INSITES

xero

Xero Integration

Questionnaire

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Thanks for choosing Insites to synchronise data for your business

Completing this document will give us a better understanding of your business and website requirements. Let's get started! Please mark ⊘ or leave a blank for N/A

1. Customer Details

Business Name:	
Contact Name:	
Mobile Phone No:	
Work Phone No:	
Email Address:	
Mailing Address:	
Website URL:	

2. Billing Contact

Same as above

Business Name:	
Contact Name:	
Mobile Phone No:	
Work Phone No:	
Email Address:	
Mailing Address:	
Website URL:	

Administration Use Only

Insites Representative:

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3. Overall Settings

- Email address we should use for system notifications

  _____

- Country code of website *(2 letter country code)*

  _____

- Currency code of website *(3 letter currency code)*

  _____

- Prefix before invoice number *(optional - in accordance with accounting package)*

  _____

- Auto apply Payments?

    Yes

    If No, Status for invoice without payment

        Awaiting Approval

        Awaiting Payment

- Action for handling insufficient stocks?

    Send an email notification to the System Email

    Create a Draft order in Xero

- Business Catalyst Site ID

  _____

4. Chart of Accounts

- Account Name/Number for Product line items

  _____

  _____

- Tax setting for Products

    Tax Type for Domestic Transaction _____

    Tax Type for International Transaction _____

- Account Name/Number for Shipping

  _____

  _____

- Tax Setting for Shipping

  Tax Type for International Transaction _____

- Shipping Item Code

  _____

  _____

- Account Name/Number for Product Discount

  _____

  _____

- Tax Type for Product Discount and Discount Item Code

  _____

  _____

- Account type for payment methods

  BPay: _____

  Cash: _____

  Check: _____

  Credit Card: _____

  Direct Debit: _____

  EFT: _____

  Gift Voucher: _____

  Hosted Credit Card: _____

  PayPal: _____

  Free: _____

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5. Customer Checklist

- Insites to have website edit access

    Please add the user api@insites.io to your Business Catalyst website

- Insites to have access to Accounting Package

    Please add the user api@insites.io to your Xero Account

    Install our X.509 certificate in Accounting Package (if required)

- Accounting Package

    Provide Insites your "consumer_key" (if required)

    Provide Insites your "shared_secret" (if required)

6. Modules

Choose from our 4 modules that will perfectly fit with the needs of your business.

Send Orders & Contacts

Send orders and contacts created in Business Catalyst to Xero **$500 setup + $49 per month** (*mandatory)

Update Order Status

Update order status changes in Xero to Business Catalyst **$250 setup + $9 per month**

Update Inventory

Update inventory changes in Xero to Business Catalyst **$250 setup + $9 per month**

Sync Orders

Push orders created in Xero to Business Catalyst **$250 setup + $9 per month**

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7. Platform Subscription Agreement

I/We request and authorise Insites to arrange, through its own financial institution, a debit to your nominated account any amount Insites, has deemed payable by you. This debit or charge will be made through the Bulk Electronic Clearing System (BECS) from your account held at the financial institution you have nominated below and will be subject to the terms and conditions of the Direct Debit Request Service Agreement.

Bank Account
Australian Customers Only

Financial Institution: _____

Branch: _____

Account Name: _____

BSB: _____

Account Number: _____

Credit Card

Card Type: VISA   MasterCard

Card Issuer: _____

Card Name: _____

Card Number: _____

Card Expiry: _____

CVV: _____

NOTE: Credit Card payments incur a 2 % surcharge

By signing and/or providing us with a valid instruction in respect to your Direct Debit Request, you have understood and agreed to the terms and conditions governing the debit arrangements between you and Insites as set out in this Request and in your Direct Debit Request Service Agreement.

Company Name	_____
Contact Name	_____
Title	_____
Phone Number	_____
Website URL	_____
Service	Xero & Insites Data Synchronisation
Date of First Payment	_____
Frequency	Monthly
Amount	_____

Signature: _____   Date: _____

Signature: _____   Date: _____

If debiting from a joint bank account, both signatures are required.

