Mobile Banking Payee Setup & Maintenance Guide

Country Club Bank

A division of **fnbo**

(816) 931-4060 | www.countryclubbank.com

PAYEE MAINTENANCE

Country Club Bank's Bill Pay users can now add, edit and delete payees through the mobile banking Bill Pay interface.

Adding a Listed Payee

To add a Listed payee use the following steps:

1 First access **Bill Pay** by selecting the Plus menu in the task bar of the mobile app.

2 Select **Pay Bill** on the resulting screen.

3 The Select a **Payee** screen appears showing a list of the user's payees.

Select the **Plus** in the upper right-hand corner to add a payee.

4 Begin typing the **payee name** to see if it comes up in the list of known (listed) payees. Select the desired payee from the list.

If payee doesn't appear in the list, proceed to the non-Listed payee section starting on page five (section four).
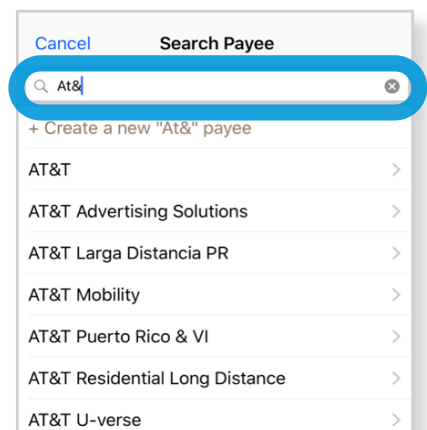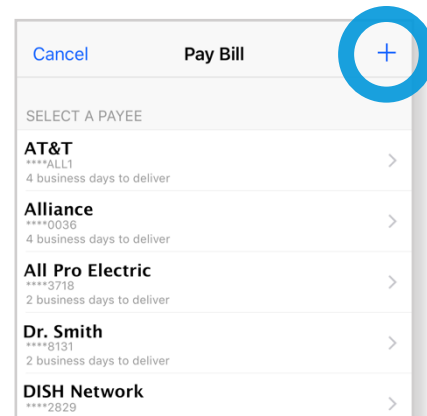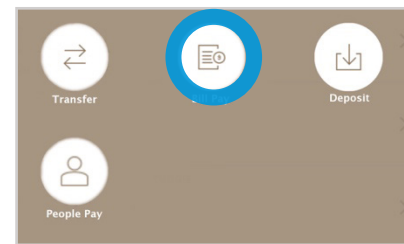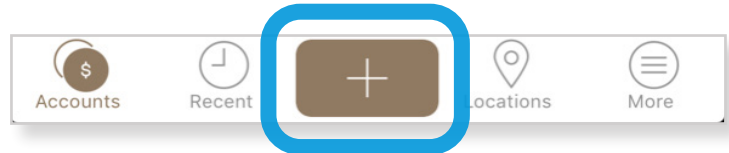
5 Once you select or create a payee, you'll be asked to fill in the payee details. Select any field to start typing:

Nickname: A friendly name you can apply to the payee to help you remember who they are. Ex: Cellphone

Account Number: Your account number with that specific payee.

Zip: Zip code to where payments are sent (usually found on your bill).

Phone: An optional field that can be edited to contain the payee's customer service number.

Click **Done** once you've entered the required information.

6 Next, you'll be taken back to the Pay Bill tab where you can see your new payee added to the list.

A message also appears at the top of the screen confirming that your payee was successfully added.

Adding a Non-Listed Payee

Non-listed payees are those billers with whom CCB does not have a relationship. Examples of non-listed payees would be small local businesses, babysitters, doctors' offices, etc.

