

Company Setup



The eftsure Customer Onboarding process can be completed utilising functionality within the eftsure Portal.

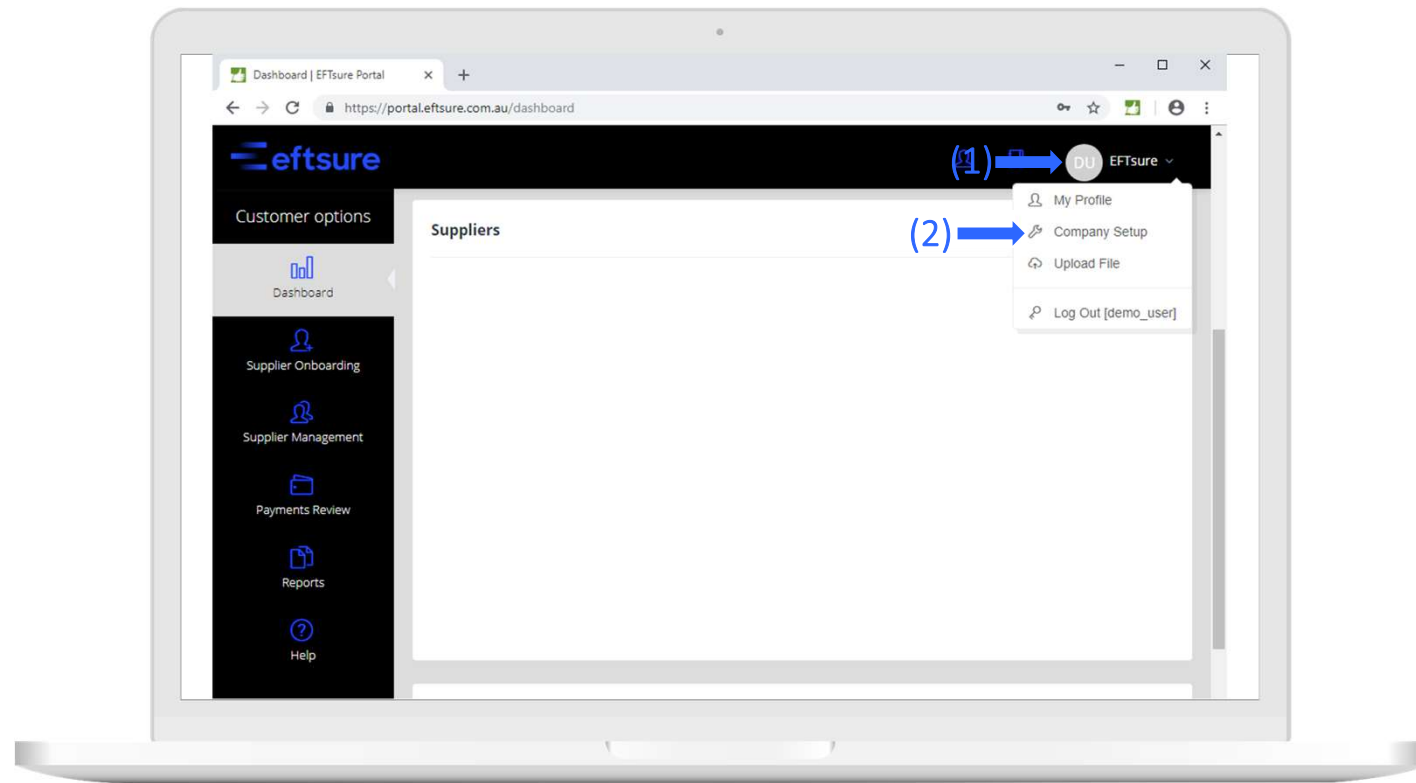


Access to the portal is provided after signing the contract and this allows you to sign-in, fill-out your company information, upload VMF, review/approve email templates, setup the Email Account and setup the Bank Extension Overlay.

