

# Supplier Details Change Request

eftsure



# Request to Update Details Email

The supplier receives the email to update their details.



**eftsure**

Dear Accounts Receivable Manager at Agriculture Packard Australia Ltd,

Ana's Demo Customer has received a request to update your details.

For Ana's Demo Customer to ensure your new details are valid we require you to please enter them into the Eftsure system for verification.

[Update your details](#)

or copy and paste the following url into your web browser: javascript:alert('This button/link is disabled on the email template preview')

Note, if your details have not changed and this is an unexpected request, please contact Eftsure support at [support@eftsure.com.au](mailto:support@eftsure.com.au)

© Eftsure 2023  
Privacy Policy for Customers and Suppliers  
Unsubscribe to emails instantly

# Start Change of Details Workflow

The Supplier enters their details to create an account with Eftsure.



Dear Accounts Receivable of **Packed CO PTY LTD**, please create a User Account to register as a supplier to **Ana's Demo Customer**.

Country  
Australia

I don't have an ABN/ACN

ABN  
ABN of your company

**I have an ACN**

Main Trading Name\*  
SNP SECURITY

First name\*  
Accounts Receivable

Surname\*  
Surname

Email  
PCO@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

**eftsure**

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

# Change of Details Workflow

**Onboarding Status:** Change Request Pending **Support reference:** 1360

Company Information      Payment Details      Additional Information

**Physical Address**

**Country \***  
 x ▾

**Physical Address Line 1 \***

**Physical Address Line 2**

**City / Suburb \***

**Post Code \***

**State \***

**Postal Address**

Same As Physical Address

# Change of Details Workflow (Cont.)

## Australian Business Registry Information

ABN

- 

## Trading Name Information

Trading Name/Personal Name \*

SNP SECURITY

Other Trading Names


## Other Information

Email Address \*

PCO@gmail.com

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

## From here, the supplier can:

- Indicate that the partial bank account details shown here are not correct or this account is no longer used.
- Indicate that they continue to use the bank details shown here and I will provide an additional bank account.
- Indicate that they continue to use the bank details shown here.

Onboarding requests > Demo Company Pty Ltd

Onboarding Status: Change Request Pending Support reference: 2137

Company Information — Payment Details — Additional information

[View account details on file with Demo Company Pty Ltd](#)

BSB Bank Account Number  
012019 \*\*\*\*\*677


a  The partial bank account details shown here are not correct or this account is no longer used


b  Continue to use the bank details shown here, and I will provide an additional bank account


c  Continue to use the bank details shown here

## a) The partial bank account details shown here are not correct or the account is no longer used

Onboarding Status: Change Request Pending Support reference: 2137

  
**Company Information**

  
Payment Details

  
Additional Information

[View account details on file with Demo Company Pty Ltd](#)

BSB Bank Account Number  
012019 \*\*\*\*677

The partial bank account details shown here are not correct or this account is no longer used

Continue to use the bank details shown here, and I will provide an additional bank account

Continue to use the bank details shown here

**Please give us some more information**

**Reason**

Please select applicable option

**Please select applicable option**

Company changed ownership

The account is closed and should not be used for any payments by anyone

The account should not be used by Demo Company Pty Ltd

The account is not mine - I do not recognise the details

The BSB of my bank has changed

This is a fraudulent account

[Add new payment type](#)

## a) The partial bank account details shown here are not correct or the account is no longer used (Cont.)

From here, the Supplier can either:

Option 1: Enter their bank account details manually

Option 2: Enter their bank account details using the bank link

The screenshot displays the eftsure onboarding interface. On the left, a sidebar shows 'Options' and 'Onboarding requests > Demo Company Pty Ltd'. The main area shows 'Onboarding Status: Please complete' and 'Onboarding Progress' with two steps: 'Company Information' and 'Payment Details'. 'Option 1' points to the 'Payment Details' step, and 'Option 2' points to the 'Payment Information' section below. The 'Payment Information' section has a dropdown for 'Select a payment type' and buttons for 'Add another payment type and continue' and 'Remove selected payment type'.

On the right, a modal window titled 'Please provide your Australian bank details in one of the following ways' is shown. It 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)

[Enter my account details manually](#)

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.

The modal also features a dropdown menu for 'Select your financial institution' with the following options:

- Business Banking Systems
- MIDWESTPLUS Bank of Melbourne Business Banking
- Commbank
- COMMERCIAL BANK
- MACQUARIE Macquarie Active
- nab NAB Business
- st.george St George Business Banking

A 'Close' button is located at the bottom right of the modal.



## a) The partial bank account details shown here are not correct or the account is no longer used (Cont.)

### Option 1:

The Supplier can manually enter the new details.

The screenshot shows the 'Supplier Verification' page for a company. It features a success message: 'Thank you. You have successfully verified your account details.' Below this, an 'Action' dropdown menu is open, showing three options: 'Provide bank account information' (selected), 'Provide bank account information', and 'Select bank account details directly from your bank'. Below the dropdown are two input fields for 'BSB \*' and 'Bank Account Number \*', with orange arrows pointing to them. Below these is an 'Account Name \*' input field, also with an orange arrow. At the bottom left is a 'Finish' button with an orange arrow pointing to it. The 'eftsurre' logo and 'Our Terms of Service and Privacy Policy.' are at the bottom right.

