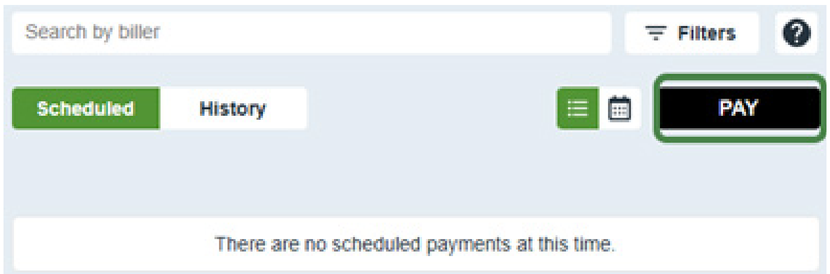
User Guide for Bill Pay and Person to Person Transfers

BILL PAY

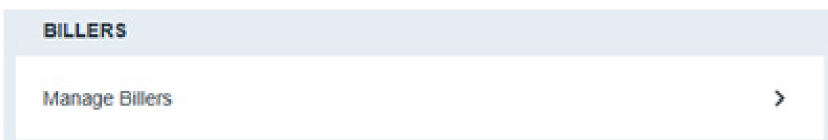
Adding a New Biller

1 Click **Pay**.

CLICK HERE



Note: Members can also add new billers by going to ***Settings*** *and clicking the arrow for Manage Billers.*



2 Click **Add Biller**.

3 Search for biller.

Note: ***Popular Billers*** *simplifies the setup process by pre-populating biller details when login credentials associated with that biller are entered, reducing manual entry.*

4 Click **+ADD**.

CLICK HERE

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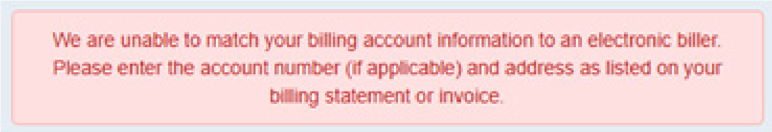
5 Complete the biller details:

- Biller Name
- Account Number
  - If no account number available, full biller address is required
- Biller ZIP Code

Note: When the biller account information is not found it will result in the error below and the full biller address will be required.



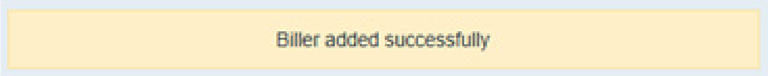
- *Optional* - Add a nickname
- *Optional* - Add a memo

6 Click **Next**.

7 Choose where to receive the 2-Step Verification Code.
Note: If adding multiple contacts in one session, verification is only required once.

8 Enter the 6-digit verification code and click **Verify Code**.
Note: If adding multiple contacts in one session, verification is only required once.

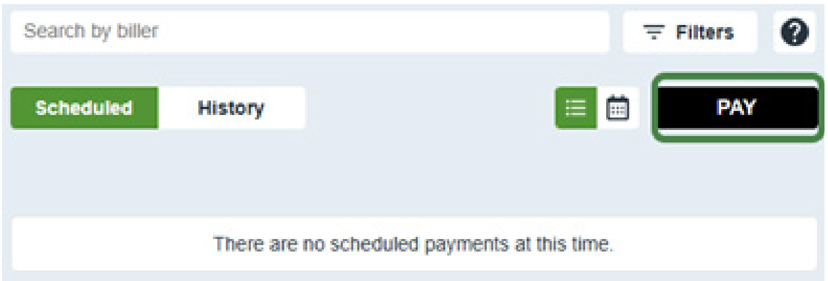
9 A confirmation message will appear: **"Biller added successfully."**



NUSENDA® CREDIT UNION

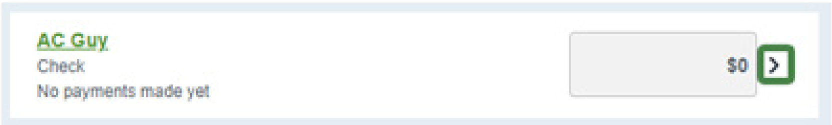
Paying a New Biller

1. Click **Pay**.



CLICK HERE

2. Locate biller.
3. Click the arrow to expand payment details.



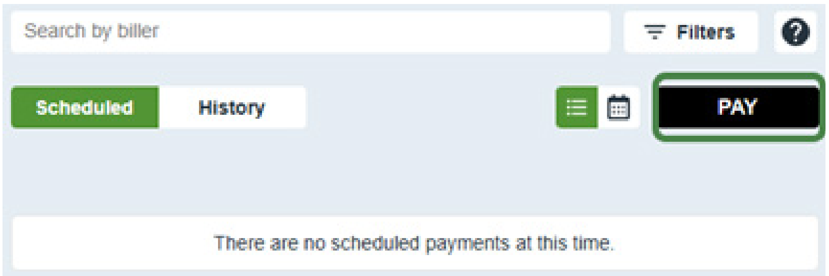
CLICK HERE

4. Enter the **payment amount.**
5. Select the **Deliver Date.**
6. Set the payment frequency (one-time or recurring).
7. *Optional* - Add a nickname.
8. Click **Pay**.
9. Review all payment details.
10. Click **Confirm**.
11. A confirmation screen will appear. Click **Done**.

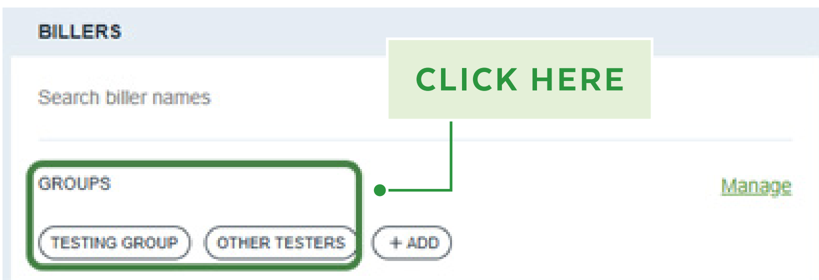
NUSENDA CREDIT UNION

Paying a Group

1. Click **Pay**.



2. Select Group.



3. Enter the amount for each biller.
4. Click **Pay**.
5. Review all payment details.
6. Click **Confirm**.
7. A confirmation screen will appear. Click **Done**.

Settings

OPEN SETTINGS

- Click the **gear icon** to open Settings.

CLICK HERE

PREFERENCES

- Set your **Default Funding Account** by clicking the arrow to view and choose account.

PAYMENT ALERTS

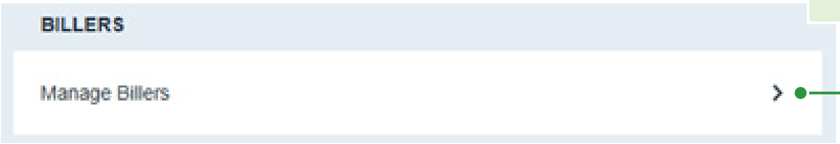
- Choose email or text (SMS) for alerts.
- Toggle alerts on/off for:
  - When payment is sent.

    Note: Green toggle indicates alerts are enabled.
- Set the number of days in advance to receive alerts.

CONTACTS

- Click the arrow to manage your billers.

CLICK HERE



GROUP FILTERS

- Click the arrow to customize and manage group filters.

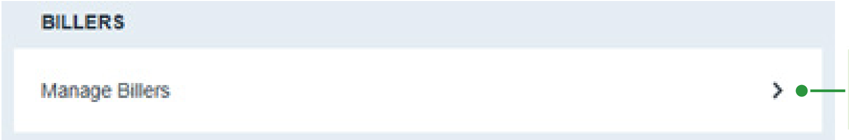
CLICK HERE

NUSENDA® CREDIT UNION

Managing Billers

ACCESS MANAGE BILLERS

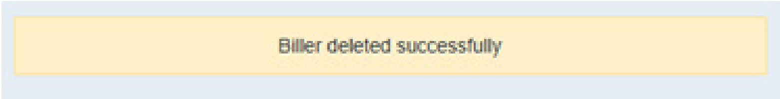
1. Click the **gear icon** to open Settings. CLICK HERE
2. Under **billers**, click the arrow to manage.



