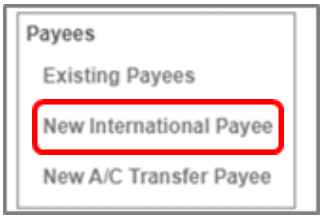
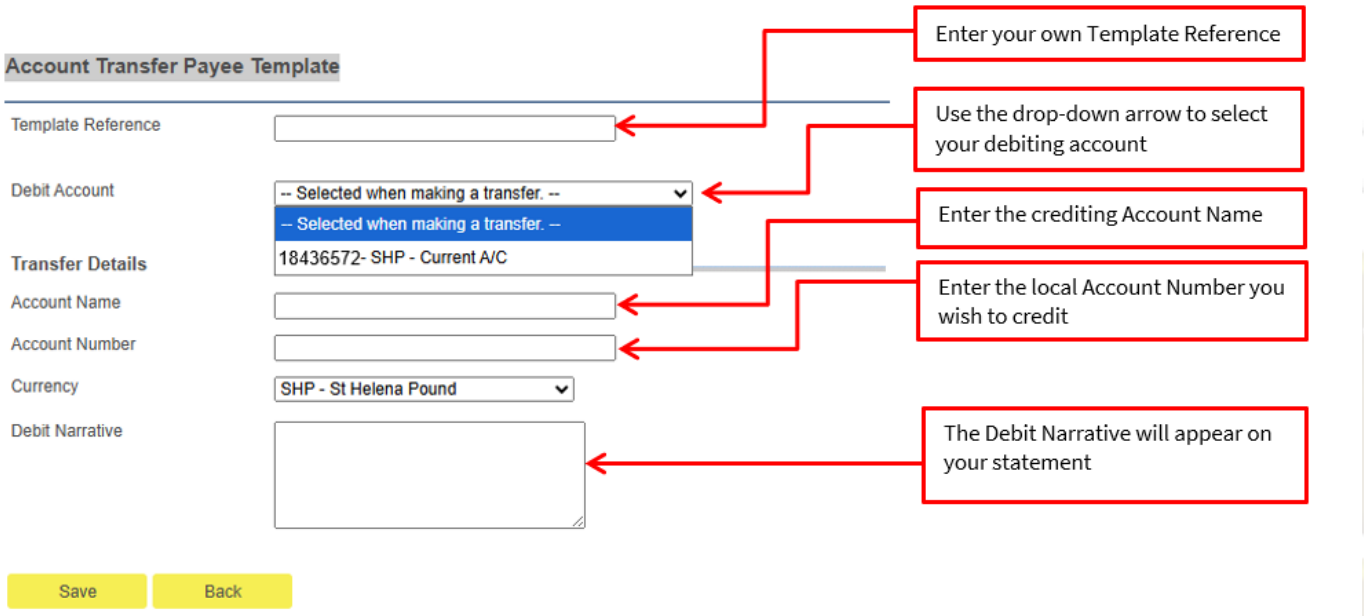
HOW TO SET UP A LOCAL PAYEE TEMPLATE



Step 1: Log in to Online Banking (www.sainthelenabankonline.com)

Step 2: You can create a local account Payee (template) to assist with regular payments to local (Bank of St Helena) accounts. Navigate to **Payees** then **New A/C Transfer Payee.**

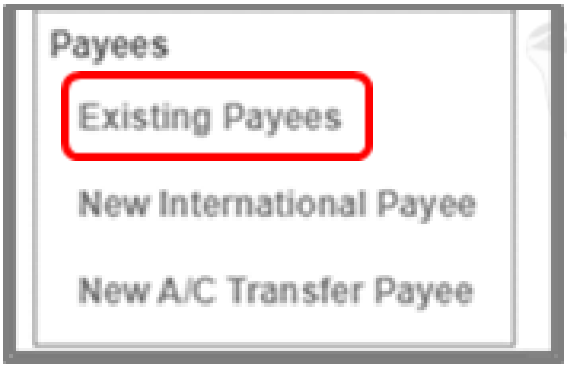
Step 3: Complete the applicable fields . The Debit Account field is optional, allowing you to select the account when you submit a payment. Choose – *Selected when making a transfer*— from the drop-down menu if you do not wish to use a specific account for this template. To leave unselected if you would like to use the template with different debiting accounts .



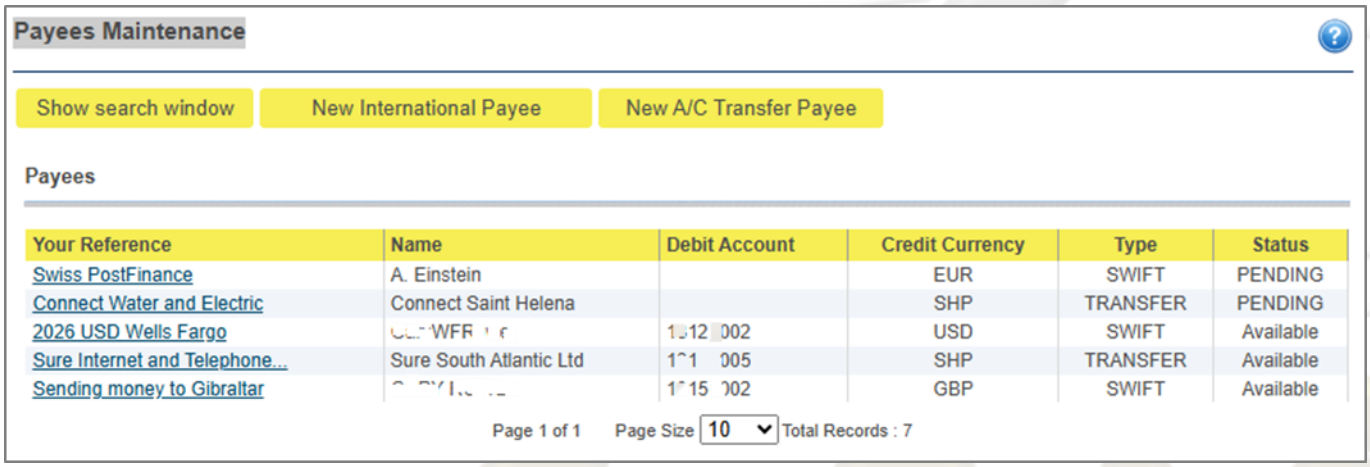
Step 4: Click "Save" to create the new A/C Transfer Payee. As a security measure you will be prompted to enter three random characters from your password to complete the account transfer. The new Payee will be created in a Pending status until it has been verified by the Bank. It will then progress to

REMOVE PAYEE

Step 4: You can view, and optionally remove a payee. You will not be able to amend an existing payee. You would need to create a new payee, and optionally remove the old payee if no longer required.



Navigate to **Payees** then **Existing Payees** to view the existing payees, including their current status.



Step 5: The field Your Reference is a link that you can click to view the details of the Payee.

When viewing the Payee, the Remove Payee button allows you to remove the payee (template). As a security measure you will be prompted to enter three random characters from your password to complete the action.

