How to Send Person-to-Person (P2P) Payments

From the Online Banking dashboard, click **Move Money** from the menu to the left of the page. From the Move Money screen, click the **New Transaction** in the Move Money box to the right of the page.

JANE W DOE Manage Profile	< Synergy Bank			
View Accounts	SCHEDULED	0 Scheduled		
≑\$ Move Money	Updated: Jan 21, 2020 10:55:36 AM	G	We will help you set up a new payment or transfer NEW TRANSACTION	
n Deposit Checks	PREVIOUS 0 Completed	٩		
😂 Manage Cards	Updated: Jan 21, 2020 10:55:36 AM	G	Click here to set up Bill Pay	
Find Locations	NO PREVIOUS TRANSFERS		ENROLL NOW	
Messages			MY PAYEES +	-
Manage Alerts			Updated: Jan 21, 2020 10:55:23 AM	3
Reports			NO PAYEES	
C Documents				
C+ Log Out				

Select the account from which you wish to send money.

JANE W DOE Manage Profile	< Synergy Bank				
View Accounts	SCHEDULED	CHOOSE AN ACCOUNT			^
∜\$ Move Money	Updated Jan	Choose which account to move mone	ey from:	A help you set up a new payment or transfer	- 1
童 Deposit Checks	PREVIOUS	SEARCH			
Manage Cards	Updated: Jan	Checking	\$5,272.61	PAY ENROLLMENT ere to set up Bill Pay	
Find Locations	NO PREV	Checking	\$3,060.75	ENROLL NOW	
Messages		Checking *9012	\$460.78 INTERNAL	5	+
A Manage Alerts		Savings *3456	\$337.81 INTERNAL	Updated. Jan 21, 2020 10:55:23 AM	C
Reports		Savings *7890	\$7,710.74 INTERNAL	NO PAYEES	
Documents					
G-Log Out					
				~	

Next, choose the person whom you wish to send money. If you have never sent money to this person before, click + Add New Payee at the bottom of the Choose a Recipient pop-up window.

● JANE W DOE A Manage Profile	< Synergy Bank		
View Accounts	SCHEDULED	CHOOSE A RECIPIENT	
≓\$ Move Money	Updated: Je	Recipients include all available internal accounts. It may also include other money movement services such as external	A help you set up a new payment or transfer
童 Deposit Checks	PREVIOUS	accounts, bill pay, or person to person payments.	
Manage Cards	U Completed Updated: Ja	SEARCH	PAY ENROLLMENT ere to set up Bill Pay
• Find Locations	NO PRE	Checking \$3,060.75 •5678 INTERNAL	ENROLL NOW
Messages		Checking \$460.78 •9012 INTERNAL >	\$ +
Manage Alerts		● Savings \$337.81 •3456 INTERNAL >	Updated: Jan 21, 2020 10:55:23 AM
Reports		Savings \$7,710.74 >	NO PAYEES
Documents			
🕒 Log Out			~
		+ ADD NEW PAYEE	

Select **Person to Person** from the Add New Payee pop-up window.

JANE W DOE O Manage Profile	< Synergy Bank		
View Accounts	SCHEDULED	ADD NEW PAYEE	× MONEY
∜\$ Move Money	Updated Ja	What type of payee is this?	A help you set up a new payment or transfer
章 Deposit Checks	PREVIOUS		
Manage Cards	Updated Ja	Select this option to create a P2P payee.	YAY ENROLLMENT ere to set up Bill Pay
Find Locations	NO PRE	~	ENROLL NOW
Messages		Select this option to create an external account.	s +
Manage Alerts			Updated: Jan 21, 2020 10:59:23 AM
e Reports			NO PAYEES
Documents			
🕒 Log Out			
			×

Enter the payee's first and last name in the appropriate fields. Then, choose how you would like to pay that person. You can send via email, text, or using his or her debit card number and expiration date. Enter the appropriate information for your selection. Click **Add Payee**. This person will be saved in your payee list for future transactions.

