Guide to Delete Payees in a Template

The delete payee service allows users to delete payees in a template.

Required Permissions

Before you can delete payees from a template, you must be assigned a role with add or remove template entry permission

Important: Changes to payees are not applied to templates pending authorization, authorized templates, or future-dated templates

1. Within the “Business ACH” widget, select the template you wish to delete Payee from.
2 Click the edit icon (pencil) next to the Payee you wish to delete.

3 Click "Remove Payee."
4. Select “Yes, remove” to continue removing Payee.

5. A confirmation message is displayed indicating the Payee has been successfully removed from the template.

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