



Beautiful business

# Partner onboarding checklist

Welcome to the Xero Partner Program!  
Use the checklist below to help you get started.

Use the links to take you to the associated help article.

Video link

View additional guide

- ## 1 Xero HQ ✓
- 
- Understand what [Xero HQ](#) is ○
  - Understand staff [access rights](#) in Xero HQ ○
  - [Invite your staff onto Xero HQ](#) and invite them to access and work on client accounts  ○
  - Set up your billing accounts (Master Admin only)  ○
  - Complete [Xero Certification](#)  ○
  - TIP** Try out the Demo organisation from the Practice Tab of your Xero HQ to practice your Xero skills ○

- ## 2 Your free Xero subscription for your practice ✓
- 
- Did you know that you receive a free Xero Premium Subscription Xero? In addition, you also get Xero Expenses and Xero Projects for free!*
- 
- Activate your free Xero practice organisation  ○
  - Complete your [organisation details](#) under practice settings  ○
  - Complete your [financial details](#) under financial settings ○
  - Set up your [custom invoice templates](#) (if required) ○
  - [Invite your finance staff](#) to your Xero practice organisation ○
  - Setup your [bank feeds](#)  ○
  - Activate [Xero Expenses](#) (free for your practice)  ○
  - Activate [Xero Projects](#) (free for your practice)  ○

### 3 Your clients ✓

---

Understand how to [convert your clients](#) to Xero ○

---

Set up your practice-wide [chart of Accounts](#) ○

---

Understand how to [set up your inventory](#) (if relevant) ○

---

### 4 Xero subscriptions ✓

---

Understand the functionalities in [Xero Regular Plans](#) ○

---

Understand the functionalities in [Xero Partner Plans](#) (these are exclusively available to Xero Partners only) ○

---

Know how to [choose the right Xero subscription plan](#) for your clients ○

---

Understand your [Partner Tier benefits and points](#)

---

### 5 Xero support ✓

---

Visit [Xero Central](#) for help on how to use Xero ○

---

[Contact Xero Support](#) ○

---



### 6 Xero Advisory Directory ✓

---

Let potential clients find you on the [Xero Advisor Directory](#) listing ○

---

Set up your [Xero Advisory Directory](#) listing\* ○

*\*You need at least one person in your practice to be certified to be listed on the Xero Advisory Directory*

---