View Accounts	SCHEDULED	K ADD NEW PAYEE	× MONEY
≝\$ Move Money	Updated: J	m What is this person's name?	help you set up a new payment or transfer
Deposit Checks	PREVIOUS	FIRST NAME John	NEW TRANSACTION
	0 Completed	LAST NAME Doe	PAY ENROLLMENT
Manage Cards	Updated .	PAYMENT METHOD	ENROLL NOW
Find Locations	NOPR	PLEASE CHOOSE HOW YOU WOULD LIKE TO PAY THIS PERSON.	
Messages			\$ +
Manage Alerts		SEND VIA EMAIL SEND VIA TEXT MESSAGE DEBIT CARD	Updated: Jan 21, 2020 10:55:23 AM
C Reports		SEND VIA TEXT MESSAGE	NO PAYEES
Documents		THIS WILL SEND A TEXT MESSAGE CONTAINING A REGISTRATION LIN 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.	
G Log Out		MOBILE PHONE NUMBER	
		ADD PAYEE	

In the Details pop-up window, enter the amount you want to send. Select the way the payee should be notified, and enter the corresponding information, if applicable. You may add an optional note to send with your payment.

JANE W DOE Manage Profile	< Synergy Bank		
View Accounts	SCHEDULED	< DETAILS	
∜ Move Money	Updated: Jan		A help you set up a new payment or transfer
童 Deposit Checks	PREVIOUS 0 Completed	Checking John Doe *1234 \$5,272.61	
Manage Cards	Updated: Jan	Enter P2P Amount:	AY ENROLLMENT ere to set up Bill Pay
Find Locations	NO PREV	AMOUNT	ENROLL NOW
🖾 Messages		How should this payee be notified?	÷ +
A Manage Alerts		Phone No potification	Updated: Jan 21, 2020 11:94:96 AM
Reports		PHONE NUMBER (985) 851-2217	5ie 9630 ₽2₽ >
C Documents		Send a Note.	
G+ Log Out		NOTE	×

Review your information in the Review This Transfer pop-up window. If the information is correct, click **Submit**. If corrections are needed click the back arrow at the top left of the pop-up window to return to the previous pop-up.

JANE W DOE Manage Profile	< Synergy Bank		
View Accounts	SCHEDULED	REVIEW THIS TRANSFER	
≑\$ Move Money	Updated: Jan	FROM CHECKING (*1234) - \$10.00	A help you set up a new payment or transfer
Deposit Checks	PREVIOUS	New Available Balance \$5,262.61	
🖨 Manage Cards	0 Completed	TO JOHN DOE	AY ENROLLMENT ere to set up Bill Pay
Find Locations	NO PREV	NOTE For Babysitting	ENROLL NOW
Messages		TOTAL \$10.00	· · · · ·
A Manage Alerts			Updatest. Jan 21, 2020 11:04:06 AM C
Reports			sie 9630 ₽2₽ >
B Documents			
🕞 Log Out			v
		SUBMIT	

Once the transfer is complete, you will receive a Confirmation Number. Your payee will receive an email or text with information on how to retrieve the payment.

JANE W DOE Manage Profile	< Synergy Bank			
View Accounts	SCHEDULED	SUCCESS	MONEY	^
≑\$ Move Money	Updatest Jan	1	A help you set up a new payment or transfer	
童 Deposit Checks	PREVIOUS	\checkmark		
Manage Cards	Updated: Jan	ALL DONE!	PAY ENROLLMENT ere to set up Bill Pay	
Find Locations	NO PREV	9601061053	ENROLL NOW	
Messages		A link to receive the funds has been sent to the recipient.	+	ie.
Manage Alerts		SET UP ANOTHER TRANSFER	Updated: Jan 21, 2020 11:04:06 AM	
& Reports			3ie P2P → 3630	
C Documents				
G= Log Out			~	
		CLOSE		