

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

### Zelle<sup>®</sup> (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<sup>®</sup> Recipients.

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

- Payee/Recipient details
- Recurring payments
- Activity History

# **Bill Pay**

#### 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: 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.

Payment Center				
		0	How To?	Settings
Send Money				
Pay From Available Balance:		Add	l a Company o	or Person
Organize My List				Sort
BEST BUY Best Buy		\$		
	Activity	Reminders	<u>AutoPay</u>	eBills ON

• Under Account Number select <u>Show</u> to view the entire account number. Save the details for this payee by screenprinting or writing them down.

	Company Name BEST BUY The company contacts us directly if the address changes.
BEST BUY	Nickname
	Best Buy
S Delete BEST BUY	Category
	Credit Card 🗸
	About adding categories
	Account Number
	* Show
	For your protection, we show only part of your account number
	Phone Number
	999 999 9999
	Apply changes to pending navments

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



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

• Select Activity within the Payments Portal

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Accounts ~	Transfers 🛩	Payments	Deposits ~	_		-		
			Payment Center	Activity	Send Money with <b>Żelle</b> *	Accounts	Profile	Help Center

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

Due Date 🔺		Description		~	Amount Due	^
×						
Payments						
Date Range						
Past 30 days	Nov 27, 2023 and future					
Past 30 days	Nov 27, 2023 and future					
Past 90 days	Sep 28, 2023 and future					
	lup 27, 2023 and future					
Past 6 months	2011 51, 2023 0110 101010					
Past 6 months Past 12 months	Dec 27, 2022 and future				a page	Þ
Past 6 months Past 12 months Year to date	Jan 01, 2023 to present	r Category	✓ Amount ✓	Deliver By 👻	Status	Þ
Past 6 months Past 12 months Year to date Previous year	Dec 27, 2022 and future Jan 01, 2023 to present Jan 01, 2022 to Dec 31, 2022	r Category	✓ Amount ✓	Deliver By 👻	Status	

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



# Bill Pay & Zelle® A To-Do list for Members Ahead of the Technology Upgrade

# 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.

		Payment Center Activ	ity Send Money with <b>Zelle</b>	4
Send	Request	Split	Activity	Settings
Recent Re	cipients			
Recent Rec	s s	JB	цв	
_	4	-/	-2	

• 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.

(continued on next page)



### Step 4: Download/Print Zelle<sup>®</sup> Activity History

•	Select	Activity

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Accounts ~	Transfers ×	Payments [	oeposits ~			
			Payment Center	Activity Send Money with	<b>Żelle</b> <sup>®</sup> Accounts Profi	le Help Center
			Calit	Activity	Sottings	

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

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 <u>www.cpfcu.com</u> 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.