

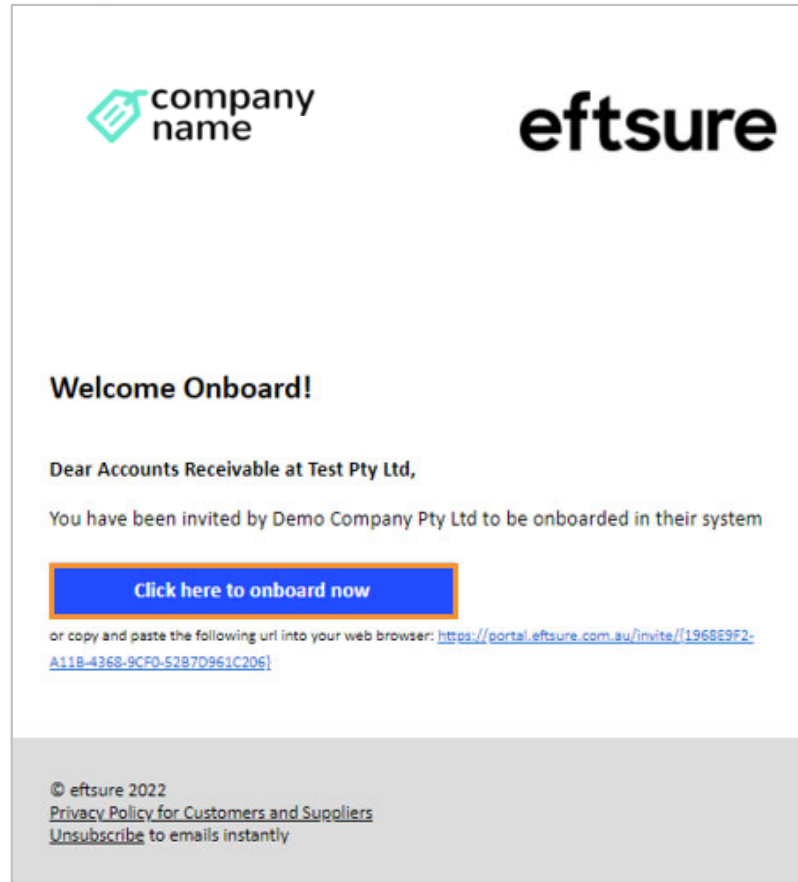
Onboarding Invite

Last Updated 202207

eftsure

Supplier Onboarding Invitation

Step 1: Open the Onboarding Invitation email and click on **Click here to onboard now** to start the process.



Supplier Onboarding Form - Registration

Step 2: Tick if you do not have an ABN

Step 3: Input your ABN, main Trading Name, and your First and Last Name.

Your email address is prepopulated, this will be your username the next time you log in.

Step 4: Create a password ensuring it meets the password requirements and click **Register**



Items with an asterisk () are required fields.*

Dear test test of Test, please create a User Account to register as a supplier to AU.

Country
Australia

I don't have an ABN

ABN
ABN of your company

Main Trading Name*
-- Please enter a valid ABN --

First name*
Accounts

Surname*
Receivable

Email
Testmillin@gmail.com

Not your email address?

Create password
Creating a password will allow you to log back in to review information

Create password

ⓘ Password must be at least 10 characters long, with at least one of the following:

- One lowercase character
- One uppercase character
- One number
- One of these special characters: !@#&*
- 10 characters minimum
- New passwords match

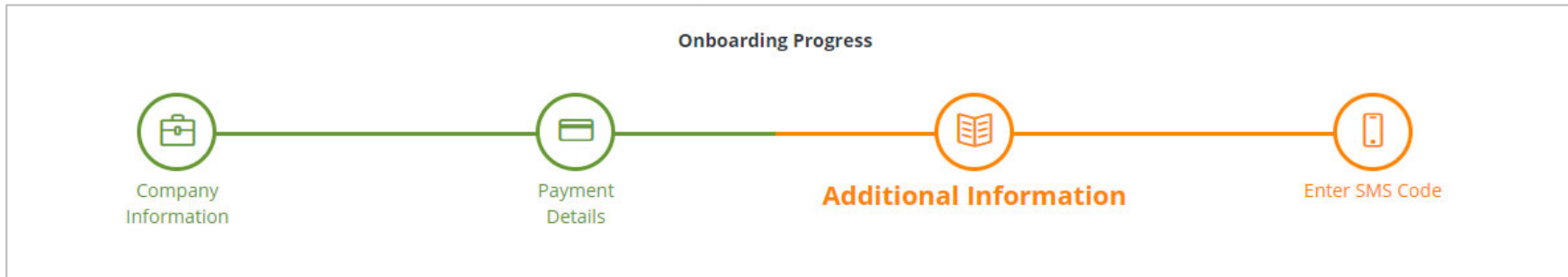
Confirm password
Confirm password

Back Register

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By clicking Register you agree to our [Terms of Service](#) and [Privacy Policy](#).

