



Log in and get lodging quickly

1

Agent details

Set up your [agent details, cloud authentication and authorisation, and ELS profile](#). Don't worry, adding your agent details won't impact any of your other lodgement methods.

2

Add staff

[Add your staff](#) and make sure all your staff are invited in with the correct credentials.

3

Add your clients

You have a couple of options when getting your client data into Xero Tax.

Option 1: [Set your clients up individually](#) if you want a fresh slate or don't have many clients to enter.

Option 2: [Bulk import your client data](#) – If you're starting fresh or have small amounts of data to convert. You can easily import your client list from the ATO's online service for tax and BAS agents, Reckon Elite, Tax Assist, or via this [CSV template](#).

Option 3: [Use our professional services team](#) if you have data to convert from a server-based tax or practice management solution. Our consulting team provides specialist support for converting client details, relationships, groups, and contacts to Xero Tax. The service provides data extraction, cleansing, formatting of data, and a specialist importing tool.

If you're switching from another software package, speak to your account manager about how we can streamline your import.

4

Get lodging

If you're trialling Xero Tax, to start lodging, you'll need to move Xero Tax out of trial which can easily be done in a couple of steps.

If you're a bronze partner or above:

For bronze partners and above, Xero Tax is free. Here's what to do:

1. Contact the customer support team to request your Xero Tax plan be changed from trial to free. Click **?** and select **Contact Support** in the top right corner. You'll need to wait for confirmation that Xero Tax has been moved to the free plan.
2. Select the **Sign Up** button at the top of the screen and enter your credit card details. You won't be charged anything.

If you're not yet a bronze partner:

1. Click the **Sign Up** button at the top of the screen.
2. Select your plan.
3. Enter your credit card details.



Lodge your first return

Lodging your first return couldn't be easier. Check out the support article on the [return workflow and lodging a return](#) or, alternatively, [join one of our live webinars](#) that step you through the process.

Then get things running smoothly

Streamline billing

[Connect Xero Tax to your free Xero subscription](#) to invoice clients at the end of the job and make billing easier.

Use digital signatures

Set up your practice to have your clients digitally sign their tax returns and activity statements. You'll be able to have your clients sign all documents digitally using [document packs in Xero HQ](#).

Pricing if you're not a bronze partner or above

Certified bronze partner or above? You're eligible for Xero Tax free of charge as a benefit of the partner program. Alternatively, you can use Xero Tax for a monthly subscription. All prices are GST inclusive.

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| \$71.50 AUD per month | \$108.90 AUD per month | \$163.90 AUD per month |
| Access for 1 user | Access for 3 to 9 users | Access for 10 or more users |