in case you choose to enable a new XPM/Tax in the future. Your status will show 'In review' while we action this.

## Coming soon

You'll stay in this stage until Xero enables the consolidation tool. If you have an active client sync, you'll stay in this stage until Xero disables it. Your status in Xero HQ shows as 'In review' if you told us you no longer use XPM/Tax.

# 2

## Continue

### Ready to create your single client record

**Action:** Your practice can now select the clients you wish to retain from Xero HQ, XPM/Tax or both. You will also need to match these clients to a Xero organisation (where one is not already connected). We will then finalise your single client record.

**Who?** Any Xero HQ admin with the edit clients privilege in XPM/Tax.

[Watch video](#)

[View decision tree](#)

[Follow the steps](#)



### Things to know:

Only one person at a time can work on consolidating.

Only one person can hit the final confirm button.

Progress is saved automatically.

New client records you create will be in your single client record database and don't need to be consolidated.

You won't be able to merge client records until later when you have a complete single client record.

## Processing

Xero brings your client records into one place so they're visible in both systems. Avoid changing organisation links to client records or archiving client records at this point (it's just for a short time), as they will be overwritten by whatever you've selected in the previous step.



## Complete

### Understand what's changed

All clients, client contacts, client groups and relationships are now stored in one database, visible in both Xero HQ and XPM/Tax.

If you create, archive or restore a client in XPM/Tax, it creates, archives or restores the client in Xero HQ too.

If you update information in one place, it will be available in the other as long as there's a matching field. The client views in each system remain as they were (so not all fields are visible in both).

When you create or change a connection between a client and an org in Xero HQ, that link flows through to XPM/Tax and is visible in the XPM/Tax client record.

[Learn more](#)

### Things to know after consolidation:

Staff access to client organisations is untouched, unless using AU/NZ Xero Tax. For AU/NZ, if you bring your Xero Tax clients to the single client record, Xero HQ admins will gain access to any practice billed organisations that were not already in Xero HQ.

Only one organisation can be linked to each client. For AU/NZ, if you are importing from a different Xero organisation in a tax return, this will update the linked organisation in XHQ.

Merging clients is now only available from Xero HQ, where potential duplicates are highlighted. If Xero automatically did step 2 for you, or you brought in clients from both systems, then check your Xero HQ client list for duplicates.

No staff will have gained access to client data they didn't have before, although Xero HQ admins do see all clients, which now includes those brought in from XPM. Any staff member with client privileges in XPM sees all clients, including those you've brought in from Xero HQ.

If you selected XPM/Tax clients to bring into your single client record, staff members in Xero HQ who weren't also in XPM/Tax may need to be re-added to clients in Xero HQ.

Group names from XHQ and XPM are combined so you may have duplicate group names. Some groups may be empty if none of the members were selected in the tool.

If you use Reports in XPM with Groups, it is recommended that you make sure clients are only part of one client group.

[Read troubleshooting tips](#)