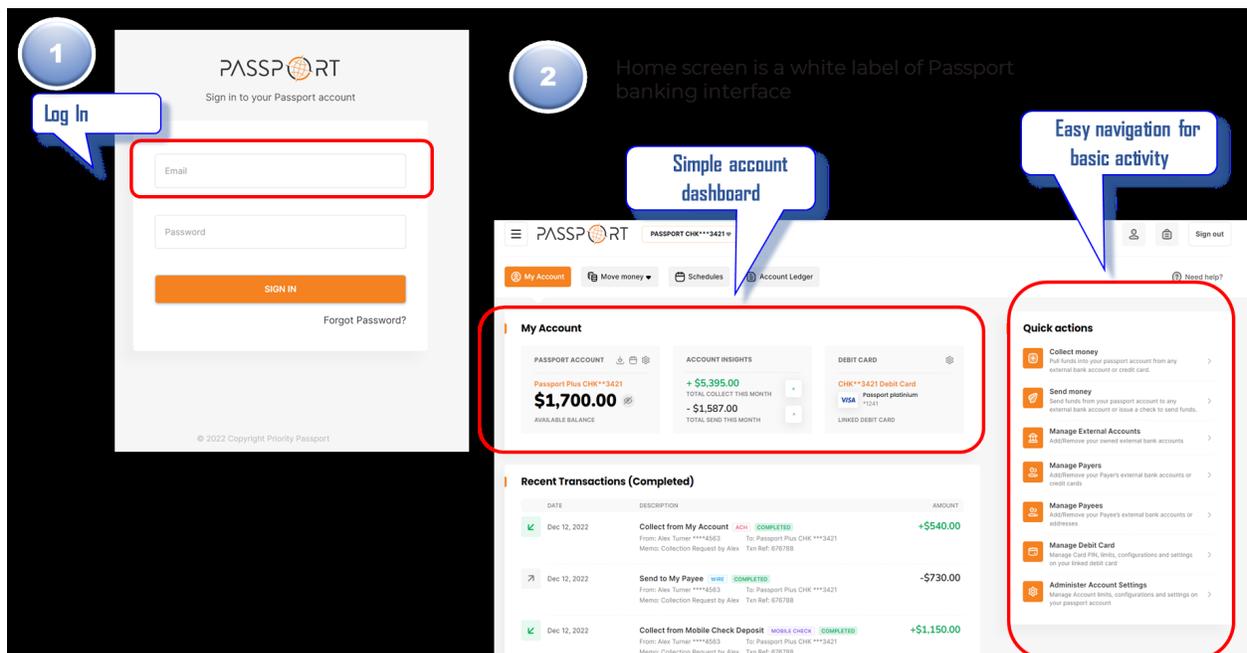


# Step by Step guide on how to operate your Passport account.

Menu :

1. How to sign into your passport account
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
5. How to add money to your passport account
6. How to pay an external account in your contacts
7. How to pay someone passport to passport
8. How to do a quick transfer

