

# How to create a beneficiary on the platform?





# You have two options for setting up a beneficiary on the platform

**OPTION 1** Fill in the information yourself directly

# **OPTION 2**

Request that the beneficiary fills in all the fields



# **OPTION 1**

Fill in the information yourself directly

**Step 1** | When setting up a Company Payment, click on **"Manage Beneficiaries".** 

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Step 3 | Complete all the required information and click "Confirm." **Important**: you need to include a bank statement with your bank details.

# **Step 2** | Click on "Create Beneficiary".





Step 4 | Done! The beneficiary has been created and is now available on the company's list of beneficiaries for making payments directed to them.





# **OPTION 2**

Request that the beneficiary fills in all the fields

Step 1 | Within the platform, click on "Beneficiaries", then select "Beneficiary Request".







**Step 2** | Click **"Send"** to submit the beneficiary request.

Step 3 | Complete all the required information and click on "Send".

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Step 5 | Your contact person will receive an email and simply needs to click on "Complete Now" to fill out all the details.

Step 4 | The request for beneficiary details will be sent to your contact person at the beneficiary's end.





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Step 7 | Done! The beneficiary is now registered, and you can proceed to create the payment for them on the platform!

# Step 6 | Once you've filled in all the fields, click on "Submit".





# If you have any questions, feel free to reach out to

# our team:

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