PLEXUS PAY PORTAL
YOUR HOW-TO GUIDE

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Activate Account

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.

plexus WORLDWIDE

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.

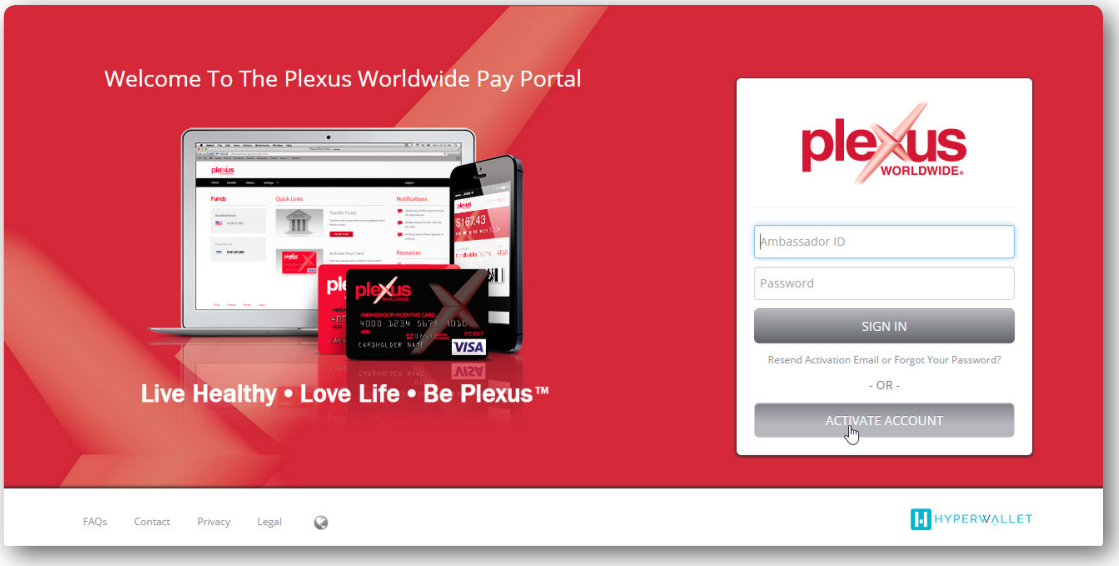
PLEASE CLICK ON THE LINK BELOW to complete activation of your account. In order to activate your account, you will need to know your Membership ID (may also be known as Distributor ID, Associate ID, or Consultant ID) which is the number (or name) used by your organization to identify you. If you are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

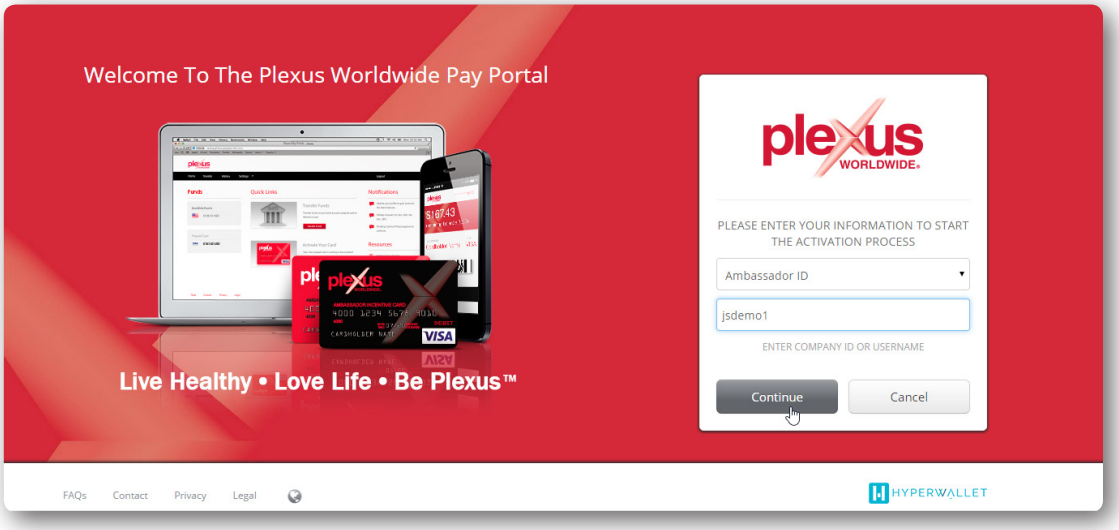
The email will include a link which will direct you to the activation page of the Portal.

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

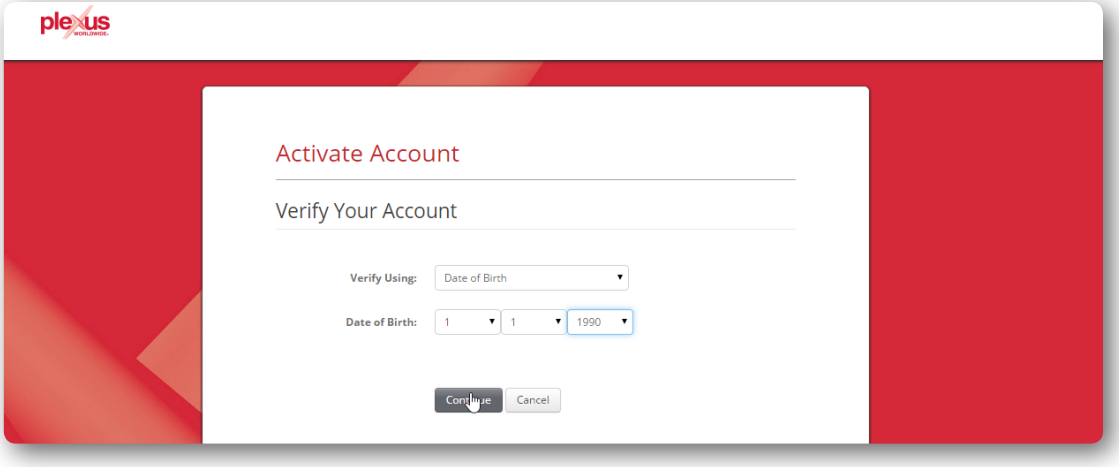


To activate your account, please enter one of four identification options:

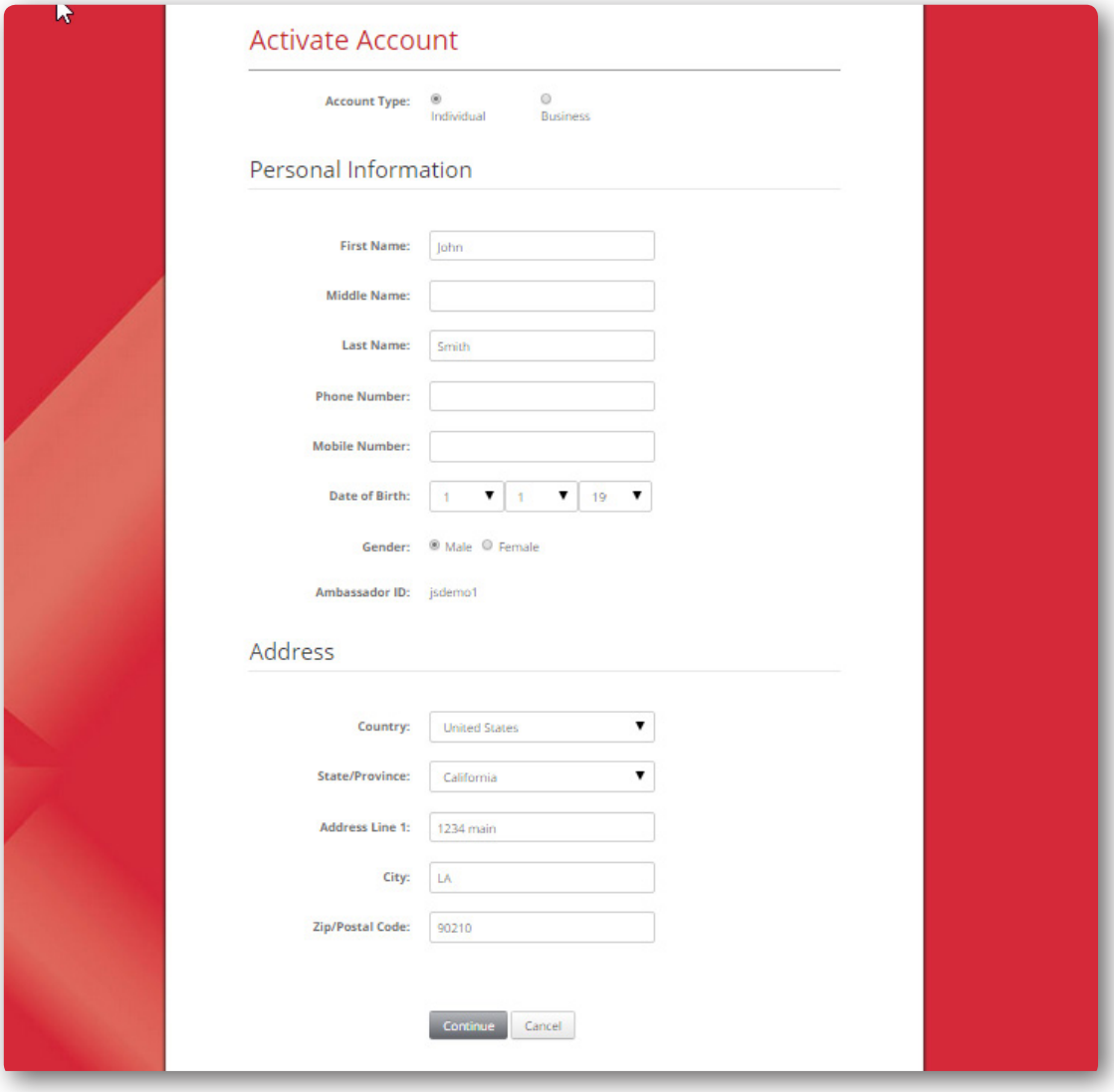
1. Your email
2. Your card number
3. Your Ambassador ID
4. Portal ID



