

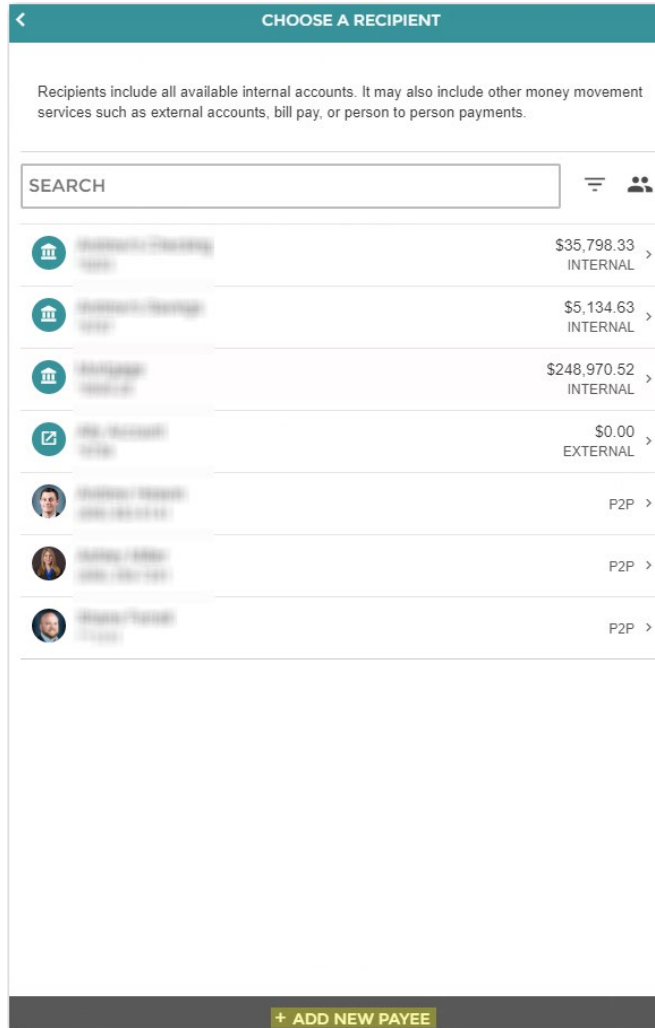
P2P Instructions

P2P Limits:

P2P Single Transfer Maximum:	\$3,000.00
P2P Single Transfer Minimum:	\$1.00
P2P Daily Card Transfer Maximum:	\$3,000.00
Rolling 7 Day Transaction Maximum:	\$5,000.00
Rolling 7 Day Amount Maximum:	\$5,000.00
Rolling 30 Day Transaction Maximum:	\$10,000.00
Rolling 30 Day Amount Maximum:	\$10,000.00

Once the customer logs in after being enabled, they will click on Move Money and have a new option when adding payees from the My Payees screen OR by initiating a New Transaction and choosing "+ Add New Payee" on the Recipient screen:





They will select “Person To Person” on the Add New Payee screen and then enter the Payee information:

ADD NEW PAYEE

What type of payee is this?

PERSON TO PERSON
Select this option to create a P2P payee.

EXTERNAL ACCOUNT
Select this option to create an external account.

When entering Payee info, the customer has 3 options:

1. Enter Payee's card info or have payee enter card info into their phone

ADD NEW PAYEE

PERSON TO PERSON

ADD PHOTO

What do you want to call this payee?

FIRST NAME
John

LAST NAME
Doe

Enter payee info:
Please enter contact information or card details to proceed ✓

EMAIL ADDRESS
john.doe@csiweb.com

MOBILE PHONE NUMBER

CARD NUMBER
9299

EXPIRATION DATE
10 / 18

SAVE

2. Enter Payee's email and an email will be sent to payee asking them to enter their card info:

ADD NEW PAYEE

PERSON TO PERSON

ADD PHOTO

What do you want to call this payee?

FIRST NAME
Jane

LAST NAME
Doe

Enter payee info:
Please enter contact information or card details to proceed ✓

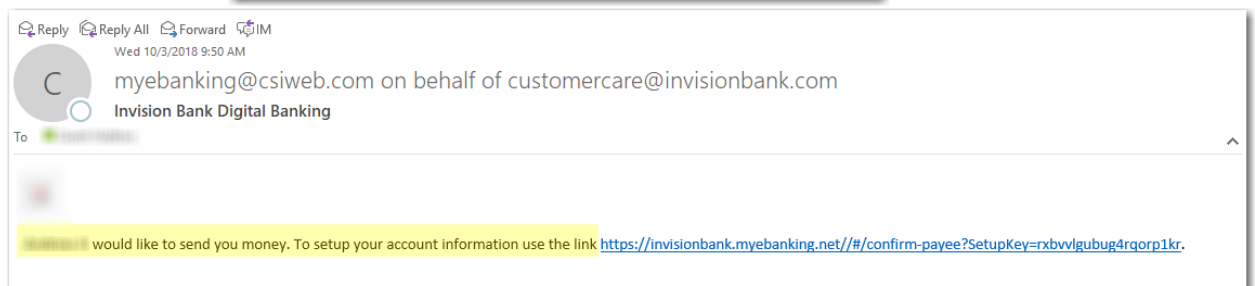
EMAIL ADDRESS
jane.doe@csiweb.com

MOBILE PHONE NUMBER

CARD NUMBER

EXPIRATION DATE

SAVE



3. Enter Payee's phone number to send them a text asking them to enter their Card info:

ADD NEW PAYEE

PERSON TO PERSON

ADD PHOTO

What do you want to call this payee?

FIRST NAME
Jim

LAST NAME
Doe

Enter payee info:
Please enter contact information or card details to proceed ✓

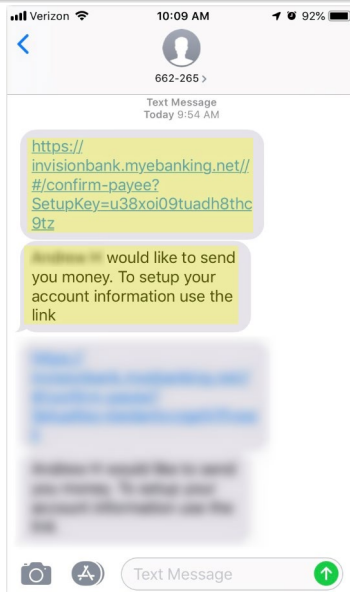
EMAIL ADDRESS

MOBILE PHONE NUMBER
(555) 555-5555

CARD NUMBER

EXPIRATION DATE

SAVE



Once all required info is entered by the recipient, you are ready to send money by going to New Transaction and choosing the newly created Payee from the Recipient list. You do have an option to choose how the Payee is notified of the payment:

The screenshot shows a mobile application interface for a P2P payment. At the top, a teal header contains a back arrow and the word 'DETAILS'. Below this, two circular icons are shown: a bank icon on the left and a person icon on the right, with an arrow pointing from the bank to the person. Under the bank icon, the text reads 'Checking' and '\$50,049.74'. Under the person icon, the text reads 'John Doe' and 'john.doe@csiweb.com'. Below this, a section titled 'Enter P2P Amount:' contains a text input field with 'AMOUNT' and '\$5'. A yellow highlight is under the question 'How should this payee be notified?'. Below this are three radio button options: 'EMAIL' (selected), 'PHONE', and 'NO NOTIFICATION'. Below the options is a text input field for 'EMAIL ADDRESS' with 'john.doe@csiweb.com'. Below that is a section titled 'What is this P2P for?' with a text input field containing 'NOTE' and 'Lunch'. At the bottom left, there is a small text '5 / 110'. At the bottom, a solid orange bar contains the text 'CONTINUE →'.