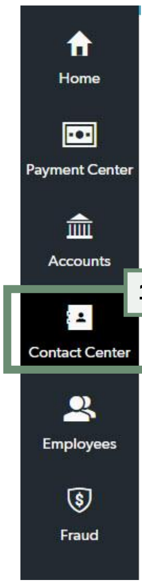
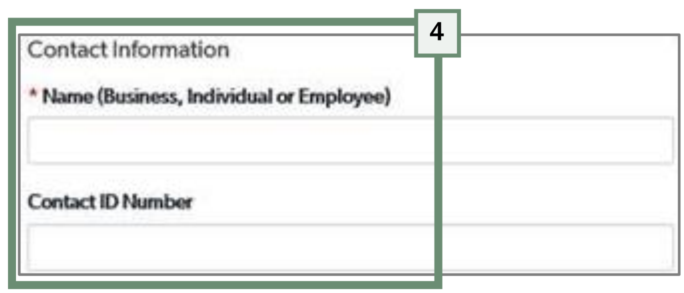
CONTACT CENTER

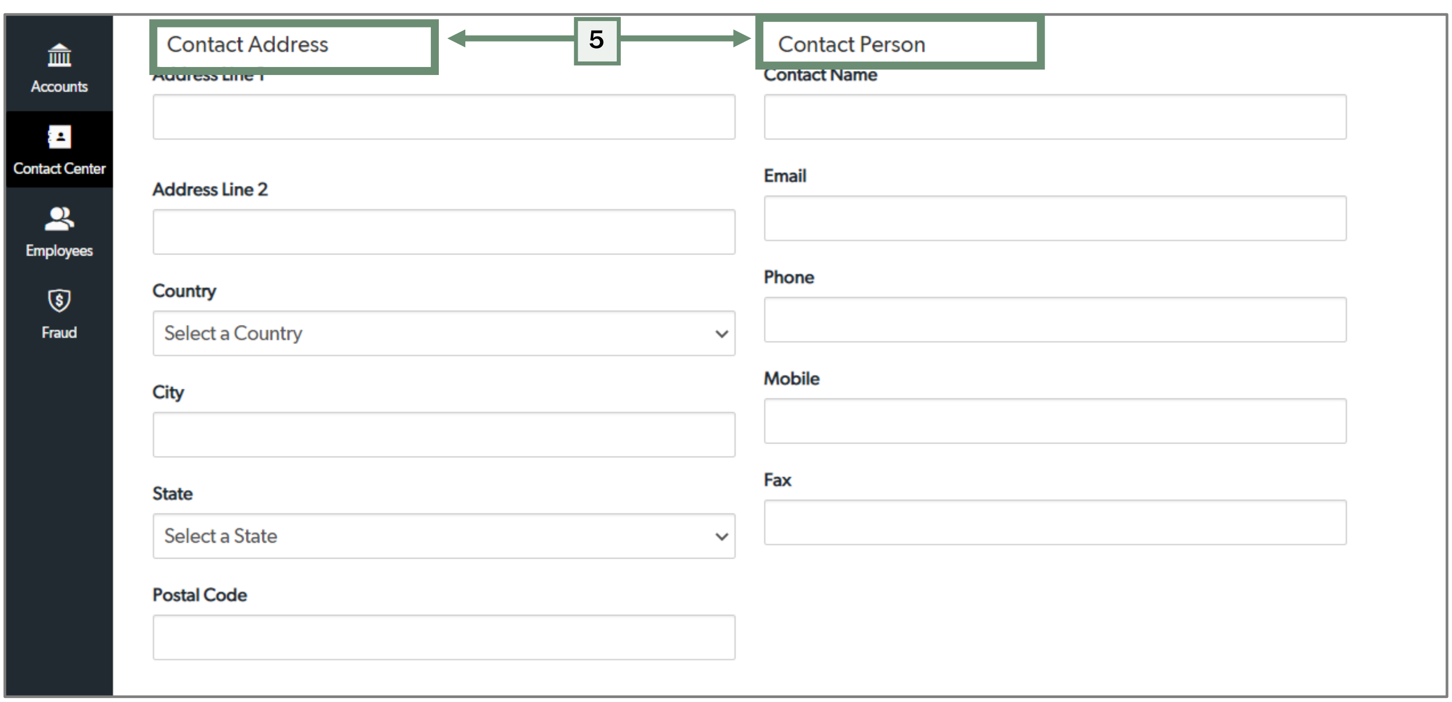
ADDING A NEW CONTACT



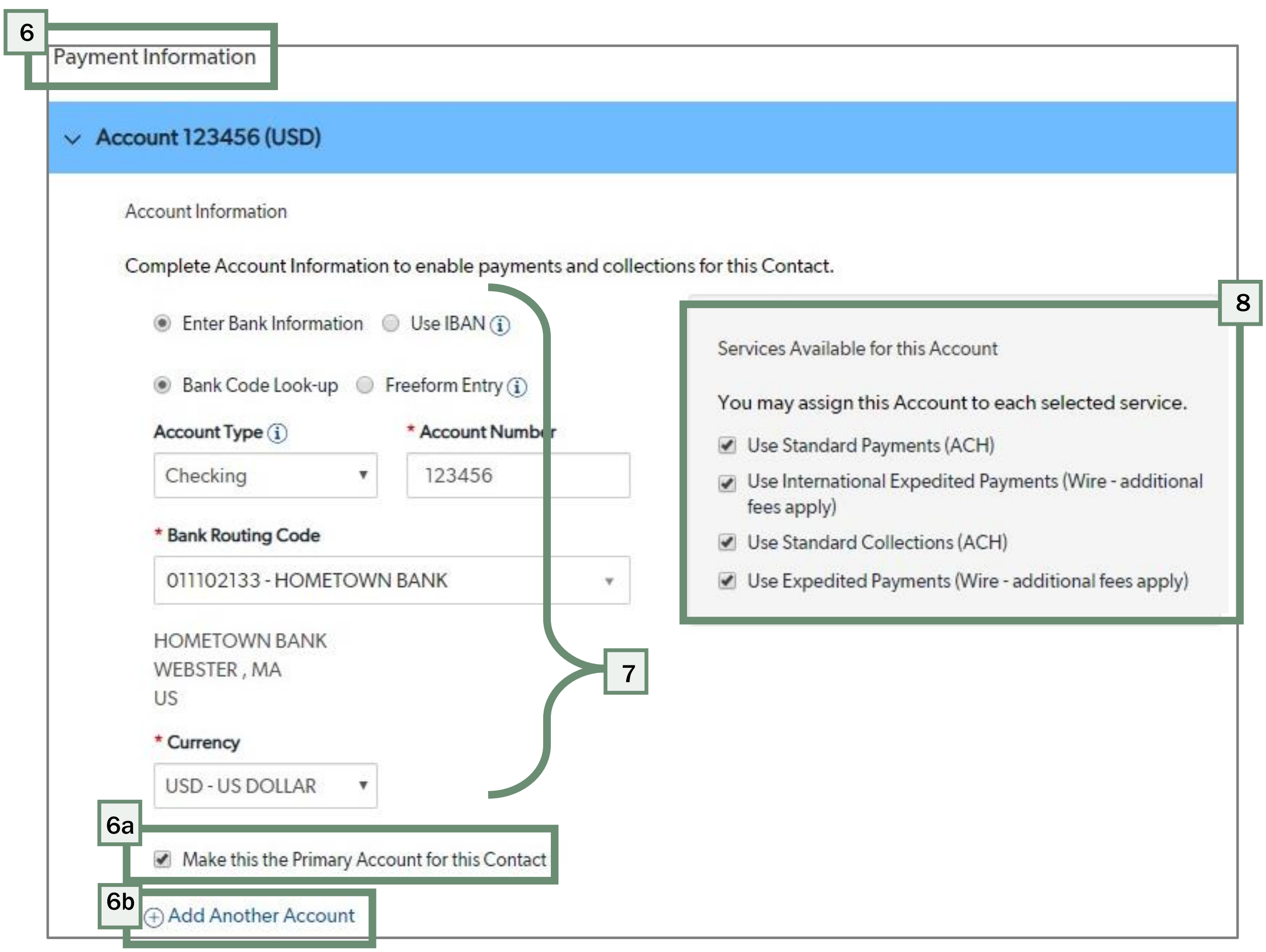
Follow these steps to add a new contact in the Contact Center. A Payee must be created before initiating any payments (ACH/Wires).

1. Select **Contact Center** from the menu.
2. Click **Add New Contact**.
3. Designate the type of contact(s).
   NOTE: If you select **Business**, both **Individual** and **Employee** are locked out. However, if you chose **Individual** you may also select **Employee** and **Business**.
4. Add the **Name** of the contact and create a **Contact ID Number**, if desired.
5. Complete the remaining fields for **Contact Address** and **Contact Person**.
   NOTE: There will be additional required fields in this step if you are set up for Wires. Additionally, the more contact information you can provide now, the better experience you will have when choosing this contact to create payments in the future.





6. Add the **Payment Information** for the contact.
    a. If no other accounts are needed, select **Make this the Primary Account for this Contact**.
    b. If additional accounts are needed, select **Add Another Account**.
7. Complete the **Account Information**.
   NOTE: Payment Information is not required, but will be necessary if this contact information is used to receive payments.
   If the **IBAN (International Bank Account Number)** is known, check that option to be prompted to enter it. Otherwise, you'll be prompted to enter the **Account Number**, **Account Type** and **Routing Number**. Choosing a currency other than USD may affect the payment methods available to be accepted by that account. Additionally, you may need to enter a second routing number for Wires that have an option for the payment.
8. Select and/or deselect payment methods listed in the **Services Available for this Account** section.



9. If contact is an Employee, you can select **Secondary Payroll Account**, complete the payment information for the account and use the **Allocation** function. The value entered in **Percentage** or **Fixed Amount** will be distributed accordingly to the secondary account for each payroll payment.
   a. **Percentage**
   b. **Fixed Amount**
10. Click **Save Contact** once all contact and/or payment information has been entered.