



# Your guide to getting started with Moneysoft



## Follow these key steps:

- Step 1 [eBook](#)
- Step 2 [Watch the short solution Demo video](#)
- Step 3 [Register for a free introductory webinar](#)
- Step 4 [Take up your free business account trial](#)

## Please note:

- Once registered for a trial, Moneysoft provides you with full service and support
- You can contact Support at any time during business hours (AEST) Mon – Fri within your trial period and online via [support@moneysoft.com.au](mailto:support@moneysoft.com.au) outside of these hours
- At the end of the 30-day trial period, you can continue on to a paid plan (see slide 4)
- Once you have a paid account, you can also request a 1-to-1 training webinar via [sales@moneysoft.com.au](mailto:sales@moneysoft.com.au) \*

\*In these sessions, the advanced service capabilities are explained and demonstrated, using one or more of your own client's accounts.

PLEASE MAKE SURE THAT YOU REGISTER VIA THE [DEDICATED AIA REFERRER PAGE](#)



## Key Learning Activities for all AIA Advisers:

- [Cashflow as a Service eBook](#)
  - [Introductory Webinar](#)
  - Business Account Resources:
    - Administrator Video
    - Adviser Video
    - Business Process eBook
    - Security Flyer
- [+ Client Account Onboarding Tutorials](#)

MONEYSOFT PARTNER Advisers Clients Reports Resources Client Notes

PARTNER RESOURCES

Cashflow Service Business Process

Security Flyer

Administrator Video

Adviser Video

# Promotional pricing




Fee Type	Min. Fee	Volumetric Fee Level (Applying to all AEU within the Business Account)		
		Active End User (AEU) Volume	Up to 10	11 - 24
<b>MONEYSOFT STANDARD PRICING</b>				
Access to all Moneysoft Web & Mobile Applications	\$598.50 p/q	\$19.95 p/m	\$15.95 p/m	\$13.95 p/m
<b>AIA AFFILIATE PROMOTIONAL PRICING</b>				
Access to all Moneysoft Web & Mobile Applications	\$478.80 p/q	\$19.95 p/m	\$15.95 p/m	\$13.95 p/m
DISCOUNT TO STANDARD PRICING	20%	-	-	-

- 20% off Standard Pricing for the first 3 months
- Discounted applied automatically on sign-up (via the AIA referral page)

# Business Registration Form



Note: No practice will be billed until a counter-signed Business Account Registration Form has been received by Moneysoft (Moneysoft will send a pre-signed form @ trial end).

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## Moneysoft Business Account Registration Form

Please ensure the details below are complete and correct.

Business Account Administrator Details	
First Name	
Surname	
Email	
Business Account Details	
Business / Entity Name	
ABN / A.C.N	
Business Address <i>(incl State / Postcode)</i>	
Contact Phone Number	
AFSL Name	
AFSL Number	
Invoicing and Payment Details	
Please provide the correct email address for all accounts payable invoice notifications and indicate your preferred payment method below.	
Accounts Payable Email Address:	
Preferred Payment Method:	
<input type="checkbox"/> Credit Card <input type="checkbox"/> Direct Deposit	

**Notes:**

- This document forms an agreement between Business Account Holder and Moneysoft Ltd.
- No payment is due to Moneysoft Ltd until this form is executed The Parties (Page 2).
- The Business Account Administrator is the authorised controller of the Business Account.

**Fees, Billing and Payment:**

The applicable Fee Level is determined according to the Active End User ("AEU") Volume associated with the Business Account (Page 2). Billing occurs in advance on a quarterly flat-fee basis. Invoiced amounts are calculated based on the AEU Volume at the end of the previous billing period. Unlimited End Users may be added to the Business Account at no extra charge during the current billing period. Details regarding payment will be provided with your invoice.

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MONEYSOFT LTD  
ABN 86 152 058 827  
Moneysoft Business Account Registration Form.docx

 **MONEYSOFT**

Licensing Plan <i>(Moneysoft use only)</i>	Standard	Wholesale	Group
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**Moneysoft Standard Pricing Schedule** Group Licensing Plan will be selected

Fee Type	Minimum Quarterly Fee	Fee Level <i>(Applying to all AEU in the Business Account)</i>		
Active End User (AEU) Volume	Up to 10	11 - 24	25 - 49	50+
Moneysoft Web & Mobile Applications	\$598.50 p/q	\$19.95 p/m	\$15.95 p/m	\$13.95 p/m

**DEFINITIONS:**

- A User is defined as a user account registered within the Moneysoft system.
- An Active End User ("AEU") is defined as a User that has activated their user account for the purposes of viewing account balance data, account transaction data, or both, via the Moneysoft Web or Mobile applications.
- "p/q" means per calendar quarter; "p/m" means per calendar month.

**TERMS:**

- All figures are quoted in Australian Dollars and are exclusive of GST and any other applicable taxes.
- All figures are inclusive of Level 1, 2 & 3 Support Services provided by Moneysoft Ltd.
- Figures are based on a minimum contractual term of 3 months.
- Volumetric Fee Level is determined using AEU associated with this Business Account only.
- Invoiced amounts are due within 14 days.

<b>Wholesale/Group Pricing Terms</b> <i>(Moneysoft use only)</i>	Group Pricing Plan terms will be pre-filled here
Price Per AEU:	
Minimum Users Billed:	
Minimum Contract Term:	

**Effective Date:** \_\_\_\_\_

The Parties hereto each acting with proper authority have executed this contract, under seal.

Business Account Licensee	Moneysoft Limited
_____ <i>Full name</i>	_____ <i>Full name</i>
_____ <i>Signature</i>	_____ <i>Signature</i>
_____ <i>Date</i>	_____ <i>Date</i>

**CONDITIONS:**

- Any and all usage of the Moneysoft application is subject to the [Terms of Service](#).
- In order to cancel your Moneysoft Business Account subscription, you are required to provide Moneysoft with at least 7 days notice.
- Moneysoft Business Account pricing is subject to change at the discretion of Moneysoft – Moneysoft will provide at least 30 days notice of any pricing increase.

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# Contact



Sales: [sales@moneysoft.com.au](mailto:sales@moneysoft.com.au)

Support: [support@moneysoft.com.au](mailto:support@moneysoft.com.au)

Telephone: **1300 850 878**

Visit us at: [www.moneysoft.com.au](http://www.moneysoft.com.au)