

**A To-Do list for Members Ahead of the Technology Upgrade**

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**Bill Pay (page 1) will not be available from January 29, 2024 until the Technology Upgrade concludes.**

**Zelle® (page 4) will not be available for several weeks beginning January 29, 2024.**

Any bills scheduled to be paid using our Bill Pay platform after Sunday, January 28 will not be paid until you set them up in the new platform after the Technology Upgrade is complete.

Please arrange for all bills to be paid before the Upgrade to ensure they are paid on time.

Prior to Monday, January 29<sup>th</sup> please record the information for your Bill Pay Payees and Zelle® Recipients.

No Bill Pay or Zelle® information will transfer to the new platform including:

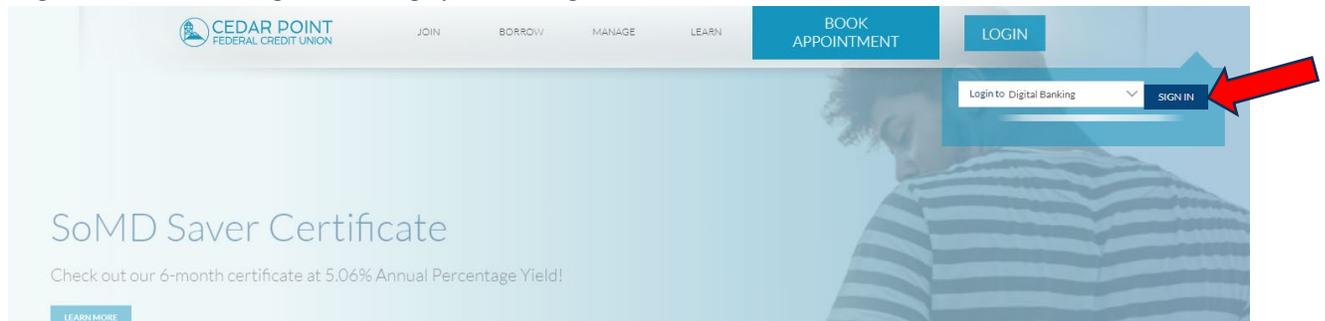
- Payee/Recipient details
- Recurring payments
- Activity History

**Bill Pay**

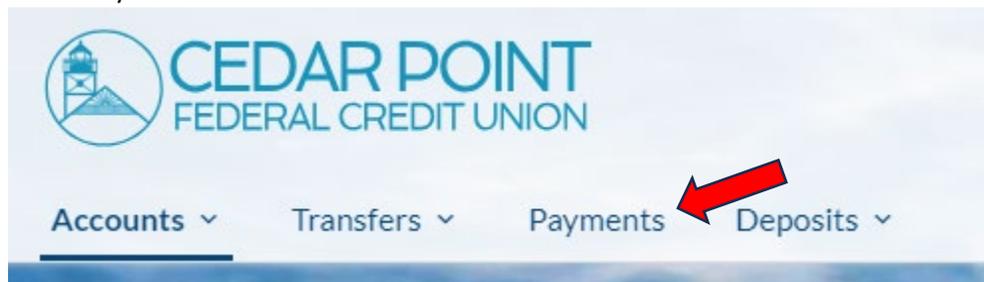
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**Step 1: Log into Digital Banking**

