**Guide to Add ACH Payee to Template**

The **Add Payees** feature allows entitled users to add payees to an ACH template.

**Required Permissions**

Before you can add payees to a template, you must have one or more payees with ACH payment methods. You must also be assigned to a role with add or remove template entry permission.

1. Within the **“Business ACH”** widget, select the template where you wish to add the Payee.
2. Click the “Add Payees” button.

3. The Add Payees to template window is displayed. Check the box next to the Payee you want to add to the template.

Note: You must add a new payee before the payee is available to add to template (See "Add ACH Payee" Guide below)
4 Click "Assign Payees" to apply the payees to the template or click "Cancel" to close.

5 In the event that there is no Payee available to select.

Click "Add an ACH Payee."
6. Click "Add New Payee."

7. Under Payee details, select **Person** or **Business**.
8. Enter the following:
   - **Full Name** (Required)
   - **Email** (Optional)
   - **Payee ID** (Optional)

9. Choose a group for the Payee (Optional)

   Click "Add Payee."
10 Click "Add payment method."

11 Select the ACH field.
Enter Beneficiary FI and account Information. Enter the following:

- **Routing Number**
- **Account Type**
- **Account Number**
- **Nickname**

Click "Save."

**Note:** To add this new payee to a template, return to Step 1.