## STEP 1: HOW TO SIGN INTO YOUR PASSPORT ACCOUNT.



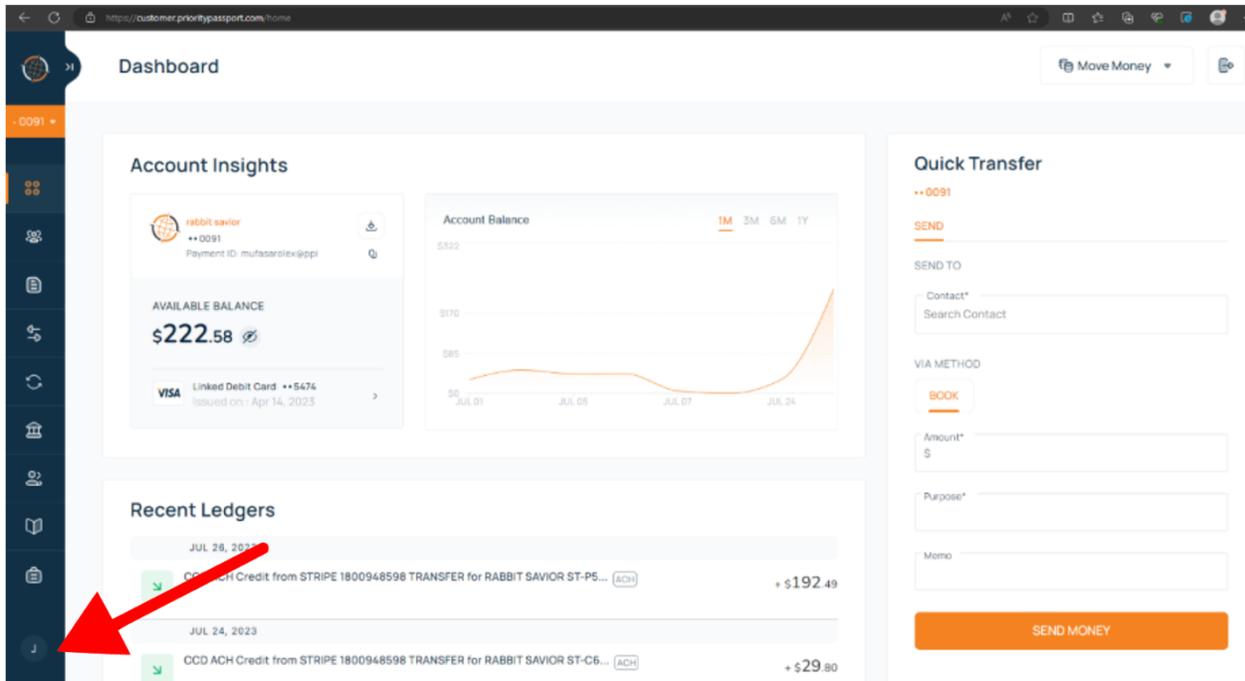
Top left enter your email that you have used and password.

Then you will be brought to the dashboard screen.