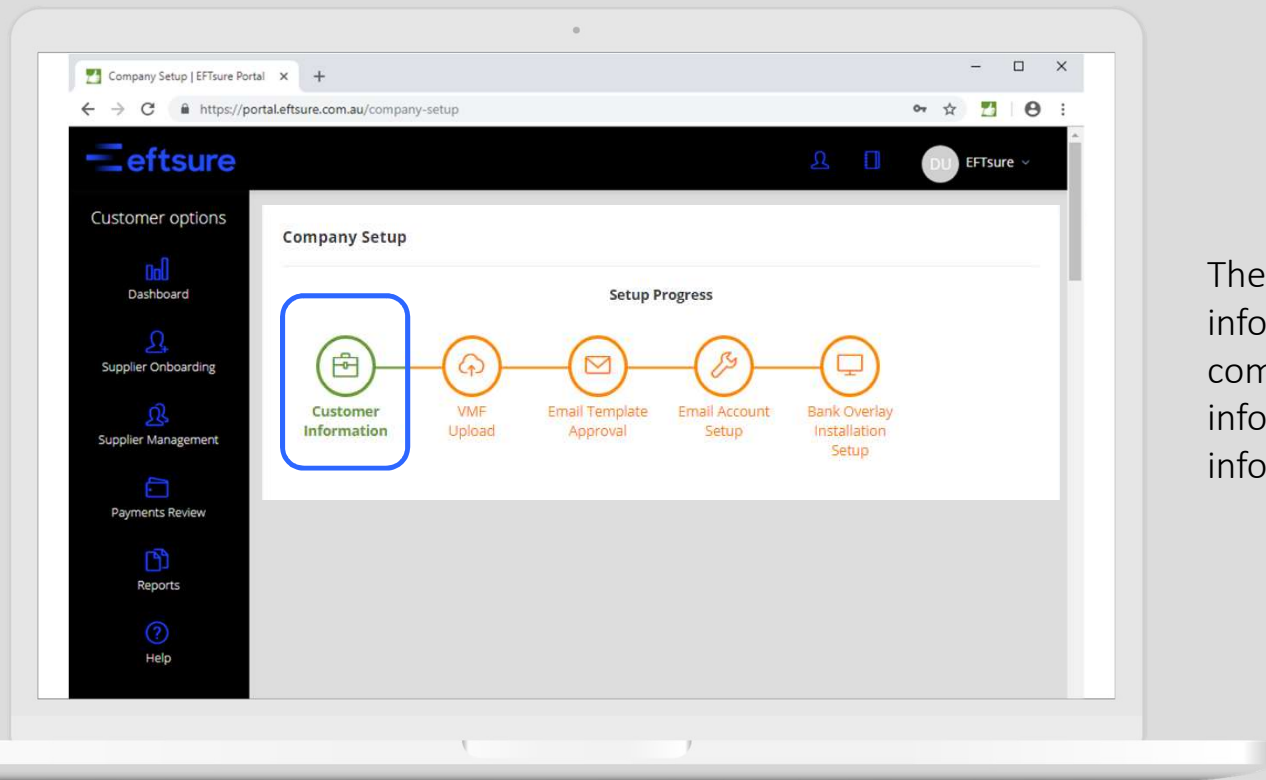
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To start, click on the Company Name found at the upper right corner.

Click on Company Setup.