- Log into the current digital banking system using the link on our website

**Step 2: Open the payment portal**

- Select Payments

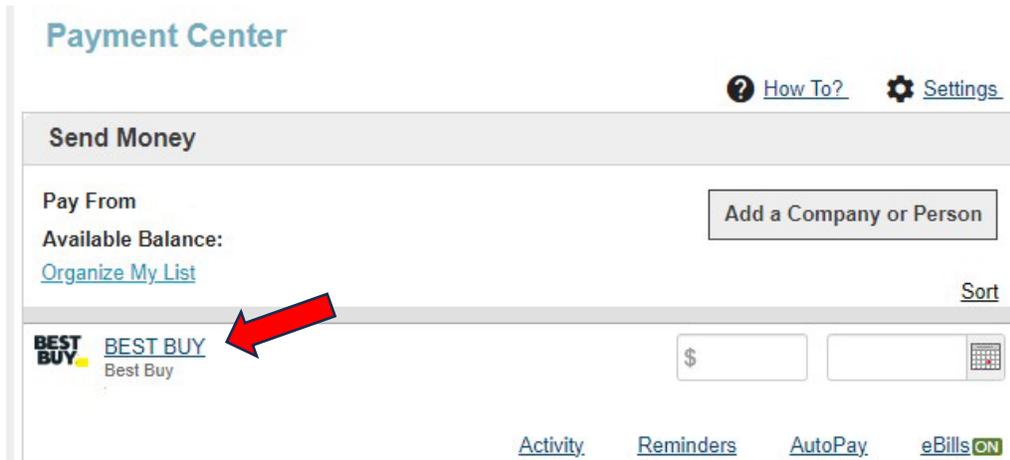


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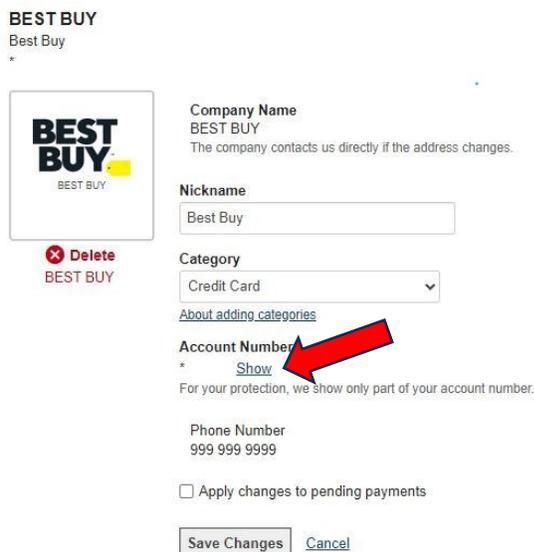
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**Step 3: Find details on each Biller**

- For details on the payments you have set up, select the company name. This will open the details for the Payee.



- Under Account Number select Show to view the entire account number. Save the details for this payee by screenprinting or writing them down.



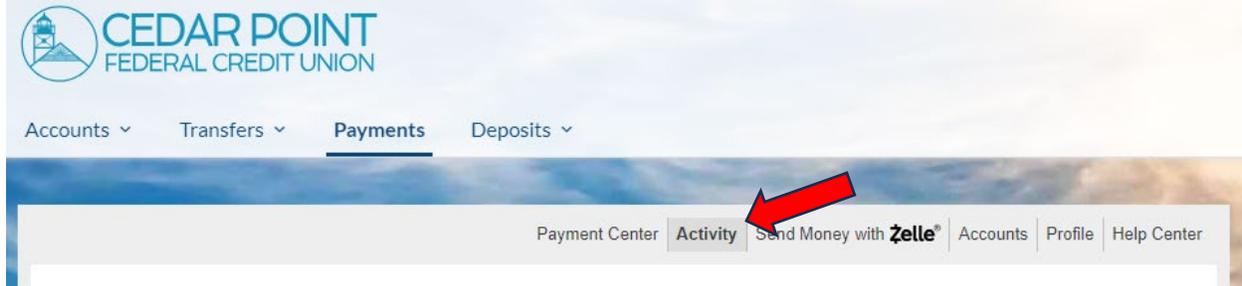
- Complete this process for ALL Payees you wish to transfer to the new system.

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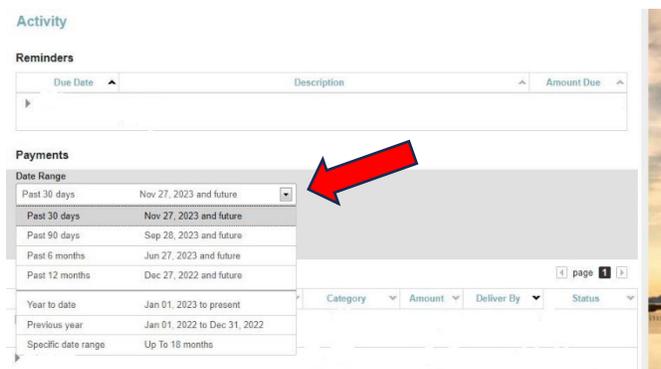
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**Step 4: Download/Print Bill Pay Activity History**

- Select Activity within the Payments Portal



- Select the Date Range for the history you want to download



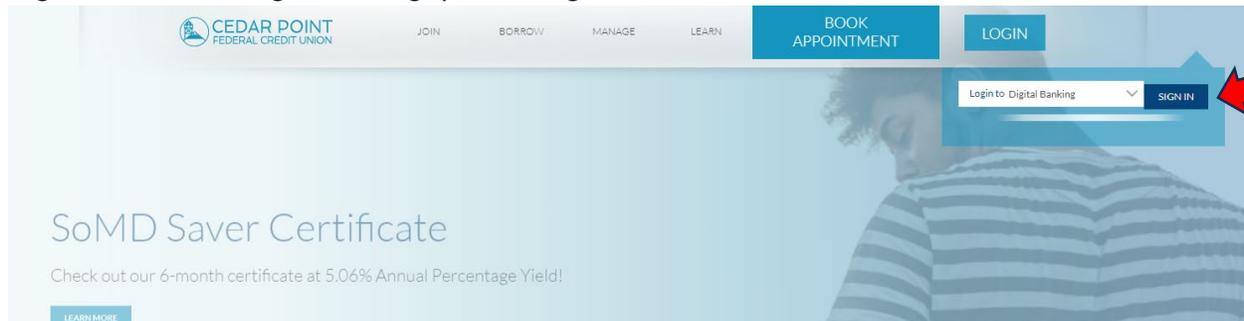
- Once it has populated, scroll down and select “Download Payment List” or “Print”. *Note: this will not provide Payee information details.*