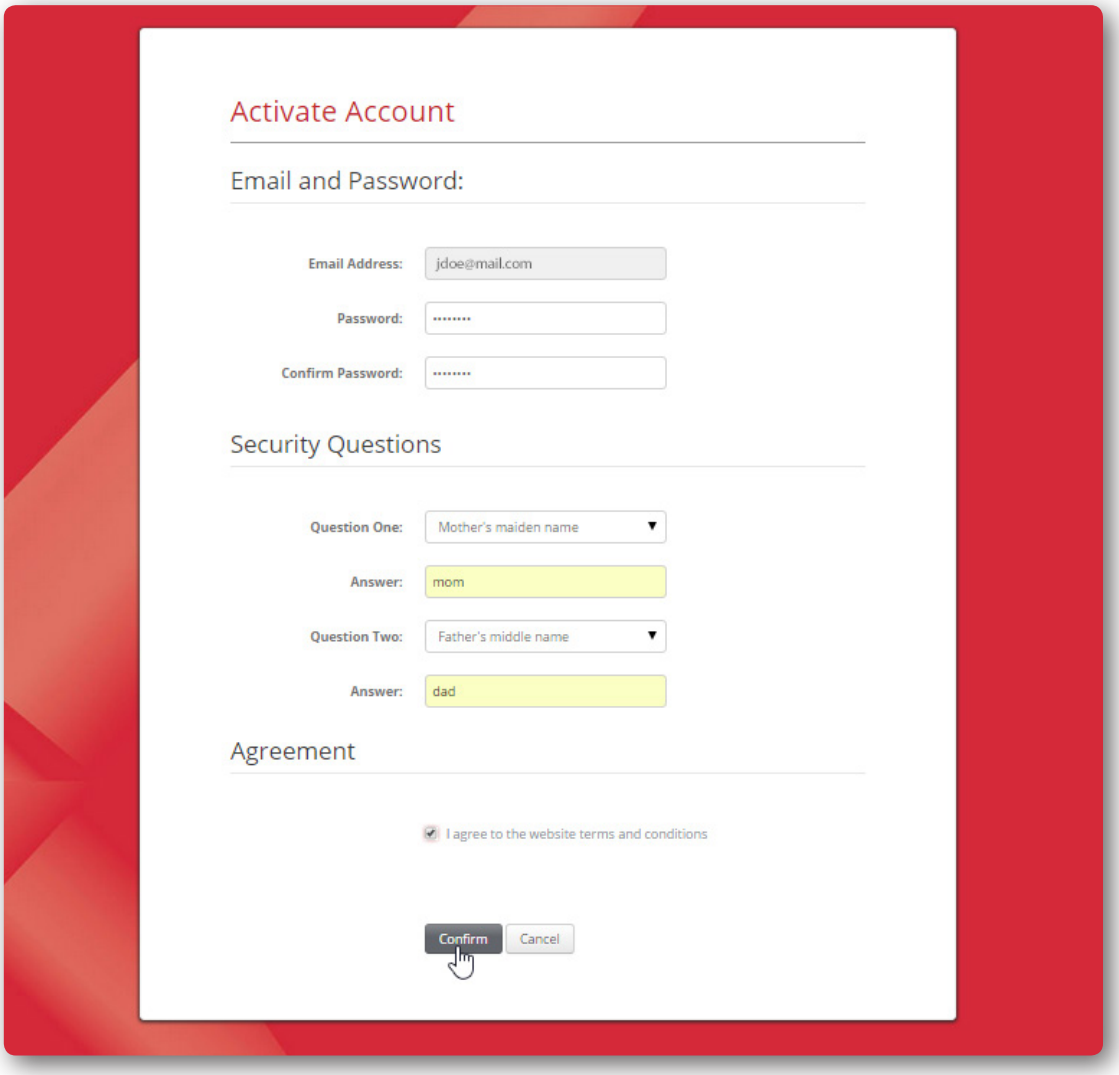
Once complete, click on **Continue**. To verify your identity, you will be asked to provide your **Date of Birth**. Click on **Continue** in order to process your account verification.



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.



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.



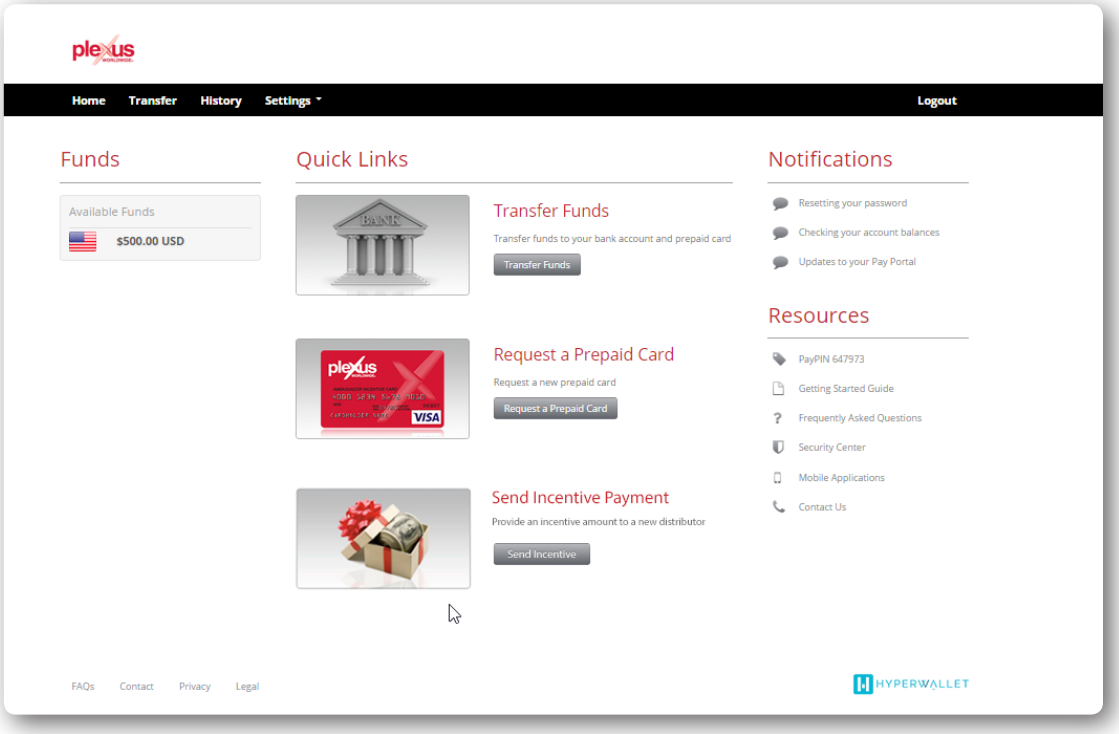
For maximum account security, choose a password that is easy for you to remember, but difficult for a stranger to guess. Passwords for the Plexus Pay Portal must have a minimum of 8 characters, and at least one letter and number. We recommend passwords have a combination of:

- 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 any 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.

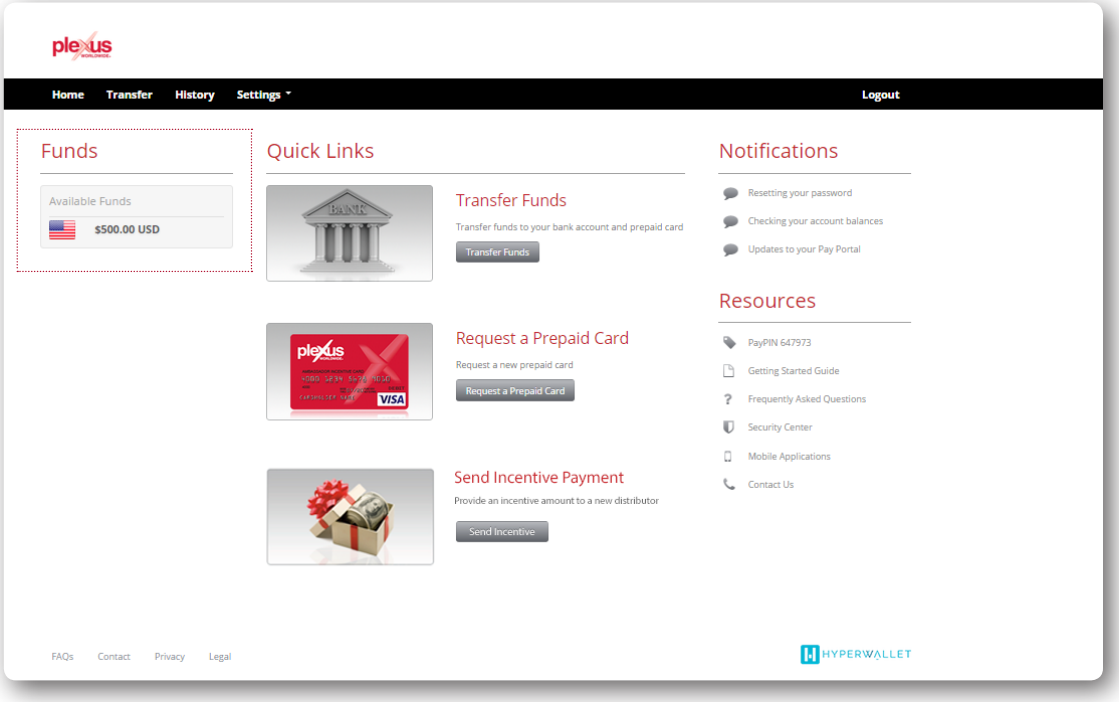
Congratulations! Your account has been successfully activated. You will now see your Plexus Pay Portal dashboard where you can easily manage your payments.



