



Managing staff and clients in My Xero - quick reference guide

Module 1: Introduction

Learn about updating staff and clients when changes occur in your Xero practice.

Ongoing change is a reality in any business. Clients grow, move or go out of business. In addition, your staff get promoted or leave the company.

For that reason, it's important to know how to manage these changes in Xero as quickly and as efficiently as possible.

Module 2: Changing client subscriptions

Learn about upgrading and transferring client subscriptions when they change.

Upgrade a client subscription

The Practice Administrator or Principal can move a client to a new pricing plan within Partner Edition or Business Edition or between editions.

[Choose or change your clients' pricing plans](#) (Help Center)

Transfer a subscription

If you recruit a client that's already using Xero, you can ask them to transfer their Xero subscription to your practice. You'll then become responsible for the monthly subscription payments to Xero.

[Subscription transfers](#) (Help Center)

Module 3: Editing and deleting staff accounts

Learn about removing staff access and deleting staff accounts, when staff members leave your practice.

Remove staff access

You can remove staff from organizations that you manage from the Staff tab in My Xero. Xero will remove the user from the organization but not from the practice.

[Remove practice staff from an organization](#) (Help Center)

[Edit practice staff details](#) (Help Center)

Remove your own access to an organization

Staff members can remove access to organizations that are not managed by the practice. Ask them to click the Adviser link in the Home tab and follow the instructions.

<input type="checkbox"/>	Name ▾	Last viewed	Access	Subscription
<input type="checkbox"/>	☆ Mia's Boutique	04 May 6:01 a.m. By Emily Matthews	Adviser	Jane Wilson Standard

Delete staff from your practice

Delete staff accounts when employees resign and no longer work for you.

[Remove a staff member from your practice](#) (Help Center)



Managing staff and clients in My Xero - my notes

Module 1: Introduction

Learn about updating staff and clients when changes occur in your Xero practice.

Module 2: Changing client subscriptions

Learn about upgrading and transferring client subscriptions when they change.

Upgrade a client subscription

Transfer a subscription

Module 3: Editing and deleting staff accounts

Learn about removing staff access and deleting staff accounts, when staff members leave your practice.

Remove staff access

Remove your own access to an organization

Delete staff from your practice



Managing staff and clients in My Xero - expert tips

Module 2: Changing client subscriptions

Tip 1: Billing

You can bill a certain client separately from others, and you can move organizations into a different billing account group. To do this, you need to be a Principal or a practice staff member with billing account access. If you're creating a new billing account, the Principal should create it, to ensure the account is a part of the practice.

Tip 2: Transfer subscriber role

A client can transfer the subscriber role from a trial organization or from a paid organization (as long as the subscription payments are up-to-date) to your practice. That way you don't have to create a brand new organization for the client.

Module 3: Editing and deleting staff accounts

Tip 1: Delete accounts

When removing staff from your practice, make sure you remove their access to client organizations before you delete their user account. Always check with the staff member, if they have access to client organizations that they were invited into by the client. The staff member must remove themselves from those organizations before you delete their account.

Tip 2: Remove access

When staff go on extended leave, you can remove access to client organizations, without deleting their account. Make sure you assign those clients to another user in the interim.