






NAB BPAY Onboarding Guide



Let your customers pay the familiar way 24/7, using their own financial institutions online or phone banking service.

Becoming a NAB BPAY® Biller can be quick and simple; however we understand that you have a business a run! So we have created this checklist to guide you through the onboarding process.

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<p>Be informed </p> <p>It is important for you to understand your responsibilities as a BPAY Biller and as such we have provided you with terms and conditions within the offer documentation.</p> <p>I have read and understood the:</p> <ul style="list-style-type: none">Letter of OfferMerchant AgreementNAB BPAY Biller Agreement & Operations ManualNAB Privacy Notification <p>If you are accepting credit as a payment option for your customers:</p> <ul style="list-style-type: none">PCI-DSS flyer <p>If you are transferring an existing BPAY biller code to NAB from another financial institution.</p> <ul style="list-style-type: none">BPAY Transfer of Sponsorship form	<p>Online Banking </p> <p>In order for you to receive reporting on your BPAY facility, you need to have access to NAB Connect, NAB Transact or Direct Link. If you don't have access or have any questions; speak to your implementation officer.</p> <p>I have access to a reporting channel</p>	<p>Generate Customer Reference Numbers (CRNs) </p> <p>It is essential that you have the ability to create Customer Reference Numbers (CRN's) with a Check Digit. Refer to the CRN sections in the BPAY User Guide to understand more about CRN's and Check Digits, why they are important and how to generate them.</p> <p>You can download our CRN generator tool available on the Biller in a Box website to create ready to use CRNs.</p> <p>I will generate our own Customer Reference numbers</p> <p>or</p> <p>I would like to use NAB's CRN generator Tool. Please refer to CRN Generator Tool for more information</p> <p>i We will ask you to provide us with 6 sample CRNs with their Check Digits to test for you to ensure that they are being calculated correctly.</p>	<p>Application documents – Letter of Offer </p> <p>I have signed the Letter of Offer</p>	<p>Application documents – NAB BPAY Biller Agreement </p> <p>The BPAY Biller Agreement and BPAY User Guide go hand in hand; there are even quick links in the User Guide to assist you with the information we need in agreement. Of course we are always here to help you – talk to your implementation officer if you have any questions.</p> <p>In the NAB BPAY Biller Agreement I have completed:</p> <ul style="list-style-type: none">Items 1 – 4: my business informationItems 5 – 8: the technical set up for my BPAYItem 9: the six sample CRN's that I generated in step 3Execution page: signed by authorised representative(s)

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Create a sample invoice



You can opt to use one of the sample templates that we have created or update your existing invoice. Refer to the Biller in a Box website for invoice rules, templates and BPAY artwork.

I want to use my own invoice and have updated it with the correct BPAY artwork.

or

I don't have time to make my own invoice, I will customise one of the sample templates

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Return application documentation



So we can start approving and setting up your facility without delay, send the following completed and signed documents to your implementation officer:

Letter of offer

NAB BPAY Biller Agreement (pages 1 – 3)

Sample Invoice

And if applicable:

BPAY Transfer of Sponsorship form

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Facility confirmed



We will contact to let you know your new BPAY Biller Code and its activation date

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Start giving your customer your biller code as a payment option