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**.

Home Page

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



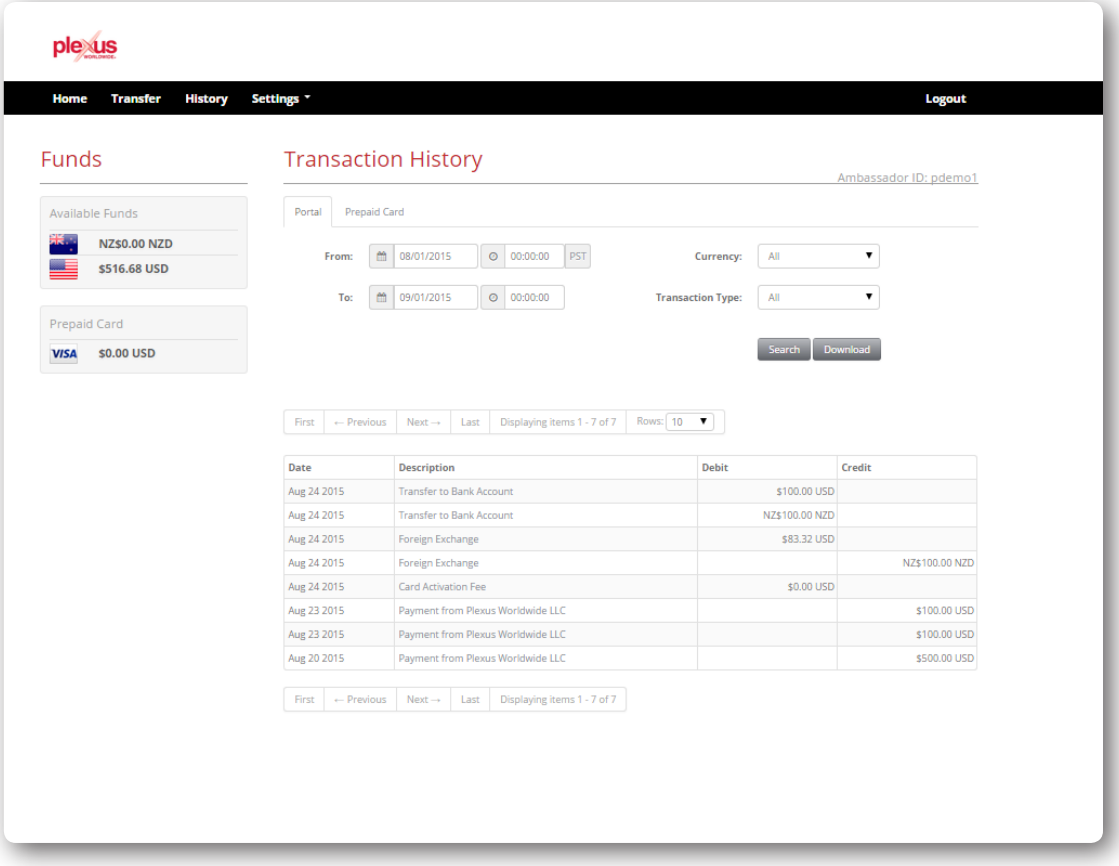
Plexus Pay Portal Home Screen

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.



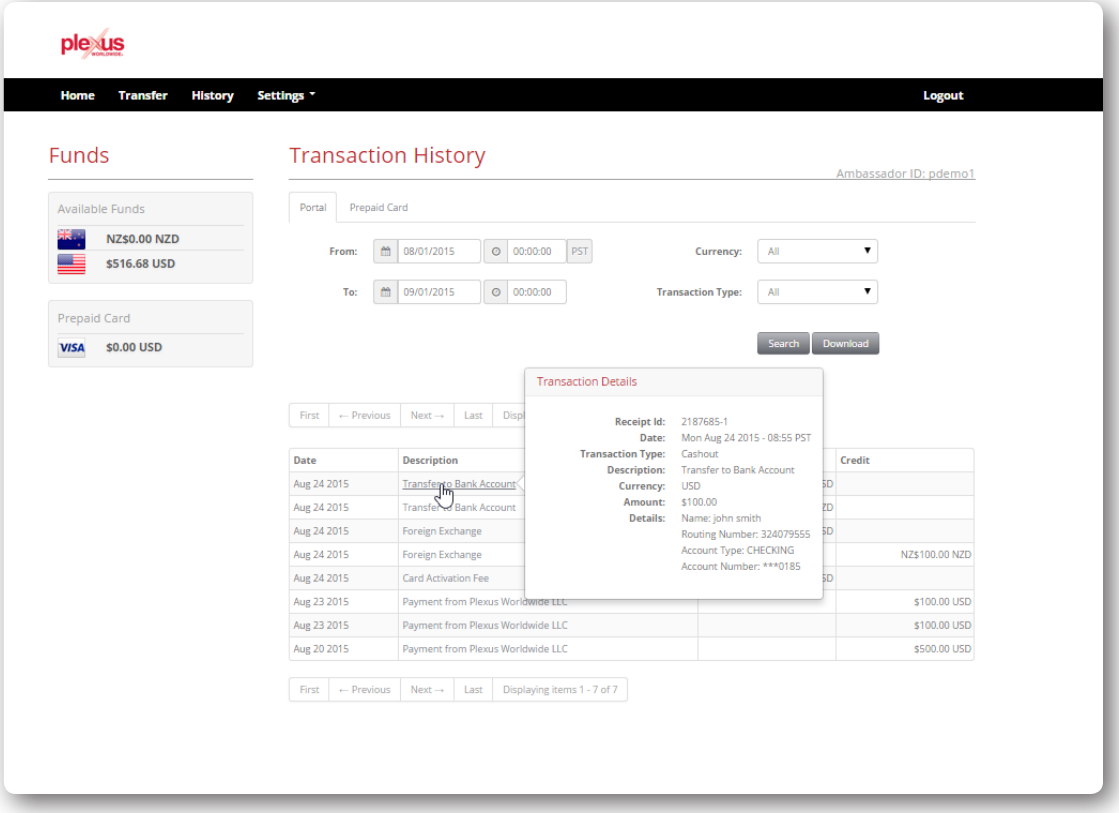
You can review your transaction history at any time by clicking on any of the available **balances** or by selecting the **History** option from the top navigation bar.

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

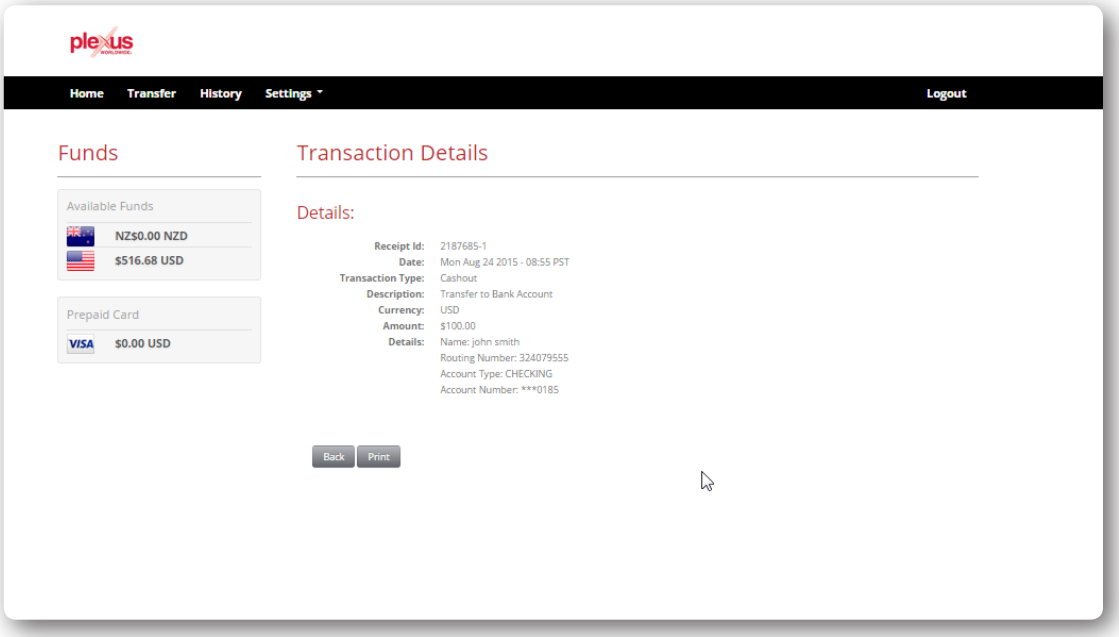
The **Portal** tab lists any transactions to and from your Portal. The **Prepaid** tab lists any transfers to and from your prepaid card. This also includes purchases.

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**.

