## Step by Step guide on how to operate your Passport account.

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- 2. How to turn off your two step authentication
- 3. How to add your external bank account and confirm bank account accuracy
- 4. How to add contacts to send them money
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- 6. How to pay an external account in your contacts
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#### STEP 1: HOW TO SIGN INTO YOUR PASSPORT ACCOUNT.

Desword	Home screen is a white label of Pass banking interface Simple account dashboard PASSP RT PARPENTING	Easy navigation for basic activity
SIGN IN Forgot Password?	Vy Account     May Account     My Account	Create match     C
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Top left enter your email that you have used and password.

Then you will be brought to the dashboard screen.

#### STEP 2: HOW TO TURN OFF YOUR TWO STEP AUTHENTICATION

On your dashboard in the left lower corner on your menu bar you will see your first name's initial.

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ê	Control Credit from STRIPE 1800948598 TRANSFER for RABBIT SAVIOR ST-P5 (2011) + \$192.49	Memo
	JUL 24, 2023	SEND MONEY
	CCD ACH Credit from STRIPE 1800948598 TRANSFER for RABBIT SAVIOR ST-C6 ACH + \$29.80	

Click that as shown below and it will take you to the next screen.

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		User Information				Password	CHANGE
88		BASIC INFORMATION					
~~		Name	Jon Silva	Status	ACTIVE	Last Changed 05/19/2023	
ő		DOB		SSN			
B		Email	mufasarolex@gmail.com	Phone	951-407-8543		
-		Primary Address		User Type	CUSTOMER	Security	
\$-		AUTHORIZED SIGNATORY	INFORMATION				
		Name	Jon Silva	SSN	****2032	Multi-Factor Authentication	
0		DOB	03/15/1979	Mobile	951-407-8543		
		Primary Address	2117 Monterey Peninsula Drive, Corona, CA, 92882	Home Phone			
金		Secondary Identification	DRIVER_LICENSE	Work Phone			
		State of Issuance	CA	Secondary Identification ID	h7508255		
ôô				Is US Citizen	No		
~ ~		AUDIT FIELDS					
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A		On 04/14/2023		On 05/25/2023			
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On the right side of the screen, see the SECURITY box and turn Multi-Factor Authentication to off

#### STEP 3: HOW TO ADD YOUR EXTERNAL BANK ACCOUNT

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Results per page

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Now add your external banking information. When this is completed, you will receive two microdeposits that Priority Passport will place in the account you added. Once you see the deposits in your existing bank account, you will go back to your external bank account menu page to verify you received the micro deposits. This is to ensure Priority Passport has the correct account connected. Click the house

on the left side bar menu . Once you submit the verification please allow 48hrs to be approved. Then you can collect and send money to your external account. Please see screenshot below.

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00		External Account Info	ormation		IN VERIFY	Account Validations	
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~		Created	mufasarolex@gmail.com	Last Updated	SYSTEM		
Ê			On 06/21/2023		On 06/26/2023		
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Click the house on the left side bar menu

Then click on ADD NEW in the right upper corner

#### STEP 4: HOW TO ADD CONTACTS AND SEND MONEY

In the left lower menu bar, click on the 2 person icon. This will take you to your contacts page.

● ADD

Click on the Add icon in the right upper corner a ٢ Contacts B Move Money E۰ Display Label 🛡 ADD DISPLAY LABEL PAYMENT MODE CREATED ON LAST UPDATED ON LAST UPDATED BY crockett myers ACH WIRE Jul 24, 2023 Jul 24, 2023 8 mufasarolex@gmail.com ACH WIRE jason fichera Jul 10, 2023 Jul 10, 2023 mufasarolex@gmail.com ₿ david pulley ACH WIRE Jun 13, 2023 Jul 10, 2023 SYSTEM ACH WIRE Jun 13, 2023 Jul 10, 2023 SYSTEM cheyenne harmon ACH Addison Emory IV Jun 13, 2023 Jul 10, 2023 SYSTEM ACH WIRE Jun 13, 2023 Jul 10, 2023 SYSTEM tristan lane 臝 ACH WIRE joan cross Jun 13, 2023 Jul 10, 2023 SYSTEM ACH WIRE Jul 10, 2023 SYSTEM Jun 13, 2023 justin starling ACH WIRE SYSTEM kacie villamor Jun 13, 2023 Jul 10, 2023 Ê Logan Leitzel ACH WIRE Jun 15, 2023 Jul 10, 2023 SYSTEM ACH WIRE Jun 16, 2023 Jul 10, 2023 SYSTEM Mike Flaherty 25 • Results per page 1 to 14 of 14 < >

Now you can add your business or individual contacts to send and receive money from them. Click ACH, WIRE AND CHECK for payment mode. Then add their information. See the next two screens below.

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00		CONTACT TYPE O BUSINESS  O INDIVIDUAL		
慾		First Name*	Last Name*	
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0		Account Type Savings	Holder Type Corporate	
宜		Account Number*	Holder Name*	
8		Routing Number*	Wire Routing Number Search	
Ψ		Validate Account *	Purpose	
Ê		Instant verification		
L		Shipped To*	Phone Number*	

Fill out all fields and where it says validate account leave on INSTANT VERIFICATION.

Then add contact and you are done.

### STEP 5: HOW TO ADD MONEY TO YOUR PASSPORT ACCOUNT

Click top right hand corner MOVE MONEY- Select Collect or Send

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83 83	rabbit savior •0091 Payment ID: mufasarolex@ppi	Account Balance <u>M</u> 3M	6M 1Y SEND SEND TO				
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С) <sub>ф</sub>	VISA Linked Debit Card •• 5474 Issued on : Apr 14, 2023	sas Sulion Julios Julio?	JUL 24				
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	JUL 24, 2023			SEND MONEY			
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## Click Collect and you will be taken to the screen below

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ê		Allow Duplicate		
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Fill out the fields accordingly then select your external account to collect from. Once you are finished filling out all fields, click collect money at the bottom and you have completed this transaction. This will be the same for sending money to your external bank account.

# STEP 6: HOW TO PAY AN EXTERNAL ACCOUNT (NON-PASSPORT CONTACT) FROM YOUR PASSPORT ACCOUNT

This step is for paying people from your passport account that do not have a passport account. The contacts are in your contact list with their external banking information.

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Click on contact or one time.

Then add amount and purpose for sending funds. Search your contact in the next field. Pay with ACH then send money. They will receive funds within 48 hours.

#### STEP 7: HOW TO PAY SOMEONE PASSPORT TO PASSPORT

If your contact has a passport account, select book then fill the fields and send money. This function is like a Zelle or Venmo between two Passport accounts.

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4 H Q	AVAILABLE BALANCE S179	Contact* Search Contact				
¢	985	VIA METHOD				
鱼	Issued on : Apr 14, 2023 > <sup>50</sup> Jul 01 Jul 05 Jul 07 Jul 24	BOOK				
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	JUL 24, 2023	SEND MONEY				
J	CCD ACH Credit from STRIPE 1800948598 TRANSFER for RABBIT SAVIOR ST-C6 (ACH) + \$29.80					

Quick transfer on the right side: Works with contacts that have Passport accounts. Make sure they give you their payment id number to enter in the field.

Example of a payment id number Payment ID: mufasarolex@ppi