To add a non-listed payee use the following steps:

1 First access Bill Pay by selecting the **Plus** menu in the task bar of the mobile app.
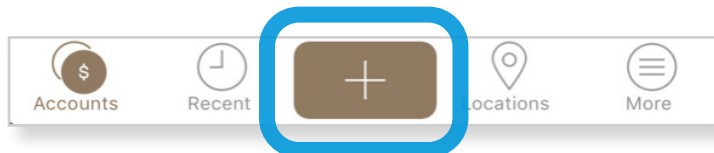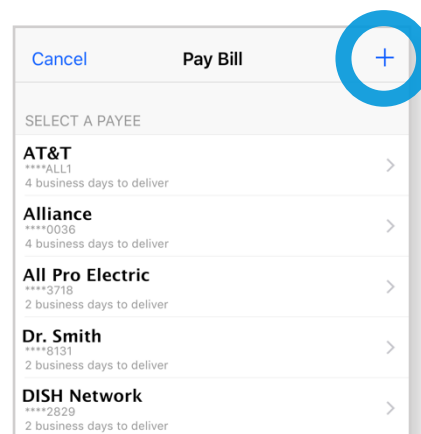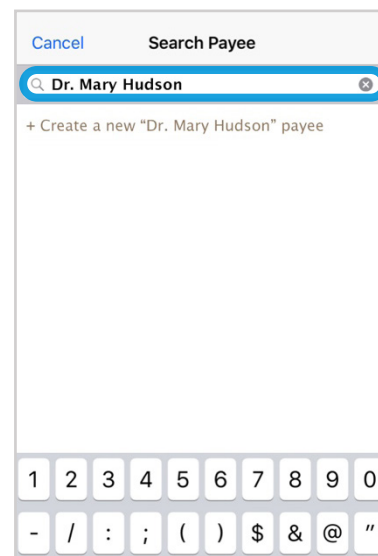

2 Select **Pay Bill** on the next screen
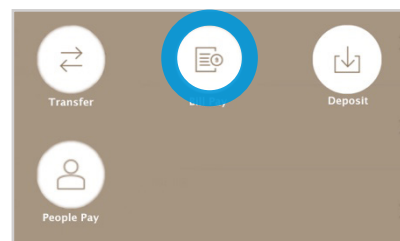
3 The Select **Payee** screen appears showing a list of the user's payees.

Select the **Plus** in the upper right-hand corner to begin adding a payee.

4 Begin typing the **payee name** to see if it comes up in the list of known payees. If it doesn't appear in the list select "Create a New Payee".

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5 The **Add Payee** screen will appear and ask for more information. Select any field to start typing:

Nickname: A friendly name you can apply to the payee to help you remember who they are. Ex: Cellphone

Account Number: Your account number with this specific payee.
Account numbers aren't required for personal payees.

Address, City, State and Zip: Address where payment should be sent.

Phone: An optional field that can be edited to contain the payee's customer service number.

Once you've entered the necessary information, click **Done**.

You should see a confirmation message showing that your **payee was added successfully.**
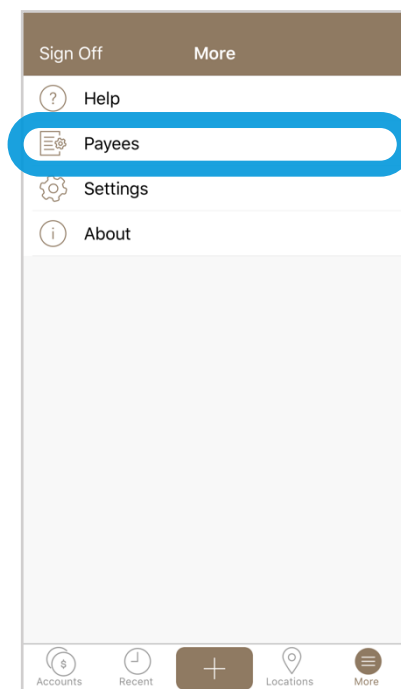
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Editing Listed and Non-Listed Payees

You may find the need to update payee information in order for payments to be successfully delivered. Follow the steps below to edit listed and non-listed:

1 To edit a payee you've previously set up, go to the **More** menu

2 Select **Payees** to bring up your payee list.

3 The app will ask you to **login** to your account to verify your identity before allowing you into the payee section.

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4 Select a **payee** from the list, and then select Edit

5 The **Edit Payee** screen displays the information available for that payee.

Listed Payees will display will display a nickname, account number, and phone number.

Non-Listed Payees will display nickname, account number, address, and phone number.

NOTE: Only the Account Number <u>cannot</u> be edited for non-listed payees.

Once the desired changes are made, select Update in the upper-right.

You can also select Delete Payee here to remove them from your list.