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8. Direct Debit Service Agreement with Insites *(ABN: 45 153 290 405)*

This document explains what your obligations are when undertaking a Direct Debit arrangement with us. It also details what our obligations are to you as your Direct Debit provider. Please keep this agreement for future reference. It forms part of the terms and conditions of your Direct Debit Request (DDR) and should be read in conjunction with your DDR authorisation.

Enquiries

You can contact us directly or alternatively contact your financial institution. These should be made at least 7 working days prior to the next scheduled drawing date. You may contact us as follows:

Email: info@Insites.io

Definitions

account means the account held at your financial institution from which we are authorised for funds to be debited.

agreement means this Direct Debit Request Service Agreement between you and us.

banking day means a day other than a Saturday or a Sunday or a public holiday listed throughout Australia.

debit day means the day that payment by you to us is due.

debit payment means a particular transaction where a debit is made.

direct debit request means the Direct Debit Request between us and you.

us or **we** means Insites, you have authorised by requesting a Direct Debit Request.

you means the customer who has signed or authorised by other means the Direct Debit Request.

your financial institution means the financial institution nominated by you on the DDR

Debiting Your Account

By signing a Direct Debit Request or by providing us with a valid instruction, you have authorised us to arrange for funds to be debited from your account. You should refer to the Direct Debit Request and this agreement for the terms of the arrangement between us and you.

We will only arrange for funds to be debited from your account as authorised in the Direct Debit Request.

or

We will only arrange for funds to be debited from your account if we have sent to the address nominated by you in the Direct Debit Request, a billing advice which specifies the amount payable by you to us and when it is due.

If the debit day falls on a day that is not a banking day, we may direct your financial institution to debit your account on the following banking day. If you are unsure about which day your account has or will be debited you should ask your financial institution.

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Amendments By Us

We may vary any details of this agreement or a Direct Debit Request at any time by giving you at least fourteen (14) days written notice.

Amendments By You

You may change, stop or defer a debit payment, or terminate this agreement by providing us with at least 7 days notification by writing to: Insites GPO Box 2507, Melbourne VIC, Australia 3001 or by telephoning us on 1300 660 285 during business hours; or arranging it through your financial institution, which is required to act promptly on your instructions.

Your Obligations

It is your responsibility to ensure that there are sufficient clear funds available in your account to allow a debit payment to be made in accordance with the Direct Debit Request.

If there are insufficient clear funds in your account to meet a debit payment:

- you may be charged a fee and/or interest by your financial institution;
- you may also incur fees or charges imposed or incurred by us; and
- you must arrange for the debit payment to be made by another method or arrange for sufficient clear funds to be in your account by an agreed time so that we can process the debit payment.

You should check your account statement to verify that the amounts debited from your account are correct.

Dispute

If you believe that there has been an error in debiting your account, you should notify us directly on 1300 660 285 and confirm that notice in writing with us as soon as possible so that we can resolve your query more quickly. Alternatively you can take it up directly with your financial institution. If we conclude as a result of our investigations that your account has been incorrectly debited we will respond to your query by arranging for your financial institution to adjust your account (including interest and charges) accordingly. We will also notify you in writing of the amount by which your account has been adjusted. If we conclude as a result of our investigations that your account has not been incorrectly debited we will respond to your query by providing you with reasons and any evidence for this finding in writing.

Accounts

You should check:

- with your financial institution whether direct debiting is available from your account as direct debiting is not available on all accounts offered by financial institutions.

- your account details which you have provided to us are correct by checking them against a recent account statement; and

- with your financial institution before completing the Direct Debit Request if you have any queries about how to complete the Direct Debit Request.

Confidentiality

We will keep any information (including your account details) in your Direct Debit Request confidential. We will make all reasonable efforts to keep any such information that we have about you secure and to ensure that any of our employees or agents who have access to information about you do not make any unauthorised use, modification, reproduction or disclosure of that information.

We will only disclose information that we have about you:

to the extent specifically required by law; or

for the purposes of this agreement (including disclosing information in connection with any query or claim)

9. Approval

To be completed by Customer

Name:

Title:

Signature:

Email:

Date: