

PLEXUS PAY PORTAL YOUR HOW-TO GUIDE



plexus
WORLDWIDE®

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Activating Your Pay Portal Account

Welcome to your Plexus Pay Portal. You will need to activate your account in order to receive your first payment. You should have received an email delivered to the email address you provided to Plexus.

Thu 8/27/2015 8:45 AM
notifications@paylution.com
Welcome John Smith to Plexus Worldwide

To  John Smith

Follow up. Start by Thursday, August 27, 2015. Due by Thursday, August 27, 2015.
If there are problems with how this message is displayed, click here to view it in a web browser.



Welcome John Smith to Plexus Worldwide

Dear John Smith,

A new account has been registered for you by your organization on Plexus Worldwide, a global payment solution.

PLEASE NOTE: THIS EMAIL DOES NOT CONSTITUTE NOTICE OF PAYMENT, but is to advise you that your account has been registered and requires activation.

PLEASE CLICK ON THE LINK BELOW to complete activation of your account. In order to activate your account, you will need to know your Membership ID (may also be known as Distributor ID, Associate ID, or Consultant ID) which is the number (or name) used by your organization to identify you. If you are unsure of your Membership ID, please contact your organization.

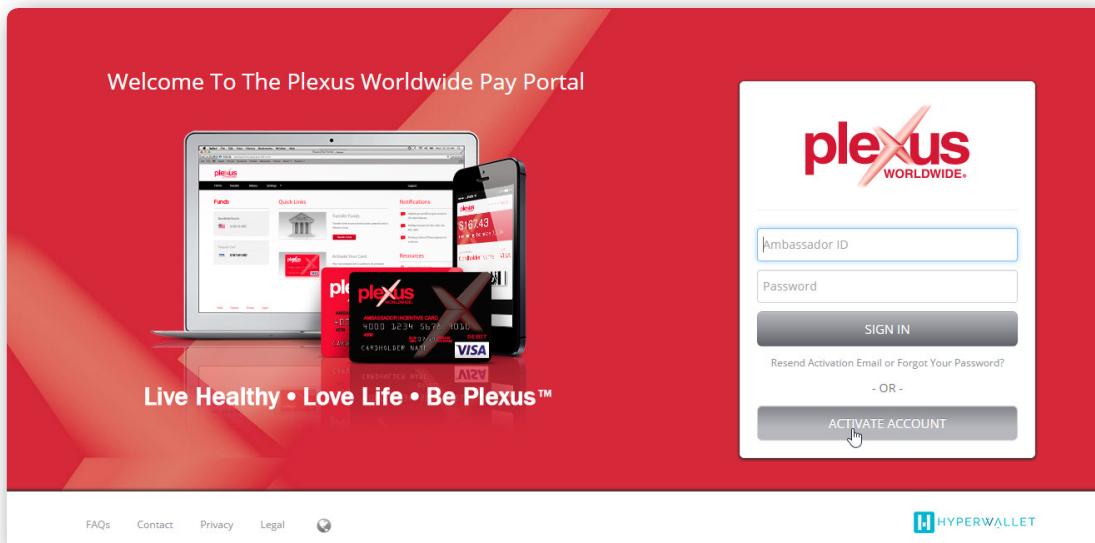
LINK:
https://uat-plexusworldwide.paylution.com/uat-plexusworldwide/hw2web/consumer/activation/verify.xhtml?walletIdentifier=WALLET_NUMBER&value=CS3366290058

Thank You
The Plexus Worldwide Team
<https://uat-plexusworldwide.paylution.com>
Have questions or need assistance? Please contact us. Our international phone and email contact information can be found at <https://uat-plexusworldwide.paylution.com/hw2web/consumer/page/contact.xhtml>.



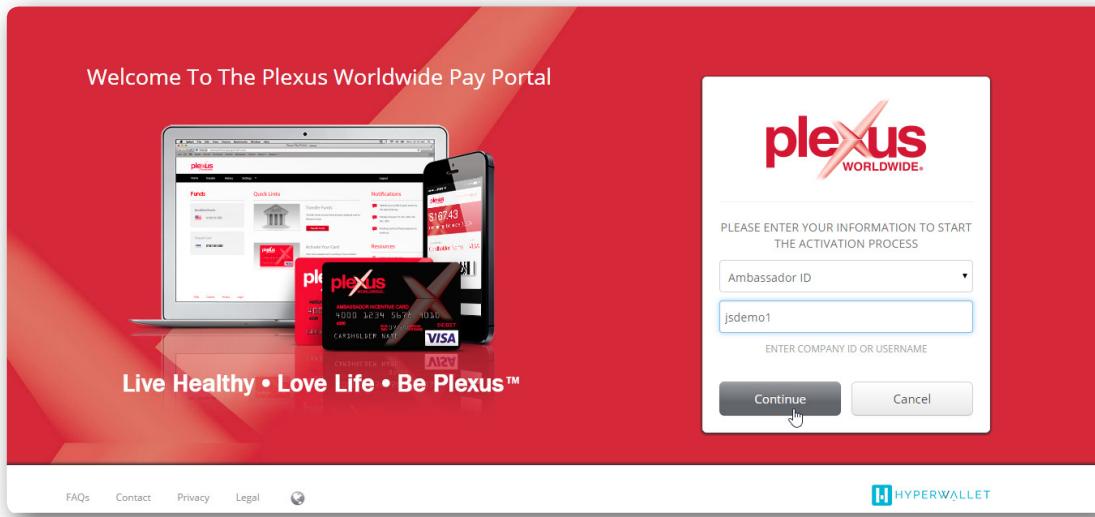
The email will include a link which will direct you to the activation page of the Portal.

From the Pay Portal Login Page, click on **Activate Account**.



To activate your account, please enter one of four identification options:

1. Your email
2. Your card number
3. Your Ambassador ID
4. Portal ID



Once complete, click on **Continue**. To verify your identity, you will be asked to provide your **Date of Birth**. Click on **Continue** in order to process your account verification.

The screenshot shows a red-themed web page with a white central modal. The modal has a title "Activate Account" and a sub-section "Verify Your Account". It contains a dropdown menu "Verify Using: Date of Birth" and a date input field showing "1 1 1990". Below the date input are two buttons: "Continue" (highlighted with a mouse cursor) and "Cancel".

Establish your profile by providing your personal information and address details. Click on **Continue** once you have filled in each area of the form. Now, you will need to establish your security information. It is important that you fill in all of the information on this screen.

The screenshot shows a red-themed web page with a white central modal. The modal has a title "Activate Account" and a sub-section "Personal Information". It includes fields for First Name (john), Middle Name, Last Name (Smith), Phone Number, Mobile Number, and Date of Birth (1 1 19). Below these are Gender options (Male selected) and Ambassador ID (jsdemo1). A second sub-section "Address" contains fields for Country (United States), State/Province (California), Address Line 1 (1234 main), City (LA), and Zip/Postal Code (90210). At the bottom are "Continue" and "Cancel" buttons.

You will then enter your email address, choose a password, and select two personal security questions which can be used to retrieve your account should you ever forget your login information, or if you wish to make changes to your account.

Activate Account

Email and Password:

Email Address: jdoe@mail.com

Password:

Confirm Password:

Security Questions

Question One: Mother's maiden name ▾
Answer: mom

Question Two: Father's middle name ▾
Answer: dad

Agreement

I agree to the website terms and conditions

For maximum account security, choose a password that is easy for you to remember, but difficult for a stranger to guess. Passwords for the Plexus Pay Portal must have a minimum of 8 characters, and at least one letter and number. We recommend passwords have a combination of:

- Lower-case letters: abcd...
- Upper-case letters: ABCD...
- Numeric characters: 1234...
- Non-alphanumeric characters: !@#\$<, ...

Choose security questions that you will remember. You will be required to answer these whenever you wish to make changes to your account.

You must check the box at the end of the screen to verify that you have read and agreed to the legal agreement. Clicking on the link will enable you to download a copy to your computer. Click **Confirm** to continue with your registration.

Congratulations! Your account has been successfully activated. You will now see your Plexus Pay Portal dashboard where you can easily manage your payments.