### Option 2:

The Supplier can use the bank link

The screenshot shows the 'eftsurre' Bank Link process. It starts with the instruction: 'Please select your bank and complete the Bank Link process.' A note follows: 'Note - If your bank is not available in the list or you are unable/unwilling to login to your banking system, please click the Back button below and select Manual - We will call you to verify'. Below this is an 'Institution' dropdown menu with the text '-- Select your financial institution --'. Below the dropdown is a list of 'Business Banking Systems' with logos and names: MOGOPLUS (Bank of Melbourne Business Banking), CommBiz (Commonwealth Bank), Macquarie Active (Macquarie), NAB Business (NAB), and St. George Business Banking (St. George).

## a) The partial bank account details shown here are not correct or the account is no longer used (Cont.)

Onboarding Status: Change Request Pending Support reference: 1786

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

**Company Representative Details**

First Name \*  
John

Last Name \*  
Smith

Position \*  
Accountant

Please Confirm \*  
 John Smith is an authorised representative of John Smith

[Continue](#)

---

Onboarding Status: Awaiting verification (Not verified yet) Support reference: 1786

Company Information — Payment Details — Additional Information — **Awaiting Verification**

**Finished**

Thank you for completing the process.

[Finish](#)

The Supplier receives the following message after completing the verification.

**eftsure**

company name

**Thank You.** We have noted your new details, and will communicate them to **Test Entity 2.**

Trading name/Personal name  
John Smith

(Australia) BSB Number  
306126

Account Number  
1122365

Account name  
John Smith



## b) Continue to use the bank details shown here, and I will provide an additional bank account

The screenshot shows a modal window titled "Please provide your Australian bank details in one of the following ways". The modal contains the following text and elements:

- 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)"
- Button: "Enter my account details manually" (highlighted in blue)
- Text: "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."
- Dropdown menu: "-- Select your financial institution --" (with a close 'x' button)
- Text: "OR"
- Text: "We don't accept payments by EFT / bank transfer - our terms are COD only"

An orange arrow points from the top right of the main interface to the modal.

The screenshot shows the main onboarding interface with the following elements:

- Onboarding Status: Change Request Pending
- Support reference: 1523
- Progress bar with three steps: "Company Information" (green), "Payment Details" (green), and "Additional Information" (orange).
- Section: "Payment Information" with a dropdown menu containing "Adam Test BSB:082080 ACC:21351321" (with a close 'x' button).
- Buttons at the bottom: "Add another payment type and continue" (blue), "Remove selected payment type" (red), and "Select this payment type and continue" (blue, highlighted with an orange border).

## b) Continue to use the bank details shown here, and I will provide an additional bank account (Cont.)

Onboarding Status: Change Request Pending Support reference: 1786

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

**Company Representative Details**

First Name \*

Last Name \*

Position \*

Please Confirm \*  
 John Smith is an authorised representative of John Smith

**Continue**

---

Onboarding Status: Awaiting verification (Not verified yet) Support reference: 1786

Company Information — Payment Details — Additional Information — **Awaiting Verification**

**Finished**

Thank you for completing the process.

**Finish**

The Supplier receives the following message after completing the verification.

**eftsure**

company name

**Thank You.** We have noted your new details, and will communicate them to **Test Entity 2.**

Trading name/Personal name  
John Smith

(Australia) BSB Number  
306126

Account Number  
1122365

Account name  
John Smith



## c) Continue to use the bank details shown here

Onboarding Status: Change Request Pending Support reference: 1786

**Company Information**      Payment Details      Additional Information

[View account details on file with Eftsure Testt](#)

BSB    Bank Account Number  
306126    \*\*\*\*\*365

The partial bank account details shown here are not correct or this account is no longer used

Continue to use the bank details shown here, and I will provide an additional bank account

Continue to use the bank details shown here

[Please validate your current banking information](#)

BSB    Bank Account Number  
306126         365

Enter the missing digits to complete the account number above

## c) Continue to use the bank details shown here (Cont.)

Onboarding Status: Change Request Pending Support reference: 1786

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

**Company Representative Details**

First Name \*

Last Name \*

Position \*

Please Confirm \*  
 John Smith is an authorised representative of John Smith

[Continue](#)

---

Onboarding Status: Awaiting verification (Not verified yet) Support reference: 1786

Company Information — Payment Details — Additional Information — **Awaiting Verification**

**Finished**

Thank you for completing the process.

[Finish](#)

The Supplier receives the following message after completing the verification.

**eftsure**

company name

**Thank You.** We have noted your new details, and will communicate them to **Test Entity 2.**

Trading name/Personal name  
John Smith

(Australia) BSB Number  
306126

Account Number  
1122365

Account name  
John Smith

