



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. There is a large text input field for the email address. Below this field, the 'Campaign Name' is pre-filled with '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' (pre-filled with '000'), 'Company Name', 'Address Line 1', 'Address Line 2', 'City', 'Country' (with a dropdown arrow), 'State/Province', 'Postal Code', 'Phone Number', and 'Tax ID'. Red asterisks (*) are placed to the left of the Company Name, Address Line 1, City, Country, State/Province, Postal Code, and Tax ID fields, indicating they are required. A legend at the bottom left states '* 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**.

BENEFICIARY ENROLLMENT

1 • 2 • 3 • 4 • 5 • 6

Back

Please provide contact information for the person completing this enrollment.

Enrollee Contact Information

First Name: *

Last Name: *

Title:

E-mail: *

Confirm E-mail: *

Phone Number:

Fax Number:

* Required Information

Next

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**.

BENEFICIARY ENROLLMENT

1 • 2 • 3 • 4 • 5 • 6

Back

Please create a unique username and password for accessing Payee Manager.

Login Information

☐ Existing User

☒ New User

Username: * (6-50 characters)

Password: * (6-20 alpha-numeric characters)

Confirm Password: *

Challenge Question: *

Challenge Answer: *

* Required Information

Next

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

BENEFICIARY ENROLLMENT

1 • 2 • 3 • 4 • 5 • 6

← Back

Please create a unique username and password for accessing Payee Manager.

Login Information

☒ Existing User

Username: *

Password: *

Forgot Password?

☐ New User

* Required Information

Next →

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

BENEFICIARY ENROLLMENT

1 • 2 • 3 • 4 • 5 • 6

← Back

Please provide your bank instructions and remittance option for receipt of payment.

Bank Account Information

Bank Account No.(including IBAN, Clabe, etc.): *

Name on Bank Account: *

Bank Country: *

Currency: *

Find A Bank →

Please use Find a Bank to pre-populate your bank account details.

Enter Bank Manually Details ↕

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)
- 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

123456

Back

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.



©2020 Western Union Holdings Inc. All rights reserved. Western Union Business Solutions ("WUBS") is a business unit of the Western Union group of companies and operates through local affiliates in a number of countries around the world. For a full list of WUBS local licensing and other information, please visit www.business.westernunion.com/wubsglobaldisclaimers/. This User Guide has been prepared solely for informational purposes and does not in any way create any binding obligations on either party. Relations between you and WUBS shall be governed by the applicable terms and conditions. No representations, warranties or conditions of any kind, express or implied, are made in this User Guide.

The WESTERN UNION name, logo, trade name, trade dress and related trademarks and service marks, owned by Western Union Holdings, Inc., are registered and/or used in the U.S. and many foreign countries. This material is proprietary to Western Union and cannot be used, reproduced, copied, displayed, distributed or used to prepare derivative works without the **prior written consent** of Western Union.

All other trademarks, service marks, and trade names referenced in this material are the property of their respective owners.