



Beneficiary Enrollment User Guide 2020

1. Enter the email address that received the enrollment request. The campaign name will auto default.

The screenshot shows the 'GlobalPay PAYEE MANAGER' interface. At the top right is the 'WU BUSINESS SOLUTIONS' logo. Below the header, the text 'PLEASE ENTER EMAIL ADDRESS' is displayed. The form contains an 'Email:' field with an asterisk (*) indicating it is required, and a 'Campaign Name:' field with the value 'Sample Enrollment Campaign - ACH'. A 'Next' button with a right-pointing arrow is located at the bottom right of the form.

2. Enter the recipient information under the **Payee Contact Information**. Required fields are indicated by an asterisk (*).

The screenshot shows the 'BENEFICIARY ENROLLMENT' interface. At the top, there is a progress bar with six steps, where step 1 is highlighted. Below the progress bar, the text 'Please provide contact information for the business or individual represented in this enrollment.' is displayed. The main section is titled 'Beneficiary Contact Information'. It contains several fields: 'Payee ID:' with the value '000', 'Company Name:', 'Address Line 1:', 'Address Line 2:', 'City:', 'Country:', 'State/Province:', 'Postal Code:', 'Phone Number:', and 'Tax ID:'. Each of these fields has an asterisk (*) next to it, indicating they are required. A legend at the bottom indicates '* Required Information'. A 'Next' button with a right-pointing arrow is located at the bottom right of the form.

3. Enter the remaining recipient information under the **Enrollee Contact Information** heading and click **Next**.

The screenshot shows a web form titled "BENEFICIARY ENROLLMENT" with a progress bar at the top indicating steps 1 through 6. Step 2 is currently active. Below the progress bar is a "Back" button. The main instruction reads: "Please provide contact information for the person completing this enrollment." The form is titled "Enrollee Contact Information" and contains the following fields, each with a red asterisk indicating it is required: First Name, Last Name, Title, E-mail, Confirm E-mail, Phone Number, and Fax Number. A "Next" button is located at the bottom right of the form area.

4. Step 3 of the enrollment is setting up your login credentials for accessing the information once the enrollment is approved. There are two options, you can create new login credentials or if you are an existing Payee Manager user, you can create a Single Sign On by entering your existing username and password.
 ** This step may be excluded from some registrations

To create new user credentials

- Enter your Unique ID as your **Username**, this needs to be 6-50 alpha-numeric characters
- Enter a **Password**, this needs to be 6-20 alpha-numeric characters.
- Select a question from the **Challenge Question** dropdown list
- Provide an answer in the **Challenge Answer** field. Click **Next**.

The screenshot shows a web form titled "BENEFICIARY ENROLLMENT" with a progress bar at the top indicating steps 1 through 6. Step 3 is currently active. Below the progress bar is a "Back" button. The main instruction reads: "Please create a unique username and password for accessing Payee Manager." The form is titled "Login Information" and contains two radio button options: "Existing User" and "New User". The "New User" option is selected. Below the radio buttons are the following fields, each with a red asterisk indicating it is required: Username (with a note "(6-50 characters)"), Password (with a note "(6-20 alpha-numeric characters)"), Confirm Password, Challenge Question (a dropdown menu), and Challenge Answer. A "Next" button is located at the bottom right of the form area.

To link to an existing user

- Enter your **Username**
- Enter a **Password**

- If a match is found when you click next, your banking details will pre-populate
- If not, an exact match you will need to try again or enter a new user

5. Enter your banking information under the Bank Account Information heading and click **Find A Bank**

If you do not wish to use the Find a Bank feature, you can manually enter your bank account information under the Enter **Bank Manually** heading. Complete all fields as applicable.

6. Otherwise, enter the required information under the Search Using Bank Details or IBAN heading, including IBAN OR Routing Code/SWIFT and click **Search**.

7. Select your bank from the list provided and click the **Save** button.
8. If available select to receive your payment by Fastest Electronic Payment (Wire) or Least Cost Electronic Payment (ACH)
 - o Provide the **Bank Routing Code** or **Local Bank Routing Code**
 - Bank Routing Number is the ABA# for US Banks only. It must be 9 digits and identifies the bank which holds your account.

9. Identify whether an **Intermediary Bank** should be enabled and provide bank details.

FYI: An Intermediary bank is a bank that acts on behalf of the recipient’s bank. Payment will reach the intermediary bank before being credited to the recipient. We highly recommend you contact your financial institution to determine whether an intermediary bank is needed to receive funds from the United States. Failure to do so may result in payment being returned unprocessed.

10. Enter the required information under the **Notification of Electronic Payment Initiation** heading.

11. Enter the required information under the **Remittance Options** (if available) heading and click **Next**.

12. Read the Service Agreement, select the checkbox to agree to the terms and conditions and click **Submit Enrollment Request**

BENEFICIARY ENROLLMENT

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Please indicate your acceptance of the Western Union Service Agreement, or download for further review.

Service Agreement

You must accept the terms of this agreement before sending the enrollment request.

GlobalPay Payee Manager Terms and Conditions

Custom House (UK) Limited ("we" "us" "our") offers you access to our website ("site") on the following terms and conditions (the "Terms" or the "Agreement").

By selecting 'I ACCEPT' below, you agree to the following terms.

Background.
We have made this web platform available to you as a convenience to our customers, to whom we, or one of our affiliates, provide payments and foreign exchange services. Our customers have requested us to make payments to you on their behalf. In order to make such payments, you must access the site and provide us with the information we and/or our third party service providers deem necessary. These Terms describe the terms and conditions applicable to your access to and use of the site. In remitting payments on behalf of our customers, we, or our affiliate(s), act as service provider to our customers – not as a service provider to you. We only accept and act upon payment instructions from our customers, and will not act on your payment instructions or otherwise act as a payment service provider to you.

Payee Information. You shall be solely responsible for the accuracy and completeness of your information. You acknowledge and understand that your failure to provide us with and maintain accurate information may result in a delayed or non-delivered payment(s).

[Download Agreement](#)

I agree to the Service Agreement and have reviewed the [Online Privacy Statement](#).

[Submit Enrollment Request](#) 

13. Review the enrollment details and click **Confirm**. The enrollment is now complete.



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