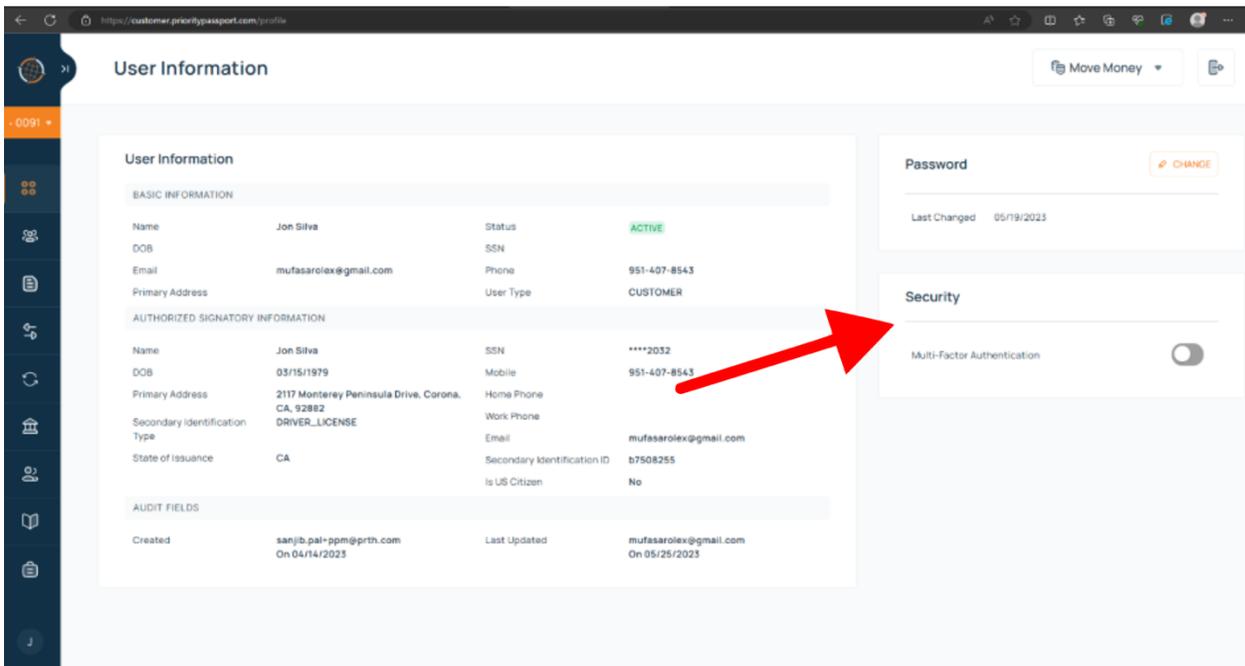
## STEP 2: HOW TO TURN OFF YOUR TWO STEP AUTHENTICATION

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

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

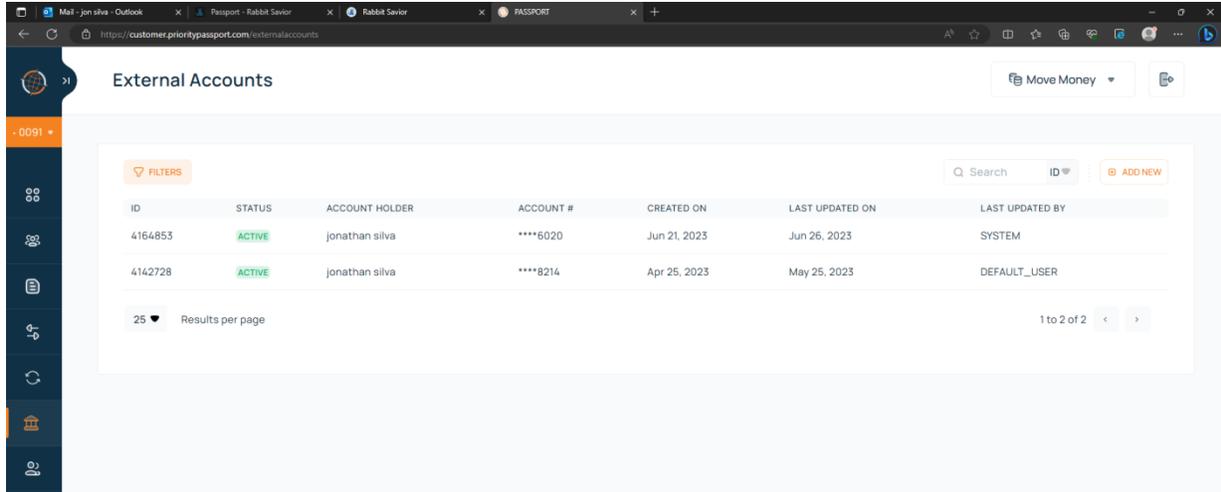


On the right side of the screen, see the SECURITY box and turn Multi-Factor Authentication to off

