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.
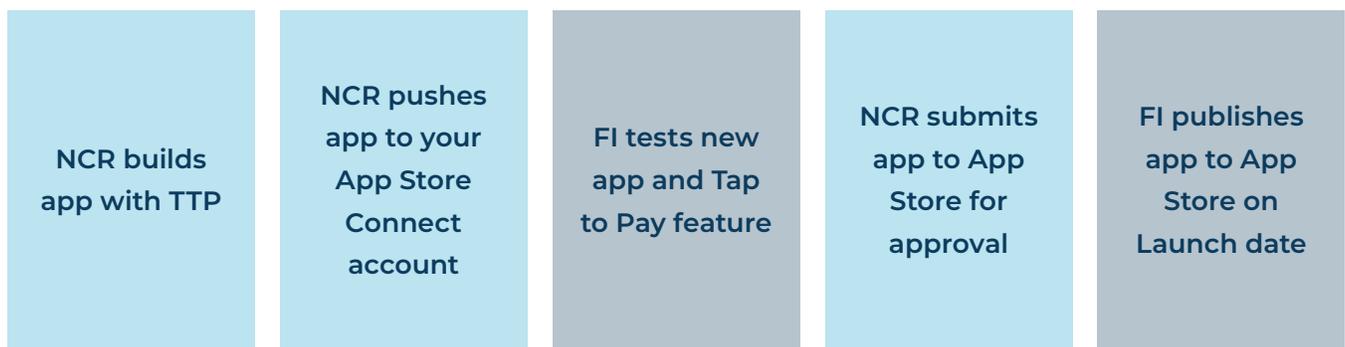
Resources you'll need:

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).

General Project Overview:

Here's a high-level process overview of the launch project. We'll break down your tasks in detail later in this document.

NCR builds app with TTP	NCR pushes app to your App Store Connect account	FI tests new app and Tap to Pay feature	NCR submits app to App Store for approval	FI publishes app to App Store on Launch date

FI Project Checklist in Timeline Order

TASK OWNER	TASK	DEPENDENCIES/ NOTES
Key Stakeholder	Sign NCR Tap to Pay agreement provided by your NCR Sales Engineer	
FI IT Resource	Request Proximity Reader Entitlement from Apple	
Project Leader	Confirm Tap to Pay Launch Date	
FI Training and Marketing Resource	[Schedule employees for Tap to Pay Webinar; create marketing strategy / plan](#)	
Testing / QA	[Test Tap to Pay within mobile app in Test Flight](#)	Mobile Banking app provider has built app w/TTP and pushed to your App Store Connect account. Autobooks has provided testing guide
Project Leader	Confirm final Go Live date	Testing outcomes and app approval
Project Leader	FI grants approval for Mobile Banking app provider to submit App with Tap to Pay to App Store	Testing complete
FI IT Resource	Publish approved app to the App Store on agreed Launch Date	Mobile Banking app provider has submitted app; Apple approval has been issued

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Confirm Tap to Pay Launch Timeline:

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).

Schedule employees for Tap to Pay webinar;
Create marketing strategy/plan (Recommended, not Required):

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.

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

Test Tap to Pay within mobile app in Test Flight:

In order for your testing team to interact with your updated mobile app in Test Flight:

1. Your online bank provider will submit the updated app with Tap to Pay on iPhone included to TestFlight, then notify you when testing may start..
2. Follow Autobooks Test Guide for details on how to test the app within TestFlight.
   NOTE: Please review the Autobooks Test Guide even if you've worked with TestFlight before.

FI grants approval for Mobile Banking App Provider to submit App with Tap to Pay to App Store:

Once testing is complete, indicate to both your mobile banking app provider and Autobooks that the mobile app may be submitted to the App Store for final approval. Please send approval to Autobooks via implementations@autobooks.co

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Publish approved app to the App Store on agreed Launch Date:

The last (and most important step) is for your team to publish your mobile app within the App Store:

1. Apple will approve the mobile app submission from your mobile banking app provider

2. Your mobile banking app provider will notify you (and Autobooks) that your mobile app is ready to be published to the App Store. You (or a resource on your team) will perform the final step to publish the app.

3. Notify Autobooks and your mobile banking app provider of your publish date. Once published, please confirm with Autobooks.

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