Company Setup



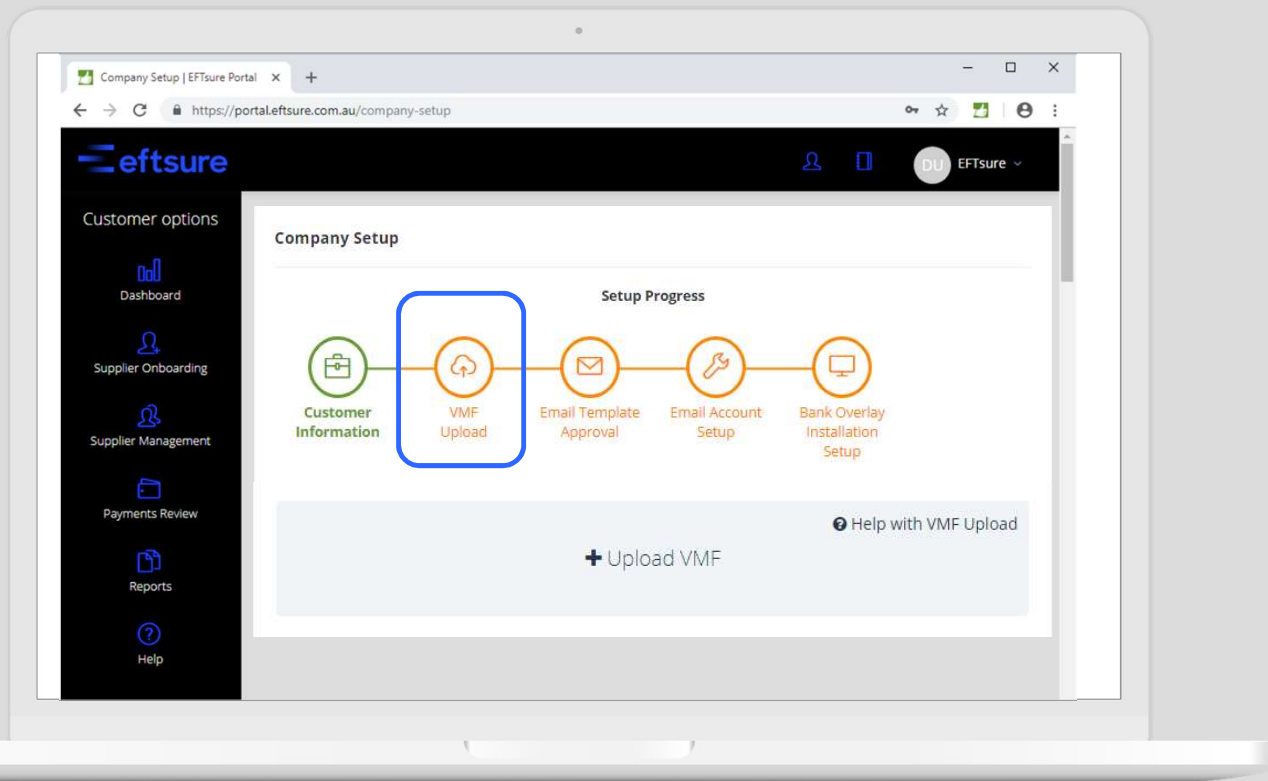
The first step is to fill-out the Customer information. This includes your company details such as ABN information, company address, contact information and etc.

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Customer Information

Australian Business Registry Information	●—●	Your company's ABN details including the Main Trading Name and Organisation Name.
Organisation Address	●—●	Your company's head office location.
Other Organisation Information	●—●	Your company's contact details such as the Main Phone Number, CFO, and contact email address.
Contact Information for Supplier Emails	●—●	Includes your company's primary contact for supplier emails. This appears as the signatory on the introduction and verification emails.
Verification Email Scope	●—●	This options help determine the scope of the mailouts, of which your suppliers are to be excluded/included.
IT Contact Information	●—●	Your company's IT contact person.
Other Company Information	●—●	Includes what Online Banking and Accounting/ERP system is used by your company.

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VMF upload

You can securely upload your Vendor Masterfile/Supplier Listing through the portal, without having to send the file through email.

The file should be uploaded in CSV format. Further information to extract the VMF is found on the 'Help with VMF Upload' link.

