



feesynergy
collect

FEESYNERGY COLLECT

Integration to Xero

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Introduction

FeeSynergy Collect (Collect) is a debtor management platform used by Accounting and Legal firms to manage the full debtor lifecycle and improve cashflow. The platform is made up of:

- the Collect engine including automated email reminders and task driven workflow
- a payment gateway fully embedded in the firm's own website
- paperless fee funding capability
- engagement letter process
- direct debit management

To facilitate the automated email reminders and task workflow, Collect is integrated with a firm's Xero account with a one-way flow of data. Implementation of the full suite of FeeSynergy products is handled by the FeeSynergy Implementation team, and this includes establishing the connection to Xero.

The FeeSynergy team works with the firm to complete the process.

Data Flow Diagram

Data flows from Xero to Collect as shown below. Xero always remains the 'source of truth' for debtor and invoice details.

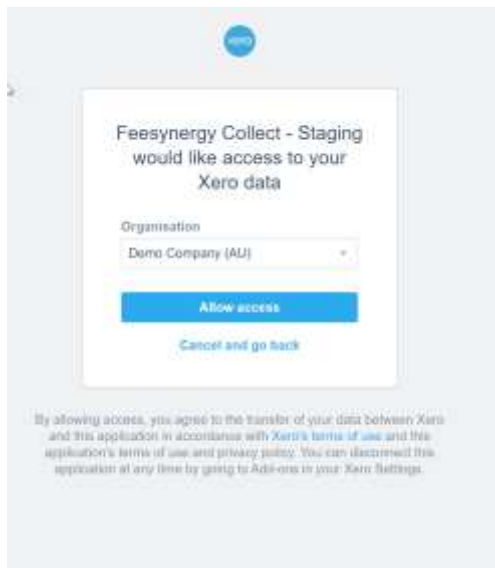


Getting Started

The connection between your Xero system and FeeSynergy Collect will be managed by the FeeSynergy implementation team as part of the onboarding process.

FeeSynergy will create a Collect account and manage the configuration and settings. The implementation team will contact you to arrange a suitable time to connect the account to Xero.

During this session, usually conducted via TeamViewer or another remote session application, the FeeSynergy team will walk you through the process. At the appropriate step in the process, you will be asked to log into Xero and Allow Access to Collect when presented with this screen:

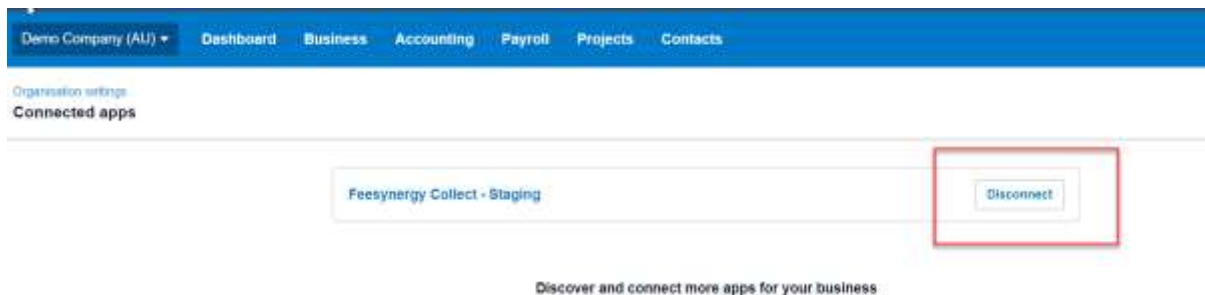


The implementation team will manage the rest!

FAQ

How do I disconnect Collect from Xero?

You can disconnect Collect from Xero by navigating to the Settings section of Xero and selecting Connected Apps.



Collect can be disconnected using the Disconnect button.

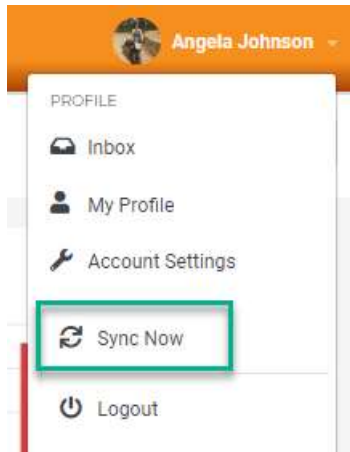
Caution: Disconnecting Collect from Xero will stop the synchronisation of data between the systems. Unless you have made prior arrangements with FeeSynergy, Collect will continue to generate automated email reminders to your clients based on out-of-date information. To cancel the FeeSynergy Collect subscription, you must contact FeeSynergy.

What doesn't your integration do?

FeeSynergy Collect does not write any transactions or other data back into Xero. The interface is one directional.

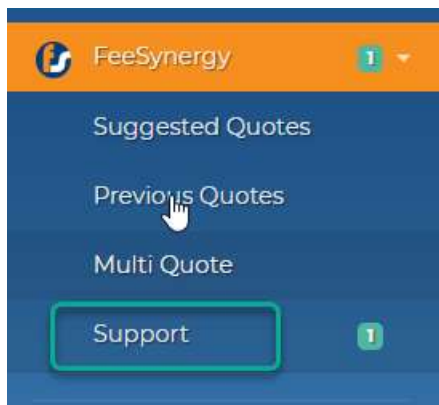
When and how does data sync occur?

Data synchronises automatically between Xero and Collect hourly between 6am and 6pm daily. These syncs are automatic and don't require any effort on your part. You are also able to manually sync the data by selecting the Sync Now option from the drop-down menu under your username.



Inline Help

Collect use guides, release notes and knowledge base are accessed directly from the Collect application. Select the FeeSynergy option from the main menu to access the support area.



Full training in all FeeSynergy products is provided as part of the onboarding process, including access to our online training material. Users can access support by:

- Phone: 03 9832 1300
- Chat or
- Email – collect@feesynergy.com.au