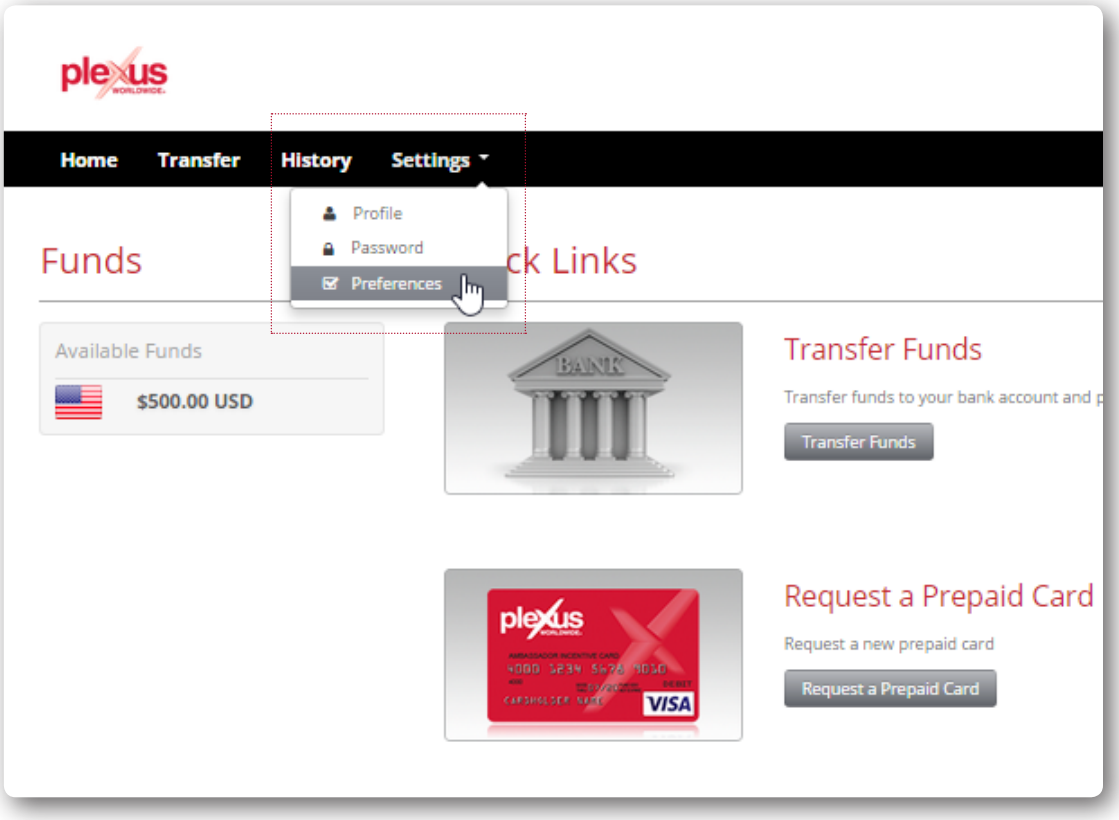


Clicking on the transaction will enable you to view and print the full transaction receipt.



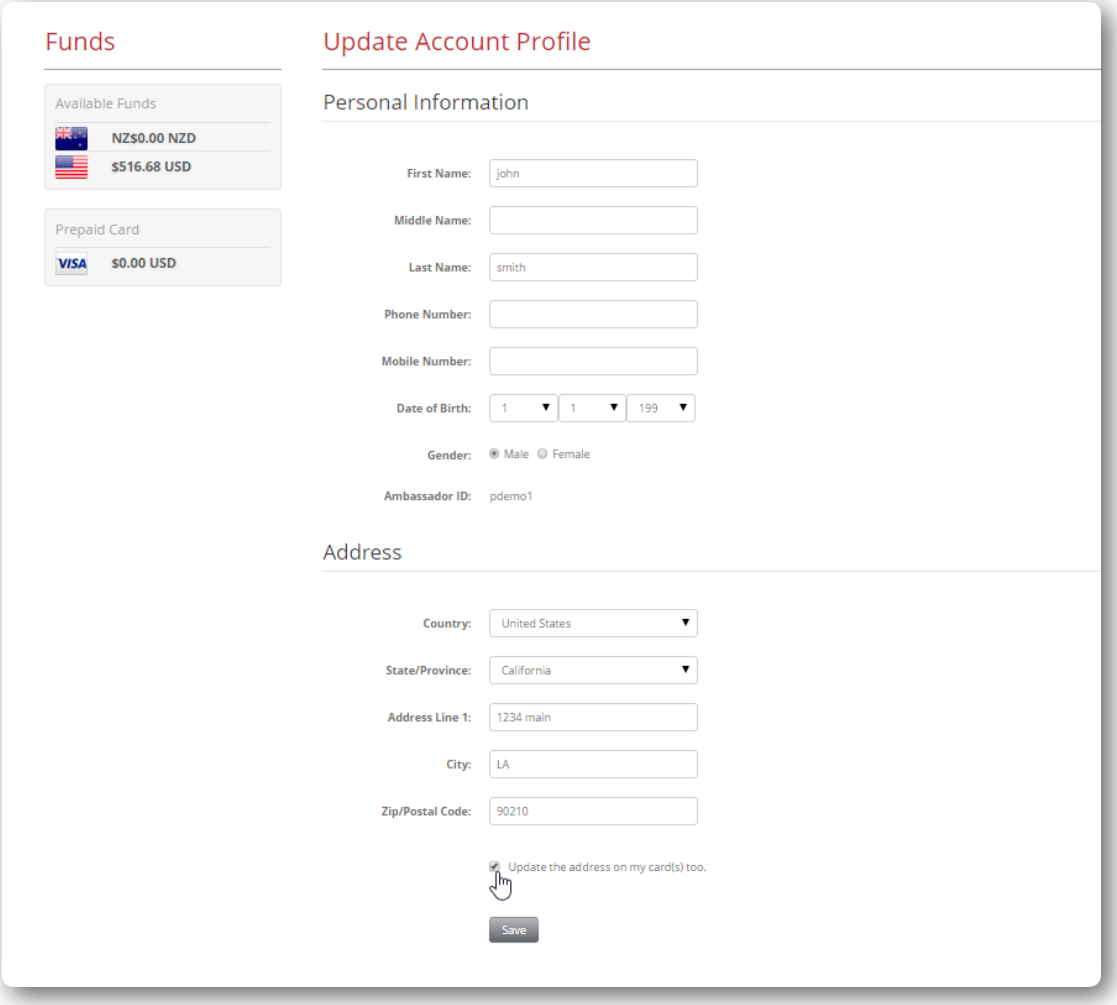
Settings

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.

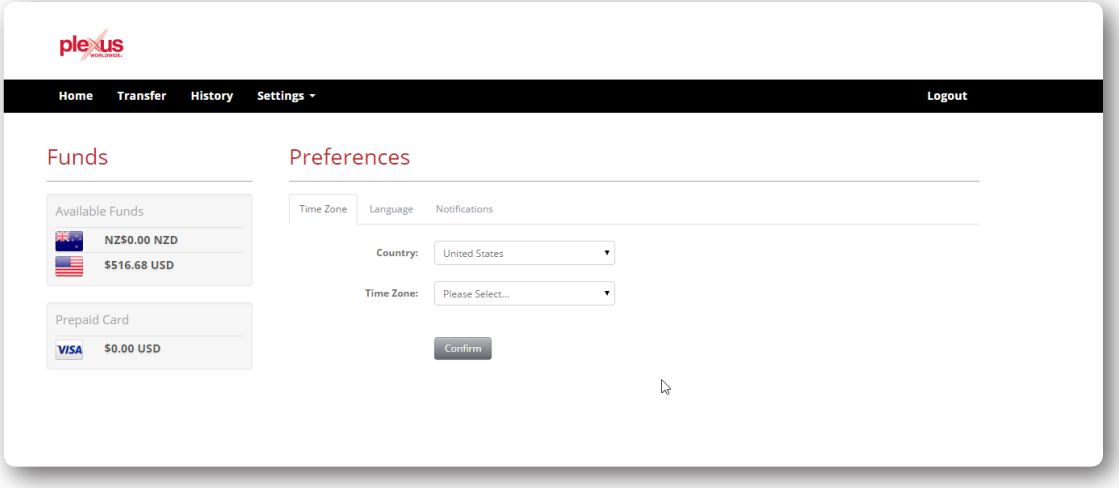
To update new address information in both your Pay Portal profile and on any associated Prepaid Cards, check the box titled: **Update the address on my card(s) too**.



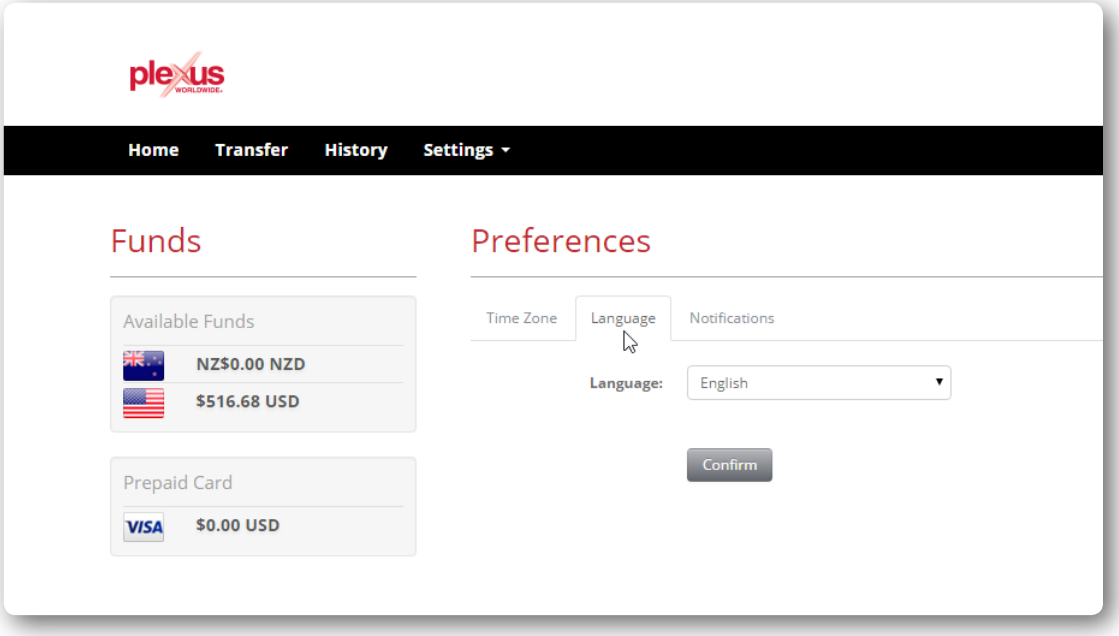
Click **Save** to update your Pay Portal profile. To update your Pay Portal password, select **Settings** followed by the **Password** option. Input your old password followed by your new password. Confirm your new password before selecting **Update Password**.

