

Onboarding Clients the Xavier Way

Xavier is a great tool to price your proposals effectively, and then understand your clients' Xero, enabling you to have a smooth onboarding process with your clients.

1. INFORMED PRICING

- The 'Activity Stats' Insight will show you the key transactional figures for a prospective clients Xero. During the discovery call get access to Xero and load them into Xavier so you can price the new client fairly.
- Have you ever taken on a new Xero client and spent weeks resolving historic data? Using the 'Health Score' in Xavier you will instantly get a feel for the quality of the Xero data. You can then price accordingly if needed.

2. SETTING UP THEIR XERO AND YOUR RELATIONSHIP

Everyone wants to kick-start a new clients experience well. Try doing the following in your initial client kick-off workshop:

- 'Dormant Accounts' Feature - Clean-up their chart of accounts using the Dormant Accounts feature, quickly identify accounting codes that are no longer in use and archive them in Xero.
- Coding the transactions to the right place:
 - Step 1 - Expenses by Month and Contact - Reports' - Using this report to understand where expenses have been coded in the last 12 months.
Tip - You can change this report to group by either Contact or Account Code
 - Step 2 - 'Contact Defaults' - set default account codes for the contacts so you know where to code them.

3. CLEANING UP THEIR DATA

- 'Unreconciled Transactions' Cleanup Tool - Look at the unreconciled bank transactions across all bank accounts.
- 'Multi-coded contacts' - Cleanse the old data as necessary.
- Lock Dates - Once the data is clean, set the lock dates in Xero. Track this going forward using the Lock Dates feature within Xavier.

4. UNDERSTANDING THEIR FINANCES

- Use the 'Regular Suppliers' insight to both understand who their regular suppliers are and spot any anomalies in the data.
- Conduct an analytical review using Xavier's Reports, or build your own in the Sandbox.
- Xero - Review P&L, and Balance Sheet.

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