

# TRUSTED

## Advisor Program

Join other Malaysia accountants and bookkeepers using Financio in their practice.

Get the tools and resources you need to succeed.



### What you will find in this kit

- 1 Introduction
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  - Why Financio?
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*“Upskill and stay current using free Financio online learning resources and webinars!”*



# Financio Advisor Kit

## Introduction

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### Welcome to Financio

Asian Business Software Solutions (ABSS) is the leading SME business solutions provider across Asia. Formed in 2009 by a management buy-out of the MYOB Asia, ABSS has grown strongly since then to provide increased freedom and efficiency for Asia's small business owners.

With offices based in Singapore and Malaysia, ABSS is currently serving a community of more than 400,000 companies across Asia.

ABSS launched Financio to sit alongside on-premise traditional accounting software, offering customers a choice. With a low cost of entry, Financio is perfect for new start-ups, right up to multi-million dollar businesses.

Who can be a Financio Advisor?

You are:

- Well versed in accounting and SME business operation.
- A digital advocate, leveraging technology to aid SMEs growth.
- Passionate in adding value for local start-ups, micro and SMEs.

Benefits include:

- Priority support, an insider view into Financio development.
- The opportunity to connect and generate new business within our users' community.
- Product margin – recurring
- Ability to connect, share and manage your clients' accounting processes
- Get free software to use in your practice, including exclusive tools only available to Financio advisors.

We hope that you will take full advantage of the resources provided by becoming a Financio advisor. Should you have any questions, please do not hesitate to contact your partner manager.

We look forward to accelerated growth and success for our users, your business and Financio.

Warm Regards,



**Rhys Brown**  
Chief Executive Officer



### Why become a Financio partner:

At Financio, we are dedicated to helping our partners be successful in managing existing customers and winning new business.

Working more effectively allows you to lower your prices, attract new clients who are still working the old, time-consuming way, or to claim back some hours in your day.

#### **Less to Stress – We do the work so you can work on your business**

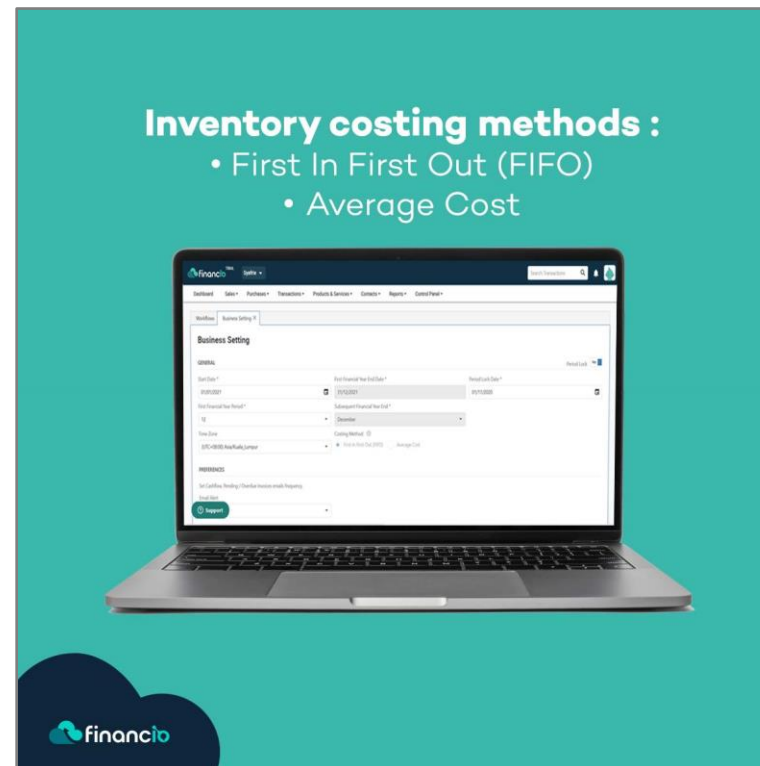
- We love to work with you, as a team.
- Create value with your expertise, focus on what you do best and leave product support to us. With our in-app chat support, our product specialist is just one click away.

#### **The Price is Right – less than a family-sized pizza!**

- Financio has the most competitive pricing structure in Asia
- We understand that it is important to make every dollar count.
- Financio is priced for any business to consume, so your customers can do more spending less

#### **Local Matters - We've got you covered.**

- Country-specific features, dashboard in English, Chinese & Bahasa
- Local compliance and features are incredibly important for SME to thrive and be successful



*“Stay ahead of the local trends & local tax compliance requirements with Financio”*

# Financio Advisor Kit

## Introduction

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### Why partner with Financio?



#### Partner Referral Fees

Attractive referral fees on all Financio subscription via your unique referral link.