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

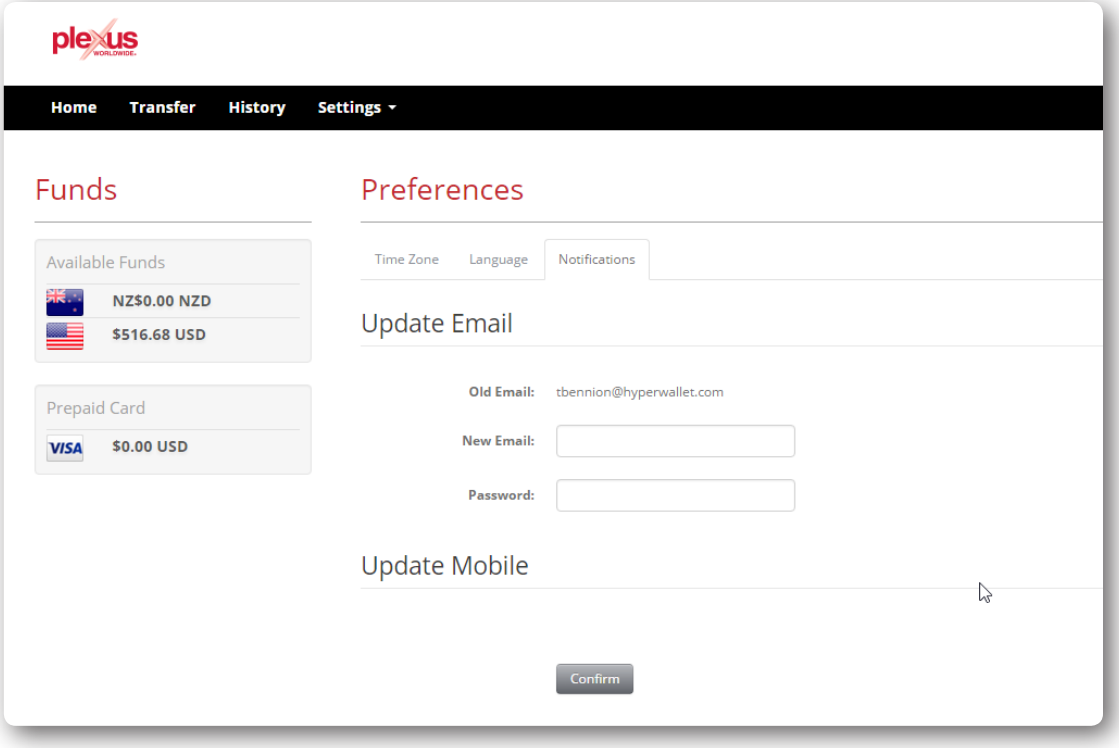
On the **Time Zone** tab, select your preferred **Country** from the dropdown list. Your country selection will pre-populate the **Time Zone** drop down with applicable selections.



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**.



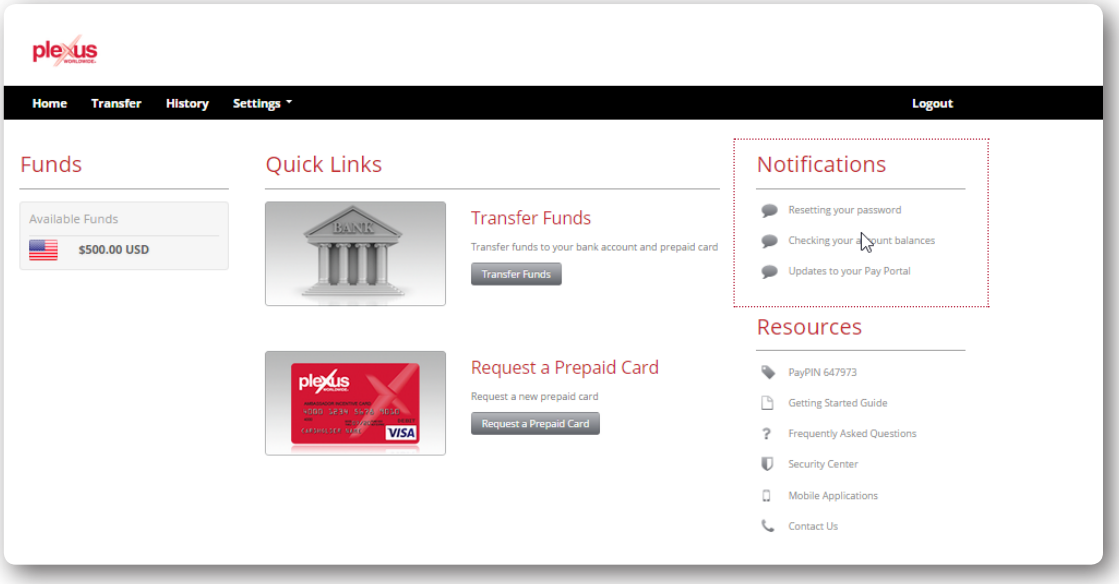
On the **Preferences** tab, input the email address where you would like to receive any notifications about your Pay Portal account and transactions.



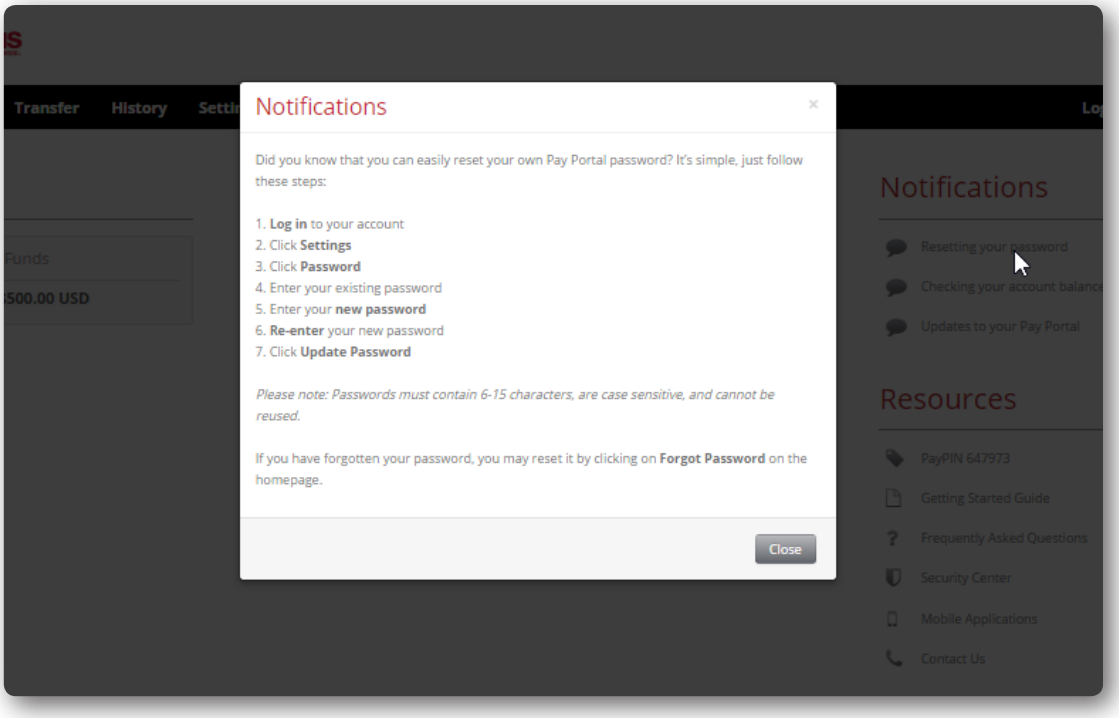
Note: Changing this email address will not update the email address associated with your account log in details. To update this email, please contact customer service by telephone. Click **Confirm to save your notifications preference.*

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.



