



# Making the switch – Ezypay's guide to a seamless migration

## ABOUT EZYPAY

Ezypay is an Australian payment facilitator.

We make it simple and easy to collect payments while managing multiple customers and payment types - all within one platform.

We offer intelligent, cloud-based software solutions that make capturing subscription and on-demand payments simple, efficient, and easy – both through a standalone platform and by integrating with leading technology partners.

## WHY SWITCH TO EZYPAY?

Changing your payment provider doesn't need to be stressful. When you choose to work with Ezypay, you'll get a streamlined migration experience supported by an experienced team who have facilitated hundreds of migrations from a wide range of suppliers.

### **Benefits of migrating to Ezypay:**

- Secure, PCI-compliant payment processing
- Seamless integration with your business' CRM or software provider
- End-to-end support from our experienced Migration and Support teams
- Clear, proactive communication
- Minimal disruption to your billing cycle
- Multiple payment methods
- One solution across multiple countries in APAC
- Flexible integration options

## WHAT DOES A MIGRATION INVOLVE?

'Migration' refers to securely moving customer billing data from an existing payment provider to Ezypay. A well-managed migration from Ezypay means your business can continue billing your customers - with minimal interruption - under a new, more powerful platform.

## WHO'S INVOLVED IN THE MIGRATION PROCESS?

A successful migration requires coordination between a few key parties. Here's a quick overview of who's typically involved and what they contribute:

- **Your business**

You'll provide the customer data, confirm the migration date, and notify your current payment provider to stop billing in advance. You'll also communicate the change to your customers and work with your new software partner to complete the setup.

- **Your new integrated software partner (if applicable)**

This is the CRM or business management platform you're switching to. They'll receive the updated customer data and work with Ezy pay to map payment tokens and set up your billing schedules.

- **Your previous integrated software partner (if applicable)**

If you're moving from one CRM platform to another, your previous CRM provider may need to assist in exporting data or providing relevant information for the transition.

- **Your previous payment provider**

This is the company currently processing your payments. They'll need to supply the customer payment file and stop billing once the migration is complete. The compilation of this data takes time, so ensure you give them plenty of notice.

Ezy pay works closely with all parties to ensure a smooth, coordinated handover with minimal disruption to your business or customers.

## WHAT WILL YOU NEED TO GET STARTED?

### Migration Checklist:

- A preferred migration date (We recommend a minimum of 7 business days)
- Encrypted customer data in CSV or XLS format
- A point of contact from your business (email and phone)
- A notification communication to be sent to your customers informing them of your intention to switch to Ezy pay

# MIGRATION PROCESS



## FREQUENTLY ASKED QUESTIONS

### 1. What data format is required by Ezypay for migrations?

Ezypay requires an encrypted CSV or XLS file with the following minimum fields:

- Customers' first name
- Customer's last name
- Customers' email

For AU bank billing:

- Account holder name
- BSB number
- Account number

For NZ bank billing:

- Account holder name
- Bank number
- Branch number
- Account number
- Suffix

For debit/credit card billing:

- Card holder name
- Full card number
- Card expiry date

It's strongly recommended to include a unique identifier—such as a membership number or customer ID—that remains consistent across both your previous CRM and payment provider systems. This ensures customers can be accurately matched between data sets and helps all parties map the data correctly.

## **2. Will payments fail after migration?**

Once the migration is complete, payments should continue as normal. However, if any expired or incorrect payment details are present in the original data, these specific payments may fail. We encourage you to double-check that all customer billing details are accurate and up to date before commencing the migration.

Please also note once the migration file has been provided to Ezy pay, any changes made in your previous system - such as updated billing dates, new customers, or payment method changes - will not be reflected in Ezy pay. To ensure everything stays in sync, we recommend making any final updates before the data is sent.

## **3. What is the expected downtime for a migration?**

Ezy pay completes most migrations within one business day after receiving the data. The integrated partner uses this data to map Ezy pay's payment tokens. Actual downtime depends on how quickly the previous provider sends the file and how fast the partner maps the data. In most cases, downtime is limited to just one day.

## **4. Can I see previous transaction history on Ezy pay?**

No. When migrating, your customers will start fresh on Ezy pay. Transaction history from the previous payment provider is not visible within Ezy pay - only customer details and payment methods are migrated.

## **5. Will there be any duplicate billing?**

To avoid any chance of duplicate billing, your previous payment provider must be informed to stop billing once the migration to Ezy pay is complete. While Ezy pay guides you through the process and provides clear timelines, the instruction to stop billing must come directly from you. We recommend confirming this with your previous provider to ensure a smooth transition for your customers.

## 6. What should customer communication look like?

Here's a sample message you can send to your customers:

"Dear Customer [Name],

Please be advised that [Your Business Name] is changing payment providers to Ezy pay Pty Ltd on [insert date].

You will now see transactions occur on your bank statement as Ezy pay\*[Your Business Name].

If you have any concerns or questions, please feel free to reach out.

Contact Details:

name@emailaddress.com

0412 345 678

Kind regards,  
[Your Business Name]"

## READY TO GET STARTED?

Please [get in touch](#) with Ezy pay or through your Ezy pay Representative (if applicable).

We're excited to start this migration process for your business – welcome to Ezy pay.

Enjoy untapped payment collection rates  
and revenue generating opportunities.

Boost your collection rate, recover  
failed payments, and process millions of  
transactions seamlessly.

[hello@ezypay.com](mailto:hello@ezypay.com)

1300 652 825

**EZYPAY**<sup>®</sup>

Ezypay is an award-winning payments facilitator.  
We craft intelligent, cloud-based software solutions that  
make capturing payments simple, efficient and easy.

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