

Tap to Pay FI Launch Instructions

Document Goal:

Tap to Pay for iPhone is an add-on module to the Autobooks product suite. This document provides instructions on the tasks that must be completed by you (the financial institution) in order to make Tap to Pay available to your small business customers / members.

Resources you'll need:

To launch Tap to Pay on iPhone, you'll need certain resources aligned internally to complete the full set of tasks. Make sure to secure at a minimum:

1. Project leader that can determine Go Live dates, secure employee resources for various tasks.
2. Testing or Quality Assurance resources.
3. Your resource that manages publishing of online banking apps to the App Store.
4. Training and Marketing resource(s).

FI Project Checklist in Timeline Order

TASK OWNER	TASK	DEPENDENCIES/ NOTES
Project Leader	Confirm Tap to Pay Launch Date	
FI Training and Marketing Resource	Schedule employees for Tap to Pay Webinar	
FI Training and Marketing Resource	Create marketing strategy/plan	

Confirm Tap to Pay Launch Timeline:

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Schedule employees for Tap to Pay webinar:

Training: Autobooks provides two options for training your staff on Tap to Pay

1. Autobooks hosts regular Tap to Pay training webinars for your staff to attend. [Click here](#) to register for an upcoming training date.
2. Train the team yourself using our [Tap to Pay training kit supplement](#).

Create marketing strategy/plan (recommended, not required):

Marketing: Autobooks provides all the marketing assets you'll need to promote Tap to Pay to your customer base. [Review our marketing assets here](#).