How to refer a client to Planday

A guide for Partners

planday
FROM XERO

How to use this guide

This guide is for partners to refer their clients to Planday.

Are you the client's Xero subscription holder?

Yes

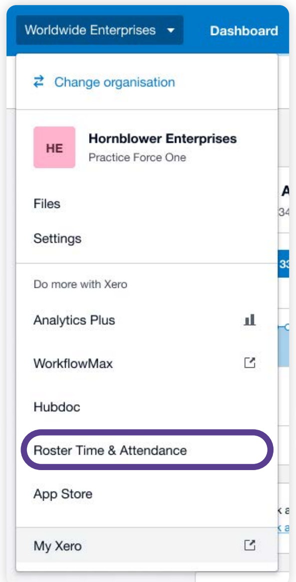
Click here for partner sign up process

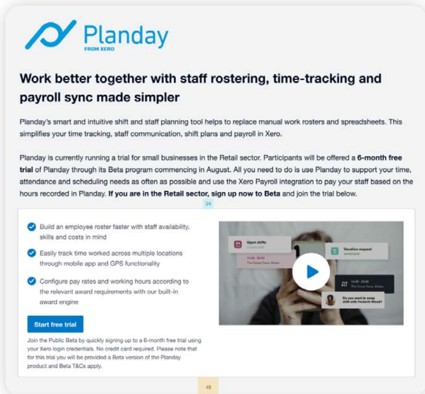
No

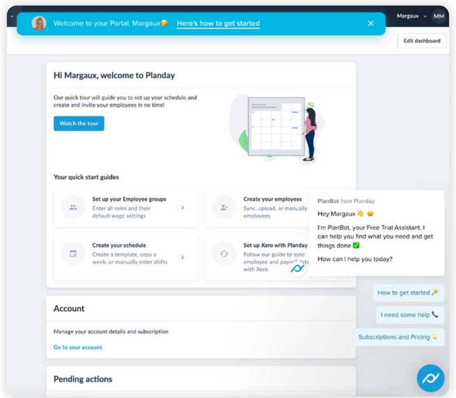
Click here for client sign up process

Creating a Planday trial for clients and inviting them into Planday

As the Xero subscriber you'll be the primary contact and receive all communications from Planday. You can choose what you pass on to your client.







1 Connect to the client's Xero account

2 Find Planday in the Xero nav bar

Under the 'Do more with Xero' you'll see the heading 'Time tracking & Rostering (Planday)'.

3 Start a free trial

Learn more about Planday's key functionalities and benefits and start a free trial by signing up with Xero credentials.

4 Access the Planday portal straight away

Once signed up, you can start using Planday.

5 Invite the business owner/payroll admin into Planday

Create, edit and invite employees

6 Client receives email inviting them to Planday

7 Start using Planday

Clients

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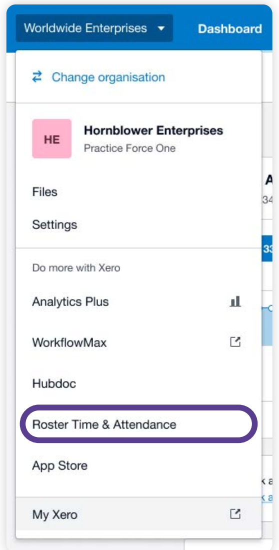
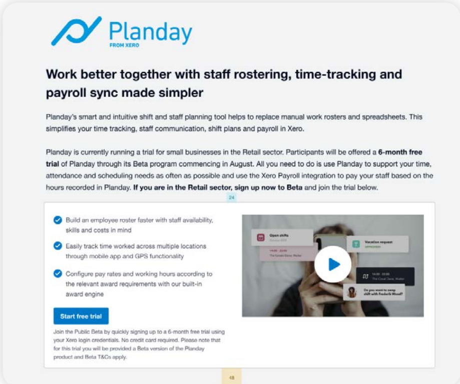
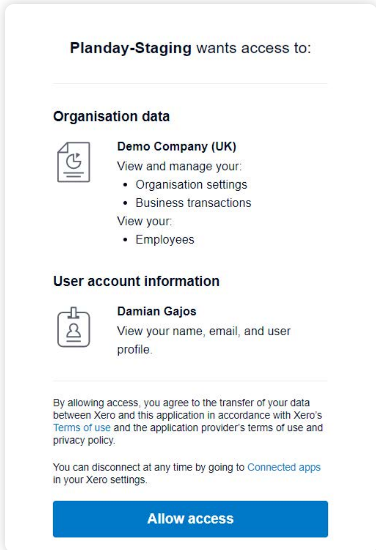
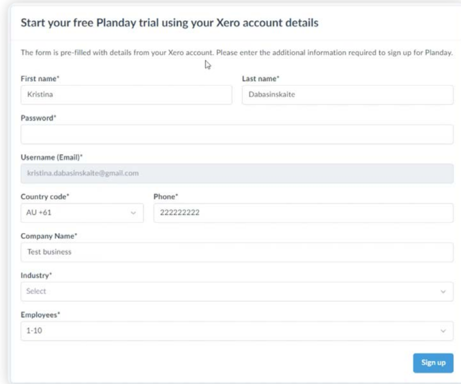
How your client starts a free trial with Planday via Xero

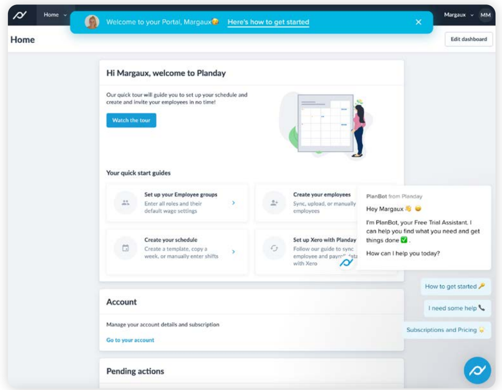
If your client is the subscriber, they'll need to start their own trial. Therefore they'll receive all the communications and be our primary contact. You can ask your client to add you as a user if you'd like access.

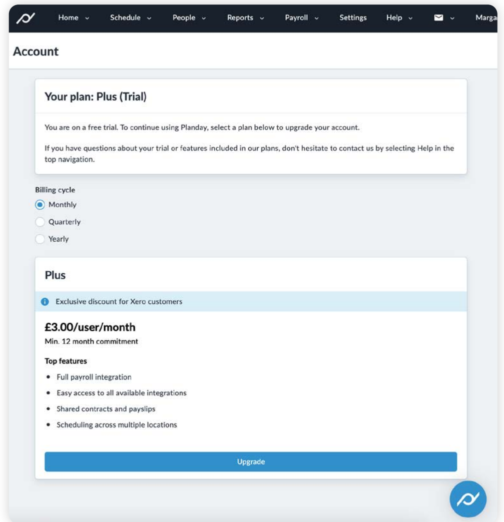












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Learn more about Planday's key functionalities and benefits and start a free trial by signing up with Xero credentials.

3 Authorise access to your Xero account

Once access is allowed, you'll be redirected to Planday's platform to finalise the sign up.

4 Confirm your details to start

The sign up form is pre-filled with information from your Xero account.

You'll only need to select the industry and enter your Xero password.

5 Access the Planday portal straight away

Once signed up, you can start using Planday.

Note: If you want your accountant/bookkeeper to have access to your Planday portal you can add them as user.

6 Continue to use Planday for your business

Once the trial period ends, you can easily upgrade to a Planday paid plan.

In Xero

In Planday

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