

Australian partner Referral Process

A referral is generated by a staff member or customer via a referral landing page. This form includes all relevant client details including contact details, number of customers and if applicable the Staff Details of the employee who is inputting the referral.

1. The information will be passed onto the appropriate Ezidebit sales representative who will make contact with the referral. They will discuss product types and rate information and advice of the online CSA form to be completed. This will occur within 3 hours of receiving the lead.
2. The online CSA (Customer Service Agreement) will be generated and sent to the referral for completion. Time taken to complete the online application by the customer is approximately 15 minutes, depending on the complexity of their business entity setup. As per the Ezidebit Service Level Agreement applications containing the correct information/level of data required will take no longer than 72 hours to be processed for new customers, and up to 2 weeks for existing migration clients to fit in with migration timelines.
3. Regarding the CSA document, the first screen an Australian customer will see lists all of the identification required in order to process the application;
 - a. Govt issued ID (e.g. Driver's License) for each authorised signatory listed on the "Execution" page
 - b. Certificate of Registration of the Business Name or a Certificate of Incorporation (certificate of registration of the business name is required if the trading name is different to the business name)
 - c. Current bank statement or deposit slip for the Settlement Account, and Billing Account (if different)
 - d. Copy of business Terms and Conditions (something provided to customers before commencing services, i.e a storage agreement)

Pages 2-4 include the rate information and product types agreed to by the Ezidebit BDM and the customer on a phone call prior to completion of the form – these will be different for each customer/application.

Page 5 requires agreement to the Terms and Conditions and Product Disclosure Statement (both available via hyperlink) – this must be done by the Director or owner of the company. It is also possible to add a secondary signatory if required in the instance of joint business ownership.

Please note occasionally more items are requested. This is on a case-by-case basis.

4. When a customer is approved the partner team and the customer will receive the digital key from Ezidebit onboarding team