Supplier Onboarding Form – Onboarding Progress



This indicates your Onboarding progress. You can click on any of the four sections to go back and make changes once that section is completed.

Green – Completed

Orange – In Progress/Incomplete

*Note: The **Enter SMS Code** section will only appear if the Customer has entered a mobile phone number on the invite as this triggers the 2-factor authentication process to help ensure the person who is completing the form is the intended recipient.*

Supplier Onboarding Form – Company Information



Step 7: Complete the **Physical** and **Postal address** sections

Physical Address

Country *
Australia

Physical Address Line 1 *

Physical Address Line 2

City / Suburb *

Post Code *
2030

State *
NSW

Postal Address

Same As Physical Address

Supplier Onboarding Form – Company Information



Step 5: Complete the **Australian Business Registry Information** section

Australian Business Registry Information

ABN *
21168403736 (Active from 25/11/2014)

Entity Name
EFTSURE PTY LTD

Entity Type
Australian Private Company

GST Registration
Registered from 01/02/2015

This Company is a Small Business. *
-- Select --

** Definition of small business - An entity with an annual turnover of less than \$10 million for the most recent income year.

Step 6: Complete the **Trading Name Information** section

Trading Name Information

Main Trading Name *
EFTSURE PTY LTD

Other Trading Names

Supplier Onboarding Form – Company Information



Step 8: Complete the **Other Information** section and click **Continue**

Other Information

Email Address *

Landline Phone Number **

Mobile Phone Number **

ⓘ ** Please enter either Landline Phone Number or Mobile Phone Number. At least one phone number is required.

Fax Number

Website Address

Continue

Supplier Onboarding Form – Payment Details



The following will appear if you have previously verified with Eftsure. If you have, you have the option to select bank account details that you have previously supplied.

Alternatively, you can add a different set of bank account details.

If you select to use previously Verified details, you must verify the bank account by entering the missing account number digits.

Select bank account you previously verified with eftsure ✕

This option will be available if eftsure already has your bank details recorded. Please select this option (if available) if you wish to use the details eftsure has recorded. After selecting this option, you will be shown the BSB and the last 3 digits of the account. You will be required to complete the remaining digits to choose this option.

Existing account

-- Select -- ✕ ▾

OR

I would like to use a different account

Existing account

BSB:082916 ACC: ****741 ✕ ▾

Please enter the missing digits of your account number below.

Verify account number

Supplier Onboarding Form – Payment Details



Step 9: Suppliers who have previously used Eftsure can select a payment type they have previously used.

A screenshot of the "Payment Information" section of the onboarding form. It features a dropdown menu with the text "-- Select a payment type --" and a close button (x). Below the dropdown are two buttons: "Add new payment type" (highlighted with an orange border) and "Remove selected payment type".

New suppliers can click **Add new payment type**

Step 10: Select your preferred method for providing your banking details.

A screenshot of a dialog box titled "Please provide your Australian bank details in one of the following ways". The dialog contains the following text: "Please *either* click the Blue 'Enter my account details manually' button below to enter your bank account details (this option will take longer as it *may* result in eftsure calling you to confirm the details)". Below this text is a blue button labeled "Enter my account details manually" (highlighted with an orange border). The text continues: "*or alternatively*, for a much quicker automatic process (without the need for a call from eftsure), you may select your bank from the dropdown list and follow the prompts to login to your bank through the system." At the bottom of the dialog is a dropdown menu with the text "-- Select your financial institution --" and a close button (x).

Option 1: Enter your account details manually

Option 2: Obtain your details directly from your bank by selecting your financial institution from the dropdown list and log in from there

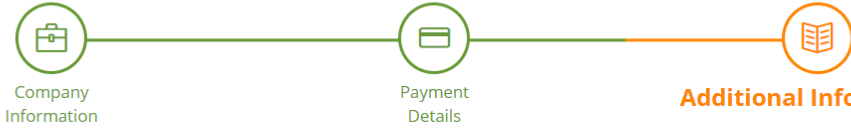
This uses the Equifax technology which banks use for approving loans. Please note that we do not see or store any login details.

Supplier Onboarding Form – Customer Requested Additional Information

Complete the Additional Information section. The Customer may require specific additional information. This could be documentation requirements, agreeing to their Ts & Cs, invoices, etc. Any additional requirements from the Customer will appear in this section.

