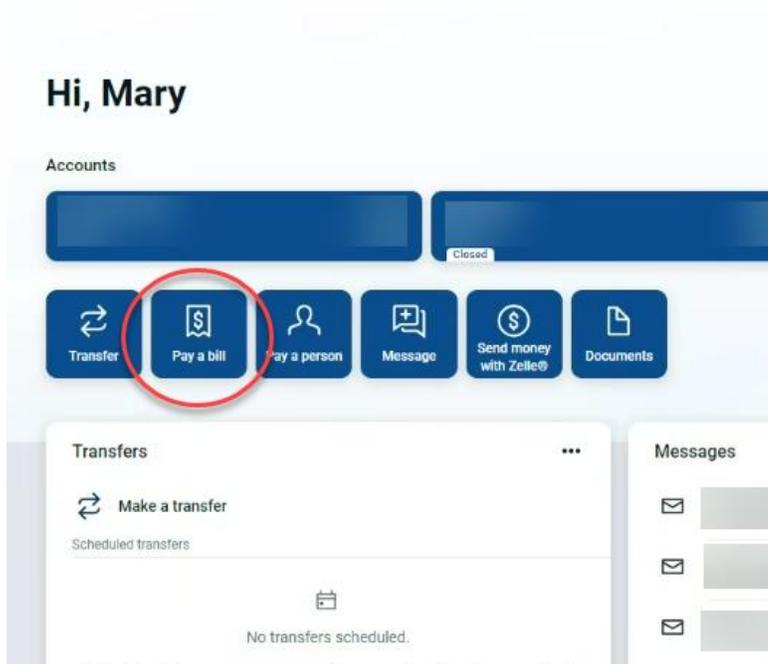


# Managing Payments with Bill Pay Dashboard

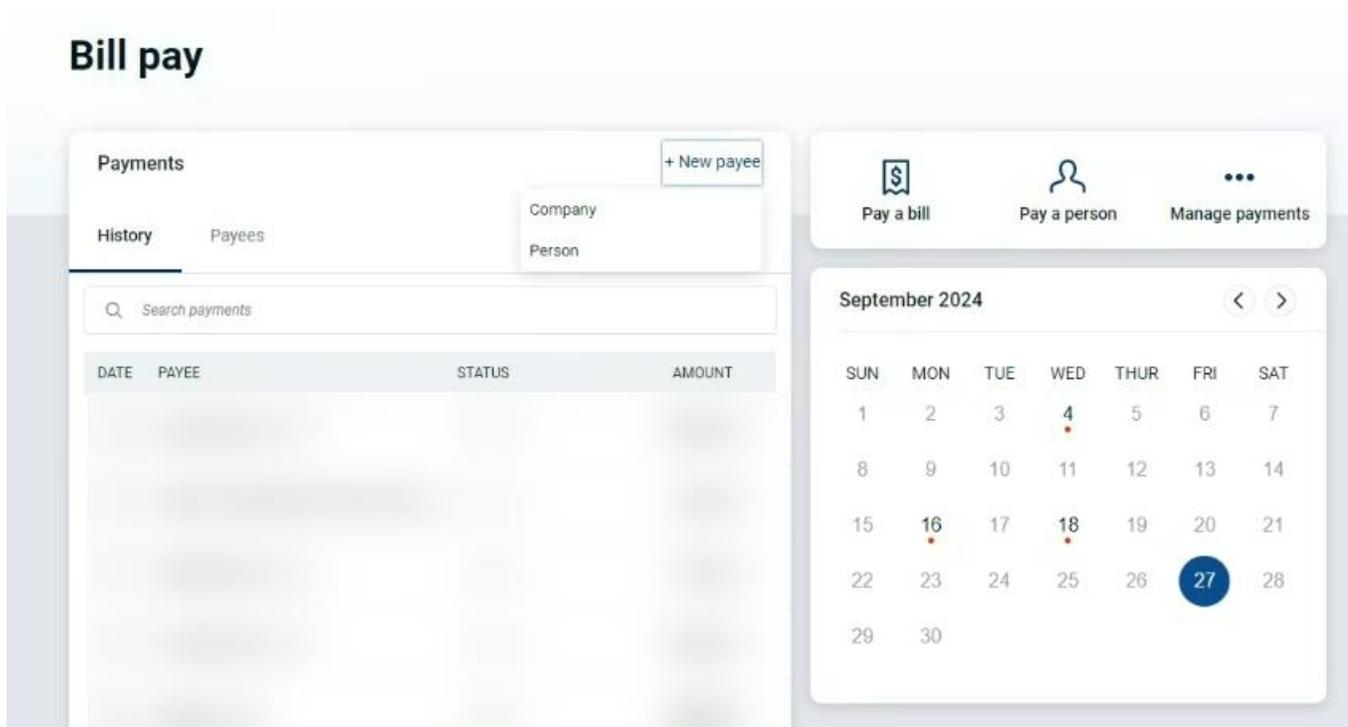
## Step 1.

Select the **Pay a Bill** button on your Dashboard.



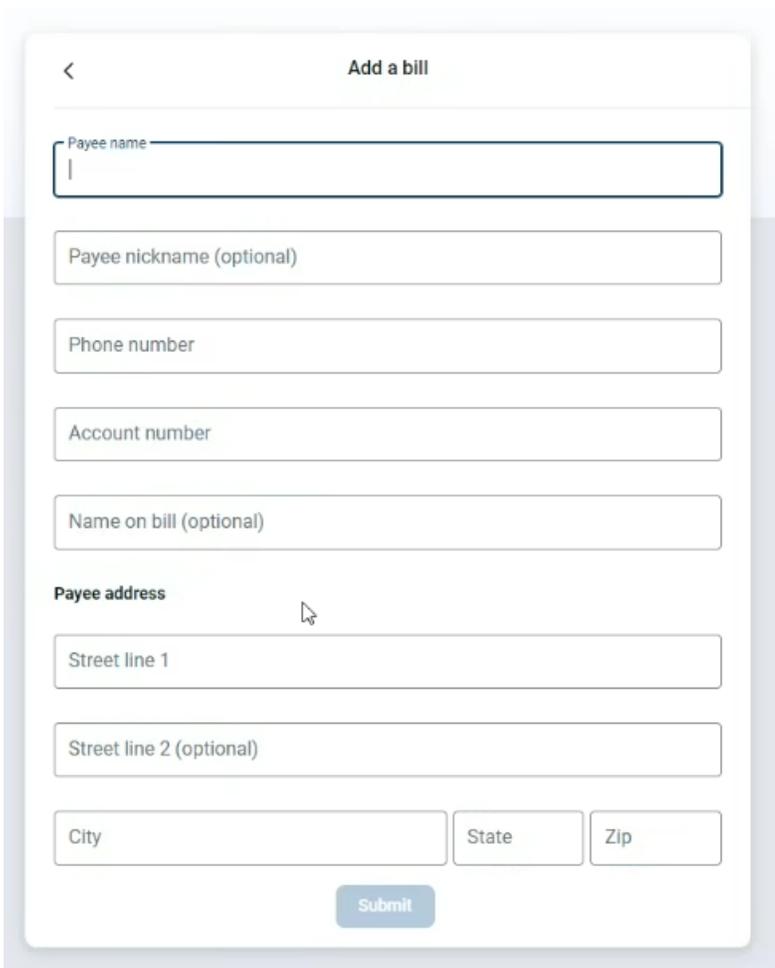
## Step 2.

From the Bill Pay screen, you can view your **payment history**, your added **payees**, and your **payment calendar**. From this screen you can also **add new payees**, **pay a bill**, **pay a person**, or **manage your payments**.



### Step 3.

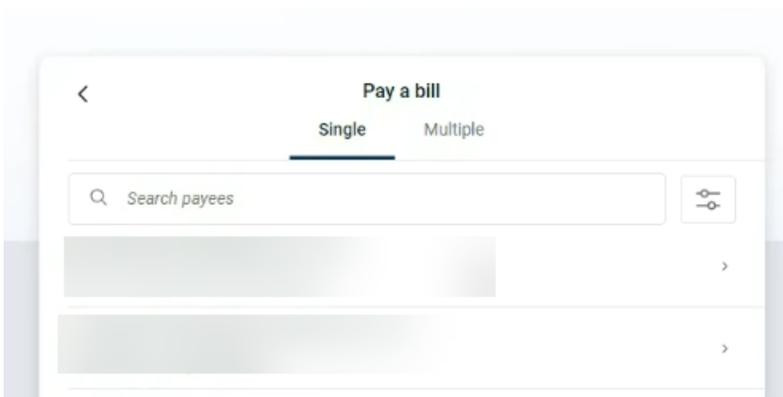
If you choose + **New payee**, you will be asked to select **Company** or **Person**. Then, it will ask for you to provide the information for the company or person you would like to pay (the payee).



The screenshot shows a mobile application screen titled "Add a bill". At the top left is a back arrow, and at the top center is the title "Add a bill". Below the title are several input fields: "Payee name" (with a cursor), "Payee nickname (optional)", "Phone number", "Account number", and "Name on bill (optional)". Below these is a section header "Payee address" followed by three input fields: "Street line 1", "Street line 2 (optional)", and "City". To the right of the "City" field are two smaller fields labeled "State" and "Zip". At the bottom center is a blue "Submit" button.

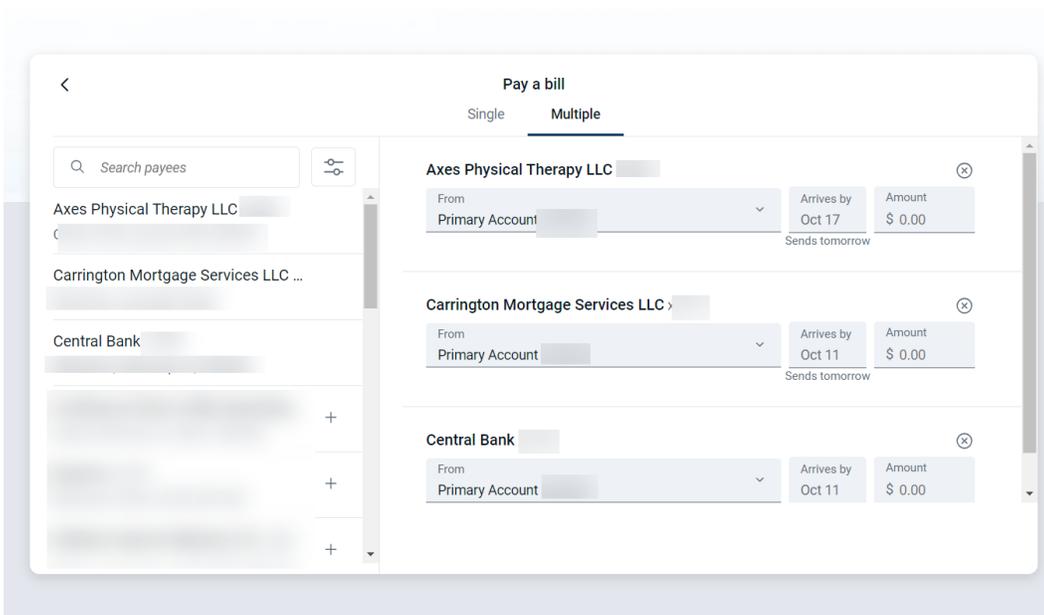
### Step 4.

To make a payment to one of your payees, select **Pay a Bill** and search for the payee you wish to pay.



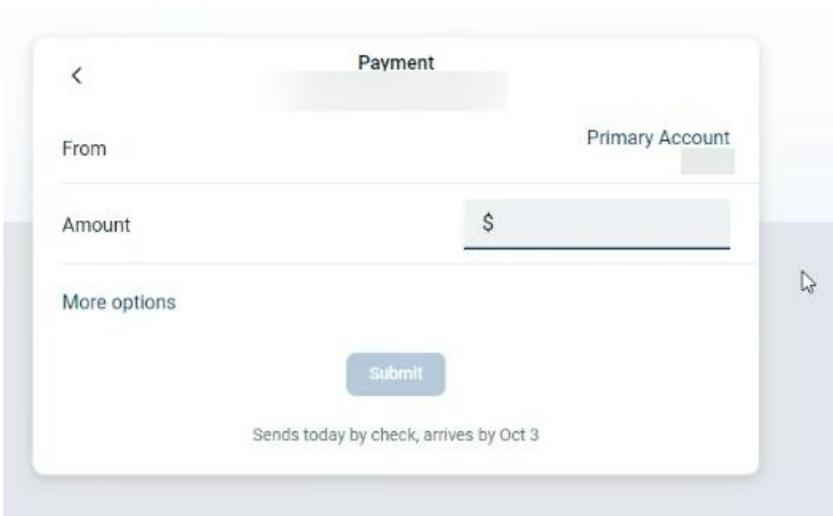
The screenshot shows a mobile application screen titled "Pay a bill". At the top left is a back arrow, and at the top center is the title "Pay a bill". Below the title are two tabs: "Single" (which is selected and underlined) and "Multiple". Below the tabs is a search bar with a magnifying glass icon on the left and the placeholder text "Search payees". To the right of the search bar is a filter icon. Below the search bar are two blurred list items, each with a right-pointing chevron (>) indicating it is a selectable item.

Or you can select Multiple in order to pay make more than one payment at a time.



### Step 5.

Select the account you wish to make the payment from and enter the amount you wish to pay.



If you'd like to set up a recurring payment or otherwise schedule a payment, select the **More options** button. From this subsequent screen you can designate when a payment should be made.

< Payment [redacted] y LLC

From Primary Account [redacted]

Amount \$ [redacted]

Frequency Once >

Arrives by Oct 23 >  
Sends tomorrow

Notes Add memo or comment >

Hide options

Submit

Payment will be made by check

If you would like to set up a recurring payment, select **Frequency**. This will allow you to select how often you would like the payments to be sent.

< Frequency

Once ✓

Weekly

Every other week

Every four weeks

Monthly

Every other month

Twice monthly

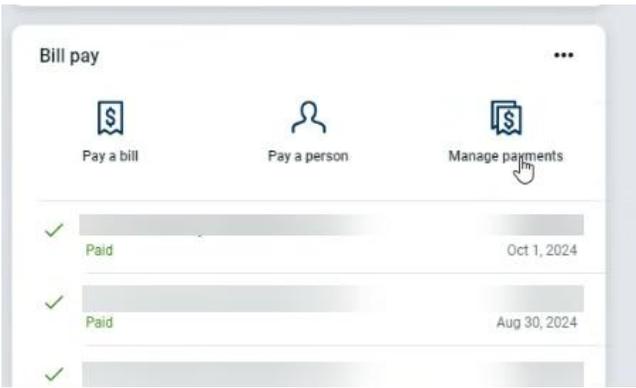
Every three months

Every six months

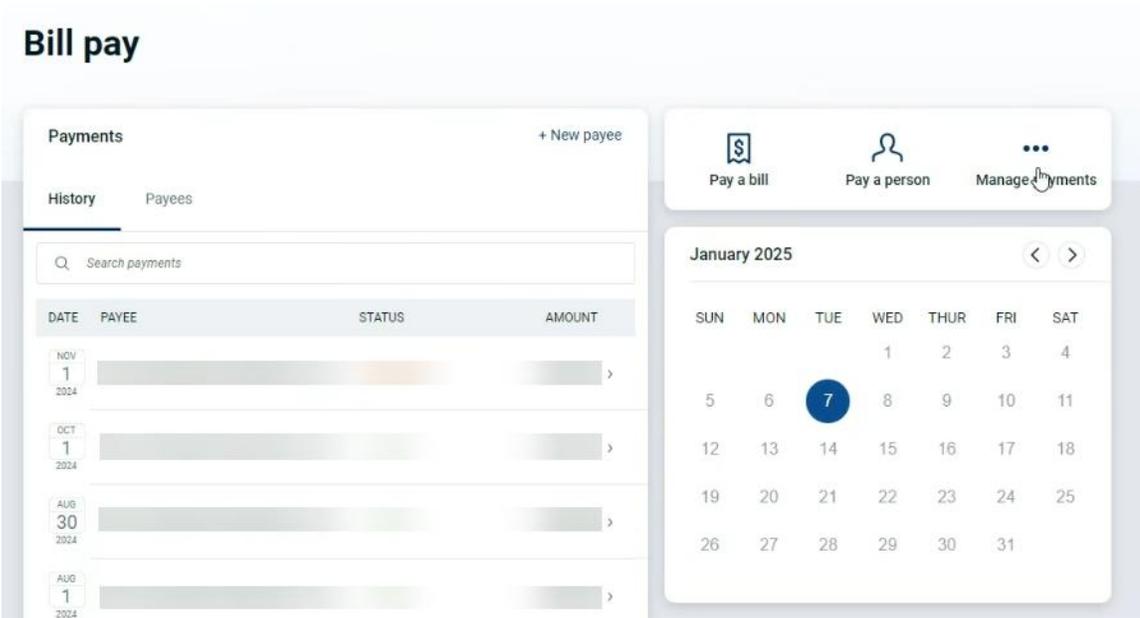
Annually

### Step 6. (optional)

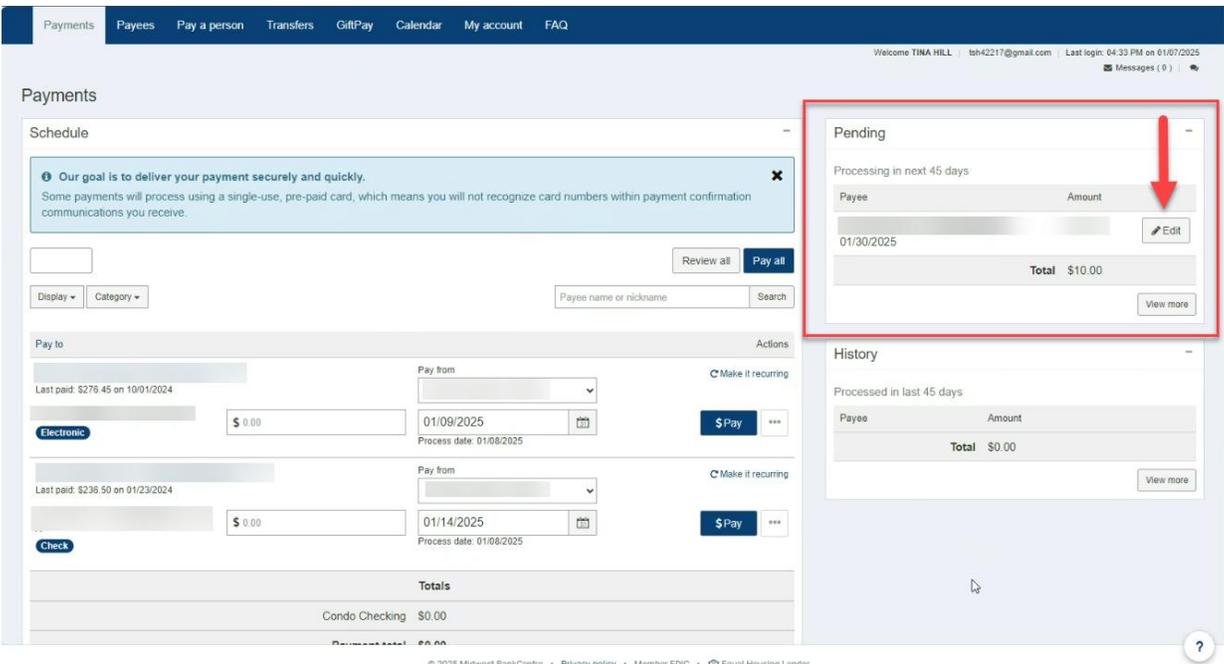
If you would like to edit one of your recurring payments after the fact, you can do so by clicking **Manage Payments** from your Dashboard.



You could also click on **Manage Payments** from the Bill Pay screen.



From the next screen – the Payments tab – you can click **Edit** next to any pending payment you wish to adjust.



This brings up the **Edit Payment** screen, where you can adjust the amount paid, the payee, the account from which a payment is made, or the date of the payment. You can also stop the payment from this screen by toggling the switch at the bottom. **Click the Submit button to confirm your changes.**

Payments Payees Pay a person Transfers GiftPay Calendar My account FAQ

### Edit payment

\* Required field

Pay to  Check

Pay from \*

Confirmation 52

Amount \* \$ 10,000

Payment date \* 01/30/2025 Calendar  
Process date: 01/24/2025

Comment   
(Maximum characters: 1000) You have 100 characters left. Comments are for personal use and will not be seen by the payee

Memo   
(Maximum characters: 25)

I would like to stop this payment