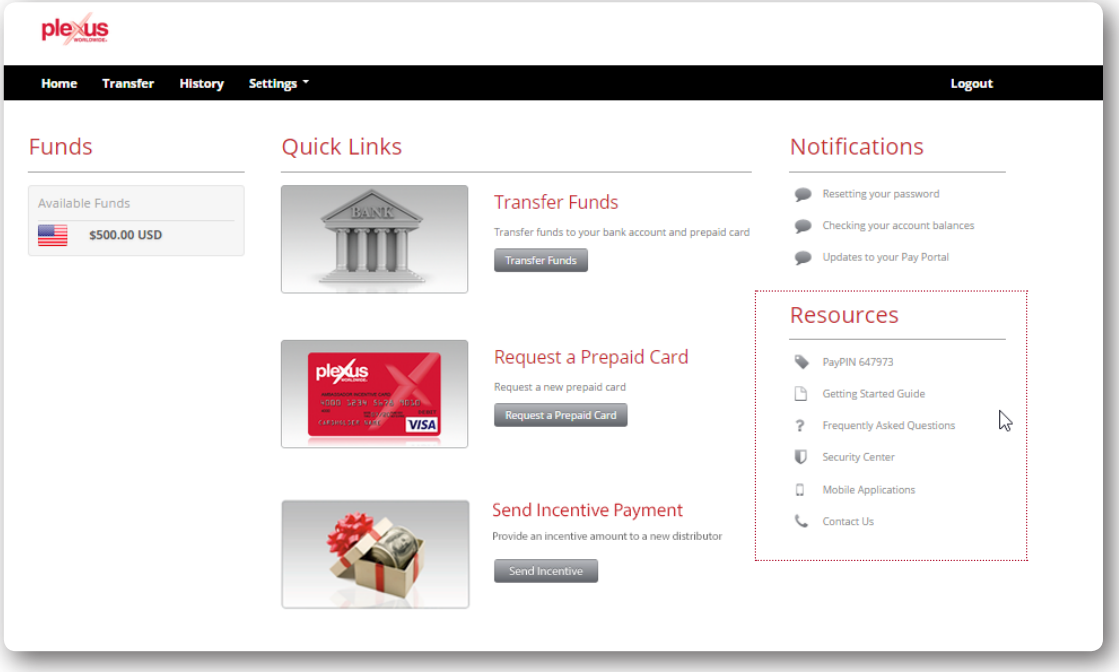
When you click on the notification you wish to view, it will open in a pop-up window.

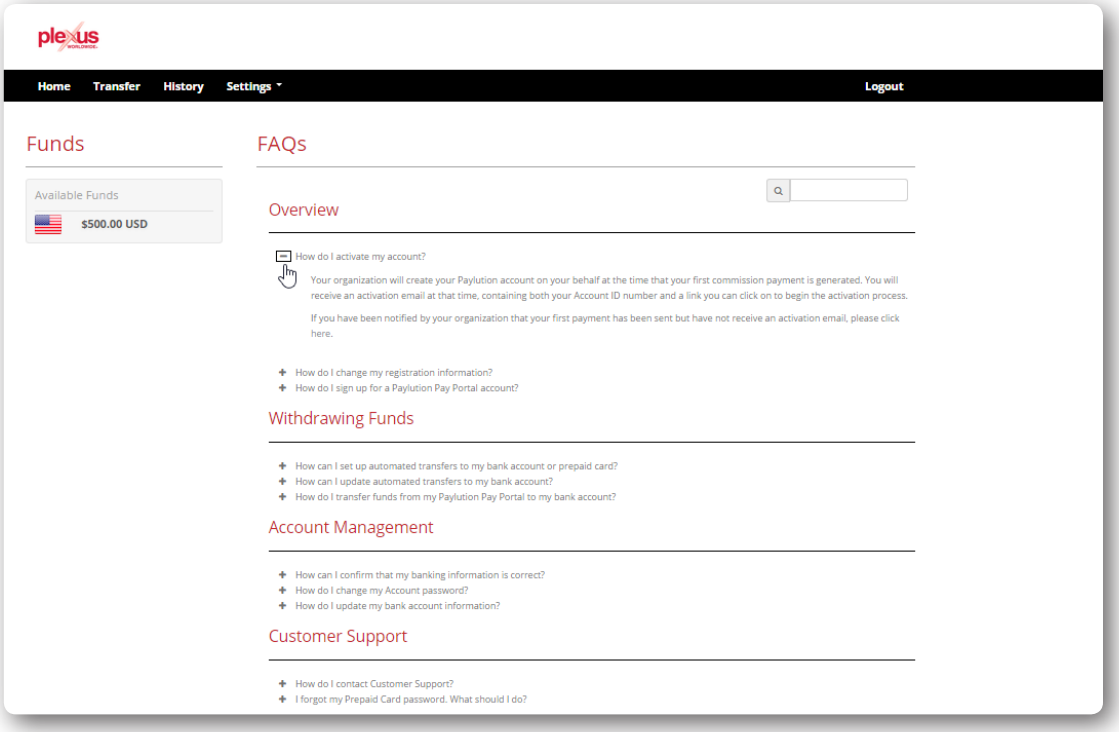


Expanded Portal Notification

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.



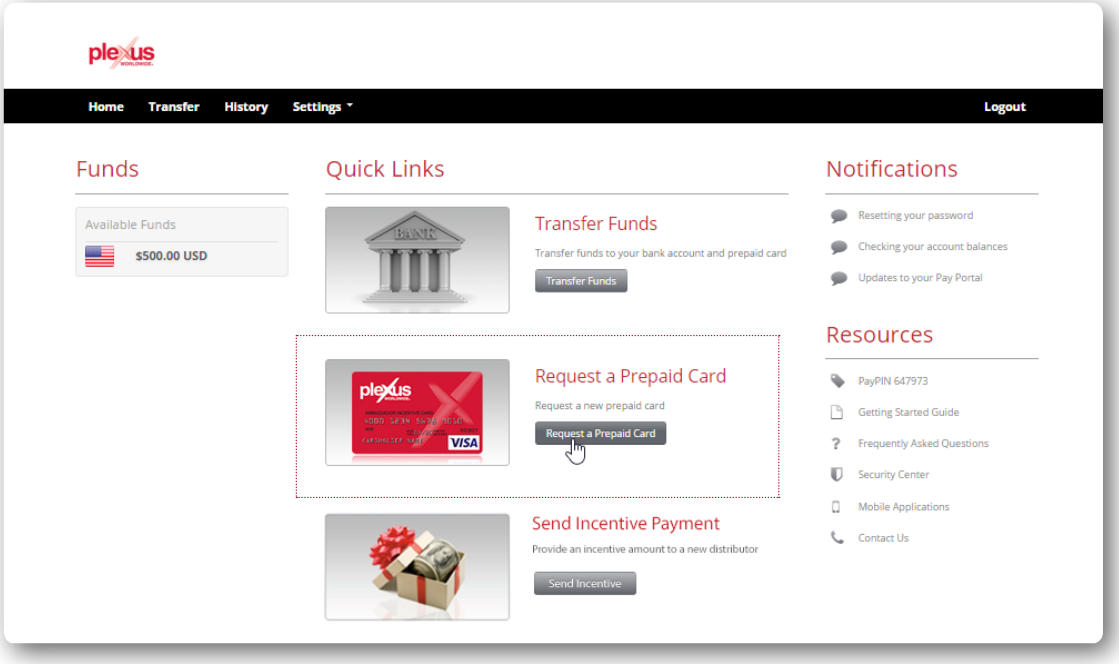


FAQ's- Accessible from the Resources section

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.*

Requesting a Prepaid Card

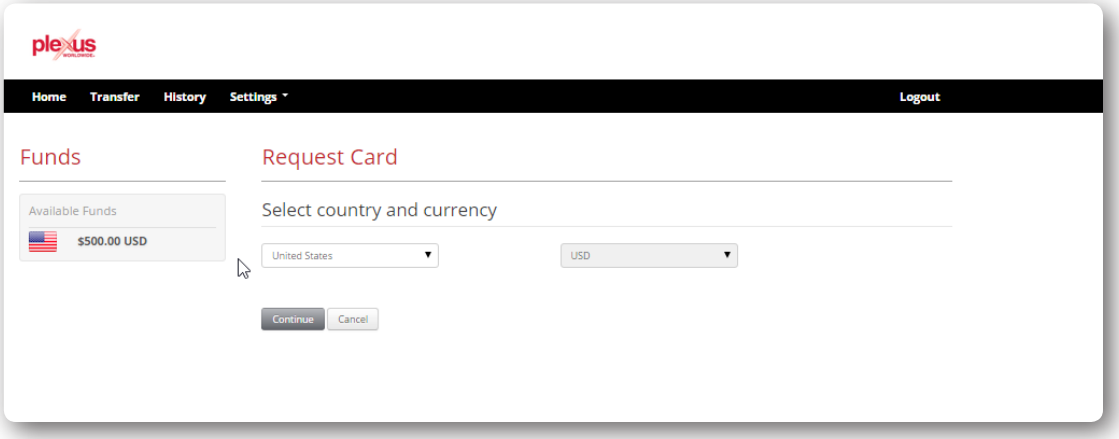
You can request a prepaid card by clicking **Request a Prepaid Card** on the home screen of the Pay Portal.



