

BACSTEL-IP after sales check list

Taking the final few steps towards BACSTEL-IP

Congratulations – you're almost there! You have already completed the major steps towards delivering the benefits of BACSTEL-IP® to your organisation – benefits which are only available through this new delivery channel:

However, to make sure your implementation goes as smoothly and easily as possible, we have produced a comprehensive check list which should enable you to monitor the next critical stages. By working methodically through this check list you can ensure that you have everything in place in good time before actually going live with BACSTEL-IP.

The following questions are designed to cover all of the major stages in final preparation, however other queries might arise which are particular to your individual application or organisation. If so, you should contact either your sponsoring bank, or your solution supplier. Alternatively, you'll find plenty of help, tips and advice at www.bacstel-ip.com

Since this check list spans a period of 2-3 weeks after choosing your software solution, please keep it in a readily accessible place for ease of reference.

Award winning BACSTEL-IP

BACSTEL-IP has won four of the industry's top honours in 2003.

- The innovation category as well as the overall award for Corporate IT at the Technology Industry Forum Awards
- The prestigious Services Award at the annual British Computer Society (BCS) Awards
- Best Use of B2B and e-commerce award at the Financial Sector Technology Awards
- Best e-business Project of the Year from Computing magazine.



BACS

BACSTEL-IP

I. After sales checklist

These are the important stages you should check and tick off to ensure a smooth progression before going live with BACSTEL-IP:

ACTION	SUGGESTED TIMETABLE	TICK
Have you sent the Application Form back to your bank?	Day 1	<input type="checkbox"/>
Have you sent the Agreement Form (signed contract) back to the solution supplier?		
Do you have the contact details for the bank?		
Do you have the contact details for the solution supplier?		
Have you created a new folder in your email package on your PC to store the relevant emails that you receive from BACS® and the bank? (See following page for separate emails checklist).	Day 2	<input type="checkbox"/>
Do you have a confirmed date for installation from the solution supplier and the Engineer's name?	Day 5	<input type="checkbox"/>
Have you checked that both the Primary Security Contacts (PSCs) will be available on the installation date?		
Have you checked the browser version? (See previous guide called 'Tips For Migration' available on www.bacstel-ip.com). E.g. Internet Explorer or Netscape Navigator; is the version you are using the correct specification?		
Do you have the user number(s) and corresponding bank account details available for the installation?	Day 10	<input type="checkbox"/>
Do you have a sample of data file ready to be used during the installation?		
Have you had the pre-installation briefing from your solution supplier?	Day 15	<input type="checkbox"/>
Does your bank provide smart card, card reader, signing solution software? If so, have these been received?		
If your bank is not providing any of the above, have you checked that your solution supplier is providing them?		
Have you received all the emails on the following page?		

If all the above are ticked you are now ready for your solution software to be installed.

2. Checklist of emails that you will receive

These emails should be stored in a newly created, secure folder on the same PC as the installation is to take place as some of them will be needed during the installation of the supplier software.

DETAILS OF EMAILS	BANK / CARD ISSUER / BACS	TICK
1. PSC will receive an email giving details of registration process	Bank sends Day 1–5	<input type="checkbox"/>
2. PSC will receive an email confirming digital certificate has been issued	Bank sends Day 1–5	<input type="checkbox"/>
3. PIN notification email will be received by the contact	Bank or Card Issuer sends Day 10–15	<input type="checkbox"/>
4. DN email will be received by the contact, needed to complete the PKI registration	BACS sends Day 10–15	<input type="checkbox"/>
5. CHAP password notification email will be received by the contact	BACS sends Day 10–15	<input type="checkbox"/>
6. Welcome email will be received by the PSC	BACS sends Day 15–17	<input type="checkbox"/>

By now, your software should have been fully installed and your system should be delivering the full range of benefits of BACSTEL-IP. During the next month, you should continue to use this check list to ensure that the very final stages of implementation run as smoothly as possible.

3. Checklist to be used during first few months after installation

ACTION

Have you downloaded the Service User Guide from www.bacstel-ip.com/serviceuserguide

Have you printed off the 'Getting Started Guide' so that it is handy for day-to-day tasks?
Go to; www.bacstel-ip.com

That's it! If you have completed all these steps satisfactorily and ticked each item off as completed, your BACSTEL-IP connection should be fully functional and delivering the full benefits of the new BACS delivery channel.

Please remember that if you encounter any problems or have any queries – either during implementation of your BACSTEL-IP system or in the early months of using the system – help is always at hand. Simply contact either your sponsoring bank or solution supplier or visit www.bacstel-ip.com

Thank you for using BACSTEL-IP.

www.bacstel-ip.com

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