



Setting up your Xero practice - quick reference guide

Module 1: Introduction

Learn about the initial setup required, when you log into your Xero Partner Edition for the first time.

The principal user adds the admin user and edits the practice profile. The practice administrator manages staff and client organizations, and edits report settings.

Module 2: Completing the initial setup in My Xero

Learn how to customize your practice settings and add billing accounts.

Switching on your practice profile

Use Xero's Advisor Directory to promote your practice's strengths and connect with potential clients.

[Promote your practice in the Xero Advisor Directory](#) (Help Center)

[Set your organization settings and public profile](#) (Help Center)

Adding a practice organization

Set up your free practice organization in Xero.

[Add your practice organization to Xero](#) (Help Center)

Adding billing accounts

Add billing accounts to manage your subscriptions and control how you get billed for using Xero.

[Maintain billing and subscriptions](#) (Xero TV)

[Billing accounts and details](#) (Help Center)

[Give practice staff access to billing accounts](#) (Help Center)

Module 3: Setting up staff and clients

Learn about adding staff and client organizations in your Xero practice.

Adding staff members

Invite staff that will work on client organizations into your practice in Xero.

[Invite a user into your practice](#) (Help Center)

[Set up staff access to report templates in Partner Edition](#) (Help Center)

Adding a client organization

Add as many organizations to Xero as you like and choose a pricing plan for each one.

[Add a client organization to your practice](#) (Help Center)



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Assigning staff to organizations

Add staff to a client's Xero organization to give them access to that client's accounts. There are several ways you can do this.

[Add practice staff to client organizations](#) (Help Center)

Creating client groups

Create groups to categorise your organisations. For example by business type, frequency of review or account manager.

[Create groups to organize your clients in Partner Edition](#) (Help Center)

Editing report publishing styles

Set up a default logo, border colour and footer for client reports. Your default styles will show on your clients' published PDF reports.

[Create report publishing styles in Partner Edition](#) (Help Center)



Setting up your Xero practice - my notes

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Setting up your Xero practice - expert tips

Module 2: Completing the initial setup in My Xero

Tip 1: Online Adviser Directory

Make sure you keep your certification current and maintain at least bronze status to get the benefits of your practice's listing in the Adviser Directory.

Leverage your partner status to raise your profile in the search results. The more clients you have on Xero, the higher you'll feature.

Tip 2: Practice description

The practice description in your public practice profile is limited to 400 characters, so make everyone count.

It's your chance to spotlight your practice's point of difference and vision for your clients. Be succinct and use keywords for the services and industries you specialize in.

Tip 3: Billing accounts

We recommend that you set up two billing accounts. One for all clients on Business Edition pricing plans and one for all clients on Partner Edition pricing plans. This helps you manage your subscriptions more easily.

You can give other staff members in your practice limited access to these billing accounts so they can add client organizations to your practice's billing accounts.

Module 3: Setting up staff and clients

Tip 1: Adding staff

If you're setting up your practice from scratch, add your staff first so that they're members of the practice already when you add client organizations.

Tip 2: Adding client groups

Create groups to categorize your organizations. Group them by business type, frequency of review or account manager, depending on the size of your practice and client base. As your client base grows, groups make it easier for staff to see only a subset of clients that they're working with.