The screenshot shows the Plexus Pay Portal dashboard. At the top, there is a navigation bar with links for Home, Transfer, History, Settings, and Logout. The main content area is divided into several sections:

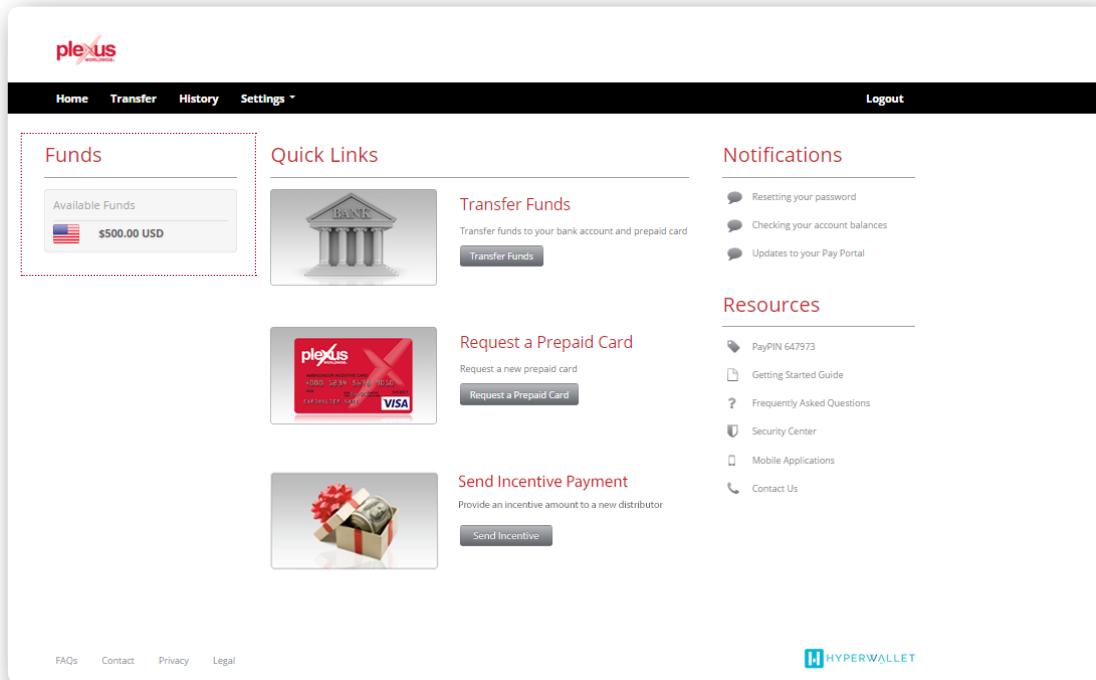
- Funds:** Displays "Available Funds" as \$500.00 USD.
- Quick Links:** Includes a "Transfer Funds" section with a "BANK" icon and a "Transfer Funds" button, and a "Request a Prepaid Card" section with a "plexus" logo and a "Request a Prepaid Card" button.
- Notifications:** Lists three items: "Resetting your password", "Checking your account balances", and "Updates to your Pay Portal".
- Resources:** Lists six items: "PayPIN 647973", "Getting Started Guide", "Frequently Asked Questions", "Security Center", "Mobile Applications", and "Contact Us".
- Bottom Navigation:** Links for FAQs, Contact, Privacy, Legal, and a Hyperwallet logo.

Once logged out, to access your Plexus Pay Portal again, navigate to the website and from the Login Page. You can now use either your Ambassador ID or your email and password to access your account. Enter these login credentials and click on **Sign In**.

Navigating Your Plexus Pay Portal

Home Page

From the Home page, you can get a quick- access view of your available funds, notifications, card management features and more.



Plexus Pay Portal Home Screen

Quick Links

From the Quick Links menu, you can choose to **Transfer Funds**, **Request a Prepaid Card**, or send a **Incentive**. For more information on Incentives, see the Incentives section later in this document. Clicking on **Transfer Funds** from the Quick Links menu will allow you to add a new transfer method to your account.

History

The Plexus Pay Portal allows you to easily view and download your transaction history from the **History** tab. You can also search for a particular transaction using the date range, currency and transaction type as filters.

Funds

Available Funds	NZ\$0.00 NZD
	\$516.68 USD
Prepaid Card	\$0.00 USD
	\$0.00 USD

Transaction History

Ambassador ID: pdemo1

Date	Description	Debit	Credit
Aug 24 2015	Transfer to Bank Account	\$100.00 USD	
Aug 24 2015	Transfer to Bank Account		NZ\$100.00 NZD
Aug 24 2015	Foreign Exchange	\$83.32 USD	
Aug 24 2015	Foreign Exchange		NZ\$100.00 NZD
Aug 24 2015	Card Activation Fee	\$0.00 USD	
Aug 23 2015	Payment from Plexus Worldwide LLC		\$100.00 USD
Aug 23 2015	Payment from Plexus Worldwide LLC		\$100.00 USD
Aug 20 2015	Payment from Plexus Worldwide LLC		\$500.00 USD

You can review your transaction history at any time by clicking on any of the available **balances** or by selecting the **History** option from the top navigation bar.

Past transactions can be segmented into **Portal** transactions or **Prepaid Card** transactions.

The **Portal** tab lists any transactions to and from your Portal. The **Prepaid** tab lists any transfers to and from your prepaid card. This also includes purchases.

Both screens list transactions by date, with the most recent transaction at the top. Users can search their transaction history for specific events in three ways: by date, by currency or by transaction type. Click **Download** to save a copy of your transactions to your computer (.xlsx format).

To see a quick overview of a transaction record, simply place your mouse cursor on the desired **Transaction Description**.

The screenshot shows the plexus worldwide web application. At the top, there's a navigation bar with links for Home, Transfer, History, Settings, and Logout. Below the navigation, the main area is divided into two sections: 'Funds' on the left and 'Transaction History' on the right.

Funds Section:

- Available Funds:** NZ\$0.00 NZD and \$516.68 USD.
- Prepaid Card:** VISA \$0.00 USD.

Transaction History Section:

- Filter Options:** Portal (selected), Prepaid Card, From: 08/01/2015, To: 09/01/2015, Currency: All, Transaction Type: All.
- Table:** Shows a list of transactions from Aug 24, 2015, to Aug 20, 2015. One transaction is highlighted with a mouse cursor: "Transfer to Bank Account".
- Details Pop-up:** Shows the transaction details for the highlighted transfer. The receipt ID is 2187685-1, dated Mon Aug 24 2015 - 08:55 PST. The transaction type is Cashout, description is Transfer to Bank Account, currency is USD, amount is \$100.00, and details include Name: john smith, Routing Number: 324079555, Account Type: CHECKING, and Account Number: ***0185.
- Credit Table:** Shows a table of credits with columns for Description, Amount, and Credit.
- Pagination:** First, Previous, Next, Last, Displaying items 1 - 7 of 7.

Clicking on the transaction will enable you to view and print the full transaction receipt.

This screenshot shows the 'Transaction Details' page, which is a detailed view of the transaction highlighted in the previous screenshot.

Navigation: Home, Transfer, History, Settings, Logout.

Funds Section: Available Funds: NZ\$0.00 NZD and \$516.68 USD; Prepaid Card: VISA \$0.00 USD.

Transaction Details:

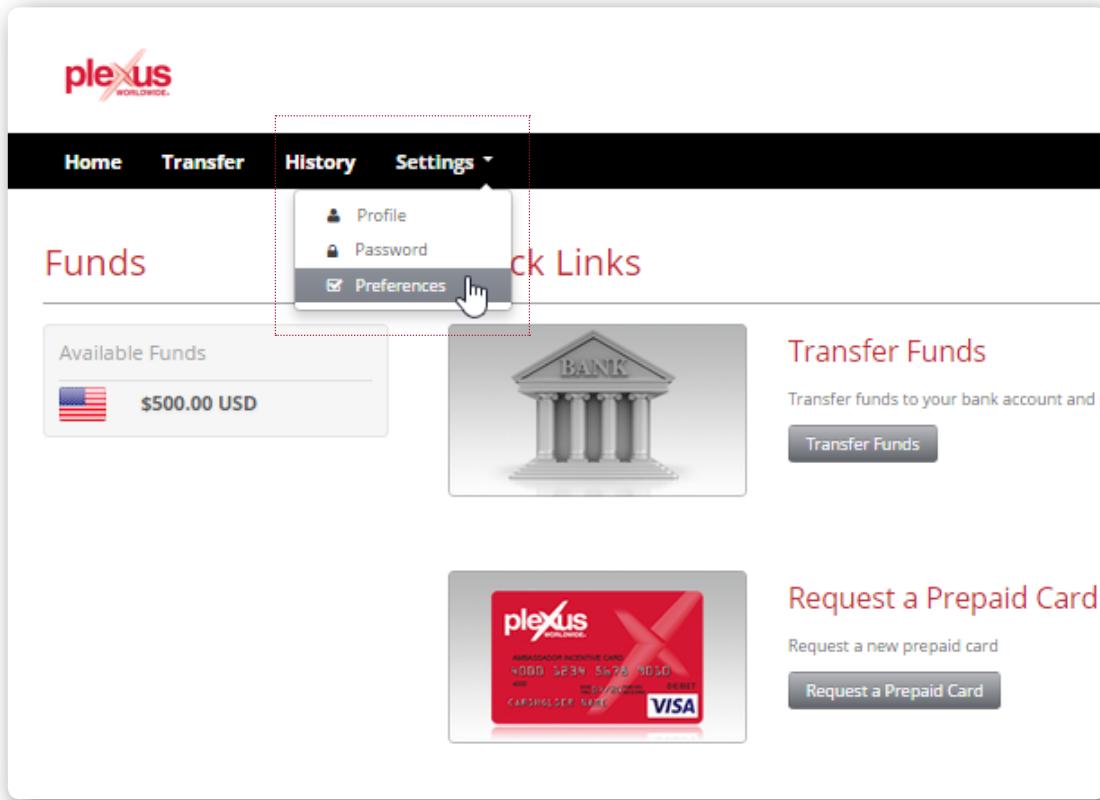
Details:

Receipt Id:	2187685-1
Date:	Mon Aug 24 2015 - 08:55 PST
Transaction Type:	Cashout
Description:	Transfer to Bank Account
Currency:	USD
Amount:	\$100.00
Details:	Name: john smith Routing Number: 324079555 Account Type: CHECKING Account Number: ***0185

Buttons: Back, Print.

Settings

You may edit your account settings at any time using the dropdown menu from **Settings** in the navigation bar.



Members can update their profile, password and preferences at any time in the **Settings** area of their Pay Portal Account. To update your personal information and address details, select **Settings** followed by the **Profile** option.

To update new address information in both your Pay Portal profile and on any associated Prepaid Cards, check the box titled: **Update the address on my card(s) too.**

Funds

Available Funds	
	NZ\$0.00 NZD
	\$516.68 USD
Prepaid Card	
	\$0.00 USD

Update Account Profile

Personal Information

First Name:

Middle Name:

Last Name:

Phone Number:

Mobile Number:

Date of Birth:

Gender: Male Female

Ambassador ID: pdemo1

Address

Country:

State/Province:

Address Line 1:

City:

Zip/Postal Code:

Update the address on my card(s) too.

Click **Save** to update your Pay Portal profile. To update your Pay Portal password, select **Settings** followed by the **Password** option. Input your old password followed by your new password. Confirm your new password before selecting **Update Password**.

To update your preferred time zone, language and notification settings, select **Settings** followed by **Preferences**. This will open the main preference screen.

On the **Time Zone** tab, select your preferred **Country** from the dropdown list. Your country selection will pre-populate the **Time Zone** drop down with applicable selections.

The screenshot shows the Plexus Pay Portal interface. At the top, there is a navigation bar with links for Home, Transfer, History, Settings (with a dropdown arrow), and Logout. Below the navigation bar, there are two main sections: 'Funds' on the left and 'Preferences' on the right.

Funds Section:

- Available Funds:** NZ\$0.00 NZD and \$516.68 USD.
- Prepaid Card:** VISA \$0.00 USD.

Preferences Section:

- Time Zone:** United States
- Language:** English (selected)
- Notifications:** Please Select...

A 'Confirm' button is located at the bottom right of the Preferences section. A cursor arrow is pointing towards the Language dropdown menu.

Once you have made your selection, click on **Confirm**. On the **Language** tab, select your preferred **Language** from the dropdown list. Once you have made your selection, click on **Confirm**.

The screenshot shows the Plexus Pay Portal interface, similar to the previous one but with a focus on the 'Language' tab in the Preferences section.

Funds Section:

- Available Funds:** NZ\$0.00 NZD and \$516.68 USD.
- Prepaid Card:** VISA \$0.00 USD.

Preferences Section:

- Time Zone:** United States
- Language:** English (selected)
- Notifications:** Please Select...

A 'Confirm' button is located at the bottom right of the Preferences section. A cursor arrow is pointing towards the Language dropdown menu.

On the **Preferences** tab, input the email address where you would like to receive any notifications about your Pay Portal account and transactions.

The screenshot shows the Plexus Pay Portal interface. At the top, there is a navigation bar with links for Home, Transfer, History, and Settings. The main content area is divided into two sections: "Funds" and "Preferences".

Funds: This section displays "Available Funds" in NZD and USD. It also shows a "Prepaid Card" with a VISA logo and a balance of \$0.00 USD.

Preferences: This section includes tabs for Time Zone, Language, and Notifications. Below these tabs, there is a "Update Email" form with fields for Old Email (tbennion@hyperwallet.com), New Email (empty), and Password (empty). There is also a "Update Mobile" section with a "Confirm" button.

*Note: Changing this email address will not update the email address associated with your account log in details. To update this email, please contact customer service by telephone. Click **Confirm** to save your notifications preference.

Notifications

The notification section of the Plexus Pay Portal was designed to keep you informed of any important messages, updates or information about your account.

The screenshot shows the Plexus Pay Portal interface. At the top, there is a navigation bar with links for Home, Transfer, History, Settings, and Logout.

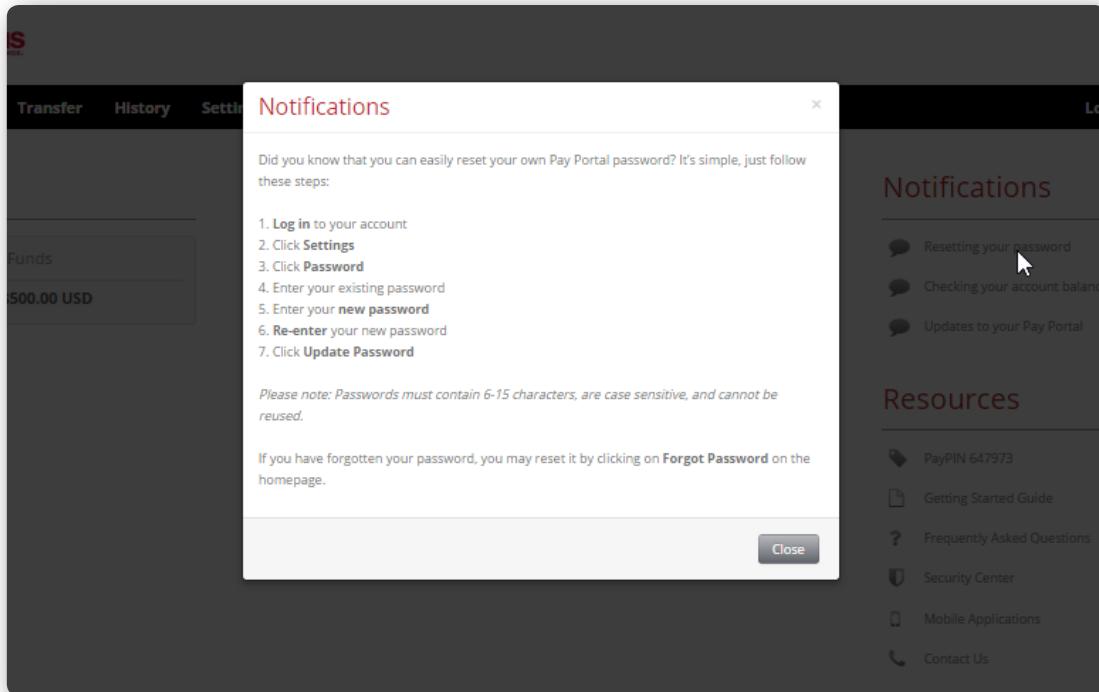
Funds: This section displays "Available Funds" in USD.

Quick Links: This section includes links for "Transfer Funds" (with a "Transfer Funds" button) and "Request a Prepaid Card" (with a "Request a Prepaid Card" button).

Notifications: This section is enclosed in a dashed box and lists three types of notifications: Resetting your password, Checking your account balances, and Updates to your Pay Portal.

Resources: This section lists various resources with icons: PayPIN 647973, Getting Started Guide, Frequently Asked Questions, Security Center, Mobile Applications, and Contact Us.

When you click on the notification you wish to view, it will open in a pop-up window.



Expanded Portal Notification

Resources

Under the **Resources** section, you will find everything you need to manage your portal. From here, you can access your **PayPIN***, read our FAQ's and Getting Started Guide, look up customer support contact information, and more.

The screenshot shows the 'Resources' section of the Plexus Pay Portal. At the top, there is a navigation bar with links for Home, Transfer, History, Settings, and Logout. Below the navigation bar, there are three main sections: 'Funds' (showing Available Funds of \$500.00 USD), 'Quick Links' (with options for Transfer Funds, Request a Prepaid Card, and Send Incentive Payment), and 'Notifications' (listing Resetting your password, Checking your account balances, and Updates to your Pay Portal). A red dotted box highlights the 'Resources' section, which contains links to PayPIN 647973, Getting Started Guide, Frequently Asked Questions, Security Center, Mobile Applications, and Contact Us.

The screenshot shows the 'FAQs' section of the Plexus Pay Portal. At the top, there is a navigation bar with links for Home, Transfer, History, Settings, and Logout. Below the navigation bar, there are several sections: 'Funds' (showing Available Funds of \$500.00 USD), 'FAQs' (with an 'Overview' section containing a search bar and a question about activating an account), 'Withdrawing Funds' (listing questions about setting up automated transfers), 'Account Management' (listing questions about banking information and account passwords), and 'Customer Support' (listing questions about contacting support and forgot PIN). A red dotted box highlights the 'FAQs' section.

FAQ's- Accessible from the Resources section

*Please Note: The **PayPIN** is different from your prepaid card PIN. You may require to provide this PayPIN if you are making a product order over the phone with a Plexus Worldwide Representative and would like to pay for the order using funds in your pay portal.

Managing Your Funds

Requesting a Prepaid Card

You can request a prepaid card by clicking **Request a Prepaid Card** on the home screen of the Pay Portal.

The screenshot shows the Plexus Pay Portal interface. At the top, there's a navigation bar with links for Home, Transfer, History, Settings, and Logout. Below the navigation is a main content area divided into three columns: 'Funds', 'Quick Links', and 'Notifications'. The 'Funds' column displays 'Available Funds' as \$500.00 USD. The 'Quick Links' column contains three items: 'Transfer Funds' (with a 'Transfer Funds' button), 'Request a Prepaid Card' (with a 'Request a Prepaid Card' button highlighted with a red dashed box), and 'Send Incentive Payment' (with a 'Send Incentive' button). The 'Notifications' column lists three items: 'Resetting your password', 'Checking your account balances', and 'Updates to your Pay Portal'. The 'Request a Prepaid Card' section also includes a small image of a red Visa-prepared card.

The system will require that you create a new transfer method prior to processing your prepaid card request. To add a new transfer method, please select:

- The country where you are transferring funds to
- How you would like to receive the funds (the prepaid card option will be preselected)
- Which currency you would like your prepaid card to have

Click on **Continue** to save your transfer method.

This screenshot shows the 'Request Card' step of the process. It features a 'Funds' sidebar on the left with available funds of \$500.00 USD. The main area is titled 'Request Card' and contains a 'Select country and currency' section with two dropdown menus: one for 'United States' and another for 'USD'. At the bottom of this section are 'Continue' and 'Cancel' buttons. The background of the main area has a light gray gradient.

You will then be required to fill out your personal and address information. Please provide an accurate shipping address for your prepaid card. Incorrect address information will result in card delivery failure. Replacement cards will be requested at your expense.

Funds

Prepaid Card

Available Funds
Flag: **\$500.00 USD**

Please enter a personal name only. Business names will not be accepted and will result in the cancellation of your card with any additional replacement cards issued at your expense.

Personal Information

First Name:

Last Name:

Date of Birth:

Address Information

Country:

State/Province:

Street:

City:

Zip/Postal Code:

Card Fees

VISA USD Cardholder Agreement

Review and submit your prepaid card request by clicking on **Confirm**. Your prepaid card request has now been submitted. Please note that all prepaid cards must be activated before they can be used to make a purchase. You can activate your card by:

- Calling the number on the back of your card and using the automated phone system or,
- Clicking **Activate Card** on the home screen of your Pay Portal (see below).

**Note: You will be required to provide your 16 digit card number as part of either activation process.*

Click **Confirm** to continue. To automatically load all available funds to your prepaid card, simply check the box next to this option on the final screen of the activation process. You must check the box at the end of the screen to verify that you have read and accepted the **cardholder legal agreement**. Clicking on the link will enable you to download a copy to your computer.

If you have chosen to automatically transfer the balance of your funds to your card, these funds will now be transferred to your prepaid card in real-time. Members who did not select the automatic transfer can manually add funds to their card in the Transfer area of the Pay Portal.

Activating your Prepaid Card

Activating a Prepaid Card

You will see your pre-active card under the Quick Links menu, with the option to **Activate Your Card**.

The screenshot shows the plexus platform interface. At the top, there is a navigation bar with links for Home, Transfer, History, Settings, and Logout. Below this is a main content area divided into three columns: 'Funds', 'Quick Links', and 'Notifications'. The 'Funds' column displays 'Available Funds' (NZ\$0.00 NZD, \$516.68 USD) and a 'Prepaid Card' section showing a VISA card with a balance of \$0.00 USD. The 'Quick Links' column contains a 'Transfer Funds' section with a bank icon and a 'Transfer Funds' button, and a 'Activate Your Card' section with a red dashed box around it. The 'Activate Your Card' section features a plexus prepaid card image, the text 'Your new prepaid card is waiting to be activated', and an 'Activate Your Card' button. The 'Notifications' column lists options like Resetting your password, Checking your account balances, and Updates to your Pay Portal. The 'Resources' column provides links to PayPIN 974461, Getting Started Guide, Frequently Asked Questions, Security Center, Mobile Applications, and Contact Us.

You will be prompted to enter the card number as it appears on the front of your card.

The screenshot shows the plexus platform interface at the 'Activate Card' step. At the top, there is a navigation bar with links for Home, Transfer, History, Settings, and Logout. Below this is a main content area divided into two columns: 'Funds' and 'Activate Card'. The 'Funds' column displays 'Available Funds' (NZ\$0.00 NZD, \$516.68 USD) and a 'Prepaid Card' section showing a VISA card with a balance of \$0.00 USD. The 'Activate Card' column has a heading 'Activate Card' and a sub-instruction 'Please enter your 16-digit card number as printed on the front of your card.' Below this is a 'Card Number:' input field with a placeholder '1' and a 'Continue' button. A cursor is visible over the input field.

Enter your card number. You will then be required to choose a 4-digit PIN for the card. Enter your PIN and click on **Continue**.

The screenshot shows the plexus mobile banking application interface. At the top, there is a navigation bar with links for Home, Transfer, History, Settings, and Logout. The main content area is divided into two sections: 'Funds' on the left and 'Prepaid Card PIN' on the right.

Funds Section:

- Available Funds:** Shows an American flag icon and \$500.00 USD.
- Prepaid Card:** Shows a VISA logo and \$0.00 USD.

Prepaid Card PIN Section:

Your card is activated. To use your card at an ATM you must select a PIN.

PIN:

Confirm PIN:

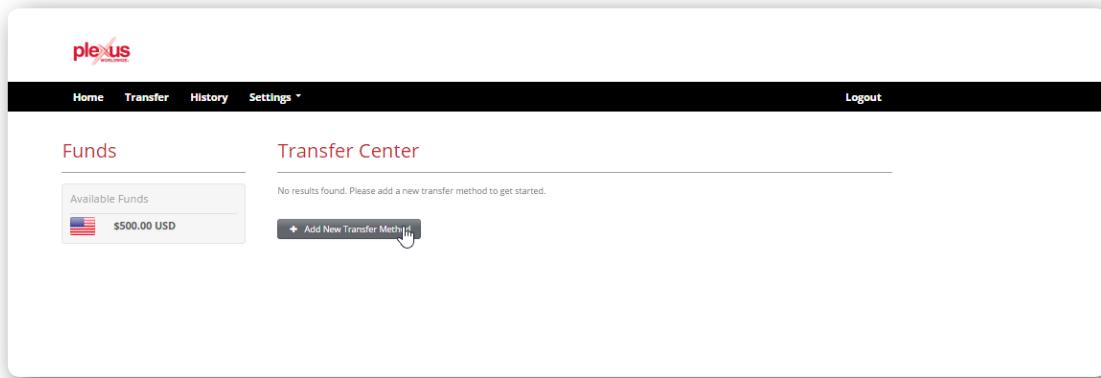
Buttons: A 'Confirm' button with a mouse cursor icon, and a 'Cancel' button.

Setting up your Bank Account

Setting Up a Bank Account

Your Pay Portal is a repository for funds earned as a Plexus Ambassador. As an Ambassador, you have the option of transferring these funds to a bank account as part of the “cash out” process. In order to do this, you must first add a bank account transfer method to your account. All transfers take place in the Transfer Center area of the Pay Portal. To access the Transfer Center, click on either **Transfer Funds** from Quick Links or **Transfer** on the top navigation.

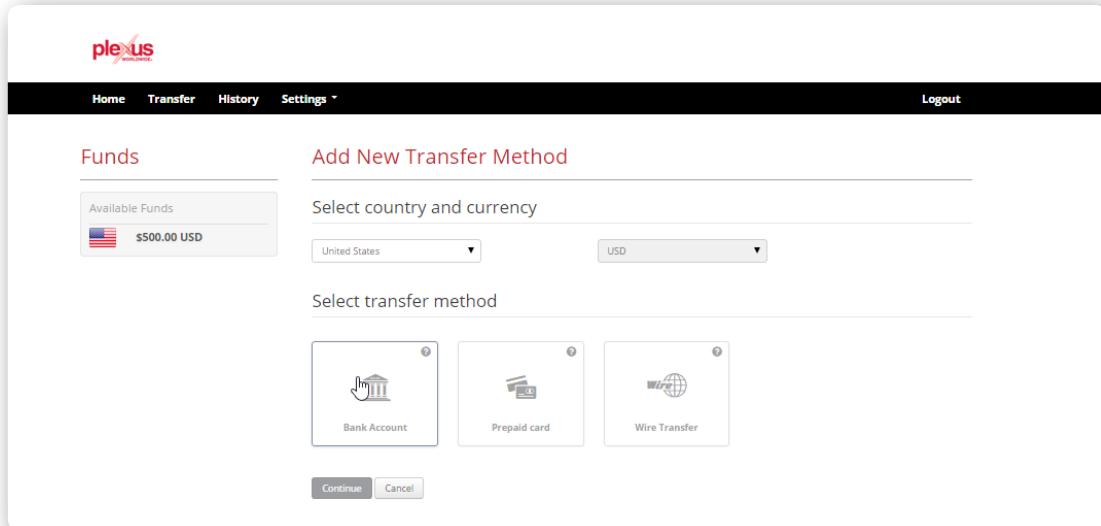
Click **Add New Transfer Method**.



When you click on **Add New Transfer Method**, you will see the transfer methods that are available to you through your program. In this case, you will see the option to transfer to a bank account, prepaid card, or make a wire transfer. Select your country, currency, and method.

