



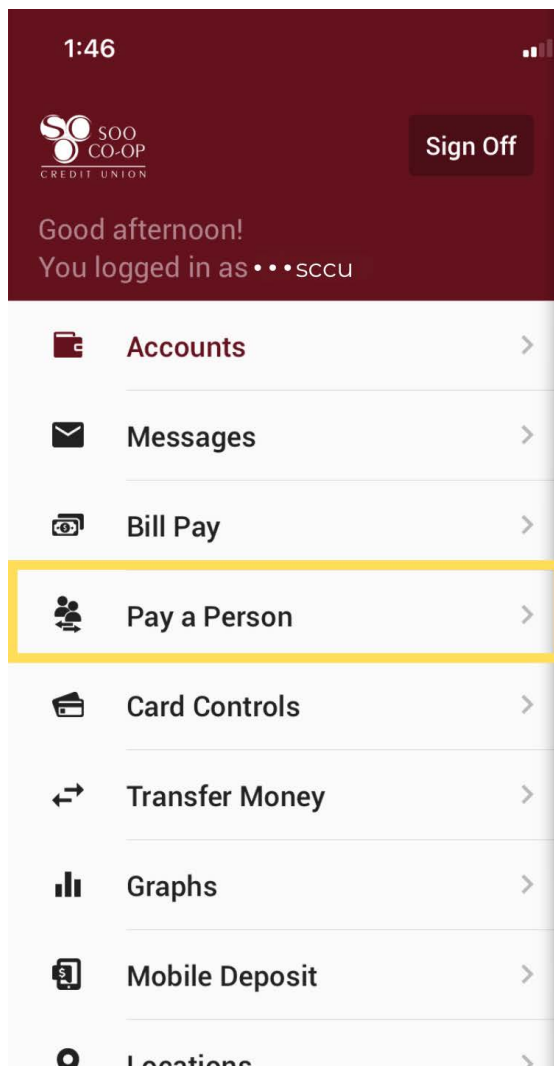
SOO
CO-OP
CREDIT UNION

Pay-a-Person

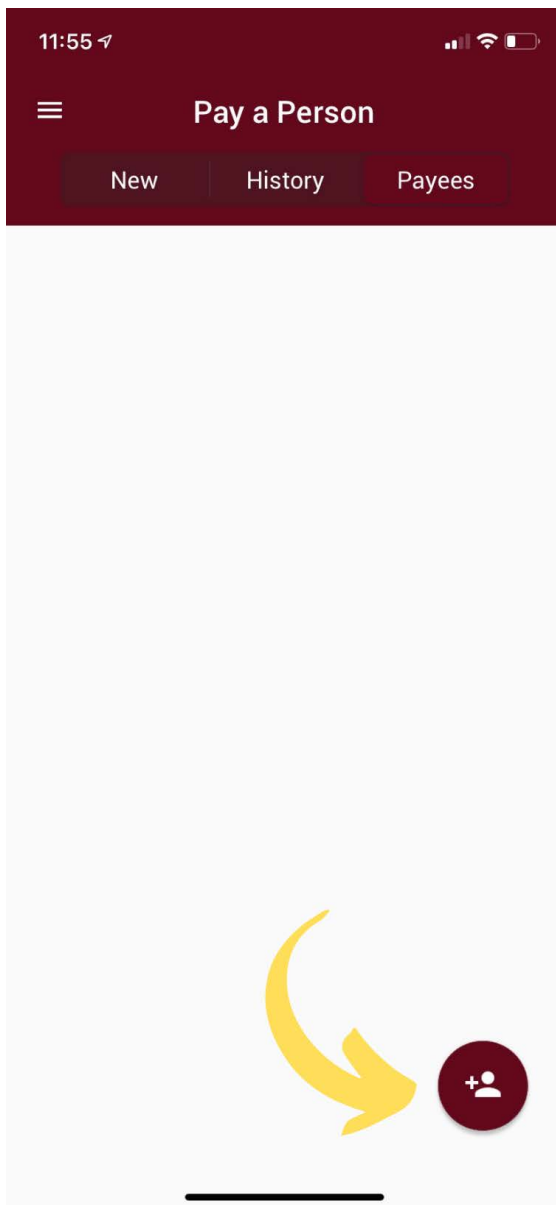
This new feature provided by Soo Coop allows members to send money to anyone via text or e-mail regardless of which financial institution that person banks with! This process takes 3-5 days to fully process depending on day of the week, time of day, and any holidays within the processing time.