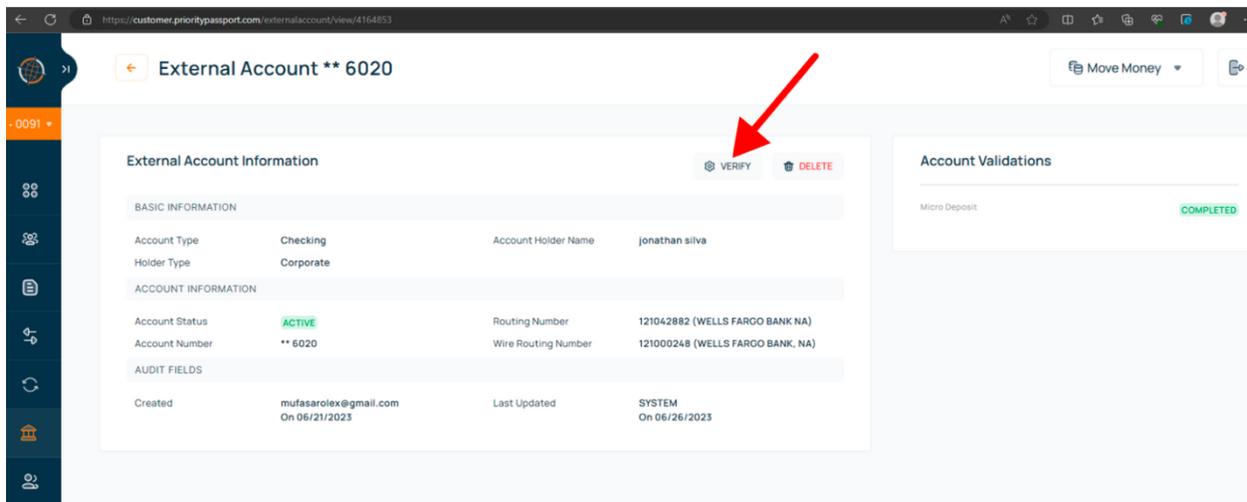


### STEP 3: HOW TO ADD YOUR EXTERNAL BANK ACCOUNT

Click the house on the left side bar menu . Then click on ADD NEW in the right upper corner



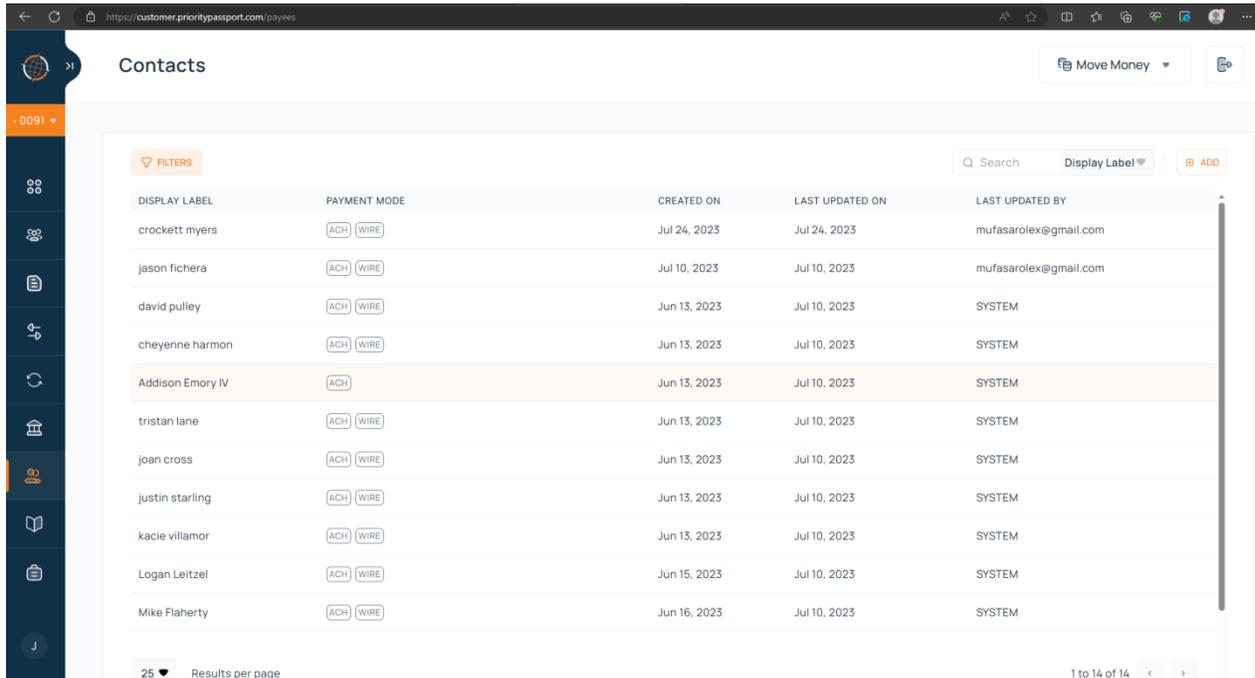
Now add your external banking information. When this is completed, you will receive two micro-deposits that Priority Passport will place in the account you added. Once you see the deposits in your existing bank account, you will go back to your external bank account menu page to verify you received the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