Transfer to a Bank Account

If you are transferring to a bank account, you will be required to enter your account details. A standard check should have all of the bank information you need in order to fill out this page. You will also see the fees, and estimated processing times (if applicable) at the bottom of this page.



Funds

Available Funds	\$500.00 USD
-----------------	--------------

Add Transfer Method

Account Details



Account Type: USD Bank Account

Routing Number:

Account Number:

External Account Type: SAVINGS
 CHECKING

Remember As: [?](#)

Transfer Fees & Processing Time

Fee: \$0.00 USD
 Processing Time: 1-3 Business Days

Buttons: Continue Cancel

It is important to double check your bank account information. If you enter an incorrect routing or bank account number, it can take over seven days for those funds to go out. We recommend that you double check your numbers to avoid any inconvenience.

**Please note: If you are adding a savings account, it is recommended that you contact your bank in order to verify the account information before submitting.*

Required information includes:

- Routing Number: This number routes the funds to the correct bank. It is always nine digits long. The sample check image below will help you locate your routing number.
- Account Number: This is the number for the account you are accessing.
- Owner Type: Select whether this is a personal or company account.
- Bank Account Type: Select whether it is a checking or savings account.
- Remember As: This is the name you can provide in order to help you identify the account. You will see this name in your Transfer Center.

Click on **Continue** to initiate the account creation. You are required to establish an owner for the account. By default, the system will auto-populate the account details of the Pay Portal owner. To confirm that this is the registered owner of the bank account, click on **Confirm**.

Funds

Available Funds	NZ\$0.00 NZD
	\$516.68 USD

Prepaid Card	
	\$0.00 USD

Add Transfer Method

Confirm

Account Details

Account Type: US Bank Account
 Routing Number: 021000021
 Account Number: 12345678901234
 Bank Account Type: savings

Transfer Fees & Processing Time

Fee: \$0.00 USD
 Processing Time: 1-3 Business Days

Owner of Record

Full Name: john smith
 Address: 1234 main, LA, CA, 90210, UNITED STATES
 Date of Birth: Jan 1, 1990

Need to change the account owner details? Enter New Owner

Confirm **Cancel**

If the bank account is registered to a different owner, click **Enter New Owner** to provide additional account owner details. Review your personal and address information. Click on **Confirm** to submit your banking information.

The transfer method has been successfully created. You now have the option to create an auto transfer from your Pay Portal to this bank account.

**Note: You have not transferred any funds to this bank account yet. You will need to initiate a one-time transfer or create an auto transfer rule in order to successfully initiate a funds transfer.*

Funds

Available Funds	NZ\$0.00 NZD
	\$516.68 USD

Prepaid Card	
	\$0.00 USD

Add Transfer Method

The transfer method has been successfully created.

Transfer To Bank Account **Create Auto Transfer**

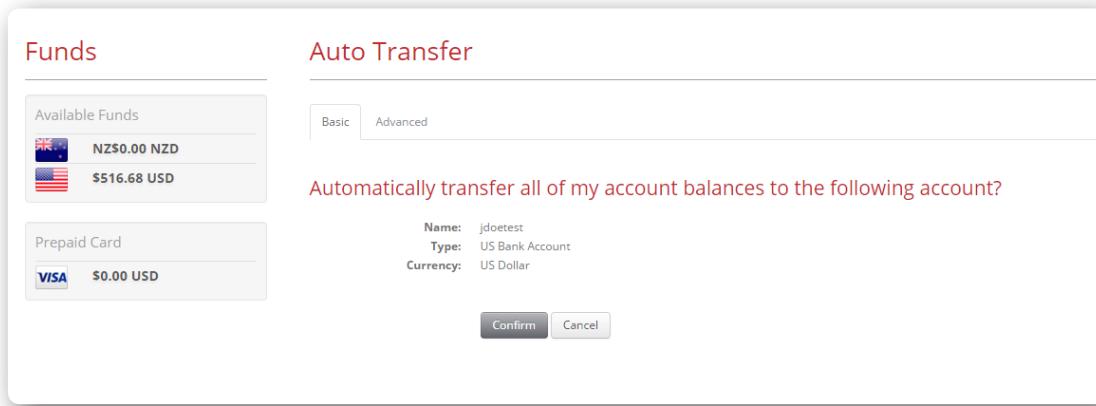
[Return to Transfer Center](#)

Auto Transfer

Create an Auto Transfer

You will have the option to create an auto transfer rule (Auto Cash out) immediately after adding a bank account to your Pay Portal (see screen above). This action can also be set up from the Transfer Center. To access the Transfer Center, click on either Transfer Funds or Transfer from the Home screen of the Pay Portal.

Click the **Actions** dropdown next to the transfer method that you wish to auto transfer the funds to. Select the **Create Auto Transfer** option to create an automatic transfer rule from your Pay Portal to the chosen account. Members have the ability to set up Basic or Advanced auto transfers to their selected transfer method.



The **Basic Auto Cash** out option enables a member to automatically transfer all account balances to the selected account, while the **Advanced** tab provides users with the ability to configure custom transfers. To authorize a Basic transfer, click on **Confirm**.

The **Advanced** option allows a member to automatically transfer a percentage of funds from their Pay Portal account to a predetermined account (i.e. prepaid card, bank account). You may Auto Cash out 100% of your account balances to a single account or you may split the Auto Cash out among multiple saved accounts.

Select where you would like the Auto Cash out to deposit funds by selecting your **Transfer Method** from the dropdown menu. Note: The total Auto Cash out must equal 100%.

To transfer all available funds to the preferred transfer method, leave the percentage field at 100%. If you would like to split the Auto Cash out transfer between multiple transfer methods, you will need to adjust this percentage. Click on **Add to Configuration** to save this Auto Cash out parameter. It will now be visible under the **Selected Transfer Methods** area.

If you have decided to split your Auto Cash out, you will be asked to create a second transfer to capture the remaining balance. Select where you would like the Auto Cash out to deposit your remaining funds by selecting an available Transfer Method from the dropdown menu. Click **Add to Configuration** to save this Auto Cash out parameter.

Funds

Auto Transfer

Available Funds

	NZ\$0.00 NZD
	\$516.68 USD

Prepaid Card

	\$0.00 USD
--	------------

Selected Transfer Methods

To setup your auto transfer configuration you'll first have to select a transfer method and the percentage of funds you'd like to transfer from the available transfer methods section below.

Available Transfer Methods [?](#)

Transfer Method: : 100 % [Add Configuration](#)

Additional Options

Auto Transfer Status: Enable my auto transfer configuration

More Options »

[Confirm](#) [Cancel](#)

Both Auto Cash out transfer parameters will now be visible under the **Selected Transfer Methods** area. Your current set of selected transfer methods is considered complete. If you should wish to make changes to these settings, please click on **Clear Selected Transfer Methods**. This will clear all of your transfer parameters so that you can create a new Auto Cash out arrangement. Otherwise, please click the **Confirm** button to submit your auto transfer configuration for processing.

Funds

Auto Transfer

Available Funds

	NZ\$0.00 NZD
	\$516.68 USD

Prepaid Card

	\$0.00 USD
--	------------

Selected Transfer Methods

jdoetest [USD] : 100% [Clear Selected Transfer Methods](#)

Available Transfer Methods [?](#)

Your current set of selected transfer methods is considered complete. To make changes, please clear your selected transfer methods, otherwise please click the confirmation button to submit your auto transfer configuration for processing.

Additional Options

Auto Transfer Status: Enable my auto transfer configuration

More Options »

[Confirm](#) [Cancel](#)

*Note: This auto transfer rule is set to scan your account every day. Whenever funds are available, they will be transferred based on your parameters. This auto transfer will remain active until you disable it (to do so, you will need to remove the check next to the Enable auto transfer configuration and click Confirm).

Payees can further customize their auto transfer in the More Options area which will reveal the following parameters:

Additional Options

Auto Transfer Status: Enable my auto transfer configuration

[« Fewer Options](#)

Transfer Period: Every day
 Monthly, starting on GMT

Minimum Funds Owed:

For example, if you only wish to perform an Auto Transfer if your balance is greater than \$100 please enter this amount in the field above.

Additional Currencies: CAD USD AUD NZD

For example, if you receive funds in multiple currencies and you wish to have these balances automatically converted into your transfer currency, please select those currencies above.

Transfer Period: Members can schedule their auto transfer to take place on a monthly schedule rather than a daily basis. To do this, select the **Monthly, starting on** option. This will unlock the calendar.

Select the day of the month that you would like your first auto transfer to occur on. The system will automatically run this transfer rule monthly on the selected date.

Min Account Balance: Members can trigger an auto transfer based on the minimum account balance in their Pay Portal account. Simply input the desired balance into the **Min Account Balance** field.

Additional Currencies: If you receive funds in multiple currencies, you can choose to have these balances automatically converted into your transfer currency. Put a check next to the currency that you would like to have your balances converted to.

Click **Confirm** to save your selections. Your auto transfer is now enabled. You can confirm this in your Pay Portal Transfer Center by clicking on Transfer. There will now be a “Yes” next to any account that is associated with an auto **transfer**. You can update or cancel these transfer settings at any time by clicking on the “Yes” or selecting the **Update Auto Transfer** from the **Actions** dropdown menu.

plexus

Home Transfer History Settings ▾ Logout

Funds

Available Funds

	NZ\$0.00 NZD
	\$616.68 USD

Prepaid Card

	\$0.00 USD
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Transfer Center

Type	Name	Description	Currency	Country	Auto Transfer	Action
	jdoetest	US Bank Account	USD		Yes	Action ▾
	Kiwi	New Zealand Bank Account	NZD		No	Action ▾
	MACU	US Bank Account	USD		No	Action ▾
	smith-**1510	Primary Prepaid Card	USD		No	Activate

+ Add New Transfer Method

Prepaid Card Transfer

Transfer to a Prepaid Card

You can transfer funds to your prepaid card as soon as it has been activated. All transfers take place in the Transfer Center area of the Pay Portal. To access the Transfer Center, click on either **Manage Your Card** or **Transfer**.

Funds	Prepaid Card
<p>Available Funds</p> <p> \$500.00 USD</p>	<p>Please enter a personal name only. Business names will not be accepted and will result in the cancellation of your card with any additional replacement cards issued at your expense.</p>
<h3>Personal Information</h3> <p>First Name: <input type="text" value="John"/></p> <p>Last Name: <input type="text" value="Smith"/></p> <p>Date of Birth: <input type="text" value="1 ▾ 1 ▾ 199 ▾"/></p>	
<h3>Address Information</h3> <p>Country: <input type="text" value="United States ▾"/></p> <p>State/Province: <input type="text" value="California ▾"/></p> <p>Street: <input type="text" value="1234 main"/></p> <p>City: <input type="text" value="LA"/></p> <p>Zip/Postal Code: <input type="text" value="90210"/></p>	
<h3>Card Fees</h3> <p>VISA USD Cardholder Agreement</p> <p><input type="button" value="Continue"/> <input type="button" value="Cancel"/></p>	

Prepaid cards that have been successfully activated will be visible in the Transfer Center.

If your prepaid card isn't listed here, please call the toll-free activation number located on the back of your card for assistance.

Click the **Actions** dropdown next to the prepaid card that you wish to transfer funds to. Select the **Transfer To Card** option to move funds from your Pay Portal to your prepaid card.

Input the amount that you wish to transfer from your Pay Portal to your prepaid card.

Alternatively, if you wish to “cash out” (transfer all funds in your Pay Portal to your prepaid card), simply check the **Transfer Maximum Amount** option. An optional message can be included via the **Personal Notes** field.

Note: The **From dropdown menu may be disabled (as it is in this example). This is because there is only one transfer method available. This field will be enabled once additional transfer methods are activated and loaded with funds (e.g. a bank account).*

Click **Continue**. Review your transfer information and click **Confirm** to initiate the transfer. The transfer is now complete. These funds are available for immediate use on your prepaid card. The balances of your Pay Portal and prepaid card have also been updated in real-time. You can view details of this transfer in the **History** area of the Pay Portal. Clicking on the transaction will enable you to view the receipt.

Transfer from a Prepaid Card

Members can transfer funds from a prepaid card into their Pay Portal or into a bank account (provided a bank account has been added as a transfer method).

To access the Transfer Center, click on Transfer. Click the Actions dropdown next to the prepaid card that you wish to transfer funds from. Select the Transfer From Card option to move funds off of your prepaid card.

The screenshot shows the plexus Pay Portal interface. At the top, there's a navigation bar with links for Home, Transfer, History, Settings, and Logout. Below this is a section titled 'Funds' which displays 'Available Funds' (\$500.00 USD) and a 'Prepaid Card' (\$0.00 USD). A button '+ Add New Transfer Method' is also present. To the right, under 'Transfer Center', a table lists two transfer methods: 'john doe' (US Bank Account) and 'Doe-**8186' (Primary Prepaid Card). For the prepaid card, an 'Action' dropdown menu is open, showing options: Transfer To Card, Transfer From Card (which is highlighted with a red dashed box), View Details, View Card Transactions, Reset Pin, and Create Auto Transfer.

The **From** field will be auto populated with the prepaid card account.

Note: The **To dropdown menu may be disabled. This is because there is only one transfer method available (your Pay Portal account). This field will be enabled once additional transfer methods are activated (e.g. a bank account). If the field is enabled, select where you would like to transfer the funds to.*

Input the amount that you wish to transfer from your prepaid card. Alternatively, if you wish to “cash out” (transfer all funds from your prepaid card to either your transfer source), simply check the **Transfer Maximum Amount** option.

Click on **Continue**. Review your transfer information and click **Confirm** to initiate the transfer. The transfer is now initiated. If your transfer involved moving funds back into your Pay Portal, the balance will have been updated in real-time. Alternatively, it can take up to 24 hours for funds to be redistributed to a bank account. You can view details of this transfer in the **History** area of the Pay Portal.

Wire Transfer

If you wish to add a **Wire Transfer** as a transfer method for your account, you will be required to fill out the recipient's account information. You can also view the fees and estimated processing times at the bottom of the page.

The screenshot shows the plexus application interface with the following details:

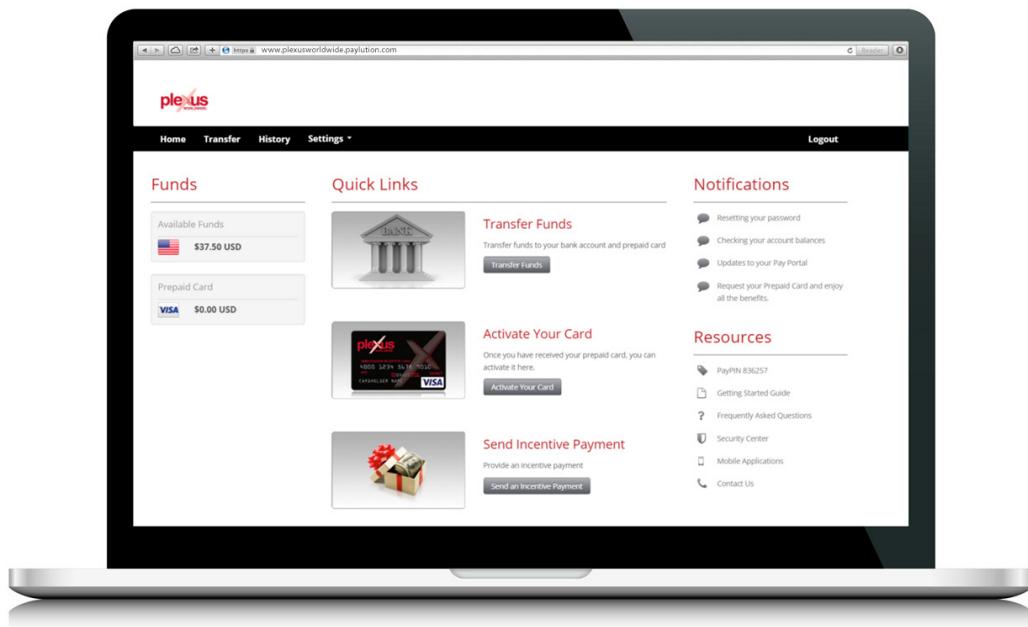
- Header:** Home, Transfer, History, Settings, Logout
- Funds Section:** Available Funds: \$500.00 USD (with a US flag icon)
- Add Transfer Method Section:**
 - IMPORTANT:** You may only send funds to a bank account that you own and is in your own name. If you try to send funds to a bank account belonging to someone else, your transfer will fail, and you will be assessed a fee for the returned payment.
 - Recipient Financial Account Information:** Fields include:
 - Account Type: USD Wire Transfer
 - Country: UNITED STATES
 - SWIFT Code: [Input Field]
 - Routing Number: [Input Field]
 - Account Number OR IBAN: [Input Field]
 - Additional Information: [Input Field]
 - Remember As: [Input Field] with a help icon (?)
 - Enter Intermediary Bank Account
- Transfer Fees & Processing Time:**
 - Fee: \$20.00 USD
 - Processing Time: IMMEDIATE
- Buttons:** Continue, Cancel

