

CHOOSE A RECIPIENT

Recipients include all available internal accounts. It may also include other money movement services such as external accounts, bill pay, or person to person payments.

SEARCH

	My Checking	\$78,419.81	INTERNAL	>
	My Savings	\$6,941.41	INTERNAL	>
	Mortgage Loan	\$248,765.89	INTERNAL	>
	Loan	\$30,000.00	INTERNAL	>
	My Account	\$0.00	EXTERNAL	>
	John Doe		P2P	>
	John Doe		P2P	>
	John Doe		P2P	>

+ ADD NEW PAYEE

They will select “Person to Person” on the **Add New Payee** screen and then enter the Payee information:

ADD NEW PAYEE

What type of payee is this?

PERSON TO PERSON
Select this option to create a P2P payee.

BILL PAY
Select this option to create a Bill Pay payee.

EXTERNAL ACCOUNT
Select this option to create an external account.

When entering Payee info, the customer has 3 options:

1. Enter Payee's email and an email will be sent to payee asking them to enter their card info:

ADD NEW PAYEE

PERSON TO PERSON

ADD PHOTO

What is this person's name?

FIRST NAME
John

LAST NAME
Smith

PAYMENT METHOD

Please choose how you would like to pay this person.

Send Via Email Send Via Text Message Enter Payee Debit Card

SEND VIA EMAIL

This will send a message containing a registration link to the email address provided. The recipient will use the link to visit a secure site to enter debit card details needed for payments to process.

EMAIL ADDRESS
john.smith@bank.com

ADD PAYEE

From: myebanking@csiweb.com <myebanking@csiweb.com> **On Behalf Of** customercare@invisionbank.com
Sent: Thursday, April 9, 2020 2:52 PM
To: [Redacted]
Subject: Your Friend wants to send a SPIN transaction!

Thank you for using CSI SPIN!

[Redacted] would like to send you money.

To set up your account information use the link:

<https://invisionbank.myebanking.net/#!/confirm-payee?SetupKey=ri6lgo9ebwwlu7tnmqma>.

This setup link will expire in 3 days.

2. Enter Payee's phone number to send them a text asking them to enter their Card info. ***Only available if bank offers Text Alerts***

<

ADD NEW PAYEE

>

PERSON TO PERSON

ADD PHOTO

What is this person's name?

FIRST NAME
John

LAST NAME
Smith

PAYMENT METHOD

Please choose how you would like to pay this person.

Send Via Email

Send Via Text Message

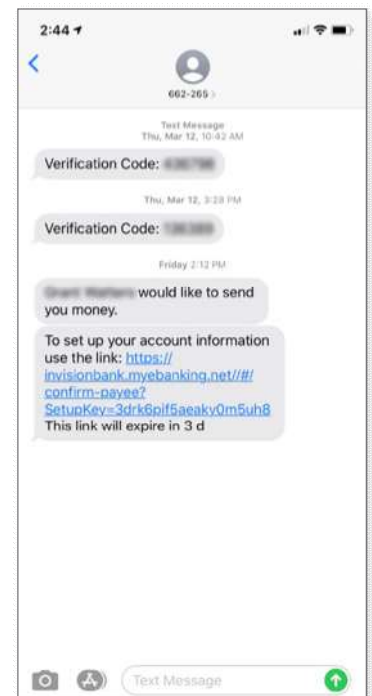
Enter Payee Debit Card

SEND VIA TEXT MESSAGE

This will send a text message containing a registration link to the phone number provided. The recipient will use the link to visit a secure site to enter debit card details needed for payments to process.

MOBILE PHONE NUMBER
(555) 555-5555

ADD PAYEE



3. Enter Payee's debit card number and expiration date directly within the app.

The screenshot shows a mobile app interface for adding a new payee. The title bar at the top is teal with a back arrow on the left, 'ADD NEW PAYEE' in the center, and a close 'X' on the right. Below the title bar, the section 'PERSON TO PERSON' is highlighted in orange. A large circular placeholder with the text 'ADD PHOTO' is centered. Below this, the question 'What is this person's name?' is followed by two text input fields: 'FIRST NAME' with the value 'John' and 'LAST NAME' with the value 'Smith'. The next section is 'PAYMENT METHOD', with the instruction 'Please choose how you would like to pay this person.' Below this are three buttons: 'Send Via Email' (with an envelope icon), 'Send Via Text Message' (with a mobile phone icon), and 'Enter Payee Debit Card' (with a green background and a card icon). The final section is 'ENTER PAYEE'S DEBIT CARD INFORMATION', with a note: 'The debit card details provided will be used to securely send a payment to the recipient.' Below this are two text input fields: 'DEBIT CARD NUMBER' and 'EXPIRATION DATE', both marked as 'required' on the right. At the bottom of the screen is a grey bar with the text 'ADD PAYEE'.

Once all required info is entered by the recipient, you are ready to send money by going to **New Transaction** and choosing the newly created **Payee** from the **Recipient** list. You do have an option to choose how the Payee is notified of the payment:

The screenshot shows a mobile app interface for a P2P transaction. At the top, a teal header bar contains a back arrow, the word 'DETAILS', and a close 'X' icon. Below the header, there are two circular icons: a bank icon on the left and a person icon on the right, separated by a right-pointing arrow. The bank icon is labeled 'Checking' with a small asterisk and the number '2741' below it, and a balance of '\$40,458.65' at the bottom. The person icon is labeled 'John Smith'. Below this, there is a section titled 'Enter P2P Amount:' with a text input field containing 'AMOUNT \$5'. Underneath is a yellow highlighted section titled 'How should this payee be notified?' with three radio button options: 'Email' (selected), 'Phone', and 'No notification'. Below the radio buttons is a text input field labeled 'EMAIL ADDRESS' containing 'john.smith@bank.com'. Further down is a section titled 'Send a Note.' with a text input field labeled 'NOTE' containing 'Lunch'. At the bottom left of the form area, it says '5 / 110'. At the very bottom, there is an orange bar with the text 'CONTINUE →'.

< DETAILS X

Checking
*2741
\$40,458.65

→ John Smith

Enter P2P Amount:

AMOUNT
\$5

How should this payee be notified?

☒ Email
☐ Phone
☐ No notification

EMAIL ADDRESS
john.smith@bank.com

Send a Note.

NOTE
Lunch

5 / 110

CONTINUE →