Onboarding Status: Please complete Support reference: 5020

Onboarding Progress



Attachments

Please attach Certificate of Insurance and enter expiry date below.

[Upload new file](#) [Select previously uploaded file](#)

Company Representative Details

First Name *

Last Name *

Step 11: If the form has a section asking for documentation, click on **Upload new file** to submit requested file.

(If you have submitted this same documentation for other Customers, click on **Select previously uploaded file.**)

Supplier Onboarding Form – Customer Requested Additional Information

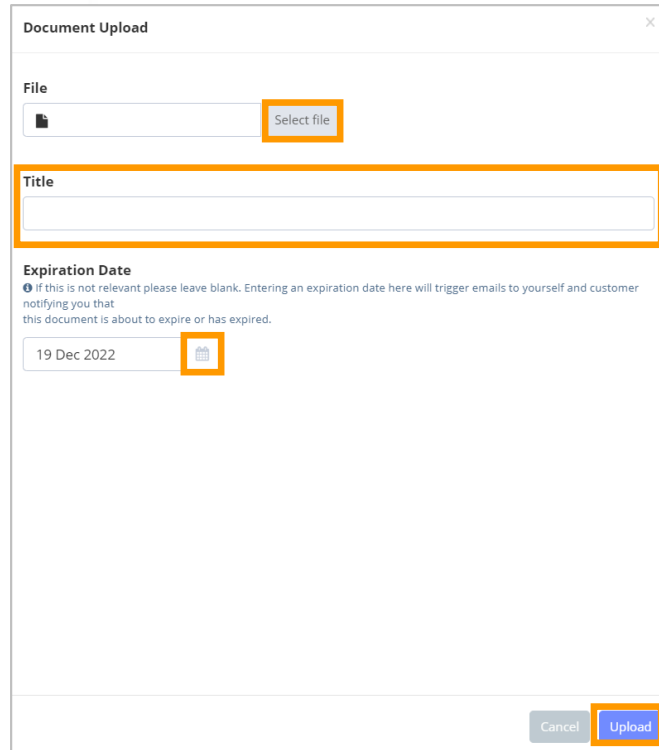
Step 12: The following pop-up will appear. Click **Select File** to attach the requested document from your computer.

Step 13: Add a **Title** for your attached document.

Step 14: Click on the calendar icon to choose the expiry date (must be a date future date).

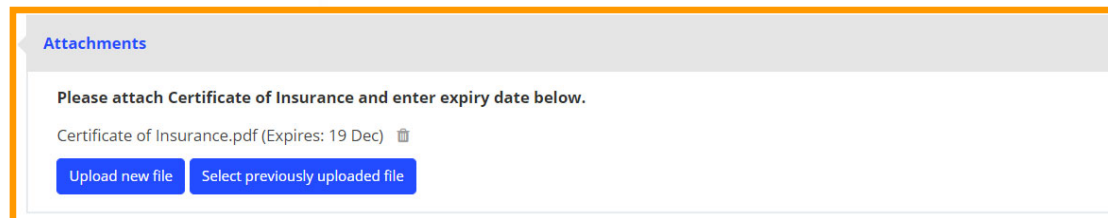
Step 15: Click **Upload**.

The Additional Information section will update with the information regarding the uploaded file.



The screenshot shows a 'Document Upload' dialog box with the following fields and controls:

- File:** A file selection input field with a 'Select file' button highlighted in orange.
- Title:** A text input field for the document title, highlighted in orange.
- Expiration Date:** A date selection field showing '19 Dec 2022' with a calendar icon to its right, highlighted in orange. Below the field is a note: 'If this is not relevant please leave blank. Entering an expiration date here will trigger emails to yourself and customer notifying you that this document is about to expire or has expired.'
- Buttons:** 'Cancel' and 'Upload' buttons at the bottom right, with 'Upload' highlighted in orange.



The screenshot shows the 'Attachments' section of the form, highlighted in orange:

- Attachments:** A section header.
- Instructions:** 'Please attach Certificate of Insurance and enter expiry date below.'
- File List:** A list item 'Certificate of Insurance.pdf (Expires: 19 Dec)' with a trash icon to its right.
- Buttons:** 'Upload new file' and 'Select previously uploaded file' buttons below the file list.

Supplier Onboarding Form – Customer Requested Additional Information

Complete the rest of the Additional Information section.

Step 16: Confirm your Company Representative Details by entering your position and confirming that you are an authorised representative and click **Continue**

Onboarding Status: Please complete Support reference: 5020

Onboarding Progress

Company Information — Payment Details — **Additional Information**

Attachments

Please attach Certificate of Insurance and enter expiry date below.