First, you must be set up for Bill Pay to use this feature. If you are not currently signed up for Bill Pay, you can find more information at www.soocoop.com/bill-pay.

In this example, we will be assuming that you already are. For The first thing you will do in the Soo Coop mobile app is choose Pay a Person from the Menu:



If you already use Bill Pay, you may already have some payees on the next screen. For now we are going to set up a NEW payee by tapping on the icon on the bottom right:



You will then be given options to set up the new payee and choose what payment option you want! **Please note that the Check option can take longer than the others since a physical Check will be sent to the person you are paying.** You can also import payees from your device's contact list to help fill this out more quickly!

11:56

← New Payee

Import from Contact List

Payment Option

Check >

Name

Nickname Optional

Address Optional

City

State

Postal Code

Create

11:56

← Choose Payment Option

Check ✓

Text Message

Email

Direct Deposit

In this example we will choose Text Message and then fill out the requested information:

11:56

← New Payee

Import from Contact List

Payment Option
Text Message >

Name
Maxine Member

Nickname
Max

Mobile Phone
555-765-4321

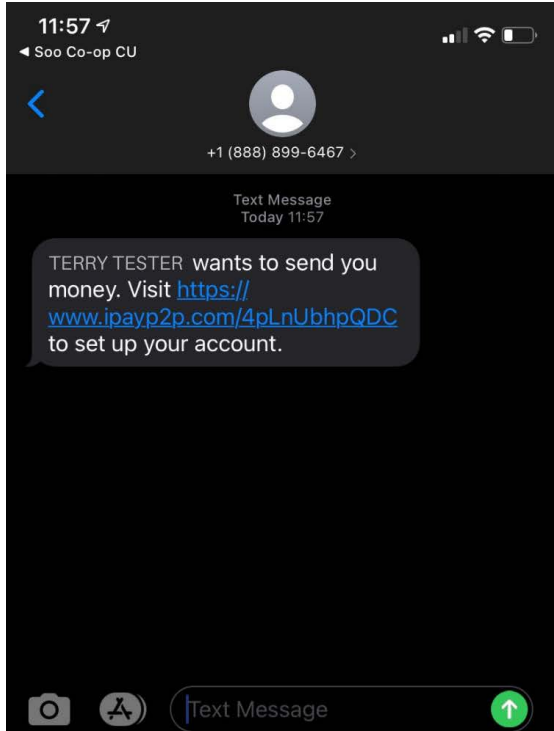
Keyword
Example

Confirm Keyword
Example

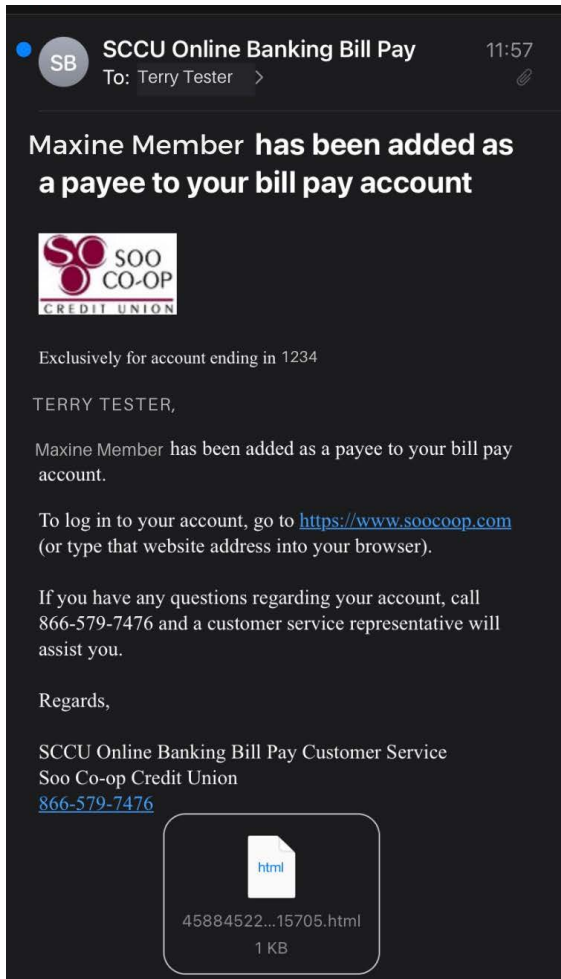
Why do I need a Keyword?