CLICK HERE

REMOVING A BILLER

1. Select the biller.
2. Select the icon.
3. Click **Confirm**.
4. A confirmation message will appear: *“Biller deleted successfully.”*



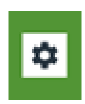
EDITING A BILLER

1. Select the biller.
2. Update any of the following:
   - Account Number
   - Nickname
   - Biller Address
   - Manage Group Filters
3. Click **Update**.
4. A confirmation message will appear: *"Your changes have been saved."*

Managing Groups

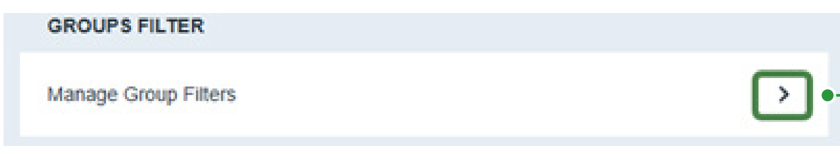
ACCESS MANAGE GROUP FILTERS

1. Click the **gear icon** to open Settings.



CLICK HERE

2. Under **Group Filters**, click the arrow.

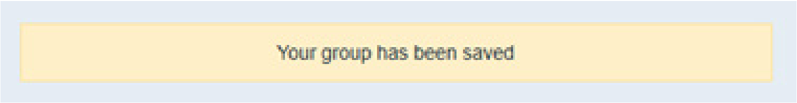


CLICK HERE

CREATING A GROUP

1. Click **Create Group**.
2. Enter a group name.

3. Select billers to include.
   Note: Members can use the search bar to find billers quickly.
4. Click **Save**.
5. A confirmation message will appear: “Your group has been saved.”



EDITING A GROUP

1. Click the group.
2. Update the **group name** and/or **billers**.
3. Click **Update**.
   Note: If no billers remain in the group, the group will be automatically deleted.
4. A confirmation message will appear: *“Your group filter ‘Group Name’ has been updated.”*

REMOVING A GROUP

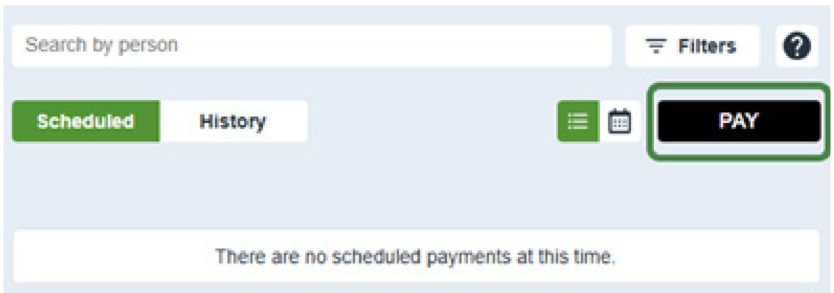
1. Select the group.
2. Select the icon.
3. Click **Confirm.**
4. A confirmation message will appear: *“Group Filter has been removed.”*

User Guide for Bill Pay and Person to Person Transfers

PERSON TO PERSON TRANSFERS

Adding a New Contact

1. Click **Pay**.



CLICK HERE

*Note: Members can also add new contacts by going to **Settings** and clicking the arrow for Manage Contacts.*

CLICK HERE

2. Select **Add Contact**.
3. Choose where to receive the 2-Step Verification Code.
Note: If adding multiple contacts in one session, verification is only required once.
4. Enter the 6-digit verification code and click **Verify Code**.
5. Complete the contact details:
    - First Name
    - Last Name
    - Mobile Number and/or Email
6. Confirm the **payment delivery method**.