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

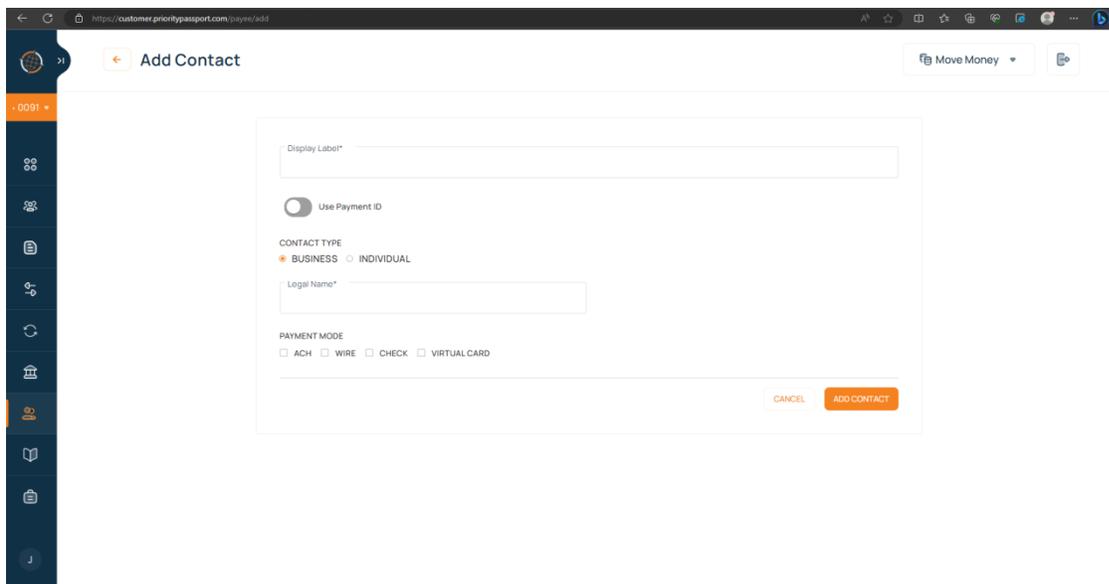
In the left lower menu bar, click on the 2 person icon . This will take you to your contacts page.

Click on the Add icon in the right upper corner .



DISPLAY LABEL	PAYMENT MODE	CREATED ON	LAST UPDATED ON	LAST UPDATED BY
crockett myers	<input type="checkbox"/> ACH <input type="checkbox"/> WIRE	Jul 24, 2023	Jul 24, 2023	mufasarolex@gmail.com
jason fichera	<input type="checkbox"/> ACH <input type="checkbox"/> WIRE	Jul 10, 2023	Jul 10, 2023	mufasarolex@gmail.com
david pulley	<input type="checkbox"/> ACH <input type="checkbox"/> WIRE	Jun 13, 2023	Jul 10, 2023	SYSTEM
cheyenne harmon	<input type="checkbox"/> ACH <input type="checkbox"/> WIRE	Jun 13, 2023	Jul 10, 2023	SYSTEM
Addison Emory IV	<input type="checkbox"/> ACH	Jun 13, 2023	Jul 10, 2023	SYSTEM
tristan lane	<input type="checkbox"/> ACH <input type="checkbox"/> WIRE	Jun 13, 2023	Jul 10, 2023	SYSTEM
joan cross	<input type="checkbox"/> ACH <input type="checkbox"/> WIRE	Jun 13, 2023	Jul 10, 2023	SYSTEM
justin starling	<input type="checkbox"/> ACH <input type="checkbox"/> WIRE	Jun 13, 2023	Jul 10, 2023	SYSTEM
kacie villamor	<input type="checkbox"/> ACH <input type="checkbox"/> WIRE	Jun 13, 2023	Jul 10, 2023	SYSTEM
Logan Leitzel	<input type="checkbox"/> ACH <input type="checkbox"/> WIRE	Jun 15, 2023	Jul 10, 2023	SYSTEM
Mike Flaherty	<input type="checkbox"/> ACH <input type="checkbox"/> WIRE	Jun 16, 2023	Jul 10, 2023	SYSTEM

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.