Incentives

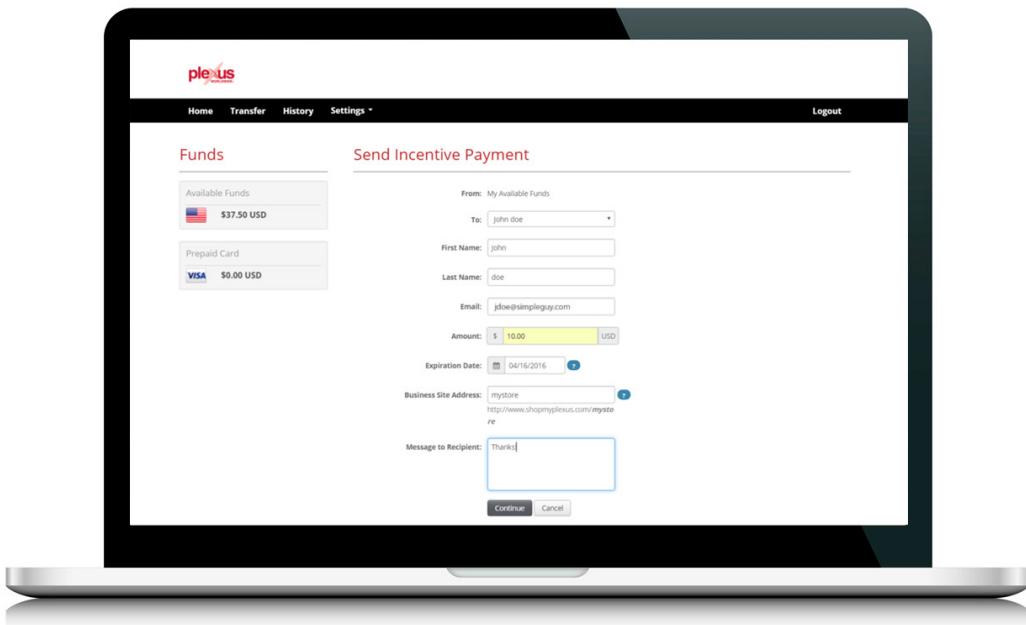
Incentives

Incentives is a feature which lets you send incentive payments to customers and potential ambassadors. Recipients of the incentive can use the funds to purchase merchandise from your Shop My Plexus store- a simple and hassle-free way for someone to try out the amazing Plexus products. The incentive is sent as an email which contains a code that can then be used for redemption at checkout.

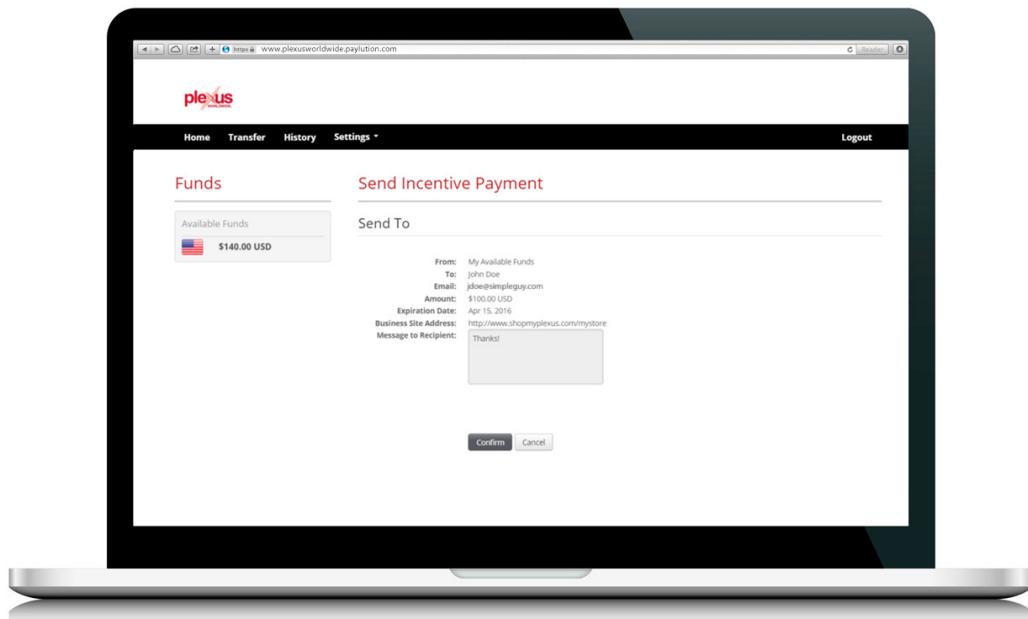
To get started, select **Send Incentive**, under the **Incentive** heading.



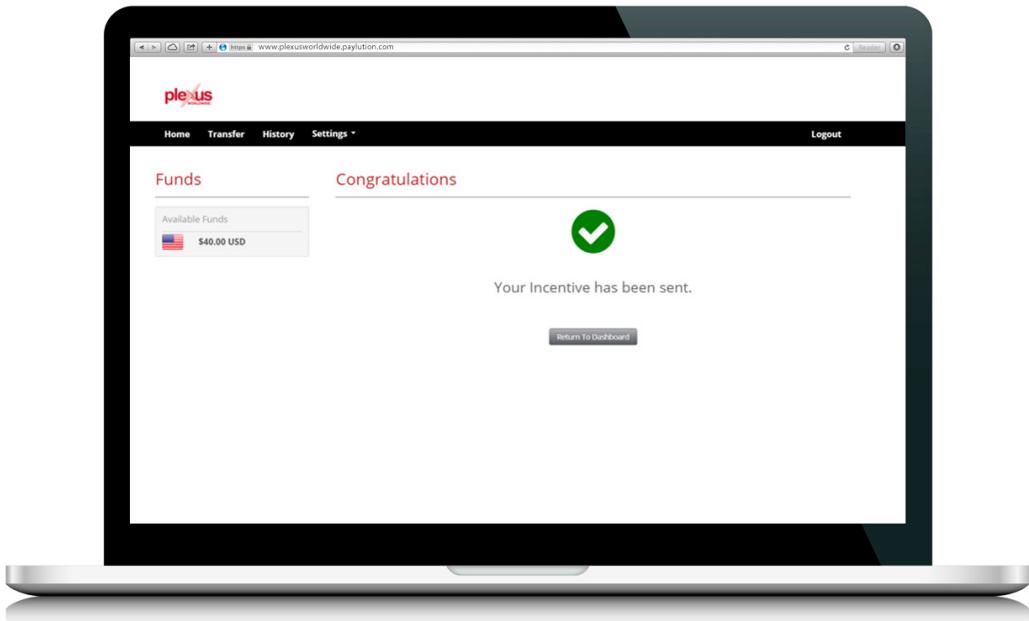
Once you click on **Send an Incentive Payment**, you will be required to fill in the appropriate information for the transaction. The information requested is minimal. Just fill in the amount, the recipient's name and email address, and select an expiration date for the Incentive. Please also note that the default expiration date is set to 30 days, but can be customized up to a maximum of 6 months. You will also have the option to enter a personal note to the recipient. Please note that the first time you send an Incentive, you will be prompted to provide the URL for your Shop My Plexus store. The beginning of the URL will be pre-populated for you (www.shopmyplexus.com/), and you will type in the custom portion of the URL. Once you have entered this in, it will be stored for future Incentive payments.



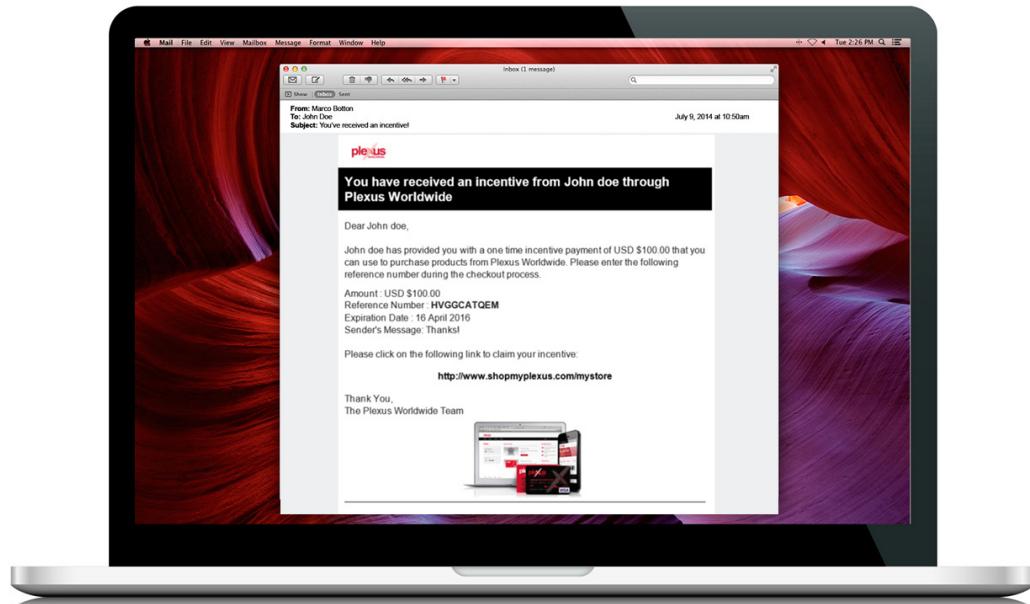
You will then click on **Continue**, and be prompted to **Confirm** the transaction.