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## Zelle®

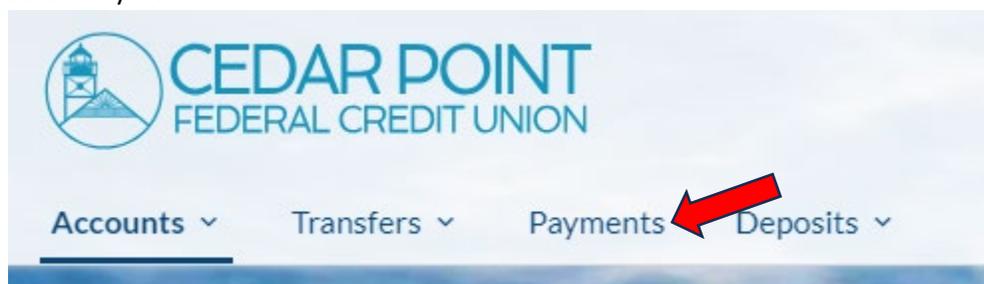
### Step 1: Log into Digital Banking

- Log into the current digital banking system using the link on our website



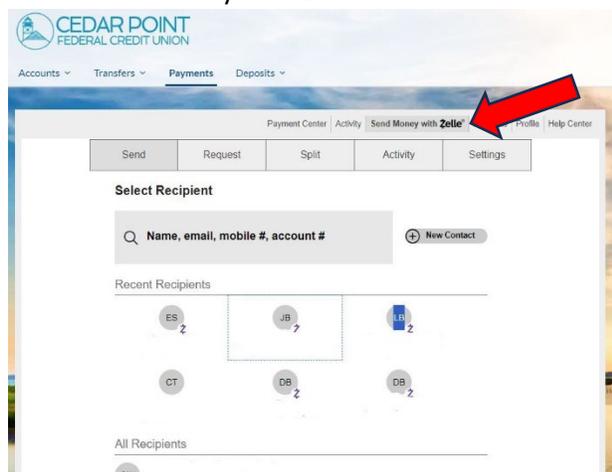
### Step 2: Open the payment portal

- Select Payments



### Step 3: Record/Print your Zelle Recipient Information

- Select Send Money with Zelle.



- Here you can see a list of All Recipients and the method used to send funds, (e.g. cell phone, email, etc.) Print this list or write down the Recipients you wish to set up in the new platform.

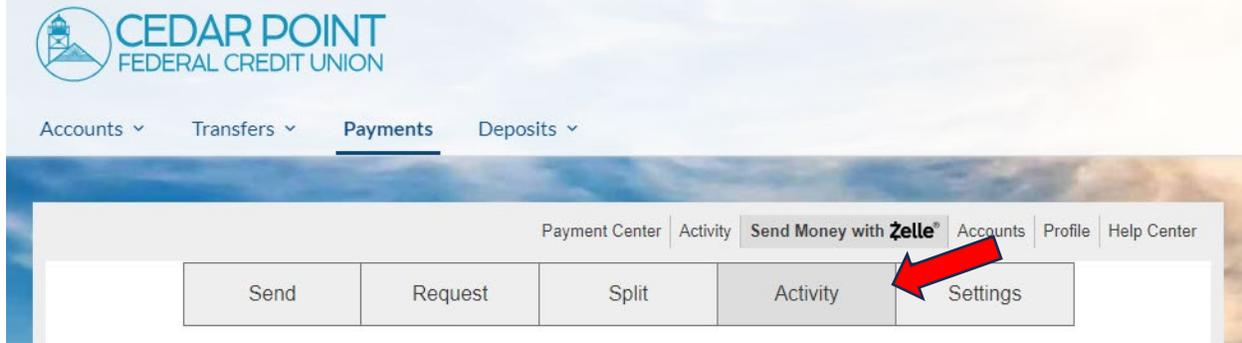
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**Step 4: Download/Print Zelle® Activity History**

- Select Activity



- Print the activity you want to save.

**Keep in Mind**

Access to the new Bill Pay system will be available on Tuesday, February 6<sup>th</sup>, once the Technology Upgrade is concluded.

Access to Zelle® will not be available on Tuesday, February 6<sup>th</sup> and will be available at a later date. Please refer to [www.cpfcu.com/upgrade](http://www.cpfcu.com/upgrade), which will be updated as soon as we have more information regarding the availability of Zelle®.

Users will be required to re-enroll in digital banking and Bill Pay when the Technology Upgrade is complete. To do that, you can sign in through the login portal on our website at [www.cpfcu.com](http://www.cpfcu.com) or download the new app from the App Store or Google Play. Mobile users will need to uninstall the existing app and download the new app. To enroll, you will need the following information handy: your last name, date of birth, full SSN & zip code.