Display Label\*

Use Payment ID

CONTACT TYPE  
 BUSINESS  INDIVIDUAL

Legal Name\*

PAYMENT MODE  
 ACH  WIRE  CHECK  VIRTUAL CARD

Mail - jon silva - Outlook | Passport - Rabbit Savior | Rabbit Savior | PASSPORT

https://customer.prioritypassport.com/payee/add

### Add Contact

Move Money

Use Payment ID

**CONTACT TYPE**

BUSINESS  INDIVIDUAL

First Name\*  Last Name\*

**PAYMENT MODE**

ACH  WIRE  CHECK  VIRTUAL CARD

**EXTERNAL ACCOUNT DETAILS**

Account Type  Holder Type

Account Number\*  Holder Name\*

Routing Number\*  Wire Routing Number

Validate Account\*  Purpose

**SHIPPING ADDRESS DETAILS**

Shipped To\*  Phone Number\*

Address Line 1\*  Address Line 2

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

The screenshot shows the Rabbit Savior dashboard. At the top right, there is a 'Move Money' button. The main content is divided into three sections: 'Account Insights', 'Recent Ledgers', and 'Quick Transfer'.

**Account Insights:** Shows the account name 'rabbit savior', account number '0091', and payment ID 'mufasarolex@ppi'. The available balance is \$222.58. A linked Visa debit card is also shown.

**Account Balance:** A line graph showing the account balance over time, with markers for JUL 01, JUL 05, JUL 07, and JUL 24. The balance starts at \$0, rises to about \$170, and then rises sharply to over \$200 by JUL 24.

**Recent Ledgers:** Lists two transactions from STRIPE: a \$192.49 credit on JUL 26, 2023, and a \$29.80 credit on JUL 24, 2023.

**Quick Transfer:** A form to send money. It includes fields for 'SEND TO' (Contact\*), 'VIA METHOD' (BOOK), 'Amount\*', 'Purpose\*', and 'Memo'. A 'SEND MONEY' button is at the bottom.

Click Collect and you will be taken to the screen below

The screenshot shows the 'Collect Money' form. It includes a 'My Account' button, a 'Destination Account\*' field with 'CHE \*\*\*0091', and a 'Purpose\*' field. The 'SELECT METHOD' section has 'ACH' selected. There are also fields for 'Source Account\*', 'Processing Mode' (Same Day), and 'Memo'. At the bottom, there are toggle switches for 'Allow Duplicate' and 'Repeat'. A 'Transaction Summary' box on the right shows the collect amount as \$0.00, destination as CHE \*\*\*0091, and processing mode as Same Day.

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.

The screenshot shows the 'Send Money' page on the PriorityPassport website. The page has a dark blue sidebar on the left with various icons. The main content area is white and contains a form for sending money. On the left side of the form, there are three buttons: 'Contact', 'One Time', and 'My Account', each with a right-pointing arrow. The form fields include: 'Amount\*' (with a '\$' symbol), 'Source Account' (pre-filled with 'CHE \*\*\*0091'), 'Purpose\*', and a 'SELECT METHOD' section with buttons for 'ACH' (highlighted in orange), 'WIRE', 'CHECK', and 'BOOK'. Below these are dropdown menus for 'Select Destination Account', 'Processing Mode' (pre-filled with 'Same Day'), 'Authorization Type' (pre-filled with 'Written'), and a text field for 'Addenda'. On the right side of the form, there is a 'Transaction Summary' box containing the following information: 'Send Amount \$0.00', 'From CHE \*\*\*0091', 'To', 'Purpose', 'Via ACH', 'Processing Mode Same Day', and 'Memo'.

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.

The screenshot displays the Passport PriorityPassport.com dashboard. The top navigation bar includes a 'Move Money' button. The main content area is divided into three sections:

- Account Insights:** Shows the account name 'rabbit savior' with ID '0091' and Payment ID 'mufasarolex@ppi'. The available balance is \$222.58. A linked Visa debit card is also shown.
- Account Balance:** A line chart showing the account balance over time, with a peak of \$322 and a low of \$0.
- Recent Ledgers:** A table of recent transactions, including two CCD ACH credits from STRIPE.
- Quick Transfer:** A form for sending money to a contact. It includes fields for 'SEND TO' (Contact\*), 'VIA METHOD' (BOOK), 'Amount\*', 'Purpose\*', and 'Memo'. A 'SEND MONEY' button is at the bottom.

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