#### Enriched Ways to Excel

Learn and excel at Financio Academy with videos, webinars, training and partner on-boarding guides.



#### Complimentary Financio Premier

Receive a complimentary Financio Premier account to help your practice keep up to date with local trends and compliance we have built into the Financio solution.



#### Partner & Advisor Directory Listing

Be listed in our Partner & Advisor directory and have your practice visible to thousands of potential new clients.



#### Advisor Dashboard

Easily manage and retrieve time-sensitive details of your clients' accounts via the Advisor Dashboard.



#### Sales & Technical Support

Receive direct support from Financio and your dedicated Account Manager. In addition, phone support is available for Financio Certified Partners and Approved Advisors.



#### Approved Certified Partner Logo's & Certificates

Differentiate your skills above the rest and help your clients succeed when you get yourself certified as a Financio approved partner.



#### Marketing Materials

Financio collaterals, branded apparel & giveaways, specific marketing campaigns and other digital marketing toolkits to help in the marketing of Financio to your clients.



#### Lead Generation Activities

Be invited to co-branded marketing activities generating awareness and quality leads for your practice (strictly for top partners only).



#### Partner News & Exclusive Event Invitation

Receive insiders' access to upcoming news, updates on Financio products and campaigns. Exclusive invitations extended for pre-release software testing - strictly for top partners only.

# Financio Advisor Kit

## Introduction

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### Our Strategic & Integrated Partners *Together we achieve more.*



RHB

Connect your RHB bank accounts securely with Financio. Get real-time reports, automated bookkeeping, invoicing-purchasing, management of cash flow, and tax reports.



Unifi Business

Financio & Telekom Malaysia (TM) partner up to offer Unifi Business customers a suite of solutions that help boost business' productivity and ease up operations.



iKEY Edutech

Digitalize your education centre operation and automate your accounting and taxation tasks with iKEY Edutech and Financio.



JomPAY

With JomPay and Financio, you can get paid faster, with approximately 40 banks across Malaysia. Your customers can now pay you via Internet & Mobile Banking or ATMs nationwide.



Kakitangan

Kakitangan.com an online platform for SMEs, simplifying HR by providing you with one platform to manage your payroll, benefits, employee information and much more.



Lazada

Seamlessly synchronize pricing & inventory of your Lazada E-commerce business with Financio. Say goodbye to manual stock updates as sales come in



StoreHub

Automatically synchronizes your sales and inventory data from StoreHub to Financio. Save time by eliminating manual bookkeeping – all-in-one place.



Stripe

Connect Financio with Stripe to allow your customers to make payments using their preferred credit or debit card. Payments and fees are automatically synced to the correct invoices and accounts so the transaction is reconciled easily and accurately.



mooPayroll

Connect your Financio account with mooPayroll. Each time you run a payroll, a journal entry will be created and automatically sync to your Financio.



Tembo Pay

Malaysia cloud payroll and HR software for small business. Simplify how you perform everyday payroll and human resources tasks with Tembo Pay. Let your payroll data auto-sync with Financio.



*"By teaming up with industry partners, we believe that the sum of our efforts will deliver solutions that will better serve the Asian SME needs"*

## Partner Benefits

Qualification Criteria	Reseller	Advisor Bronze	Advisor Silver	Advisor Gold
Number of Active Subscriptions	1 - 50	1 - 50	51 - 100	> 101
	General	Bookkeepers & Accountants		
Commercial				
Partner Margin / Commissions	20 - 35%	20 - 35%	20 - 35%	Please ask
Onboarding Specialists to Assist in Client Conversions and Technical Queries	●	●	●	●
Free Financio Premier Subscription (Not for Resale)		●	●	●
Advisor Dashboard (Account Management )		●	●	●
Invitation to Monthly Product Release Updates			●	●
			●	●
Marketing				
Advisor Portal - Marketing Materials	●	●	●	●
Usage of Advisor Logos		●	●	●
Financio Partner Directory Listing		●	●	●
Demand Generation Workshops & Webinars		●	●	●
Use of ABSS Training Facilities for Your Customer Events			●	●
Marketing Development Fund Support (T&Cs apply)			●	●
Support				
Financio Academy - Knowledge Base, Trainings & Webinars	●	●	●	●
In-App Priority Support (live chat) or phone support	●	●	●	●



**“Get additional benefits as you move up the partner status levels from bronze to gold”**

## Partner Enablement Journey



### **PARTNER ENABLEMENT JOURNEY**

Our Enablement journey is designed to get you ready and knowledgeable about our products and services. This includes:

- Introductory Training
- Sales and sign-up process
- FAQ handling
- Marketing
- Monthly Product Updates
- Support Access
- Billing

### Partner Enablement Resource Guide

Action Required	Notes / Resources (HTML Links)
<b>Partner Onboarding (2 weeks journey)</b> <ul style="list-style-type: none"><li>• Complete and submit the Partnership Interest Form (via Financio website)</li><li>• Partner Agreement &amp; Advisor account creation</li><li>• Sign up for a Financio Account with "Point of Contact" email ID per partner application form</li><li>• Partner profile updated on Financio Partner Directory</li><li>• Partner to verify details listed on Financio Partner Directory is up-to-date</li><li>• Partner Welcome Kit is on its way!</li></ul>	<a href="#">Partnership Application Form</a>
<b>Goal Alignment</b> <ul style="list-style-type: none"><li>• Review of Partner Benefits Table</li><li>• Set Progressive Milestone on Attainment</li></ul>	
<b>Product / Support Education</b> <ul style="list-style-type: none"><li>• Assign at least 1 staff as Financio Product Specialist</li><li>• Self train and upskill via Financio Academy<ul style="list-style-type: none"><li>➢ Tutorial Articles &amp; Videos</li><li>➢ Register and attend Live Webinars</li></ul></li><li>• Bookmark Financio Knowledge Base</li><li>• Financio Advisor Portal</li></ul>	<a href="#">Financio Trainings &amp; Webinars</a> <a href="#">Financio Knowledge Base</a> <a href="#">Financio Advisor Portal</a>
<b>Demand Generation</b> <ul style="list-style-type: none"><li>• Partner webpage to be updated with Financio partner logo, Financio product blurb, redirect link to Financio webpage</li><li>• Offer Financio Services Package/ Bundle</li><li>• Financio New Setup/ Migrate/ Training Services</li><li>• Partner product/ service offer bundled with Financio</li><li>• Plan and schedule acquisition campaign</li></ul>	
<b>Review / Feedback</b> <ul style="list-style-type: none"><li>• Quarterly progression review and feedback with your partner manager</li></ul>	

## Financio Advisor Kit

### Getting Started

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#### Logo and Brand Guidelines

The Financio Advisor brand mark is comprised of inseparable elements.



## Financio Advisor Kit

### Getting Started

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#### Primary Brand Mark Positive

The primary positive brand mark is the preferred logo and should only be used on a white background.



#### Primary Brand Mark Reverse

The primary reverse brand mark should only be used on a dark background.



#### Monotone Black Positive

When multiple colour printing is not an option and the brand mark is to appear on a white background please use a solid black brand mark.



#### Monotone Black Reverse

When colour is not an option and the brand mark is to appear on a black background please use the solid white brand mark.

# Financio Advisor Kit

## Getting Started

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### Brand Mark

#### Misuse

As a key asset of the brand, it is important that the appearance of the brand mark remains consistent. The brand mark should not be misinterpreted, altered or added to in anyway.

These rules apply to all the variants of the Financio, Colour Restrictions, and Company brandmarks.



**DO NOT** distort the brand mark.



**DO NOT** outline the brand mark.



**DO NOT** rearrange the brand elements.



**DO NOT** rotate the brand mark.



**DO NOT** place the Primary Positive brand mark on a dark background.



**DO NOT** place the Primary Positive brand mark on photography.

# Financio Advisor Kit

## Getting Started

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### Primary Brand Mark

#### Clear Space

To ensure consistency of logo treatment and use, it is very important to follow the clear space rules.

The Financio brand mark must always feature a minimum amount of clear space as indicated by the height of the 'a graphic' in the brand mark. No other logos, copy or images are to encroach on this space.

These rules apply to all the variants of the Financio brand marks.

### Primary Brand Mark

#### Minimum Size



The minimum size for the Financio brand mark is 8mm high. These rules apply to all the variants of the Financio brand mark.

# Financio Advisor Kit

## Partner Agreement

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### 1. Duration

Upon acceptance to the partner program, this partnership agreement is effective immediately for a period of twelve (12) months.

Either party may terminate this agreement for any reason by providing thirty (30) Business Days' notice to the other party.

Each party may terminate this agreement with immediate effect by delivering notice of the termination to the other party, if the other party fails to perform, has made or makes any inaccuracy in, or otherwise materially breaches, any of its obligations, covenants, or representations, and the failure, inaccuracy.

### 2. Confidentiality

Both parties agree that they shall respect and uphold the confidentiality requirements of the other party and shall take reasonable steps to ensure that neither party's confidential property is shared with additional parties.

### 3. Data Protection

Each of the Parties agree to ensure that they will obtain any consent, pursuant to the Personal Data Protection Act (No. 26 of 2012), as is necessary to further the provision of the Referral Services by the Referrer, from any relevant individuals as required and is subjected to terms as stated within Financio Privacy Policy.  
<https://financio.co/malaysia/privacy-policy>

### 4. Marketing Activities

#### a. Marketing Collaterals

Both parties to be granted a no-cost, limited, non-exclusive, non-transferable, revocable rights to use the other party logo for the sole purpose of generating co-branded, mutually acceptable content. All rights reserved by both parties in such logo and related materials.

