

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.

		User Guide - How to enter Payment Met
ank Accounts		+ Add
20000/5698	Active	,
111906271		
5/6/22		
United States		
ly Payment Methods		+ Add
You must also add a payment method to be paid into your bank account.	PAY-1636634)	

4. The page below appears. Fill out these required fields: *Account Number, Account Type, and Routing Number*. Once complete, select **Save.**

<u>Note:</u>

- 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.

Bank Accounts			
*Account Number *Account Type "Routing Number Bank Bank Branch	 ~		<u>Save</u> <u>Cancer</u>
XXXXX5698 111906271 5/6/22 United States		Active	

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



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



		User Guide – How to enter Payment Methods
Bank Accounts		+ Add
X9999	Active	Add Bank Account
111900659		
Checking		
7/19/23		
United States		

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**.

<u>Note:</u> 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.

ly Payment Methods	
	<u>S</u> ave <u>C</u> ancel
*What do you want to call this payment method?	*Payment Amount
	Percentage V 100 %
*Payment Type	*Bank Account
Direct Deposit v	111900659 X2345 Checking ~

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

QRG	100 %	
Direct Deposit		
111906271		

<u>Note:</u> 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.

(X1010	Active	
221672851		
Checking		
2/1/23		
United States		
000005698	Active	
111906271		
5/6/22		
United States		



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

Bank Accounts			
		7	
*Country United S	tates		
Account Number XX1010			
*Account Type Checkin	ig ~		
*Routing Number 2216728	i51 🗸 🕚		
Bank 1 FIRST	BANK		
Bank Branch 1 FIRST	BANK 221672851		
Active 🗹			

3. The page below appears and the changes reflected.

В	ank Accounts		+ Add ^
_	XXX0199	Active	1
	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	<u>S</u> ave	<u>C</u> ancel
*What do you want to call this payment method? *Payment Amount			
QRG Percentage V	50 %		
Payment Type *Bank Account			
111900659 X9999 Checking	~		



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

ly Payment Methods		Reorder
QRG	50 %	/
Direct Deposit		P
111900659		
X9999		
Checking		

<u>Note:</u> 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.

XXIUIU	Active	
221672851		
Checking		
2/1/23		
United States		
XXXXX5698	Active	,
111906271		
5/6/22		

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.

Bank Accou	nts
*Country	United States
Account Number	XXXX0199
*Account Type	Savings V
*Routing Number	221672851 v
Bank Branch Active	1 FIRST BANK 221672851
XXXXX5698	Active
111906271	
5/6/22	
United States	



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

ly Payment Methods		+ Add
QRG11	100 %	
Direct Deposit		
221672851		
XXX0199		
Swings		

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

		Delete <u>S</u> ave <u>C</u> a
*What do you want to call this payment method?	*Bank Account	
QRG11	221672851 XXX0199 Savings	~

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

My Payment Methods					
You're about to delete this payment method. Do you want to continue? (PAY-1636684) O <u>K</u>				

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

My Payment Methods		+ Add
▲	You must also add a payment method to be paid into your bank account. (PAY-1636634)	