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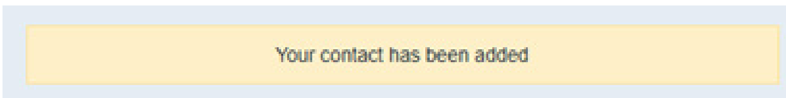
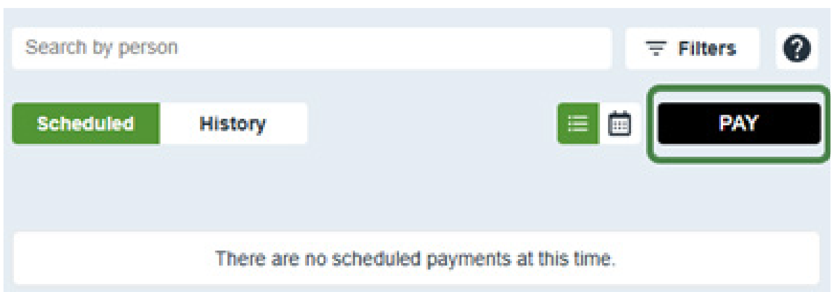
4. Set a **security question** and **answer** that the contact must provide to receive payment.
5. Click **Save**.
6. A confirmation message will appear: *"Your contact has been added."*



Paying a Contact

1. Click **Pay**.

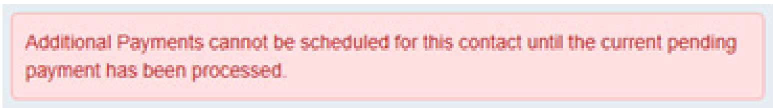
CLICK HERE



2. Select the contact.
3. Click **Next**.
4. Enter the **payment amount**.
5. *Optional* - Add a memo.
6. Confirm the **funding account**.
7. Select the **send date**.
8. Set the payment frequency (one-time or recurring).

9 Select **Pay**.

Note: Payments to contacts with pending transactions will result in the error below until original payment has been processed.



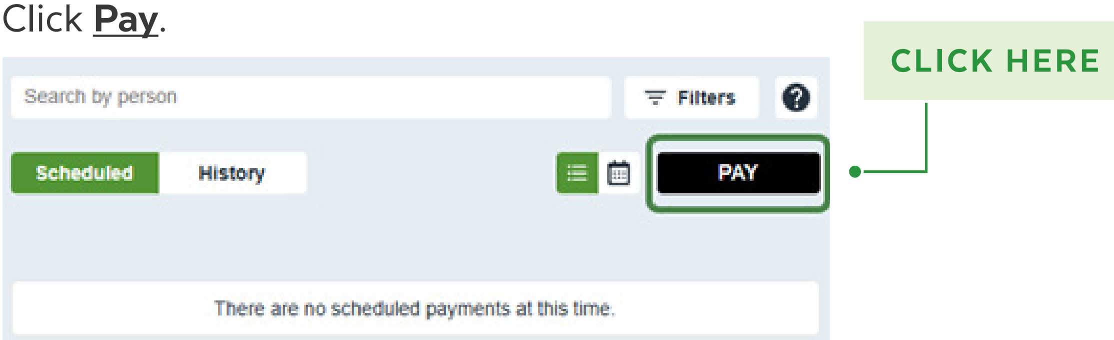
10 Review all payment details.

11 Click **Confirm**.

12 A confirmation screen will appear. Click **Done**.

Paying a Group NEW

1 Click **Pay**.



2 Select Group.

3 Click **Select All Contacts Below** or choose individual contacts.

Note: Contacts with a checkmark will be included. ✓

4 Click **Next**.

5 Complete one of the following:

- Enter an amount applicable to each contact.
- Click **Custom Amounts** to enter individual amounts per contact.

6. *Optional* - Add a memo.
7. Confirm the funding account.
8. Select the **send date**.
9. Set the payment frequency (one-time or recurring).
10. Click **Pay**.
11. Review all payment details.
12. Click **Confirm**.
    Note: If a contact has a pending payment, any additional payment attempts will result in the error shown below until the original payment is processed. Payments to contacts without pending transactions will process as expected.

