ZACHRY
PROJECT **MAVERICK**

Step-by-Step Instructions

Zachry Business Use Case

Use the Payment Method functionality of Oracle to add, edit, or deactivate a Bank Account and manage your Payment Methods.

- The direct deposit information is captured in the Bank Account section before being assigned as a Payment Method.
- Additional Payment Methods allow for either a fixed percentage amount or dollar amount allocation. There are a maximum of 3 Bank Accounts and 3 Payment Methods. If an employee chooses not to set up a direct deposit account, the default in Oracle will be a Pay Card deposit.
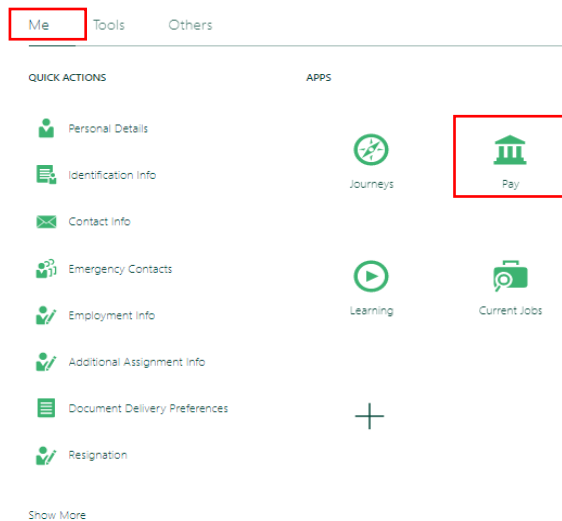
Jump to:

Edit Bank Accounts & Payment Methods
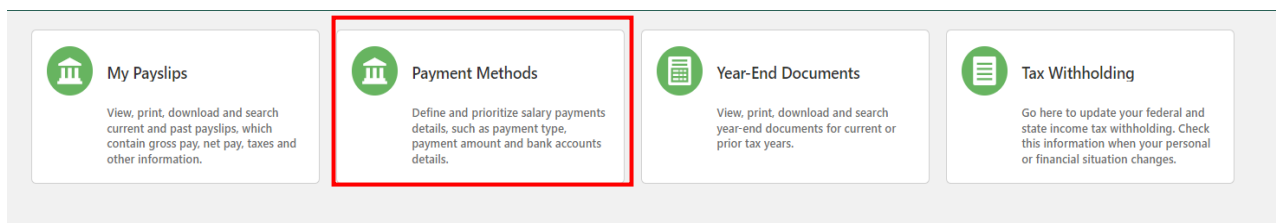
Deactivate Banks Accounts & Delete Payment Methods

Add Bank Accounts & Payment Methods
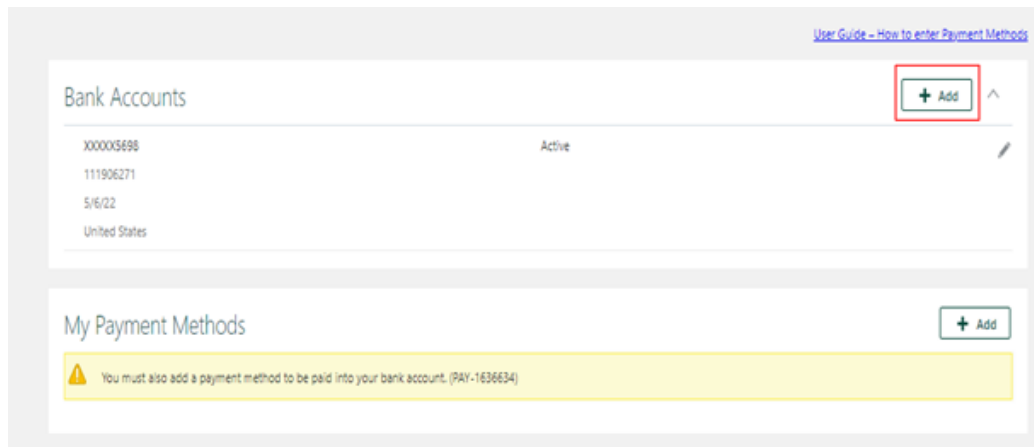
Performed by: Employee