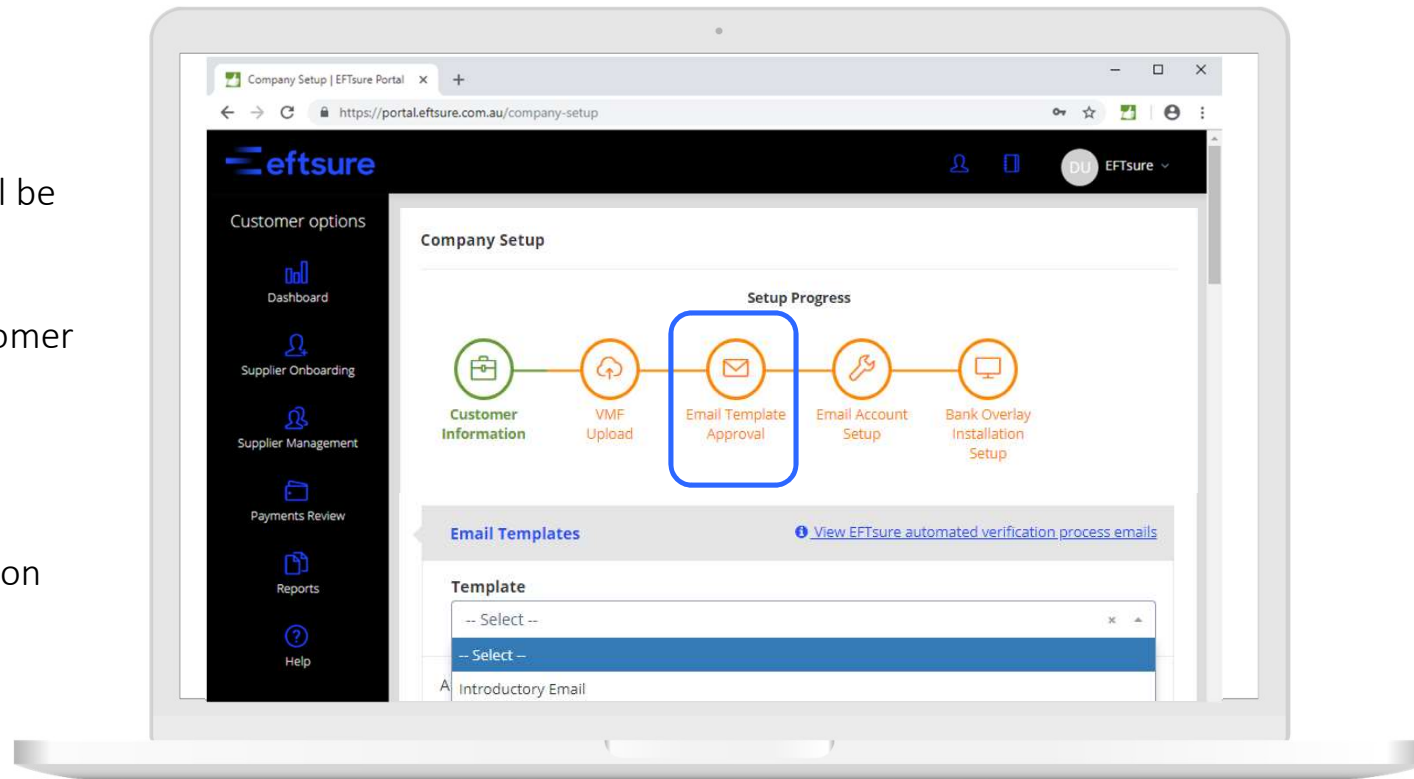
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Email Template Approval