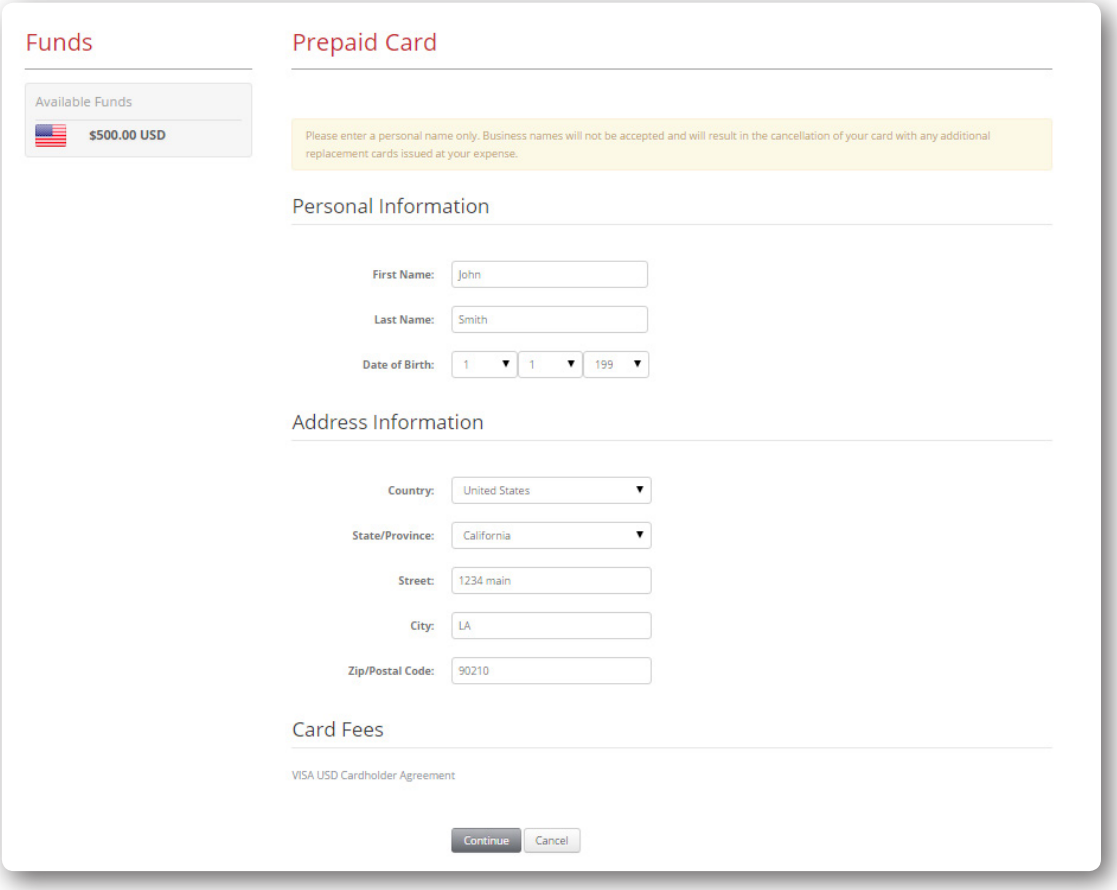
The system will require that you create a new transfer method prior to processing your prepaid card request. To add a new transfer method, please select:

- 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.



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.



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).

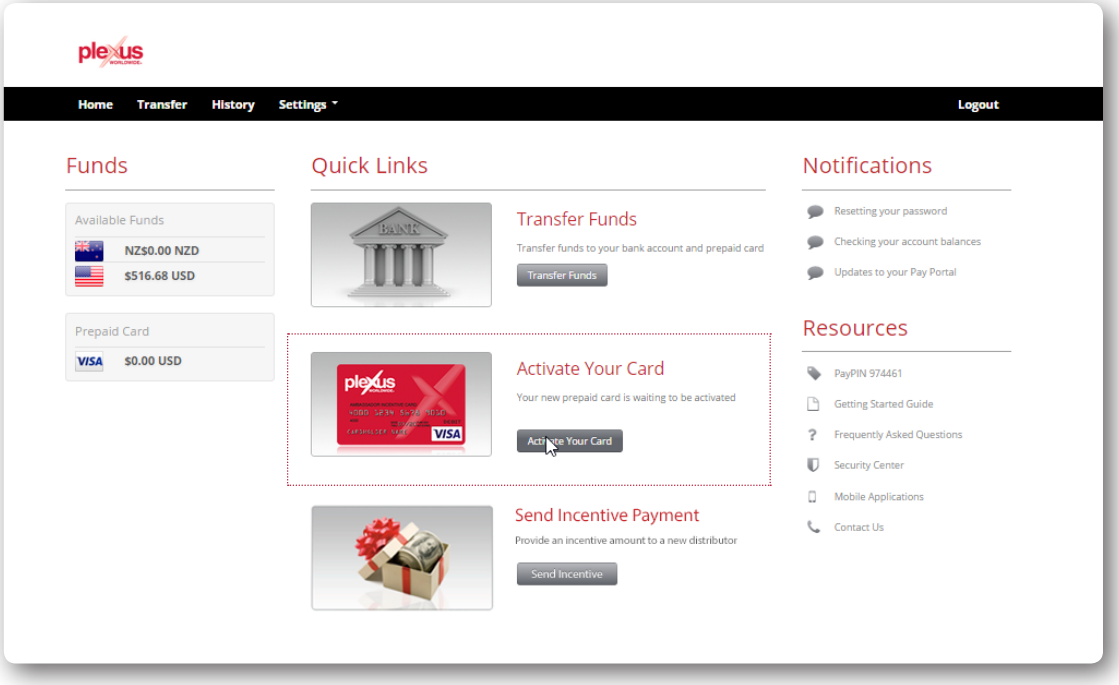
**Note: You will be required to provide your 16 digit card number as part of either activation process.*

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.

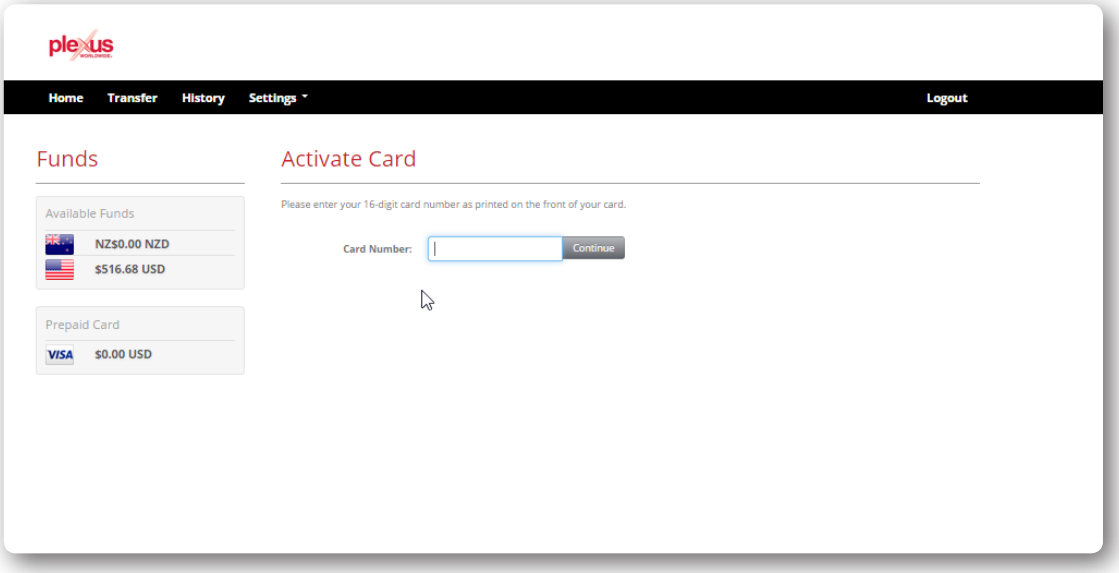
If you have chosen to automatically transfer the balance of your funds to your card, these funds will now be transferred to your prepaid card in real-time. Members who did not select the automatic transfer can manually add funds to their card in the Transfer area of the Pay Portal.

Activating a Prepaid Card

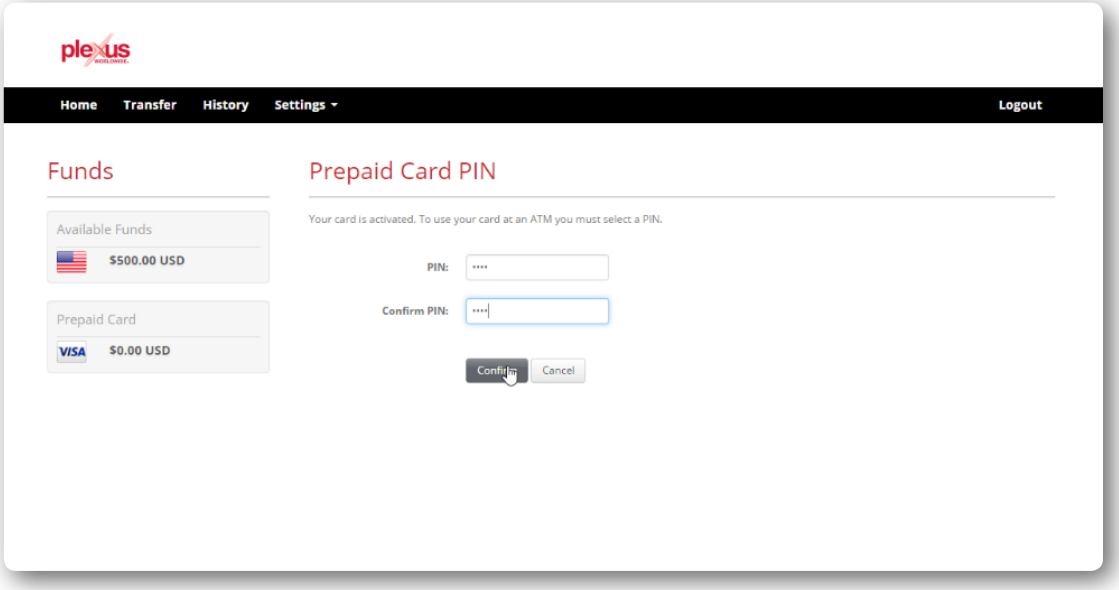
You will see your pre-active card under the Quick Links menu, with the option to **Activate Your Card.**



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



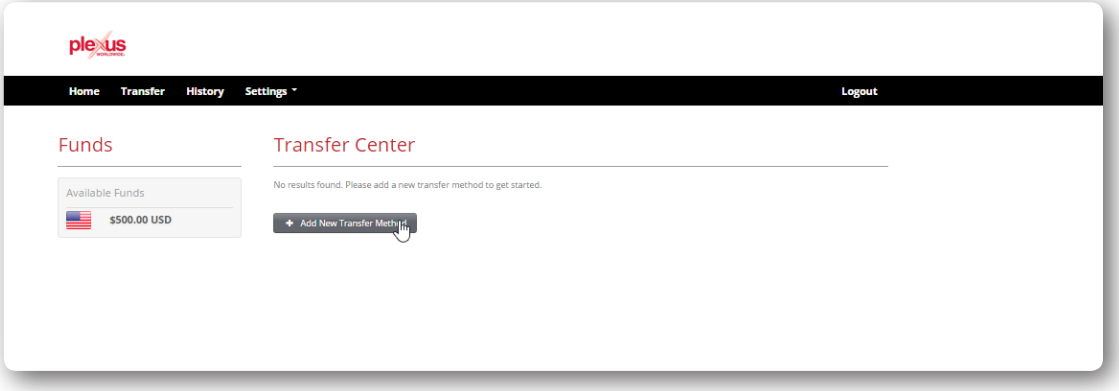
Enter your card number. You will then be required to choose a 4-digit PIN for the card. Enter your PIN and click on **Continue**.