Certificate of Insurance.pdf (Expires: 19 Dec)

[Upload new file](#) [Select previously uploaded file](#)

Company Representative Details

First Name *

Last Name *

Position *

Please Confirm *

Jane Smith is an authorised representative of EXAMPLE PTY LTD

[Continue](#)

Step 17: The following pop-up will appear. Click **Yes** to finalize the Onboarding Invitation.

Please Confirm ×

Are you sure you want to complete onboarding and notify **Demo Company Pty Ltd**?

Supplier Onboarding Form – SMS Code

Some Customers activate 2-Factor Authentication to ensure the person who is completing the form is the intended recipient

SMS Code

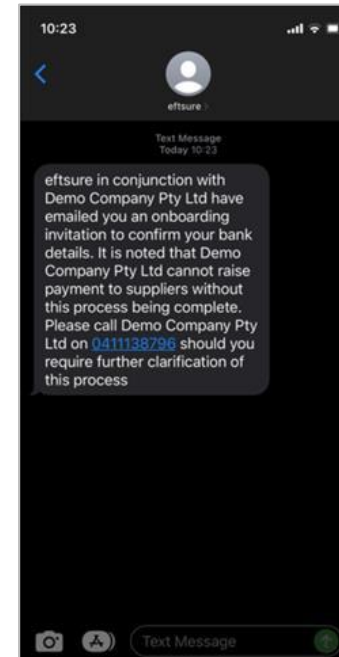
SMS code has been sent to [redacted] on mobile number ending in 928

SMS code

If you don't receive your SMS code within the next 10 minutes please press Resend. If you still do not receive your code please proceed without the SMS code.

Resend (available in 20s) **Verify (available for 9m 50s)**

You will receive an SMS containing a code. Enter the code into the **SMS code** section and press **Verify**

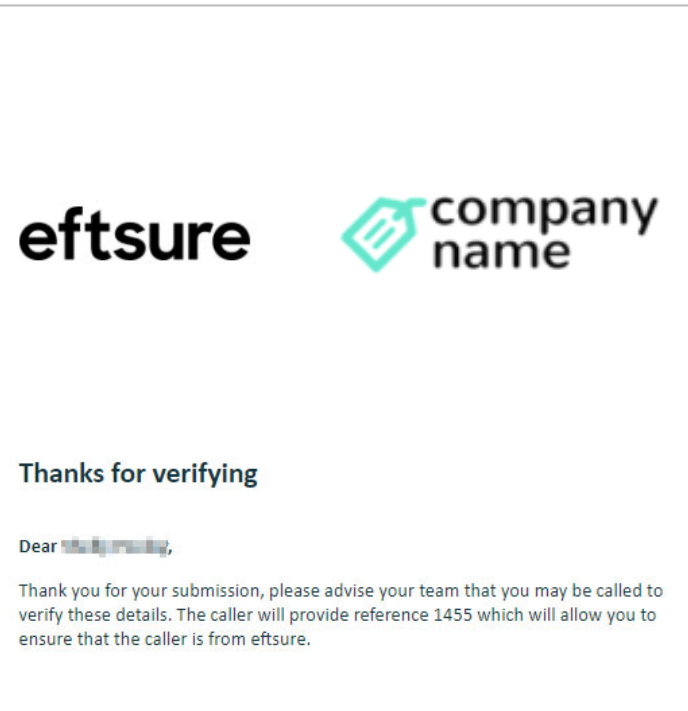


Once finalized, the Onboarding Form will go to our Verifications Team to Verify your details. We may call you if we require any additional information.

Supplier Onboarding Form – Verification

Once finalized, the Onboarding Form will go to our Verifications Team to Verify your details and you will receive the following email.

We may call you to Verify the provided details. If we do, the caller will provide the reference number outlined in the email you receive.



Sydney
Level 6, 122 Walker Street – North Sydney

Melbourne
Level 40, 140 William Street – Melbourne

Perth
197 St Georges Terrace - Perth

Eftsure support | T: 1300 985 976 | E: support@eftsure.com.au

The Eftsure logo is positioned in the upper right corner of the image. It consists of the word "eftsure" in a white, lowercase, sans-serif font. The background behind the logo is a close-up, low-angle shot of a modern glass skyscraper. The glass panels are highly reflective, showing distorted views of the sky and other buildings. The lighting is dramatic, with a strong orange and yellow glow from the bottom left, suggesting a sunrise or sunset, which creates a gradient across the glass facade. The overall aesthetic is professional and modern.