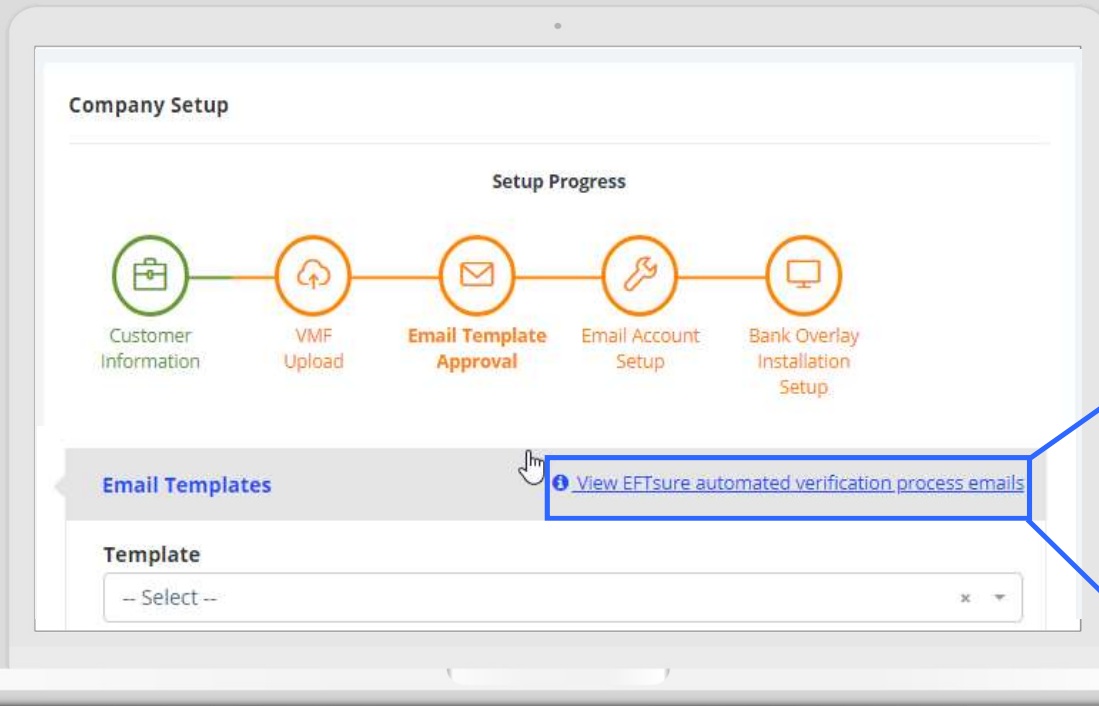
This step allows you to check and review the email templates that will be sent to your suppliers.

Details that are entered in the customer information will populate the email templates and will be available for review.

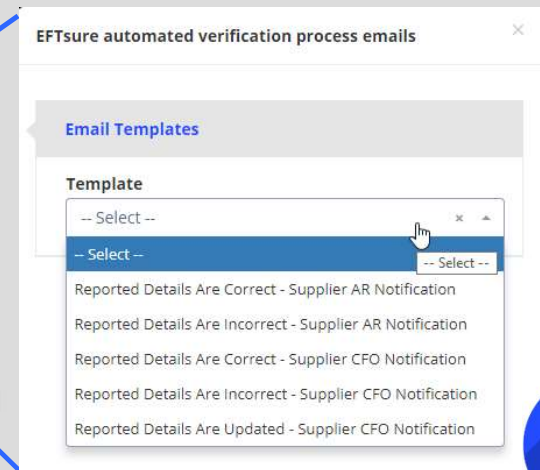
Once reviewed and approved, click on 'Submit'.



