



# ALLIED BILLPAY UI

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## SUMMARY

BillPay / FlexPay is a payment option to pay an Electronic or Paper/Check Biller quickly and easily using your checking account.

## INTENDED USE OF THIS DOCUMENT

This document is intended to provide a detailed demonstrate the BillPayV2.

# PAY BILLS

## Main Page Overview

NAVIGATION MENU

SEARCH BOX

ADD PAYEE BUTTON

SHOW: RECENT/ALL

The screenshot shows the main interface of the Pay Bills application. At the top, there is a navigation bar with a dropdown menu labeled 'I want to', a search box, an 'Add Payee' button, and a 'Show: Recent' dropdown. Below this is a table of payees with columns for Name, Amount, Send On, Est. Delivery, and Recurring. The table lists five payees: AMERICAN BURGER, COMCAST, FRONTIER COMMUNICATION, LOWE'S, and PIZZA CUBE. To the right of the table are two widgets: 'Scheduled Payments' (showing 'There are no scheduled payments') and 'Recent Payments' (showing a payment for FRONTIER COMMUNICATION on 2/27/19 for \$6.21).

PAYEES LIST

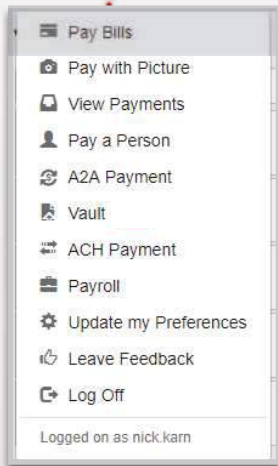
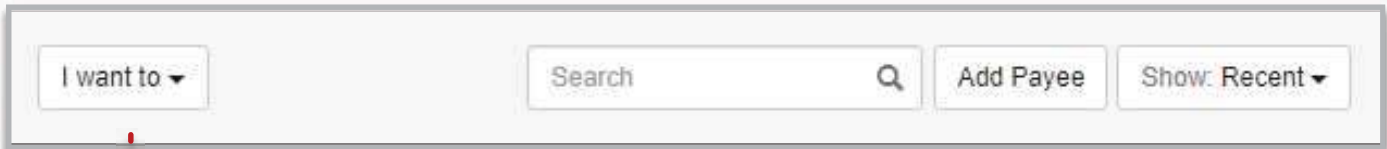
SCHEDULED AND RECENT PAYMENTS WIDGETS

DYNAMIC WINDOW RESIZING

This screenshot shows the same Pay Bills interface as above, but with a grey box overlaid on the right side, demonstrating dynamic window resizing. The box is positioned over the 'Scheduled Payments' and 'Recent Payments' widgets, and its bottom edge is being dragged downwards, as indicated by a dashed red line.

# PAY BILLS II

## Navigation & Options



- ◆ The Header of the New UI contains the “I Want To” navigation drop menu, Search Payees box, and Add Payee button.
- ◆ The drop menu serves as Options and Navigation and contains links to Pay Bills, Add Payee, Pay with Picture, View Payments, Update my Preferences, Leave Feedback, and Log Off

**\*The Version # is only displayed at the Log In screen.**

**\*\*There is no longer an Alphabetical Find Payee function.**



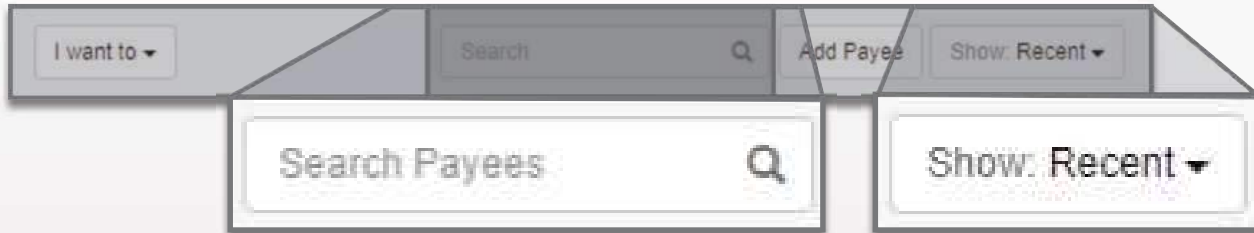
- ◆ Click either one of the Add Payee buttons to create your first Payee.

CONTINUE TO ADD PAYEE



# PAY BILLS III

## Search & Payees List




I want to ▾ Search 🔍 Add Payee Show: Recent ▾

Search Payees 🔍

Show: Recent ▾

- ◆ Find and Filter Payees by:
  - ◆ Scrolling through the list of Payees
  - ◆ Entering any alpha-numeric combination that is contained within one of your Payees into the Search box.
    - Ex: Rotary Club of Texas can be found by typing “Club” or even “tary”
  - ◆ Entering last 4 digits of Account # into the Search box.
- ◆ The Show: Recent / All drop menu allows the user to expand or filter the Payees list. Payees that have gone without Payments for 90 days will only appear when Show: All is active.

Name	Amount	Send On 📅	Est. Delivery 📅	Recurring
> ALLIED - *LLIED No payment history 📧	\$ <input type="text"/>	<input type="text"/> 📅	<input type="text"/> 📅	Off
> COMCAST COMCAST - *-02-2 Next payment: \$3.33 on 2/20/19 ⚡	\$ <input type="text"/>	<input type="text"/> 📅	<input type="text"/> 📅	Off
>  LOWE'S - *151 3 No payment history ⚡	\$ <input type="text"/>	<input type="text"/> 📅	<input type="text"/> 📅	Off

- ◆ Header displays the Name, Amount, Send On / Deliver By Date fields and a Recurring Schedule button. Once a Payee is created it will appear below the header.

# PAY BILLS IV

## Payee Line, Details, Options & Payment Queue

The screenshot shows a payee line for Comcast. It includes a dropdown arrow on the left, the payee name 'COMCAST COMCAST - \*-02-2', a logo, and the text 'Next payment: \$3.33 on 2/20/19'. To the right are input fields for amount, date, and a calendar icon, followed by an 'Off' button. Below this are fields for 'Mario \*56456' and 'Test', an 'Edit Payee' button with a dropdown arrow, a 'Rush Payment' button, and a 'History' button.

- ◆ Each Payee Line consists of a Payee Name / Nickname, last 4 digits of Account #, last Payment History, Payment Type Icon, Amount field, Send On / Deliver By Date fields & Calendars, and Recurring button.
- ◆ Clicking on a Payee or the arrow to the left of it turns the Payee beige and opens up Payee Options which include: Pay From Account drop menu, Memo field, Edit Payee button, and Rush Payment button.
- ◆ The arrow to the left of the Payee indicates points down when details are open.

**\*Some Payees display a logo.**

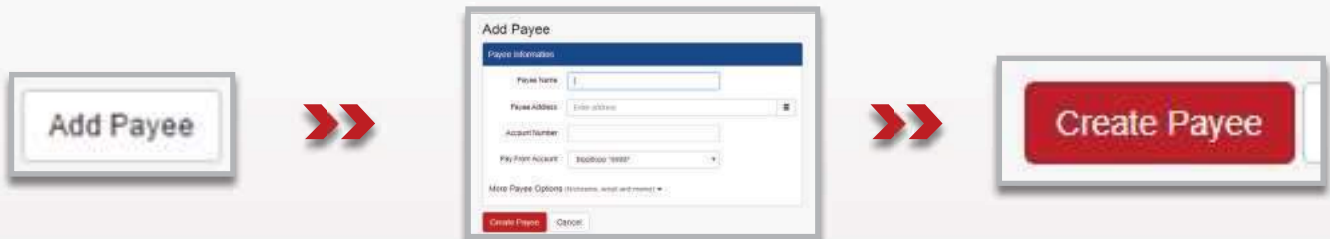
**\*\*The User must click the arrow to close the Payment Options.**

The screenshot shows a Payments Queue section. It features the text 'Payments' and 'Total amount' with a value of '\$5.00'. Below 'Payments' is a '1' followed by a drop-down arrow. To the right is a red button labeled 'Pay Bills' with a document icon.

- ◆ The Payments Queue appears at the top right of the page only after you enter an Amount next to one of your Payees
- ◆ It displays the # of Payments, accompanied by a drop display arrow, Total Amount of all Payments and a Submit Payments button.
- ◆ Clicking the drop display arrow opens a preview list of all Payments where you can view and delete Payments.
- ◆ Clicking the Pay Bills button will open a Payment Review window with the header Pay Bills.

# ADD PAYEE

## Add Payee process



The Add Payee process can be as simple as linking an account or manually creating your Payee.

1. Click Add Payee from the main page.
2. Search for a Biller and link your account OR Add Manually
3. Click Add Payee / Create Button.

**\*Check the Payees list to see that your new Payee is listed and displays the correct Payment Type icon.**

# ADD PAYEE

## Add Payee process



- ◆ Click either one of the Add Payee buttons to create your first Payee.

Add Payee

Search by payee name


Can't find your payee?  
You may add it manually.

◆ Enter the name of a Payee into the Search box, then select their logo icon from the resulting Payees list.

or

- ◆ If you can't find the Payee in the list, click on Add Payee to enter the Payee information manually.
- ◆ To return to the Pay Bills page instead, click the Cancel button.

# ADD PAYEE MANUALLY

## Add Payee Page Overview

### Add Payee

#### Payee Information



COMCAST

Payee Address  ☰

Account Number

Pay From Account  ▼

More Payee Options (Nickname, email and memo) ▼

#### Additional Information

What is your service address? \*

What is your PIN for this biller? \*

What are the last 4 digits of your Social Security Number? \*

\* If the User clicked Add Manually after entering a name in the search box some information, such as the logo and/or delivery information, may be provided. Any other information must be entered manually.



# ADD PAYEE MANUALLY

## Add Payee Page Breakdown in the New UI



- ◆ ENTER THE BILLER'S NAME
- ◆ \*PAYEE NAME OR LOGO WILL APPEAR HERE IF IT WAS PREVIOUSLY ENTERED IN THE SEARCH BOX.

Enter address



- ◆ ENTER PAYEE ADDRESS
- ◆ USES GOOGLE PLACES TO FIND ADDRESSES RELATING TO THE INFORMATION ENTERED
- ◆ CLICK THE OPTIONS ICON TO THE RIGHT TO ENTER ADDRESS INFO MANUALLY

Account Number

- ◆ ENTER THE ACCOUNT NUMBER.

Pay From Account

USAA \*17335

- ◆ CHOOSE THE PAY FROM ACCOUNT FROM THE DROP MENU.

Nickname

Payee Email 

Memo

### MORE PAYEE OPTIONS INCLUDE:

- ◆ NICKNAME
- ◆ EMAIL
- ◆ MEMO

What is your service address? \*

Enter a location

### SOME BILLERS ASK FOR ADDITIONAL INFORMATION SUCH AS:

- ◆ SERVICE ADDRESS

# EDIT / DELETE PAYEE

## Edit / Delete a Payee in New UI

▼ OAK SMOKE'S - \*3223  01/18/2018 01/22/2018 Off  
No payment history

Pizza Party Fund \*97253 Test [Edit Payee](#) [Rush Payment](#) [History](#)

- ◆ CLICK ON THE EDIT LINK IN THE PAYEE DETAILS / OPTIONS FROM THE PAY BILLS PAGE TO OPEN EDIT PAYEE PAGE.
- ◆ EDIT PAYEE PAGE APPEARS SIMILAR TO THE ADD PAYEE PAGE WITH EDIT PAYEE HEADER.

[Edit Payee](#)



### UPDATE PAYEE

- ◆ PAYEE NAME LOCKED, ALL OTHER FIELDS ARE EDITABLE.
- ◆ CLICK CANCEL TO FOREGO ANY CHANGES AND RETURN TO BILL PAY PAGE
- ◆ CLICK UPDATE PAYEE TO CONFIRM CHANGES TO PAYEE TEMPLATE.
- ◆ CHANGES WILL APPEAR ON PAYEE LINE, PAYEE DETAILS, UNPROCESSED PAYMENTS, AND ANY FUTURE PAYMENTS.

## Edit Payee

Payee Information		Payee Address	
Name OAK SMOKE'S TOBACCO LOUNGE	Nickname <input type="text"/>	Zip Code 46815	
Account Number 3223	Payee Email <input type="text"/>	Address Line 1 3217 STELLHORN ROAD	Address Line 2 <input type="text"/>
Pay From Account BippBopp *66997	Memo Test	City FORT WAYNE	State Indiana

[Save](#) [Delete Payee](#) [Cancel](#)

### DELETE PAYEE

- ◆ CLICK DELETE AND CONFIRM TO DELETE A PAYEE.
- ◆ DELETED PAYEES WILL NO LONGER APPEAR IN YOUR PAYEES LIST AND ANY FUTURE RECURRING PAYMENTS WILL BE CANCELED.
- ◆ ANY SCHEDULED OR RECURRING PAYMENTS WILL BE DELETED.

# ADD ACH PAYEE

Add Payee page breakdown in the New UI

(same forms, different layout)

Add ACH Payee



**Add ACH Payee**

ACH Payee Information		External Bank Information
Name *	Nickname	Routing Number *
<input type="text"/>	<input type="text"/>	<input type="text"/>
Payee Email		Account Number *
<input type="text"/>		<input type="text"/>
Transfer From		Account Type *
<input type="text" value="BlopBopp 166997"/>		<input type="text" value="Checking"/>

**Additional Information**

Reference

\* denotes required field

CANCEL BUTTON

ADD BUTTON

ADDITIONAL INFORMATION

EXTERNAL BANK INFORMATION

PAYEE NAME & TRANSFER ACCOUNT INFO

# ACH PAGE

## ACH Page Overview

- Pay Bills
- Pay with Picture
- View Payments
- Pay a Person
- A2A Payment
- Vault
- ACH Payment**
- Payroll
- Update my Preferences
- Leave Feedback
- Log Off

Logged on as nick.karn

NAVIGATION MENU

SEARCH BOX

ADD ACH PAYEE BUTTON

SHOW: RECENT / ALL

I want to ▾ Search  Add ACH Payee Show: Recent ▾

Name	Amount	Send On	Est. Delivery	Recurring
GOOD - *87478 No payment history ⚡	\$ <input type="text"/>	03/05/2019 <input type="text"/>	03/06/2019 <input type="text"/>	Off
TEST ACH - *49875 No payment history ⚡	\$ <input type="text"/>	<input type="text"/>	<input type="text"/>	Off

Scheduled Payments

There are no scheduled payments.

Recent Payments

Processed in last 90 days

ROOM  
\$4.36 on 12/07/18 ⚡

PAYEES LIST

SCHEDULED AND RECENT PAYMENTS WIDGETS

# ADD ACH PAYEE

## Add ACH Payee process



The Add ACH Payee process remains exactly the same between our current and new UI. ACH Payments are electronically transferred from one of your Pay From Accounts to an external bank account.

1. Click Add ACH Payee from the ACH page.
2. Fill in the required fields in the three information forms.
  - 2.a Payee Information
    - Name (required)
    - Nickname (optional)
    - Payee Email (optional)
    - Transfer From Account (required but selected by default)
  - 2.b External Bank Info
    - Routing Number (required)
    - Account Number (required)
    - Account Type (optional drop menu, defaults as Checking)
  - 2.c Additional Information
    - Reference (optional)

3. Click Add Button.

**\*Check the Payees list to see that your new Payee is listed and displays the correct Payment Type icon.**

# EDIT / DELETE ACH PAYEE

## Edit / Delete an ACHPayee in New UI

▼ BONES' MEDICAL LAB    \$    [ ]    [ ]    Off  
Next payment: \$6.00 on 11/29/17 ⚡

Deposit \*99999    test    [Edit Payee](#)    [History](#)

- ◆ CLICK ON THE EDIT PAYEE LINK IN THE ACH PAYEE DETAILS / OPTIONS FROM THE ACH PAGE TO OPEN THE EDIT ACH PAYEE PAGE.



- ◆ EDIT ACH PAYEE PAGE APPEARS SIMILAR TO THE ADD PAYEE PAGE BUT DISPLAYS EDIT ACH PAYEE HEADER.

### UPDATE PAYEE

- ◆ ACH PAYEE NAME LOCKED, ALL OTHER FIELDS ARE EDITABLE.
- ◆ CLICK CANCEL TO FOREGO ANY CHANGES AND RETURN TO THE ACH PAGE
- ◆ CLICK SAVE TO CONFIRM CHANGES TO AN ACH PAYEE TEMPLATE.
- ◆ CHANGES WILL APPEAR ON PAYEE LINE, PAYEE DETAILS, UNPROCESSED PAYMENTS, AND ANY FUTURE PAYMENTS.

**Edit ACH Payee**

ACH Payee Information		External Bank Information
Name	Nickname	Routing Number *
TEST ACH	[ ]	07400010
Payee Email *	[ ]	Account Number *
[ ]	[ ]	321549875
Transfer From	[ ]	Account Type *
BlppBopp '66997	[ ]	Checking

**Additional Information**

Reference

Test

\* denotes required field

[Save](#) [Delete Payee](#) [Cancel](#)

### DELETE PAYEE

- ◆ CLICK DELETE PAYEE AND CONFIRM TO DELETE AN ACH PAYEE.
- ◆ DELETED ACH PAYEES WILL NO LONGER APPEAR IN YOUR ACH PAYEES LIST AND ANY FUTURE RECURRING PAYMENTS WILL BE CANCELED.
- ◆ ANY SCHEDULED OR RECURRING PAYMENTS WILL BE DELETED.

# CREATE A ONE TIME PAYMENT I

## Making A One Time Payment Breakdown I

Name	Amount	Send On	Est. Delivery	Recurring
COMCAST - *-02-2 Next payment: \$3.33 on 2/20/19	\$ 8.25	03/06/2019	03/08/2019	Off

Payments: 2 Total amount: \$15.00

Scheduled Payments: There are no scheduled payments.

◆ SELECT A PAYEE, ACH PAYEE, OR PAYROLL EMPLOYEE FROM ITS CORRESPONDING PAGE.

OAK SMOKE'S - \*3223  
No payment history

Amount: \$ 5 Delivery Date: 01/18/2018

Payee: Pizza Party Fund \*97253

◆ ENTER AN AMOUNT AND CHOOSE A DELIVERY DATE.

Amount: \$ 5 Delivery Date: 06/21/2018

◆ CONFIRM PAY FROM ACCOUNT AND ENTER A MEMO. (OPTIONAL)

Account: Checking 1 \*4108 Memo: Test

◆ PREVIEW THE PAYMENTS FROM THE DROP LIST AND REMOVE ANY UNWANTED PAYMENTS. (OPTIONAL)

Payments	Total amount
2	\$15.00

ACE'S PIZZA - *54321	\$10.00
CAROLYN R HENRY - *76879	\$5.00

◆ PRESS THE PAY BILLS BUTTON

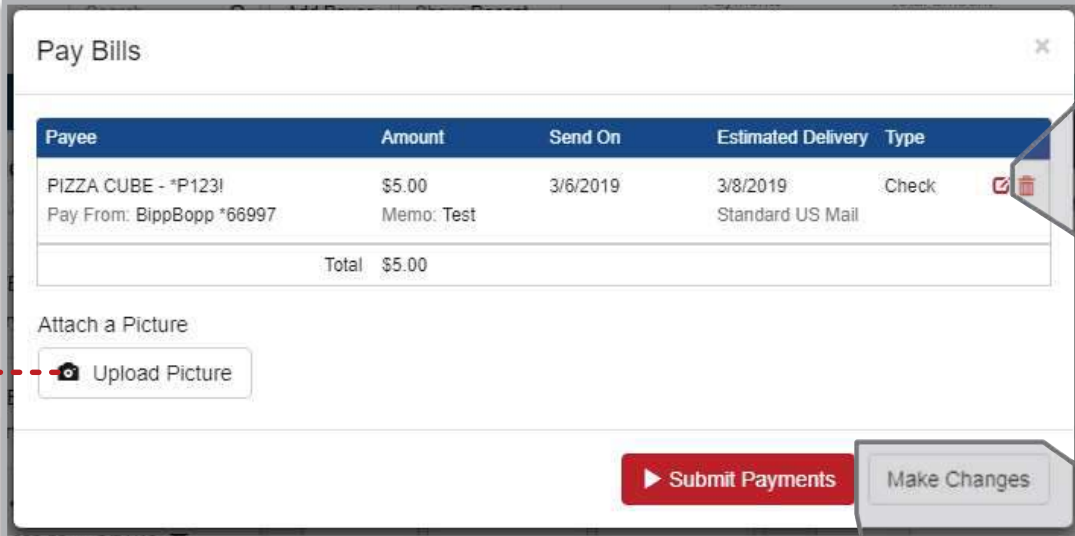
Pay Bills

# CREATE A ONE TIME PAYMENT


## One Time Payment Process in the New UI Breakdown II

◆ REVIEW PAYMENTS. 


◆ REMOVE ANY UNWANTED PAYMENTS (NEW, OPTIONAL). 




Pay Bills

Payee	Amount	Send On	Estimated Delivery	Type	
PIZZA CUBE - *P1231	\$5.00	3/6/2019	3/8/2019	Check	<input checked="" type="checkbox"/> 
Pay From: BippBopp *66997	Memo: Test		Standard US Mail		
Total	\$5.00				

Attach a Picture

 Upload Picture

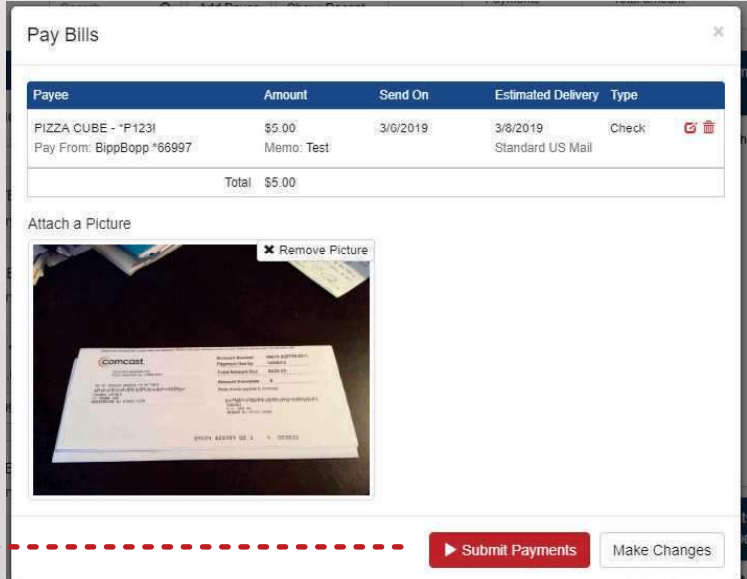


◆ MAKE CHANGES TO PAYMENTS (NEW, OPTIONAL).  
CLOSES PAYMENT REVIEW WINDOW AND KEEPS  
ALL INFORMATION SAVED AND READY TO  
CHANGE ON THE PAY BILLS PAGE. 




◆ UPLOAD PICTURE (NEW, OPTIONAL).  
ALLOWS THE USER TO UPLOAD AN  
IMAGE TO THE PAYMENT.


◆ THERE IS ALSO AN OPTION TO  
REMOVE THE IMAGE.



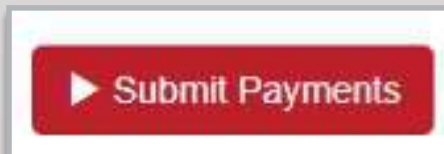
Pay Bills

Payee	Amount	Send On	Estimated Delivery	Type	
PIZZA CUBE - *P1231	\$5.00	3/6/2019	3/8/2019	Check	<input checked="" type="checkbox"/> 
Pay From: BippBopp *66997	Memo: Test		Standard US Mail		
Total	\$5.00				

Attach a Picture



◆ CONFIRM AND SUBMIT PAYMENTS. 





# CREATE A ONE TIME PAYMENT

## One Time Payment Process in the New UI Breakdown II


- ◆ PRINT OR CLOSE PAYMENTS CONFIRMATION.

Pay Bills ✕

✓ Your payment was scheduled.

Payee	Amount	Payment Date	Estimated Delivery	Confirmation #
PIZZA CUBE Pay From: *66997	\$5.00 Memo: TEST	3/6/2019	3/8/2019 STANDARD US MAIL ✉ 2890	8618019
Total		\$5.00		

ⓘ Please note: In order to post your payment as quickly and securely as possible, we sometimes make payments over secure virtual card networks. This means you may occasionally see unfamiliar card numbers in payment confirmation communications you receive.

 Print Close

# MULTIPLE ONE TIME PAYMENTS

## Multiple One Time Payment Process

I want to ▾ Search  Add Payee Show: Recent ▾ Payments: 2 ▾ Total amount: \$15.00 Pay Bills

Name	Amount	Send On	Est. Delivery	Recurring
COMCAST - *-02-2 Next payment: \$3.33 on 2/20/19 ⚡	\$ 9.75	03/06/2019	03/08/2019	Off
Mario *56456 ▾ Test		<span>Edit Payee</span>	<span>Rush Payment</span>	<span>History</span>
OAKEY SMOKER'S TOBA... - *3223 No payment history ✉	\$ 5.25	03/06/2019	03/08/2019	Off
BippBopp *66997 ▾ Test		<span>Edit Payee</span>	<span>Rush Payment</span>	<span>History</span>

Scheduled Payments Search Menu

Total: \$5.00

PIZZA CUBE Refresh Delete Print

\$5.00 on 3/06/19 ☒ 2890

- ◆ FOLLOW THE SAME PROCESS AS SETTING UP A SINGLE PAYMENT WITH MULTIPLE PAYEES, ACH PAYEES, OR PAYROLL EMPLOYEES.
- ◆ THE PAYMENT QUEUE WILL REFLECT ALL ADDED PAYMENTS.

Payments: 1 ▾ Total amount: \$5.00 Pay Bills

# RUSH / EXPEDITE PAYMENTS

## Rush Payment Process in the New UI

- ◆ SET UP PAYMENT AMOUNT AND DATES NEXT TO A PAYEE, ACH PAYEE, OR PAYROLL EMPLOYEE.
- ◆ CLICK THE RUSH PAYMENT BUTTON ON THE PAYEE LINE.

Callout: **Rush Payment**

Payee: OAKLEY SMOKER'S TOBACCO LOU... - \*3223    \$ 5.25    03/06/2019    03/07/2019    Off

No payment history

Pay From: BippBopp \*66997    Memo: Test    Edit Payee    **Rush Payment**    History

Delivery Option	Fee	Earliest Send On	Earliest Deliver By
<input type="radio"/> Standard US Mail	\$0	03/06/2019	03/08/2019
<input checked="" type="radio"/> Overnight Mail	\$19.95	03/06/2019	03/07/2019

Callout: **Overnight Mail    \$19.95**

- ◆ SELECT OVERNIGHT / NEXT DAY NEXT TO EACH PAYMENT YOU WISH TO RUSH IN THE PAYMENT OPTIONS.
- ◆ CLICK ON PAY BILLS.

Pay Bills

Payee	Amount	Send On	Estimated Delivery	Type
OAKLEY SMOKER'S TOBACCO LOU... Pay From: BippBopp *66997    Memo: Test	\$5.25	3/6/2019	3/7/2019	Check
Total				\$5.25

Attach a Picture

I have elected to expedite some payments which will incur an additional fee. I agree and wish to continue.

- ◆ VERIFY FEES FOR RUSH PAYMENTS IN THE PAYMENT REVIEW WINDOW.
- ◆ CLICK SUBMIT PAYMENTS BUTTON.

# CREATE A RECURRING SCHEDULE

## Recurring Payment Process in the New UI

COMCAST COMCAST - \*-02-2 \$ 9.75 03/06/2019 03/08/2019 Off  
Next payment: \$3.33 on 2/20/19 ⚡

Mario \*56456 Test Edit Payee Rush Payment History

- ◆ CLICK ON THE RECURRING BUTTON FROM THE PAYEE LINE NEXT TO A PAYEE, ACH PAYEE, OR PAYROLL EMPLOYEE.



Recurring Payment COMCAST

**Payment Details**

Payment Amount: \$ 0.00 Send On: 3/6/2019 Est. Delivery: 3/8/2019 Pay From Account: Mario \*56456

**Delivery Options**

Payment Frequency: Once Every Month Non-Business Day Option: Pay Previous Business Day

**Send Payments**

Until I cancel this schedule  
 Until this date: mm/dd/yyyy  
 Until 0 payments are made

Save Discard Changes

- ◆ ENTER AMOUNT.
- ◆ ENTER PAYMENT DATES OR CHOOSE FROM CALENDARS.
- ◆ CHOOSE A PAY FROM ACCOUNT. **\*CHANGES TEMPLATE DEFAULT**
- ◆ SELECT A PAYMENT FREQUENCY FROM THE DROP MENU.
- ◆ SELECT "SEND PAYMENTS UNTIL" OPTION.
- ◆ SELECT A NON-BUSINESS DAY OPTION.
- ◆ CLICK SAVE.



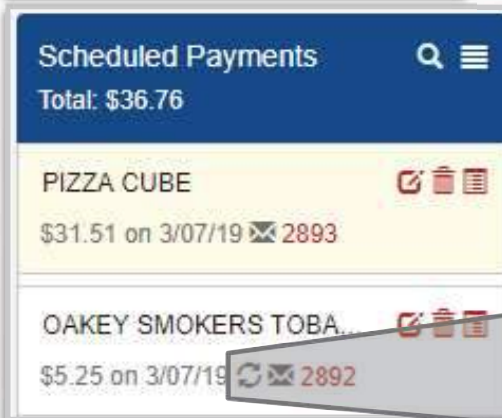
CONTINUE TO VIEW RECURRING PAYMENTS



# CREATE A RECURRING SCHEDULE

## View Recurring Payment in the New UI

### SCHEDULED PAYMENTS WIDGET



**Scheduled Payments** 🔍 ☰  
Total: \$36.76

PIZZA CUBE 🔄 🗑️ 📄  
\$31.51 on 3/07/19 ✉️ 2893

OAKY SMOKERS TOBA... 🔄 🗑️ 📄  
\$5.25 on 3/07/19 ✉️ 2892

- ◆ THERE WILL NOW BE A RECURRING ICON NEXT TO YOUR PAYMENT ON THE SCHEDULED PAYMENTS WIDGET AND VIEW ALL SCHEDULED PAYMENTS PAGE.

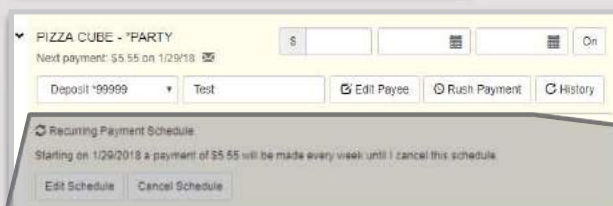
### VIEW ALL SCHEDULED PAYMENTS



**Scheduled Payments** Total: \$30.65 📄 Export 🖨️ Print

Payee	Send ...	Estim...	Amount	Pay From	Method	Type	Recurring	Memo	
OAKY SMOKER'S TOBACCO LOU...	3/08/19	3/12/19	\$2.54	BippBop...	✉️ 2894	📄	🔄	TEST	🗑️ 📄
PIZZA CUBE - *P123!	3/11/19	3/13/19	\$6.15	BippBop...	✉️ 2895	📄	🔄	TEST	🗑️ 📄

### PAY BILLS PAGE



PIZZA CUBE - \*PARTY \$ 📄 🗑️ 📄 On  
Next payment: \$5.55 on 1/29/18 🗑️

Deposit \*99999 ▼ Test 🔄 Edit Payee 🕒 Rush Payment 🕒 History

🔄 Recurring Payment Schedule  
Starting on 1/29/2018 a payment of \$5.55 will be made every week until I cancel this schedule.  
Edit Schedule Cancel Schedule

- ◆ THE RECURRING BUTTON NEXT TO YOUR PAYEE, ACH PAYEE, OR PAYROLL EMPLOYEE WILL NOW SAY ON INSTEAD OF OFF.

### Recurring Payment Schedule

Starting on 1/29/2018 a payment of \$5.55 will be made every week until I cancel this schedule.

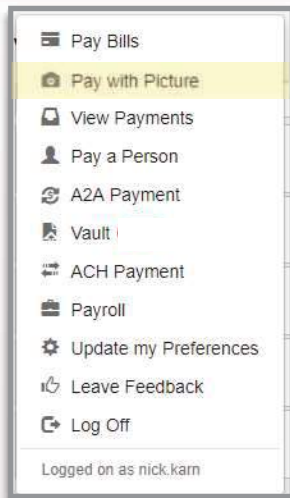
Edit Schedule

Cancel Schedule

- ◆ IF YOU CLICK ON THE PAYEE YOU WILL SEE RECURRING SCHEDULE INFORMATION.

# PAY WITH PICTURE I

## Paying With Picture in the New UI I



- ◆ SELECT PAY WITH PICTURE FROM THE NAVIGATION MENU.
- ◆ CLICK UPLOAD PICTURE.
- ◆ CHOOSE AN IMAGE FROM YOUR PHONE OR PC.



The payment review form includes fields for 'I want to', 'Amount' (set to \$ 0.00), 'Payment Date' (3/30/2018), 'Account to Pay From' (Deposit), and a 'Memo' field. There are 'Pay Bill' and 'Cancel' buttons. To the right is a scanned check from Victoria's Secret for \$342.18, with a QR code and MICR line.

- ◆ ENTER AMOUNT , CHOOSE A PAYMENT DATE, SELECT A PAY FROM ACCOUNT FROM THE DROP MENU, AND ENTER A MEMO (OPTIONAL).
- ◆ CLICK PAY BILL TO REVIEW THE PAYMENT INFORMATION.

CONTINUE TO REVIEW PAYMENT



# PAY WITH PICTURE II

## Paying With Picture in the New UI II

Pay with Picture ✕

Pay To	Amount	Date	Account to Pay From	Memo
Updating Payee...	\$7.00	3/6/2019	BippBopp	Test

- ◆ REVIEW PAYMENT.
- ◆ MAKE CHANGES IF NECESSARY.
- ◆ CLICK SUBMIT PAYMENT TO CONFIRM.



Pay with Picture

Payment scheduled successfully.

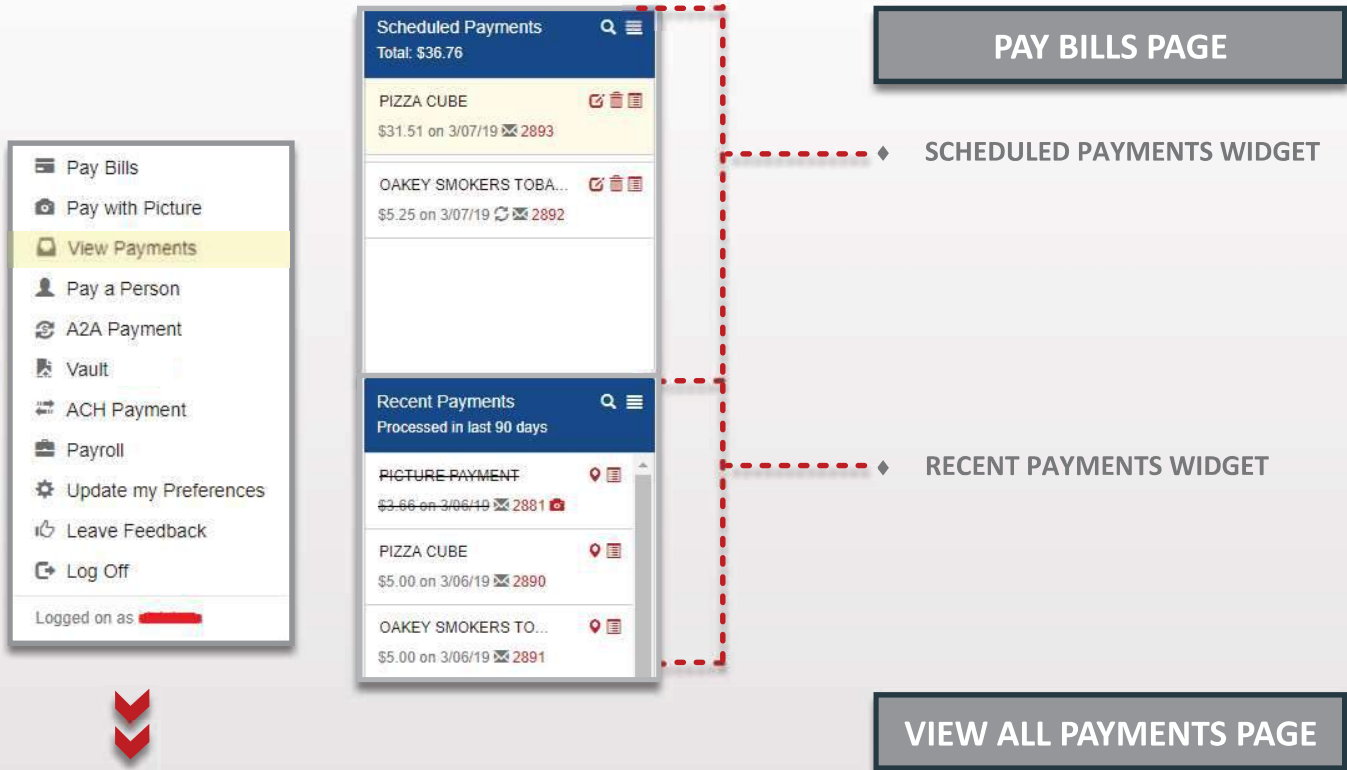
<b>Pay To</b>	We're working on reading the picture. Sometimes it takes a little time.
<b>Amount</b>	\$7.00
<b>Payment Date</b>	3/30/18 (Estimated Delivery: 4/03/18)
<b>Confirmation #</b>	0706631

- ◆ CLICK PRINT TO OPEN A PRINT PREVIEW OF THE CONFIRMATION WINDOW.
- ◆ CLICK PAY ANOTHER TO MAKE ANOTHER PAYMENT.
- ◆ CLICK DONE TO RETURN TO THE PAY BILLS PAGE.



# VIEWING PAYMENTS

## View Payments Page Comparison Overview



I want to

Scheduled Payments Total: \$30.65										<input type="button" value="Export"/>	<input type="button" value="Print"/>
Payee	Send ...	Estim...	Amount	Pay From	Method	Type	Recurring	Memo			
MIKE	11/16/17	11/16/17	\$3.00	*99999	⚡	👤	-	TEST	<input type="button" value="🗑️"/>	<input type="button" value="📄"/>	
TEXAS PETE OTHER CLY	12/05/18	12/05/18	\$8.88	*67890	⚡	👤	-	TESTING	<input type="button" value="🗑️"/>	<input type="button" value="📄"/>	

◆ TOGGLE BETWEEN SCHEDULED & RECENT PAYMENTS

I want to

Recent Payments										<input type="button" value="Export"/>	<input type="button" value="Print"/>
Payee	Send ...	Estim...	Amount	Pay From	Method	Type	Recurring	Memo			
OAKY SMOKERS TOBACCO LOU...	3/07/19	3/11/19	\$5.25	BippBo...	☒2892	📄	✓	TEST	<input type="button" value="📍"/>	<input type="button" value="📄"/>	
PIZZA CUBE - *P123!	3/07/19	3/11/19	\$31.51	BippBo...	☒2893	📄	-	TEST	<input type="button" value="📍"/>	<input type="button" value="📄"/>	
PICTURE PAYMENT	3/06/19	3/12/19	\$3.66	Marie *5...	☒2884	📄	-	TEST	<input type="button" value="📍"/>	<input type="button" value="📄"/>	



# VIEWING PAYMENTS

## Scheduled & Recent Payments Widgets Overview in the New UI

The image displays two widgets from a new user interface. The top widget, titled "Scheduled Payments" with a total of \$36.76, lists two items: "PIZZA CUBE" for \$31.51 on 3/07/19 and "OAKEY SMOKERS TOBA..." for \$5.25 on 3/07/19. The bottom widget, titled "Recent Payments" for payments processed in the last 90 days, lists four items: "PICTURE PAYMENT" for \$3.66 on 3/06/19, "PIZZA CUBE" for \$5.00 on 3/06/19, "OAKEY SMOKERS TO..." for \$5.00 on 3/06/19, and "COMCAST" for \$5,000.00 on 2/21/19. A red dashed line outlines the widgets, with callout boxes labeled "SCHEDULE PAYMENTS" and "RECENT PAYMENTS" pointing to the respective sections.

Payment Type	Merchant	Amount	Date	Transaction ID
Scheduled	PIZZA CUBE	\$31.51	3/07/19	2893
	OAKEY SMOKERS TOBA...	\$5.25	3/07/19	2892
Recent	PICTURE PAYMENT	\$3.66	3/06/19	2881
	PIZZA CUBE	\$5.00	3/06/19	2890
	OAKEY SMOKERS TO...	\$5.00	3/06/19	2891
	COMCAST	\$5,000.00	2/21/19	

# VIEWING PAYMENTS

## Scheduled Payments Widget Breakdown in the New UI



### PAYMENT LINE

- ◆ DISPLAYS THE PAYEES NAME / NICKNAME, PAYMENT AMOUNT, PAYMENT DATE, PAYMENT TYPE, CHECK NUMBER (IF PAPER), CHECK TRACKING ICON, AND PAYMENT DETAILS ICON

### SEARCH BOX

- ◆ CLICK MAGNIFYING GLASS TO ACTIVATE SEARCH BOX
- ◆ FIND AND FILTER PAYMENTS BY:
  - ◆ SCROLLING THROUGH THE LIST OF PAYMENTS.
  - ◆ ENTERING THE PAYEE NAME / NICKNAME OR ANY PART CONTAINED WITHIN IT INTO THE SEARCH BOX.
  - ◆ ENTERING LAST 4 DIGITS OF ACCOUNT # INTO THE SEARCH BOX.
  - ◆ ENTERING THE AMOUNT WITH A DECIMAL AND WITHOUT THE \$.  
EX: 7.77
  - ◆ ENTERING THE PAY DATE EXACTLY AS IT APPEARS.  
EX: 06/26/2017
  - ◆ ENTERING THE 4 DIGITS OF A PAPER PAYMENT'S CHECK #.

### EDIT PAYMENT

- ◆ TAKES USER TO
- ◆ EDIT PAYMENT PAGE.

### CANCEL PAYMENT

- ◆ ASKS USER TO CONFIRM CANCELLATION.

### PAYMENT DETAILS

- ◆ DISPLAYS PAYMENT DETAILS.

### VIEW ALL

- ◆ TAKES THE USER TO THE SCHEDULED PAYMENTS PORTION OF THE VIEW PAYMENTS PAGE.

# VIEWING PAYMENTS

## Recent Payments Widget Breakdown in the New UI



### PAYMENT LINE

- ◆ DISPLAYS THE PAYEES NAME / NICKNAME, PAYMENT AMOUNT, PAYMENT DATE, PAYMENT TYPE, CHECK NUMBER (IF PAPER), CHECK TRACKING ICON, AND PAYMENT DETAILS ICON

### SEARCH BOX

- ◆ CLICK MAGNIFYING GLASS TO ACTIVATE SEARCH BOX
- ◆ FIND AND FILTER PAYMENTS BY:
  - ◆ SCROLLING THROUGH THE LIST OF PAYMENTS.
  - ◆ ENTERING THE PAYEE NAME / NICKNAME OR ANY PART CONTAINED WITHIN IT INTO THE SEARCH BOX.
  - ◆ ENTERING LAST 4 DIGITS OF ACCOUNT # INTO THE SEARCH BOX.
  - ◆ ENTERING THE AMOUNT WITH A DECIMAL AND WITHOUT THE \$.  
EX: 7.77
  - ◆ ENTERING THE PAY DATE EXACTLY AS IT APPEARS.  
EX: 06/26/2017
  - ◆ ENTERING THE 4 DIGITS OF A PAPER PAYMENT'S CHECK #.

### CHECK TRACKING

- ◆ DISPLAYS PAPER PAYMENT TRACKING INFORMATION.

### PAYMENT DETAILS

- ◆ DISPLAYS PAYMENT DETAILS.

### VIEW ALL

- ◆ TAKES THE USER TO THE RECENT PAYMENTS PORTION OF THE VIEW PAYMENTS PAGE.

# VIEWING PAYMENTS

## View Scheduled Payments Page: Breakdown in the New UI I

- Pay Bills
- Pay with Picture
- View Payments**
- Pay a Person
- A2A Payment
- Vault
- ACH Payment
- Payroll
- Update my Preferences
- Leave Feedback
- Log Off

Logged on as [redacted]



- ◆ SELECT VIEW PAYMENTS FROM THE NAVIGATION MENU.
- ◆ CLICK SCHEDULED OR RECENT TO DISPLAY THE CORRESPONDING PAYMENTS.

I want to Scheduled Recent Search Payments

Scheduled Payments Total: \$30.65 Export Print

Payee	Send	Estim	Amount	Pay From	Method	Type	Recurring	Memo	
MIKE	11/16/17	11/16/17	\$3.00	*99999	⚡	👤	-	TEST	🗑️ 📄
TEXAS PETE OTHER GUY	12/05/18	12/05/18	\$8.88	*67890	⚡	👤	-	TESTING	🗑️ 📄
OTHER GUY	12/05/18	12/05/18	\$3.22	*76512	⚡	👤	-	DWARV...	🗑️ 📄
FUNNY	12/05/18	12/05/18	\$4.53	*23322	⚡	👤	-	WOIKS	🗑️ 📄
GOOFY	12/05/18	12/05/18	\$2.33	*76512	⚡	👤	-	RINGIT	🗑️ 📄
Oakey Smoker's Tobacco Lou...	3/08/19	3/12/19	\$2.54	BippBo...	✉️ 2894	🏠	-	TEST	📍 🗑️ 📄

I want to Scheduled Recent Search Payments

Recent Payments Export Print

Payee	Send	Estim	Amount	Pay From	Method	Type	Recurring	Memo	
Oakey Smokers Tobacco Lou...	3/07/19	3/11/19	\$5.25	BippBo...	✉️ 2892	🏠	✓	TEST	📍 📄
PIZZA CUBE - *P123!	3/07/19	3/11/19	\$31.51	BippBo...	✉️ 2893	🏠	-	TEST	📍 📄
PICTURE PAYMENT	3/06/19	3/12/19	\$3.66	Marie *5...	✉️ 2884	🏠	-	TEST	📍 📄 📄
PIZZA CUBE - *P123!	3/06/19	3/08/19	\$5.00	BippBo...	✉️ 2890	🏠	-	TEST	📍 📄

# VIEWING PAYMENTS

## View Scheduled Payments Page: Breakdown in the New UI I

### SCHEDULED

- ◆ SCHEDULE PAYMENTS PAGE
- ◆ RED INDICATES PAGE IS ACTIVE

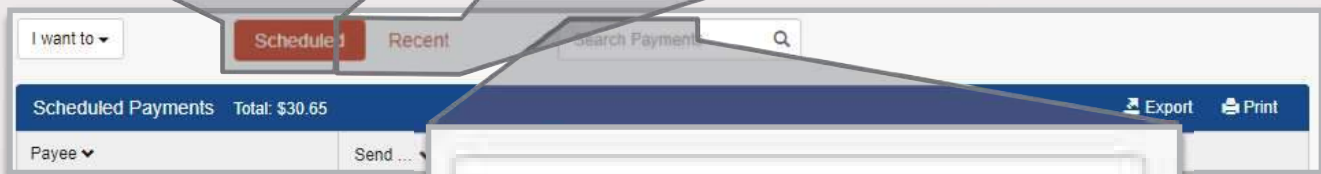
### RECENT

- ◆ RECENT PAYMENTS TOGGLE LINK
- ◆ GREY INDICATES PAGE IS NOT ACTIVE
- ◆ TAKES USER TO RECENT PAYMENTS



Scheduled

Recent



SEARCH BOX



Search Payments








- ◆ FIND AND FILTER PAYMENTS BY:
  - ◆ SCROLLING THROUGH THE LIST OF PAYMENTS.
  - ◆ ENTERING THE PAYEE NAME / NICKNAME OR ANY PART CONTAINED WITHIN IT INTO THE SEARCH BOX.
  - ◆ ENTERING LAST 4 DIGITS OF ACCOUNT # INTO THE SEARCH BOX.
  - ◆ ENTERING THE AMOUNT WITH A DECIMAL AND WITHOUT THE \$.  
EX: 7.77
  - ◆ ENTERING THE PAY DATE EXACTLY AS IT APPEARS.  
EX: 06/26/2017
  - ◆ ENTERING THE 4 DIGITS OF A PAPER PAYMENT'S CHECK #.

# VIEWING PAYMENTS

## View Scheduled Payments Page: Breakdown in the New UI II

### SORTING HEADER

- ◆ CLICK PAYEE, WITHDRAW, DELIVERED, OR AMOUNT TO SORT PAYMENTS.

Payee ▼	Send ... ▼	Estim... ▼	Amount ▼	P					
Scheduled Payments Total: \$30.65 <span>Export</span> <span>Print</span>									
Payee ▼	Send ... ▼	Estim... ▼	Amount ▼	Pay From	Method	Type	Recurring	Memo	
Oakey Smoker's Tobacco Lou...	3/08/19	3/12/19	\$2.54	BippBop...	2894		-	TEST	  
Pizza Cube - *P123!	3/11/19	3/13/19	\$6.15	BippBop...	2895		✓	TEST	  

### PAYMENT LINE

- ◆ DISPLAYS THE PAYEE'S NAME / NICKNAME, WITHDRAW DATE, DELIVERED DATE, AMOUNT, ACCOUNT #, PAYMENT TYPE, RECURRING INDICATOR, NOTE/MEMO EDIT PAYMENT ICON, AND CANCEL PAYMENT ICON.

### RECURRING INDICATOR

- ◆ CHECKED IF A PAYMENT IS PART OF A RECURRING SCHEDULE.

### EDIT PAYMENT

- ◆ TAKES USER TO EDIT PAYMENT PAGE.

### CANCEL PAYMENT

- ◆ ASKS USER TO CONFIRM CANCELLATION OF PAYMENT.

### PAYMENT DETAILS

- ◆ DISPLAYS PAYMENT DETAILS

# VIEWING PAYMENTS

## View Recent Payments Page: Breakdown in the New UI I

### SCHEDULED

- ◆ SCHEDULE PAYMENTS TOGGLE LINK
- ◆ BLUE INDICATES PAGE IS ACTIVE
- ◆ TAKES USER TO RECENT PAYMENTS

### RECENT

- ◆ RECENT PAYMENTS PAGE
- ◆ COLOR INDICATES PAGE IS ACTIVE



Scheduled

Recent

I want to ▾ Scheduled Recent Search Payments 🔍

Recent Payments Export Print

Payee ▾	Send ... ▾
OAKY SMOKERS TOBACCO LOU...	3/07/19

SEARCH BOX >>> Search Payments 🔍

### ◆ FIND AND FILTER PAYMENTS BY:

- ◆ SCROLLING THROUGH THE LIST OF PAYMENTS.
- ◆ ENTERING THE PAYEE NAME / NICKNAME OR ANY PART CONTAINED WITHIN IT INTO THE SEARCH BOX.
- ◆ ENTERING LAST 4 DIGITS OF ACCOUNT # INTO THE SEARCH BOX.
- ◆ ENTERING THE AMOUNT WITH A DECIMAL AND WITHOUT THE \$.  
EX: 7.77
- ◆ ENTERING THE PAY DATE EXACTLY AS IT APPEARS.  
EX: 06/26/2017
- ◆ ENTERING THE 4 DIGITS OF A PAPER PAYMENT'S CHECK #.

# VIEWING PAYMENTS

## View Recent Payments Page: Breakdown in the New UI II

### SORTING HEADER

- ◆ CLICK PAYEE, WITHDRAW, DELIVERED, OR AMOUNT TO SORT PAYMENTS.

Payee ▾	Send ... ▾	Estim... ▾	Amount ▾	Pay From	Method	Type	Recurring	Memo	
Recent Payments <span>Export</span> <span>Print</span>									
OAKEY SMOKERS TOBACCO LOU...	3/07/19	3/11/19	\$5.25	BippBo...	✉2892	☑	☑	TEST	📍 📄
PIZZA CUBE - *P123!	3/07/19	3/11/19	\$31.51	BippBo...	✉2893	☑	-	TEST	📍 📄

### PAYMENT LINE

- ◆ DISPLAYS THE PAYEES NAME / NICKNAME, WITHDRAW DATE, DELIVERED DATE, AMOUNT, ACCOUNT #, PAYMENT TYPE, RECURRING INDICATOR, NOTE/MEMO EDIT PAYMENT ICON, AND CANCEL PAYMENT ICON.

### RECURRING INDICATOR

- ◆ CHECKED IF A PAYMENT IS PART OF A RECURRING SCHEDULE.

### CHECK TRACKING

- ◆ DISPLAYS PAPER PAYMENT TRACKING INFORMATION.

### PAYMENT DETAILS

- ◆ DISPLAYS PAYMENT DETAILS





# EXPORTING PAYMENTS

## EXPORT Payments: Breakdown in the New UI

Export Print

Export Print



OPENS THE EXPORT OPTIONS WINDOW

Export Options

Export As:  PDF  Excel  CSV

6/27/2017



to

7/27/2017



Filter By Payee

Select A Payee

Submit

Close

### EXPORT AS

- ◆ DETERMINES A FILE FORMAT TO BE EXPORTED.

### DATE RANGE

- ◆ MANUALLY ENTER DATE RANGE INTO THE FIELDS OR SELECT FROM THE CALENDARS.

### FILTER BY PAYEE CHECKBOX

- ◆ CHECK THIS BOX TO FILTER THE EXPORT BY A PAYEE.

### SUBMIT

- ◆ DOWNLOADS THE DESIGNATED EXPORT FILE.

### CLOSE BUTTON

- ◆ CLOSSES THE EXPORT OPTIONS WINDOW.

### FILTER BY PAYEE FIELD

- ◆ CHOOSE A PAYEE FROM THE DROP DOWN TO FILTER THE PRINTED DOCUMENT BY A SINGLE PAYEE.

# PRINTING PAYMENTS

## PRINT Payments: Breakdown in the New UI

Export Print

Export Print



◆ OPENS THE PRINT OPTIONS WINDOW

Print Options

6/27/2017 to 7/27/2017

Filter By Payee

Select A Payee

Submit Close

### DATE RANGE

- ◆ MANUALLY ENTER DATE RANGE INTO THE FIELDS OR SELECT FROM THE CALENDARS.

### FILTER BY PAYEE CHECKBOX

- ◆ CHECK THIS BOX TO FILTER THE PRINT BY A PAYEE.

### SUBMIT

- ◆ OPENS A PRINT PREVIEW IN A NEW TAB.

### CLOSE BUTTON

- ◆ CLOSSES THE PRINT OPTIONS WINDOW.

### FILTER BY PAYEE FIELD

- ◆ CHOOSE A PAYEE FROM THE DROP DOWN TO FILTER THE PRINTED DOCUMENT BY A SINGLE PAYEE.

# EDIT A PAYMENT

## Editing Payments in the New UI

- ◆ CLICK ON THE EDIT PAYMENT ICON IN THE SCHEDULED PAYMENTS WIDGET OR THE VIEW ALL SCHEDULED PAYMENTS PAGE TO OPEN EDIT PAYMENT PAGE.

Payee	Send ...	Estim...	Amount	Pay From	Method	Type	Recurring	Memo	
OAKEY SMOKER'S TOBACCO LOU...	3/08/19	3/12/19	\$2.54	BippBop...	✉ 2894	☑	-	TEST	  
PIZZA CUBE - *P123!	3/11/19	3/13/19	\$6.15	BippBop...	✉ 2895	☑	-	TEST	  

Scheduled Payments  
Total: \$36.76

PIZZA CUBE  
\$31.51 on 3/07/19 ✉ 2893



Payment Information	Payee Information									
<p>Amount: \$ 5.00</p> <p>Send On: 3/12/2019</p> <p>Est. Delivery: 3/14/2019</p> <p>Memo: TEST</p> <table border="1"><thead><tr><th>Delivery Method</th><th>Send Date</th><th>Est. Delivery</th></tr></thead><tbody><tr><td><input checked="" type="radio"/> Standard US Mail (Fee: \$0)</td><td>03/12/2019</td><td>03/14/2019</td></tr><tr><td><input type="radio"/> Overnight Mail (Fee: \$19.95)</td><td>03/12/2019</td><td>03/13/2019</td></tr></tbody></table> <p>Confirmation Number: 5894851</p> <p><b>Save</b> Cancel Payment Discard Changes</p>	Delivery Method	Send Date	Est. Delivery	<input checked="" type="radio"/> Standard US Mail (Fee: \$0)	03/12/2019	03/14/2019	<input type="radio"/> Overnight Mail (Fee: \$19.95)	03/12/2019	03/13/2019	<p>Name: OAKEY SMOKER'S TOBACCO LOUNGE</p> <p>Account: 3223</p> <p>Address: 3217 STELLHORN ROAD FORT WAYNE, IN 46815</p>
Delivery Method	Send Date	Est. Delivery								
<input checked="" type="radio"/> Standard US Mail (Fee: \$0)	03/12/2019	03/14/2019								
<input type="radio"/> Overnight Mail (Fee: \$19.95)	03/12/2019	03/13/2019								

### EDIT PAYMENT

- ◆ PAYEE NAME, ADDRESS, AND ACCOUNT ARE LOCKED, ALL OTHER OPTIONS ARE EDITABLE.
- ◆ CLICK CANCEL CHANGES TO FOREGO ANY CHANGES AND RETURN TO PAYMENTS PAGE
- ◆ CLICK REVIEW TO CONFIRM CHANGES TO THE SCHEDULED PAYMENT.
- ◆ CHANGES WILL APPEAR IN THE PAYMENT DETAILS IN THE SCHEDULED PAYMENTS WIDGET AND VIEW SCHEDULED PAYMENTS PAGE.

# CANCEL A PAYMENT

## Canceling Payments in the New UI

- ◆ CLICK ON THE EDIT PAYMENT ICON IN THE SCHEDULED PAYMENTS WIDGET OR

Payee ▼	Send ... ▼	Estim... ▼	Amount ▼	Pay From	Method	Type	Recurring	Memo	
OAKY SMOKER'S TOBACCO LOU...	3/08/19	3/12/19	\$2.54	BippBop...	✉ 2894	☑	-	TEST	✎ 🗑️ 📄
PIZZA CUBE - *P123!	3/11/19	3/13/19	\$6.15	BippBop...	✉ 2895	☑	-	TEST	✎ 🗑️ 📄

Scheduled Payments  
Total: \$36.76

PIZZA CUBE  
\$31.51 on 3/07/19 ✉ 2893



### Cancel Payment

Are you sure you want to delete this payment?

### CANCEL PAYMENT

- ◆ CLICK ON THE CANCEL PAYMENT ICON IN THE PAYEMENT DETAILS / OPTIONS FROM THE SCHEDULED PAYMENTS WIDGET OR VIEW ALL SCHEDULED PAYMENTS PAGE.
- ◆ CANCELED PAYMENTS WILL BE REMOVED FROM YOUR SCHEDULED PAYMENTS LIST SCHEDULED PAYMENTS WIDGET OR VIEW ALL SCHEDULED PAYMENTS PAGE.

# EDIT A RECURRING PAYMENT SCHEDULE

## Editing Recurring Payment Schedules in the New UI

PIZZA CUBE - \*P123I

Next payment: \$5,000.00 on 2/21/19

BippBopp \*66997 Test Edit Payee Rush Payment History

Recurring Payment Schedule

Starting on 3/12/2019 a payment of \$5.55 will be made every week until I cancel this schedule.

Edit Schedule Cancel Schedule

**Edit Schedule**

**On**

The screenshot shows a recurring payment schedule for 'PIZZA CUBE'. It includes fields for payment amount, send on date, and pay from account. There are buttons for 'Edit Payee', 'Rush Payment', and 'History'. A callout box highlights the 'On' status, and another callout box highlights the 'Edit Schedule' button.



- ◆ CLICK ON THE RECURRING BUTTON OR THE EDIT SCHEDULE BUTTON FROM THE PAYEE LINE NEXT TO A PAYEE.

Recurring Payment PIZZA CUBE

Payment Details

Payment Amount: \$ 5.55 Send On: 3/12/2019 Est. Delivery: 3/14/2019 Pay From Account: BippBopp \*66997

Delivery Options

Payment Frequency: Every Week Non-Business Day Option: Pay Previous Business Day

Send Payments

Until I cancel this schedule

Until this date: 3/12/2019

Until 0 payments are made

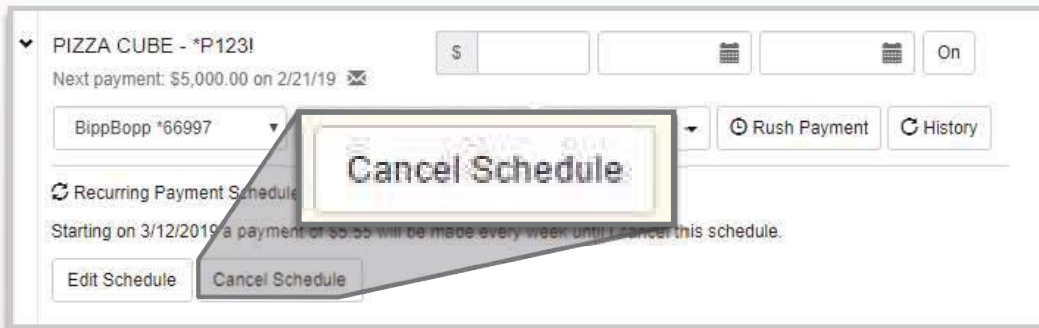
Save Cancel Schedule Discard Changes

The screenshot shows the 'Recurring Payment' edit screen for 'PIZZA CUBE'. It is divided into three sections: 'Payment Details', 'Delivery Options', and 'Send Payments'. The 'Payment Details' section includes fields for 'Payment Amount' (\$ 5.55), 'Send On' (3/12/2019), 'Est. Delivery' (3/14/2019), and 'Pay From Account' (BippBopp \*66997). The 'Delivery Options' section includes 'Payment Frequency' (Every Week) and 'Non-Business Day Option' (Pay Previous Business Day). The 'Send Payments' section includes three radio button options: 'Until I cancel this schedule' (selected), 'Until this date' (3/12/2019), and 'Until 0 payments are made'. At the bottom, there are three buttons: 'Save', 'Cancel Schedule', and 'Discard Changes'.

- ◆ CLICK CANCEL CHANGES TO FOREGO ANY CHANGES AND RETURN TO THE PREVIOUS PAGE.
- ◆ CLICK SAVE TO CONFIRM CHANGES TO THE RECURRING PAYMENT SCHEDULE.
- ◆ CHANGES WILL APPEAR FOR EACH PAYMENT OF THE RECURRING SCHEDULE UNDER PAYEE DETAILS FROM THE PAY BILLS PAGE AND WHEN VIEWING THE PAYMENT IN THE WIDGETS OR VIEW SCHEDULED PAYMENTS PAGE.

# CANCEL A RECURRING SCHEDULE

## Canceling Recurring Schedules in the New UI

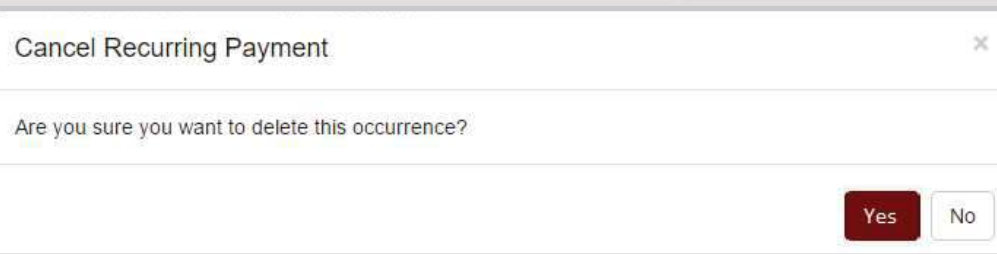
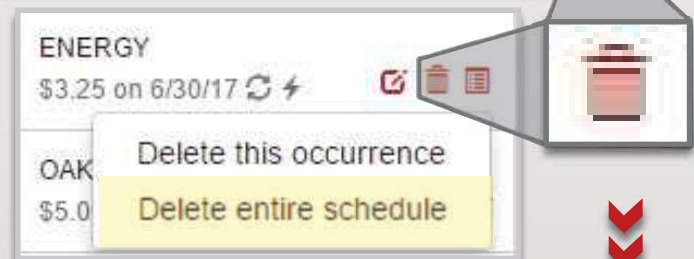


- ◆ CLICK ON THE CANCEL SCHEDULE BUTTON FROM THE PAYEE LINE NEXT TO A PAYEE.

OR

Scheduled Payments		Total: \$30.65		Export	Print			
Payee	Send ...	Estim...	Amount	Pay From	Method	Type	Recurring	Memo
OAKY SMOKER'S TOBACCO LOU...	3/08/19	3/12/19	\$2.54	BippBop...	2894		<b>✓</b>	TEST

- ◆ CLICK ON THE CANCEL PAYMENT ICON FROM THE SCHEDULED PAYMENTS WIDGET OR VIEW SCHEDULED PAYMENTS PAGE.
- ◆ CHOOSE DELETE ENTIRE SCHEDULE FROM THE DROPDOWN.



- ◆ CLICK THE YES BUTTON TO CONFIRM CANCELATION OF THE RECURRING SCHEDULE.
- ◆ CANCELED SCHEDULES WILL BE REMOVED FROM THE SCHEDULED PAYMENTS WIDGET / VIEW SCHEDULED PAYMENTS PAGE AND THE RECURRING ICON WILL NO LONGER BE BOLD NEXT TO YOUR PAYEE ON THE PAY BILLS PAGE.

# CANCEL A RECURRING OCCURENCE

## Canceling Recurring Occurrences in the New UI

Scheduled Payments		Total: \$30.65		Export		Print		
Payee ▼	Send ... ▼	Estim... ▼	Amount ▼	Pay From	Method	Type	Recurring	Memo
OAKY SMOKER'S TOBACCO LOU...	3/08/19	3/12/19	\$2.54	BippBop...	2894		✓	TEST

- ◆ CLICK ON THE CANCEL PAYMENT ICON FROM THE SCHEDULED PAYMENTS WIDGET OR VIEW SCHEDULED PAYMENTS PAGE.
- ◆ CHOOSE DELETE THIS OCCURRENCE FROM THE DROPDOWN.

ENERGY  
\$3.25 on 6/30/17

OAK  
\$5.0

Delete this occurrence  
Delete entire schedule

Cancel Payment

Are you sure you want to delete this payment?

Yes No

- ◆ CLICK THE YES BUTTON TO CONFIRM CANCELATION OF THE OCCURENCE.
- ◆ THE PAYMENT WILL NOW REFLECT THE NEXT PAYMENT DATE.

# PREFERENCES

## Update My Preferences in the New UI

I want to ▾

### Update my Preferences

User Information	Notifications
<p><b>Name</b> Test User <b>Address</b> 3201 Potato Stelhorn Rd Fort Wayne IN 46818</p> <p><b>Next Check #</b> <input type="text" value="2893"/></p> <p><b>Email</b> <input type="text" value="nick.kam@alliedpayment.com"/></p>	<p><input checked="" type="checkbox"/> Send email summary of daily payments</p> <p><input checked="" type="checkbox"/> Send email when payee is created or edited</p> <p><input checked="" type="checkbox"/> Send email for payments scheduled over <input type="text" value="\$ 2.58"/></p>

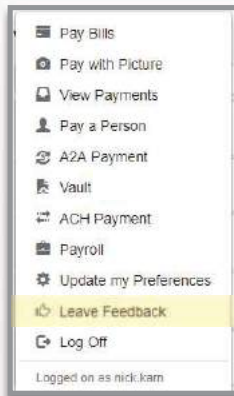
**Save**

- ◆ NAME AND ADDRESS ARE LOCKED BUT ALL OTHER PREFERENCES ARE EDITABLE.
- ◆ ENTER A CHECK # IN THE USER INFORMATION FORM.
- ◆ ENTER / EDIT EMAIL ADDRESS.
- ◆ CHECK THE BOXES NEXT TO:
  - SEND EMAIL SUMMARY OF DAILY PAYMENTS
  - SEND EMAIL WHEN PAYEE IS CREATED
  - SEND EMAIL FOR PAYMENTS SCHEDULED OVER \$X.XX
- ◆ ENTER A \$ VALUE INTO THE SEND EMAIL FOR PAYMENTS SCHEDULED OVER \$X.XX
- ◆ CLICK SAVE TO UPDATE PREFERENCES.



# LEAVE FEEDBACK

## Leaving Feedback in the New UI



A faded version of the 'Leave Feedback' form. It includes a 'Subject' field, a 'Message' field, a checkbox labeled 'Would you like to receive a reply to this comment?', and 'Send' and 'Close' buttons.

The active 'Leave Feedback' form. It features a title bar with 'Leave Feedback' and a close button. Below the title bar are three input fields: 'Subject', 'Message', and a checkbox labeled 'Would you like to receive a reply to this comment?'. At the bottom right are 'Send' and 'Close' buttons.

- ◆ ENTER A SUBJECT IN THE SUBJECT FIELD.
- ◆ ENTER A MESSAGE INTO THE MESSAGE FIELD.
- ◆ CLICK THE CHECKBOX TO RECEIVE AN EMAIL REPLY TOYOUR FEEDBACK.
- ◆ CLICK SUBMIT TO SEND FEEDBACK.