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.

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

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

See how

OR Start in Practice Manager

If you have imported your list from XPM to Xero HQ, or you joined the partner program after 6 March 2023, the new client will flow through to Xero HQ.

See 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 on the **Connect [organisation name] to practice** toggle.

See how

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

To avoid duplicate records

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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