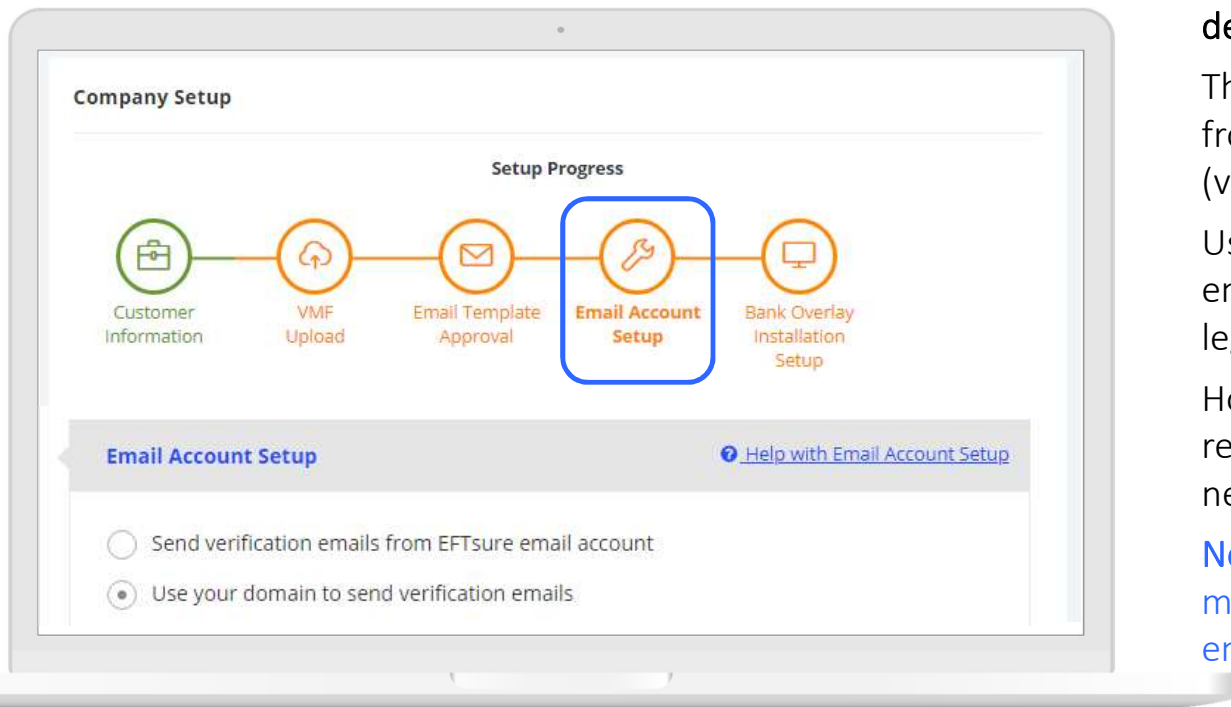
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You may also view eftsure's automated verification process emails, which are the emails sent to the Supplier and the CFO when they reported their details as correct/incorrect.



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In order for eftsure to verify supplier details, we need to contact them via email.

The first option is for the emails to be sent from the eftsure domain (verify@eft.eftsure.com.au).

Using this may increase the number of emails and calls to check if the emails are legitimate.

However these calls are brief and just require a confirmation that the supplier needs to action the request.

Note: The response rate to these emails may also be slightly lower than if the emails are sent from your domain.

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Email Account Setup

Another option is to send the verification emails through your own domain. This helps assure the recipients that these emails are not spam.

(1) Enter your company's domain name and click on 'Verify' (2) .