1. Navigate to **Homepage** and select the **Me** tab**.** Click the **Pay** icon in the App section.

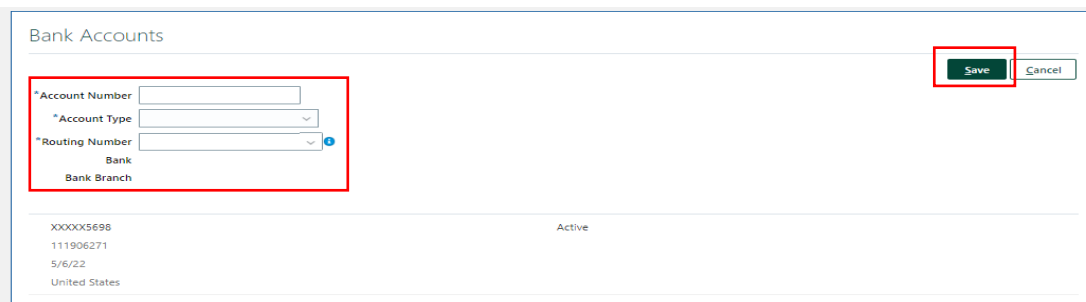2. The following options appears. Select **Payment Methods.**

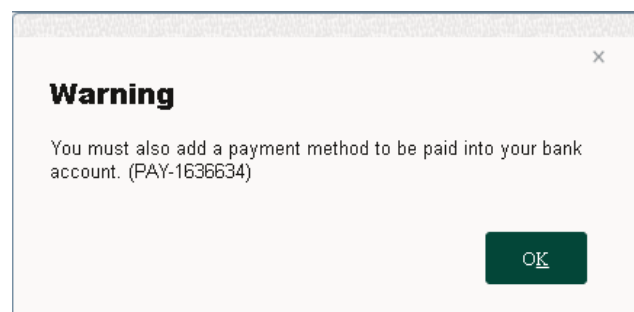3. The page below appears. Select the **+Add** button to add a **Bank Account**.

4. The page below appears. Fill out these required fields: *Account Number, Account Type, and Routing Number*. Once complete, select **Save.**
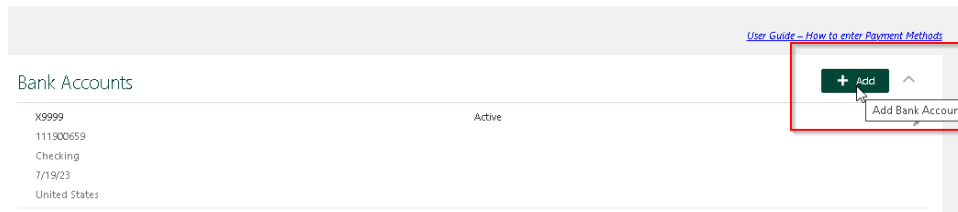
   Note:
   - The Bank and Bank Branch will autofill once you select the Routing Number.
   - A maximum of 3 banks accounts can be added to the Bank Account section.

5. After selecting **Save**, the page below message appears. Select **OK**.

6. To add a payment method, select the **+Add** button.

7. The page below appears. Fill out the required fields: *What do you want to call this Payment method, Payment Type, Payment Amount and Bank Account*. Once complete, select **Save**.

   Note: Payment Methods will be satisfied from top to bottom order, as displayed in the system, if you have more than one. A Reorder button will when more than one Bank Account exists.

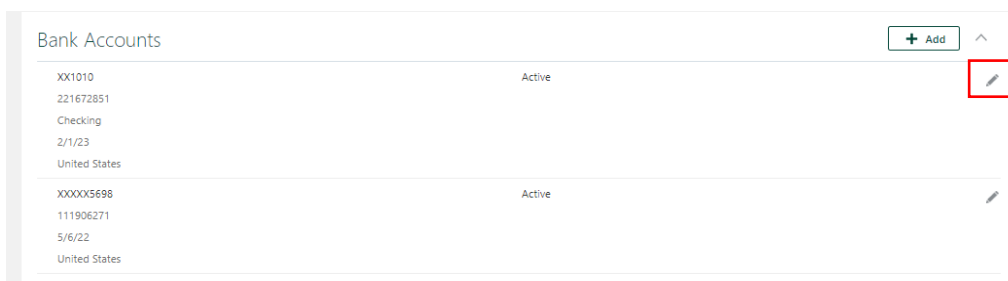8. After selecting **Save,** the page below appears with the new payment method.

   Note: If you have more than one payment method the percentage for all payment methods must add up to 100%. Additionally, the order of the payment methods determines what gets paid out first in the event you choose amount type.

Edit Bank Accounts & Payment Methods
Performed by: Employee

1. From the Payment Methods work area select the **Edit** button (pencil icon) on the **Bank Account** you wish to make changes to.
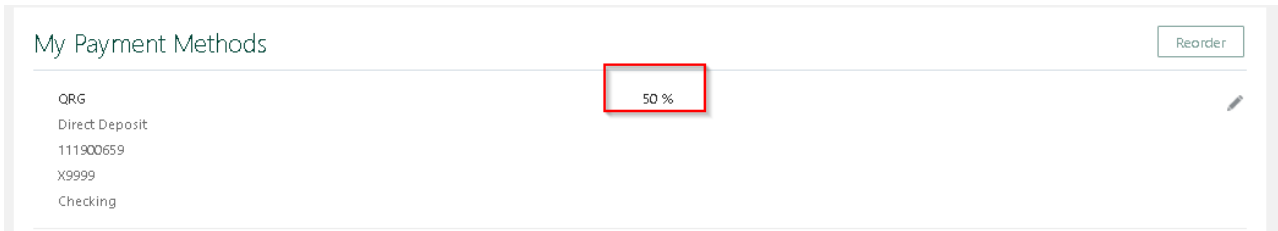
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2. The page below appears. Make any necessary changes. Once complete, select **Save.**

Bank Accounts

Save   Cancel

*Country United States

Account Number XX1010

*Account Type Checking

*Routing Number 221672851

Bank 1 FIRST BANK

Bank Branch 1 FIRST BANK 221672851

Active ☑

3. The page below appears and the changes reflected.

Bank Accounts   + Add   ∧

XXX0199   Active   ✎

221672851

Savings

2/1/23

United States

4. Navigate to **My Payment Methods**. To edit a **Payment Method**, select the **Edit** button (pencil icon).

My Payment Methods   + Add

QRG   100 %   ✎

Direct Deposit

111906271

XXXXX5698

5. The page below appears. Make any necessary changes. Once complete, select **Save.**

My Payment Methods

Delete   Save   Cancel

*What do you want to call this payment method?   *Payment Amount

QRG   Percentage   50 %

Payment Type   *Bank Account
Direct Deposit
                                                        111900659 X9999 Checking

6. The page below appears and the changes you made are saved.

Note: If you have more than one payment method the percentage for all payment methods must add up to 100%. Additionally, the order of the payment methods determines what gets paid out first in the event you choose amount type.

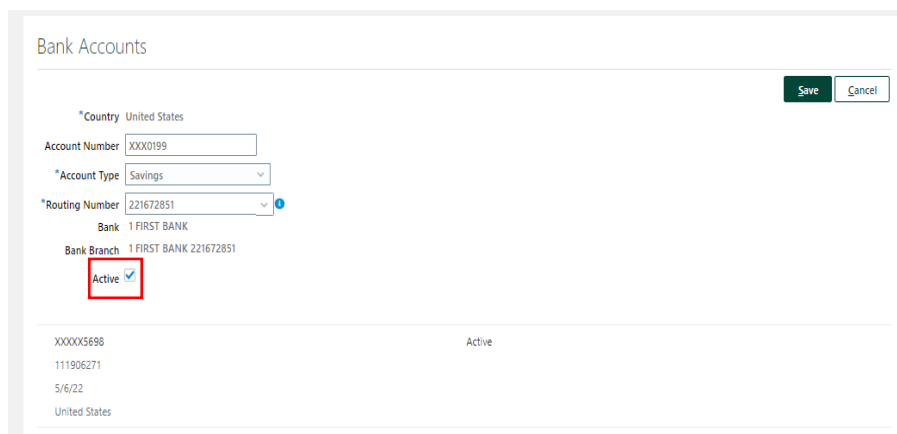## Deactivate Bank Accounts & Delete Payment Methods
Performed by: Employee

1. The page below appears. Select the **Edit** button (pencil icon) next to the **Bank Account** you want to delete.
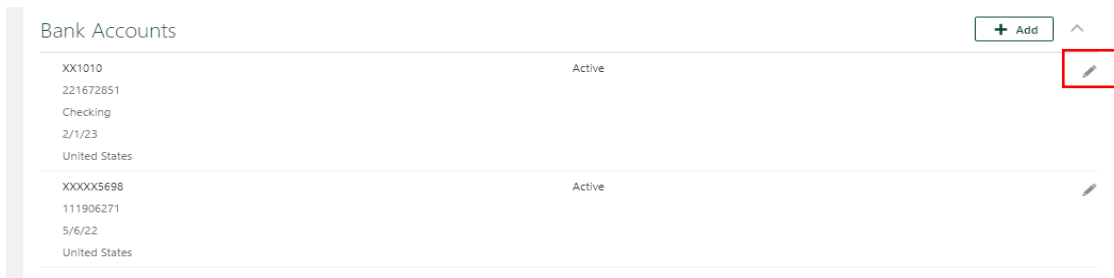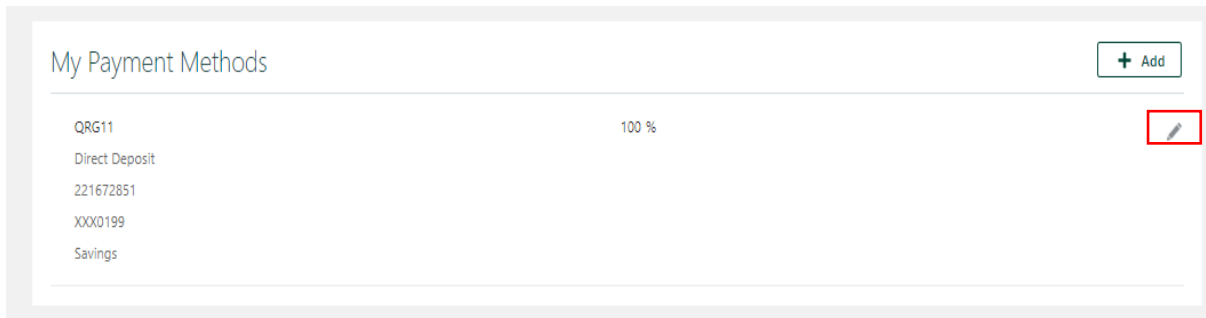

2. The page below appears. **Uncheck** the check box that says **Active.** Click **Save.** The Bank Account will reflect **Inactive.**
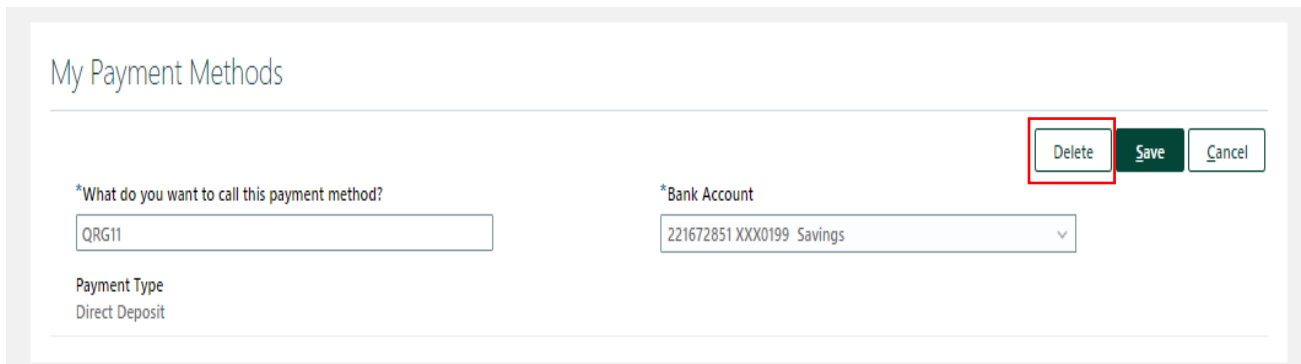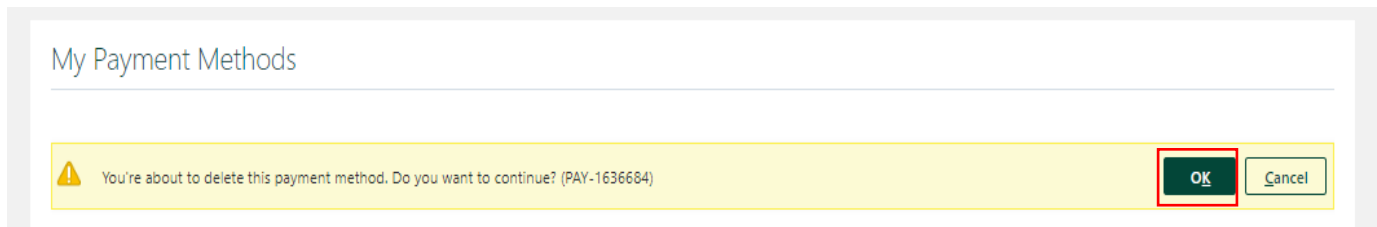*Note:* You cannot delete a Bank Account, but you can deactivate it.

3. To delete a **Payment Method**, select the **Edit** button (pencil icon) next to the **Payment Method** you want to remove.

4. The page below appears. Select the **Delete** button.

5. You will receive a notice asking: "*You're about to delete this payment method. Do you want to continue?*". Click **OK.**

6. The page below appears with the deleted payment method.