Create

The person you are sending funds to will need to know what the “Keyword” you chose is. If they do not know the Keyword you set, they will not be able to accept money from you. Once you select “Create” the number provided (or e-mail address, depending on your selection) will receive a message resembling the following:



You will receive the following e-mail:



When the payee clicks on their link from the text message they will start to setup where they want the money to go. The first screen asks for the Keyword that you chose when setting them up as a payee. Once the payee enters this keyword, they will be able to enter their information as shown below:

11:57
Messages
billpaysite.com — Private

Menu

Receive payments from [redacted]

Welcome TEST

[redacted] wants to send you money from Soo Co-op Credit Union. Here is how to get started:

1. Enter the keyword below that [redacted] has provided.
2. Provide your checking or savings account number and routing information.

Keyword

Enter keyword

Submit

I do not wish to receive payments from [redacted] at this time.

Home Contact
Norton

11:57
Messages
billpaysite.com — Private

Menu

Home / Deposit information

Deposit information needed

Enter account and routing number

This information will only be used to complete the transaction. Your financial account number and routing number will not be shared with [redacted]

Account type

Choose Account

Routing number ?

Routing number

Account number ?

Account number

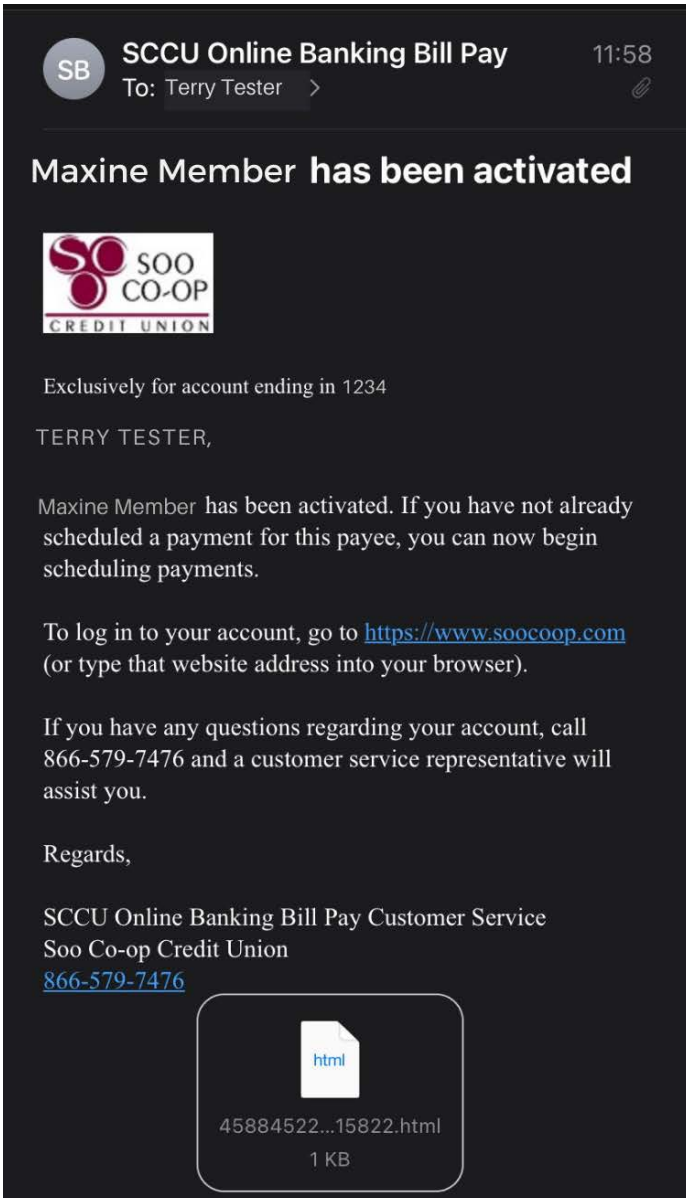
Confirm account number

Confirm account number

Cancel Submit

Home Contact

Once the payee has submitted this, they will now be able to receive funds transfers from you without any additional steps on their end. You will receive a confirmation that the recipient is set up as well:



You will now be able to send payments to this payee anytime you want! The payee will get a text (or e-mail depending on how the payee was set up) when the money is in their account and you will receive an e-mail like the example shown below:

