

SECTION 2 OF 5 · RECIPIENTS & PAYEES

Editing or Deleting a Recipient

When a recipient's account or contact details change, an authorized user can update them from the Recipients page. Users with the Manage Recipient right can also delete recipients who are no longer needed.

Editing a Recipient

In the Business Banking tab, click **Recipients**.

- 1 Find the recipient you want to edit and open their menu in the Actions column.
- 2 Use the three-dot menu on an account row to edit or remove that account.
- 3 Make your changes to the recipient's details, then click **Save Recipient**.

Form titled "Edit 123456789".

Display Name: [Text Field] Email Address: [Text Field] ☐ Send email notifications for complete payments

Accounts (1)

Account	Payment Type	Financial Institution	Routing Number
Checking: 123456789	ACH-Only	123456789	123456789

[Add account](#)

Recipient Details

Name: [Text Field] ACH Name: [Text Field] ACH ID: [Text Field]

Country: [Dropdown] Address 1: [Text Field] Address 2: [Text Field]

City: [Text Field] State: [Dropdown] ZIP: [Text Field]

Templates (0)

[Cancel](#) [Save Recipient](#)

Editing a recipient: display name, accounts, and recipient details.

Full guide reference: p. 49.

Editing a Recipient's Templates

While editing a recipient, you can see which templates they're assigned to and change their accounts or edit specific templates.

- 1 Review the list of templates the recipient belongs to and the amount they receive from each.
- 2 Click the **Access** link to edit a specific template.
- 3 Click **Save Recipient** when you're finished.

Templates (5)				
Template	Payment Type	Amount	Account	
	ACH Outgoing	\$0.01	Checking - *3456	Access
ACH Batch Test	ACH Outgoing	\$0.30	Checking - *3456	Access

The recipient's assigned templates, with payment type, amount, and account.

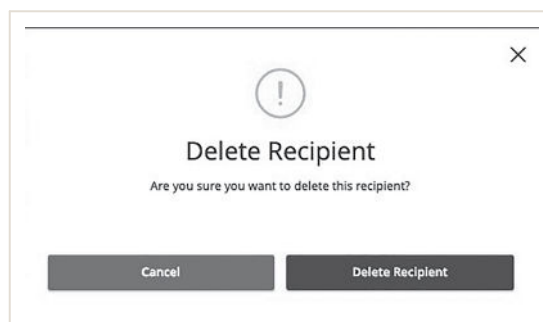
Note: For more on changing a template, see Editing a Template in the Managing Templates quick guide.

Full guide reference: p. 50.

Deleting a Recipient

Deleting a recipient permanently removes their contact information from the Recipients page. It does not erase data from payments already sent.

- 1 On the Recipients page, open the three-dot menu for the recipient and select **Delete**.
- 2 Click **Delete Recipient** to permanently remove them.



Confirm that you want to delete the recipient.

Full guide reference: p. 51.