Onboarding a client: best practice

Follow this best practice guide to keep your client list in good shape.

1 **Create a client in Xero HQ**
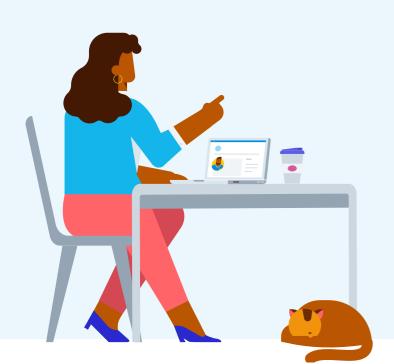
See how

Tip: To add a new client or update client details in Xero HQ, you need the administrator or master administrator user role.

OR **Start in Xero Practice Manager**

If you have a single client record, the new client will flow through to Xero HQ.

See how

2 **To start a new Xero org for a client, in Xero HQ select the client you want to create an organisation for, and click Create Xero organisation**

▶ Watch how

OR **If your client has their own Xero subscription:**

Ask the client to invite one of your Xero HQ **admin users** into their Xero org, making sure they check the 'Manage users' option.

See how

When accepting the invitation, the HQ admin user should leave the **Connect [organisation name] to practice** toggle on.

See how

They should then choose the option **Add to existing client record**. Use the search field to find the right client in Xero HQ to connect with.

3 **In Xero HQ, select Staff to give the relevant staff access to the Xero org**

See how

Tip!

Don't use My Xero to create a Xero org. If you create a Xero organisation in My Xero, you will need to link the organisation to a client in Xero HQ in order to manage staff access.

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