#### b. Marketing Data

Both parties agree to freely share any marketing data generated through any joint marketing effort, including (but not limited to) leads generated and campaign performance metrics.

### 5. Responsibilities of Financio Advisor

- Actively promote and drive adoption of Financio
- Acquire at least one (1) active subscription within 90 days upon acceptance of the partner program
- Update Financio Advisor logo on your website no later than 90 days upon acceptance of the partner program, adhering to the logo and branding guideline

# Financio Advisor Kit

## Partner Agreement

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### 6. Commercial Consideration

Partner Entitlement to be applied and tracked with the input of promo code;  
Retail Pricing below: <https://financio.co/malaysia/pricing>

Financio Essentials:

Billing Cycle	Retail Price	Entitlement (Margin applied)
Annual	RM 495	Depending on partner tier

Financio Premier:

Billing Cycle	Retail Price	Entitlement (Margin applied)
Annual	RM 825	Depending on partner tier

*\*Partner margin calculated and paid to Partner on quarterly basis.*

### 7. Entire Agreement

This Agreement embodies all the terms and conditions agreed upon between the Parties as to the subject matter of this Agreement and supersedes and cancels in all respects all previous agreements and undertakings, if any, between the Parties with respect to the subject matter of this Agreement, whether such be written or oral.

### 8. Governing Law and Jurisdiction

This Agreement shall be construed and be governed by the laws of Malaysia and the Parties hereby irrevocably submit to the exclusive jurisdiction of the Malaysia courts.

### 9. Rights of Third Parties

Nothing in this Agreement is intended to grant to any third party any right to enforce any term of this Agreement or to confer on any third party any benefits under this Agreement for the purposes of the Contracts (Rights of Third Parties) Act (Cap. 53B) (as may be amended from time to time), the application of which legislation is hereby expressly excluded.

### 10. Dispute Resolution

Any dispute arising out of or in connection with this Agreement, including any question regarding its existence, validity or termination, shall be governed by and construed in accordance with laws of Malaysia. The Parties agree to submit to the non-exclusive jurisdiction of the courts in Malaysia.

### 11. Miscellaneous

Nothing in this Agreement shall constitute a partnership or establish a relationship of principal and agent or employer and employee or any other relationship of a similar nature between the Parties.

The covenants, conditions and provisions of this Agreement which are capable of having effect after the expiration of this Agreement shall remain in full force and effect following the termination of this Agreement.

### 12. Financio Term of Use

This partnership agreement is to be read and accepted in conjunction with Financio End User License Agreement.

<https://financio.co/malaysia/terms-of-service>

## Financio Advisor Kit

### Common FAQs - Partners

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Q: Why are my users receiving communication from Financio?

A: All subscriptions that are directly owned by business owners will receive communication intended for end users. For subscription owned by partners, updates on Financio will be communicated via monthly partner newsletter.

Q: I have paid for Premier Subscription, why is the information reflected as a trial within the subscription center?

A: Your premier subscription will start once the trial period ends.

Q: Is Financio secure?

A: We've partnered with Microsoft Azure to provide users with deploy banking level security on our servers and for data transferred between your machine and our servers. Your data is safe with us.

*On subscription billing – Paid by Partner*

Q1: Will my credit card information be compromised?

We do not store any credit card information on our end.

Q2: How to ensure that there is no recurring payment if my service is terminated by the user?

Any changes to the subscription-only take effect in the next payment cycle. The account owner can immediately hit the unsubscribe after subscribing to avoid recurring charges.

Q: Can I pay for this subscription on behalf of my customer?

A: Yes you can, if you would like auto billing for all of your accounts please select the direct billing box on the application page. This will mean every customer tagged to your account will be charged directly to your payment method. Please speak to your account manager for details & set-up.



## Financio Advisor Kit

### Common FAQ

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*On subscription billing – Paid by Client*

Q: How do I receive the margin for the subscription referred?

A: This is all automated via your promo/advisor code/link

Q: If I wish to deactivate my subscription, what will happen to my data?

A: When you choose to deactivate your subscription, your service will revert to read only. Your data will be stored on our server for a period of 30 days. Data is available for download for your convenience during this time.

Q: I would like to request a feature and contribute to the future development of Financio, where/how can I provide my feedback?

A. Our users and partners guide the development of Financio. We welcome all suggestions at [our community](#). Alternatively, you may email to [product.feedback@abssasia.com](mailto:product.feedback@abssasia.com)

Q: I need help on Financio Features

A: Within Financio, click on the bottom left chat icon for more information to support services available.