13. A confirmation screen will appear. Click **Done**.

Settings

OPEN SETTINGS

- Click the **gear icon** to open Settings.

PREFERENCES

- Set your **Default Funding Account** by clicking the arrow to view and choose account.

Person to Person Transfers

PAYMENT ALERTS

- Choose email or text (SMS) for alerts.
- Toggle alerts on/off for:
  - When payment is sent.
  - When payment is delivered.

    Note: Green toggle indicates alerts are enabled.
- Set the number of days in advance to receive alerts.

CONTACTS

- Click the arrow to manage your billers.

CLICK HERE

GROUP FILTERS

- Click the arrow to customize and manage group filters.

CLICK HERE

Managing Contacts

ACCESS MANAGE CONTACTS

1. Click the **gear icon** to open Settings. CLICK HERE
2. Under **Contacts**, click the arrow to manage.

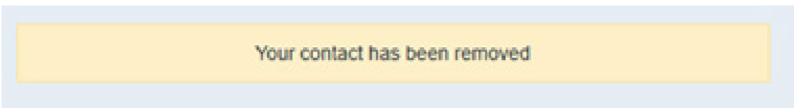
CLICK HERE

Person to Person Transfers

MANAGING CONTACTS

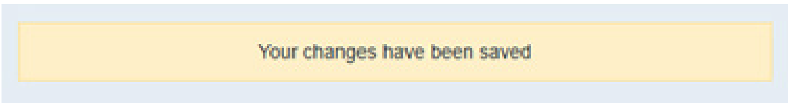
REMOVING A CONTACT

1. Select the contact.
2. Select the icon.
3. Confirm by clicking **Delete**.
4. A confirmation message will appear: *"Your contact has been removed."*



EDITING A CONTACT

1. Select the contact.
2. Update any of the following:
   - First Name
   - Last Name
   - Mobile Number and/or Email
   - Preferred Payment Method
   - Security Question
3. Click **Save Changes**.
   Note: Updating details resets verification. The contact will receive a new link and must answer the security question to proceed.
4. A confirmation message will appear: *"Your changes have been saved."*



Managing Groups

ACCESS MANAGE GROUP FILTERS

1. Click the **gear icon** to open Settings. CLICK HERE
2. Under **Group Filters**, click the arrow.

CLICK HERE

CREATING A GROUP

1. Click **Create Group**.
2. Enter a group name.
3. Select contact to include.
   Note: Members can use the search bar to find contacts quickly.
4. Click **Save**.
5. A confirmation message will appear: "Your group has been saved."

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EDITING A GROUP

1. Click the group.
2. Update the **group name** and/or **contacts**.
3. Click **Update**.
   Note: If no contacts remain in the group, the group will be automatically deleted.
4. A confirmation message will appear: *"Your group filter 'Group Name' has been updated."*

REMOVING A GROUP

1. Select the group.
2. Select the icon.
3. Click **Confirm.**
4. A confirmation message will appear: *"Group Filter has been removed."*

User Guide for Bill Pay and Person to Person Transfers

FREQUENTLY ASKED QUESTIONS

Q **Why is this change taking place?**

A We are so excited to provide our members with upgrades to provide an optimal digital experience. Enjoy new features such as:

- **Improved navigation** in both Bill Payer and Person to Person (P2P).
- **Simplified payment editing** for greater convenience in Bill Payer and P2P.
- **Distinct transaction tabs** to improve clarity in Bill Pay.
- **Group payment capability**, allowing you to pay multiple people or businesses in different amounts within P2P.

Q **Do I need to do anything extra to access the updated services?**

A No, you will automatically be in the updated services when you login with your regular credentials through Mobile or Internet Banking.

Q **What if I have more questions?**

A You can read our FAQs **here**.

Q **Where can I find further updates?**

A For up-to-date information, you can watch our video tutorials **here**.

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