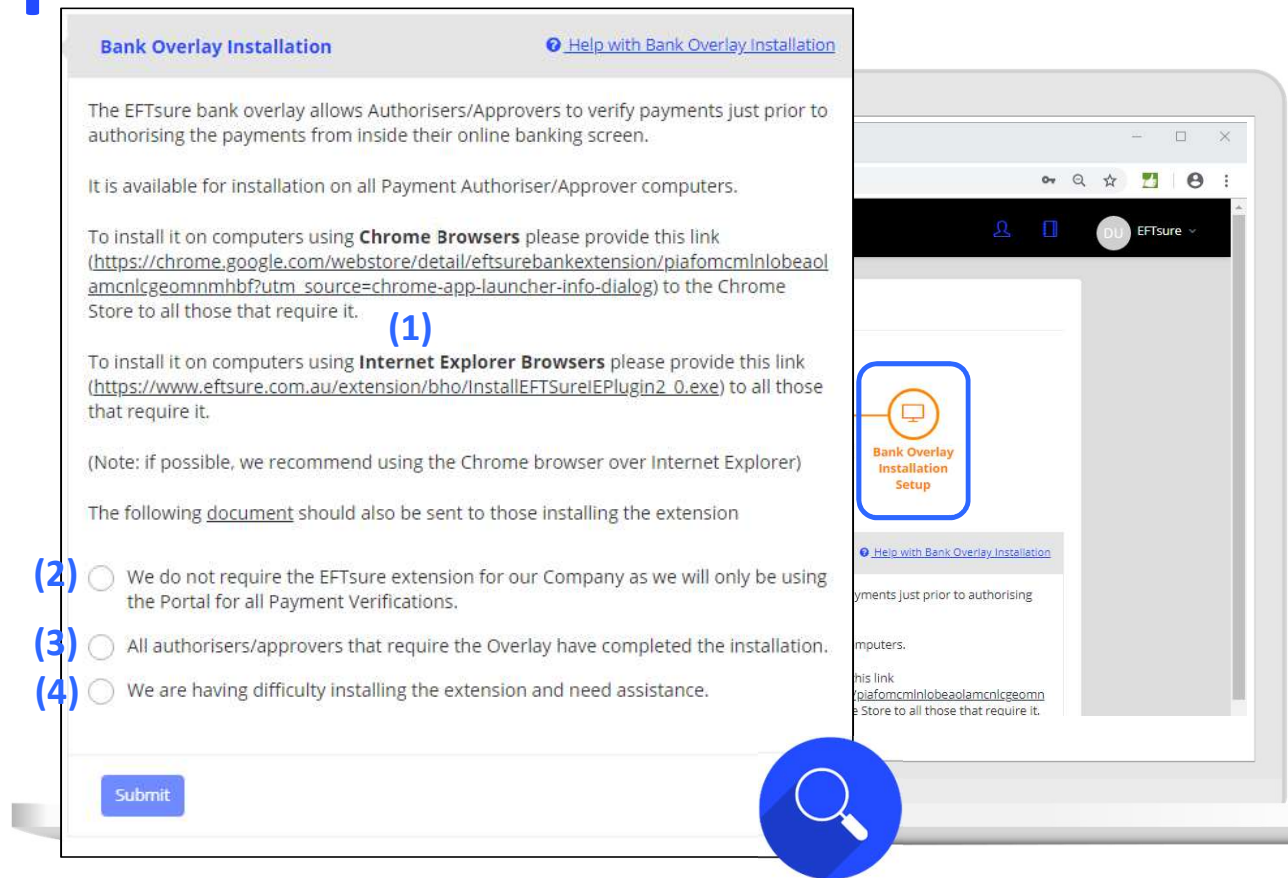
For the New Email Account Setup requirements, and additional information regarding DKIM and SPF records, click on the 'Help with Email Account Setup' link.

(3) Setup an email distribution list as instructed. Please ensure the distribution list is configured to allow external emails to be received and distributed to an external email address.

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Bank Overlay Installation Setup

- (1) This step is to setup the eftsure Bank overlay by first installing the Bank Overlay using the links provided for Chrome and Internet Explorer respectively.
- (2) Should you not require the Bank Overlay and will only be using the Portal for all Payment verifications, select the first option and click on submit.
- (3) If your authorisers/approvers who require the Bank Overlay have completed the installation, select the second option and click on submit.
- (4) Should you need any assistance on installing the Bank Overlay, select the third option to send a message to eftsure.



Bank Overlay Installation [Help with Bank Overlay Installation](#)

The EFTsure bank overlay allows Authorisers/Approvers to verify payments just prior to authorising the payments from inside their online banking screen.

It is available for installation on all Payment Authoriser/Approver computers.

To install it on computers using **Chrome Browsers** please provide this link (https://chrome.google.com/webstore/detail/eftsurebankextension/piafomcmnlcgeomnmhbf?utm_source=chrome-app-launcher-info-dialog) to the Chrome Store to all those that require it. **(1)**

To install it on computers using **Internet Explorer Browsers** please provide this link (https://www.eftsure.com.au/extension/bho/InstallEFTSureIEPlugin2_0.exe) to all those that require it.

(Note: if possible, we recommend using the Chrome browser over Internet Explorer)

The following [document](#) should also be sent to those installing the extension

(2) ☐ We do not require the EFTsure extension for our Company as we will only be using the Portal for all Payment Verifications.

(3) ☐ All authorisers/approvers that require the Overlay have completed the installation.

(4) ☐ We are having difficulty installing the extension and need assistance.

Submit

The background image shows a laptop screen with the EFTsure portal. A magnifying glass icon is overlaid on the bottom right of the laptop screen. A callout box labeled "Bank Overlay Installation Setup" points to the "Help with Bank Overlay Installation" link in the form.