You will then view the confirmation page:

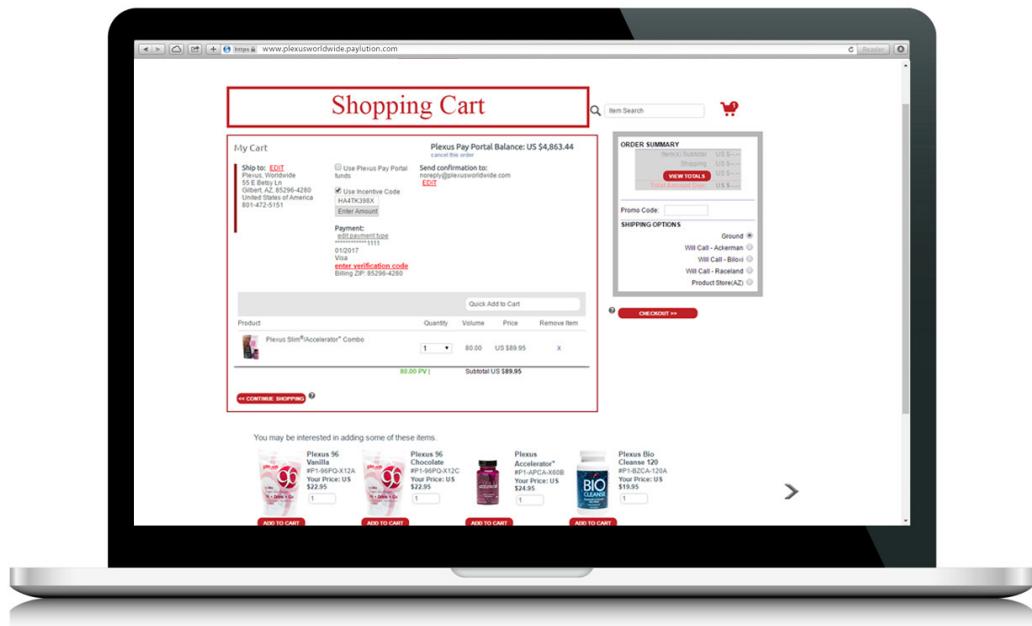


The potential ambassador will now receive a system-generated email notification to their email inbox informing them that they have received their incentive (see below). You will be able to view all of your Incentive transactions from within your regular transaction **History** page.

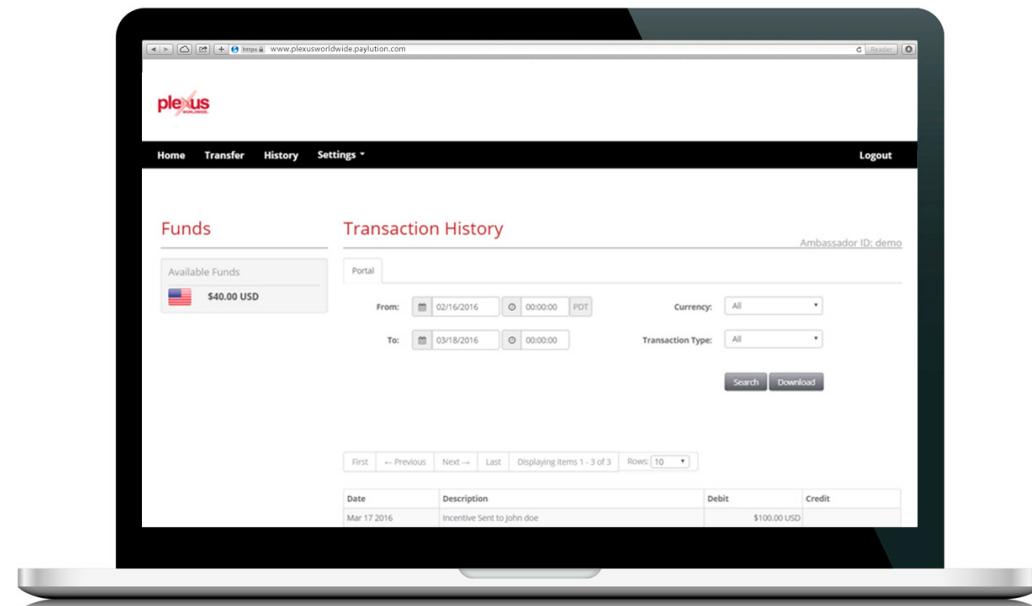


The email will contain an incentive or **coupon** number, which the recipient will use on the Plexus website at checkout (see image below). After the potential ambassador has made their selection on the Plexus website, they will have the opportunity to enter the coupon number before confirming their order.

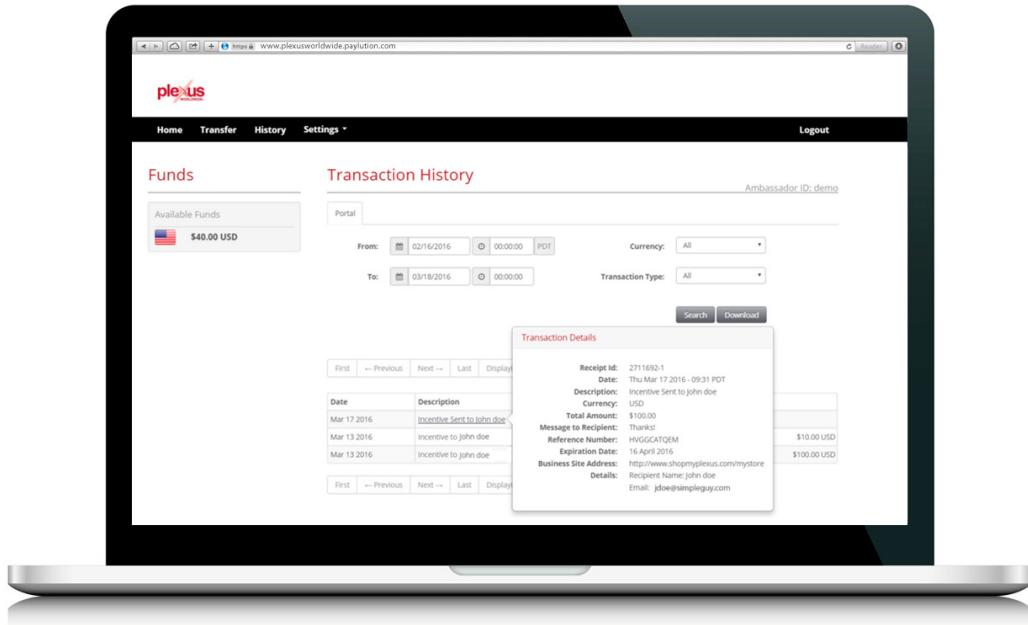
***Please note that Incentive funds must be spent in one transaction by the receiver. If the total amount is not used, the remainder will be credited back to the sender's Pay Portal funds, and will no longer be available to the potential ambassador. As the sender, you will see the refunded amount which will appear as a credit line item on the transaction history page of your Plexus Pay Portal.**



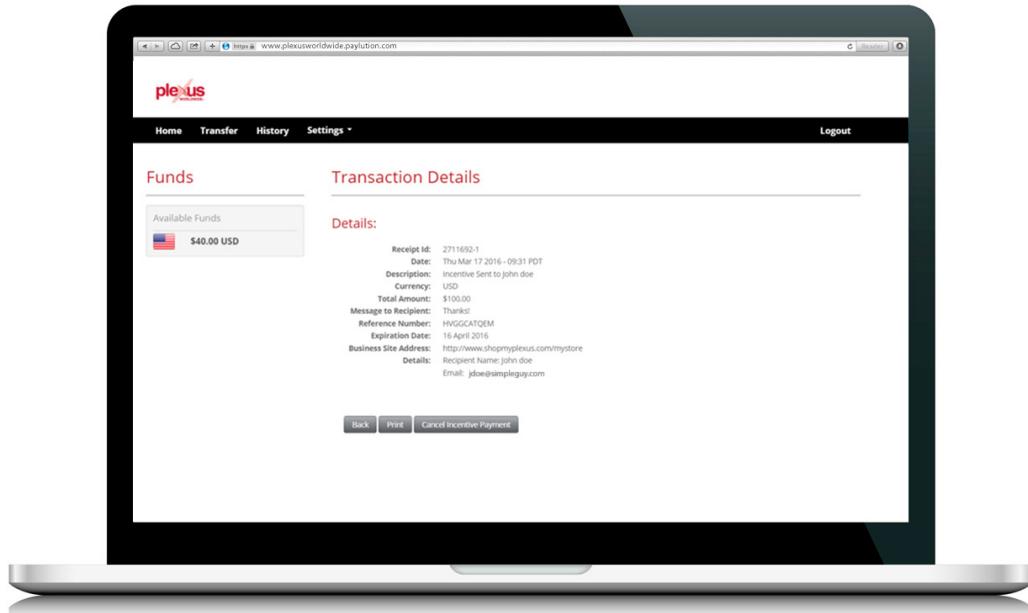
To view your Incentive transactions from your Pay Portal, navigate to **History**. You can filter to specifically search for '**Incentive**' transactions.



If you hover over the transaction you wish to view, you will be able to see a 'quick view' of the full transaction details.



Clicking on the transaction will pull up the full transaction details receipt, which you can view and print.



Please note that in the Description line, the status of payment will also be visible if any of the below statuses apply:

- **Expired:** The reference number or coupon code has expired. The expiration date will by default be set to 30 days, but this can be modified to any period of time less than 6 months. The incentive will be returned to you as the sender if it is not used before the expiration.
- **Cancelled:** The transaction has been cancelled.
- **Refunded:** The full amount of the purchase has been refunded and credited to your Pay Portal account.