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.

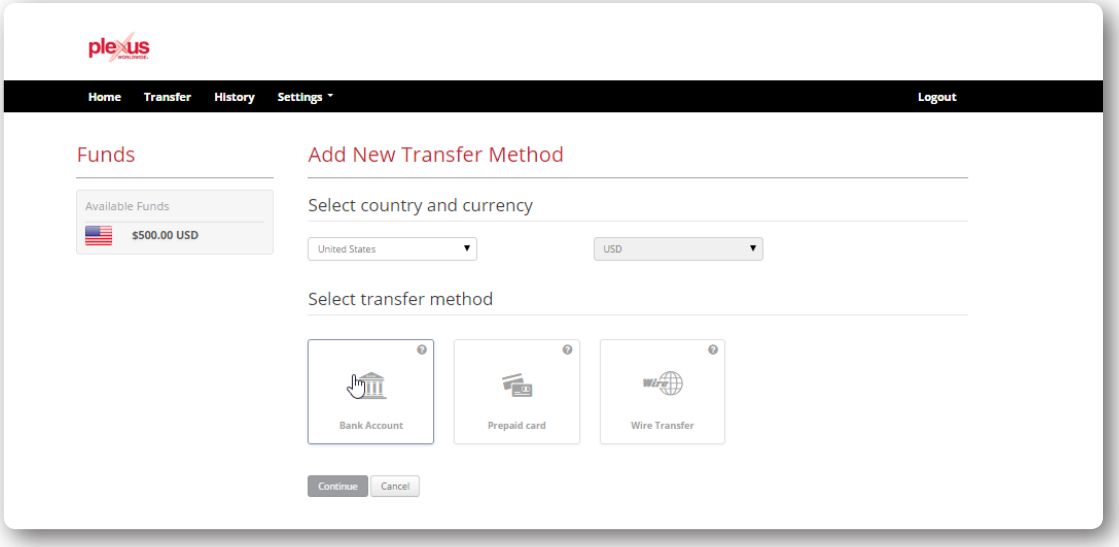
Click **Add New Transfer Method**.

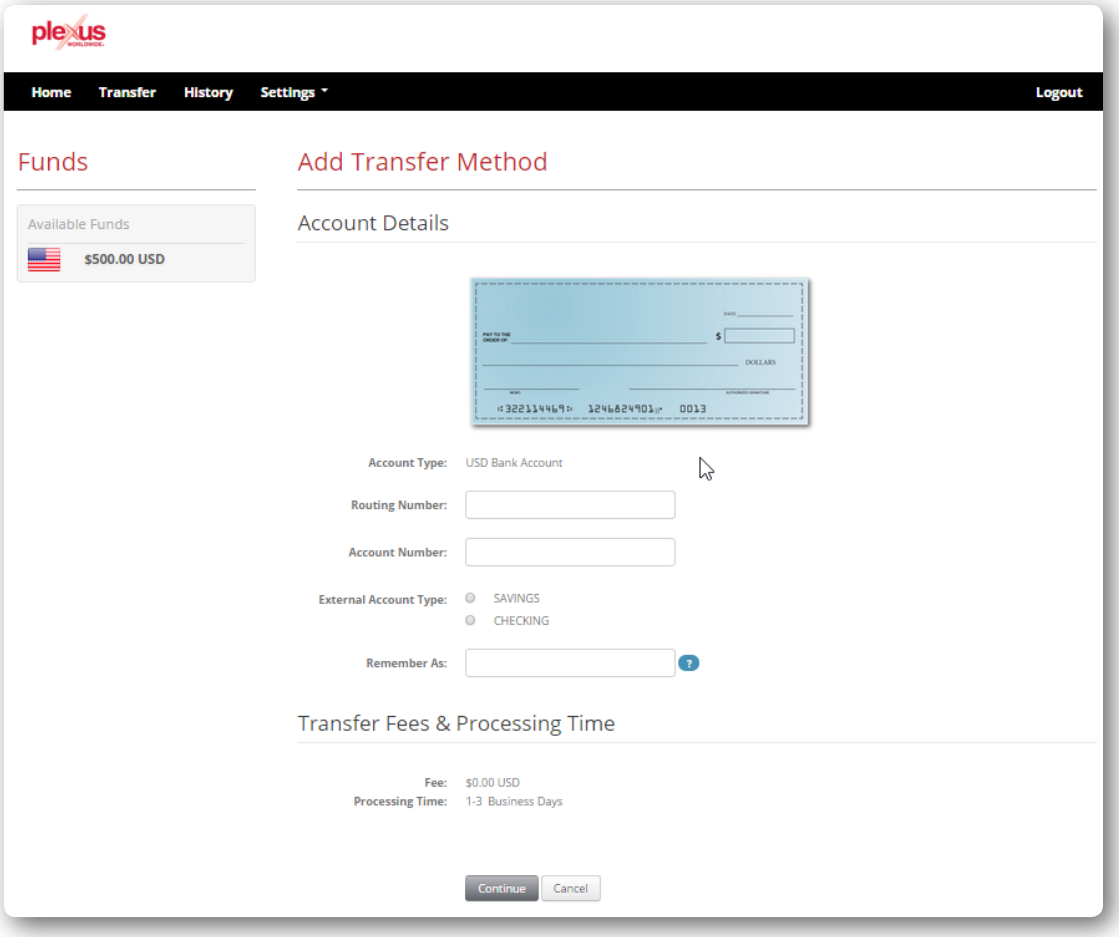


When you click on **Add New Transfer Method**, you will see the transfer methods that are available to you through your program. In this case, you will see the option to transfer to a bank account, prepaid card, or make a wire transfer. Select your country, currency, and method.

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.





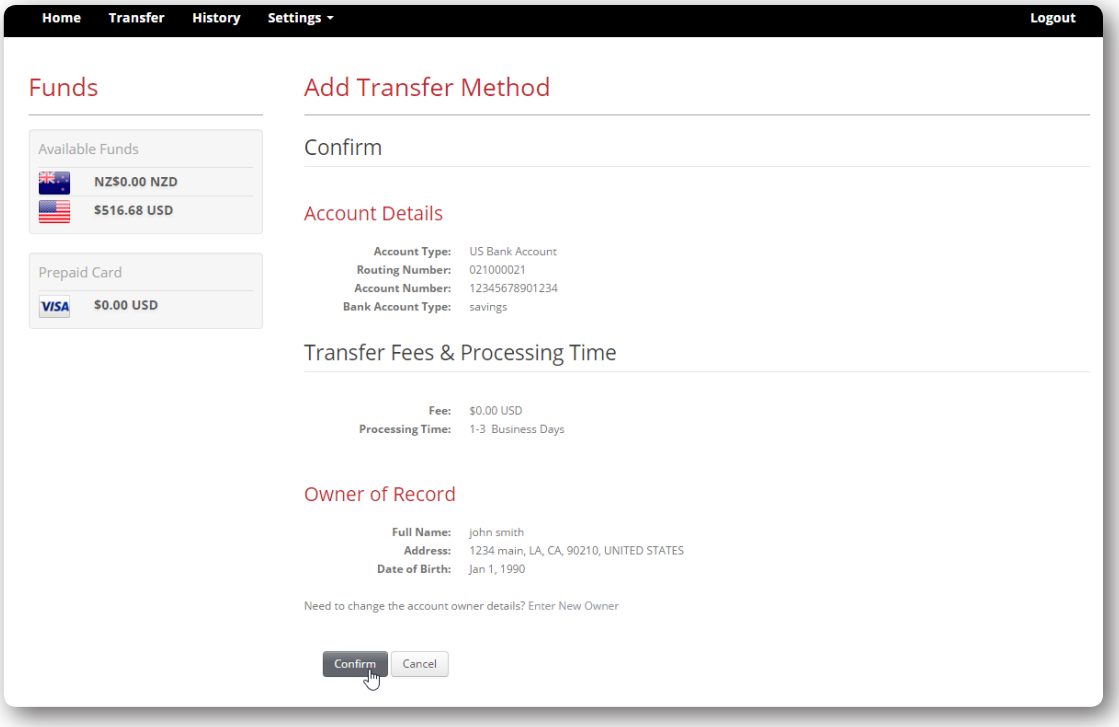
It is important to double check your bank account information. If you enter an incorrect routing or bank account number, it can take over seven days for those funds to go out. We recommend that you double check your numbers to avoid any inconvenience.

**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.

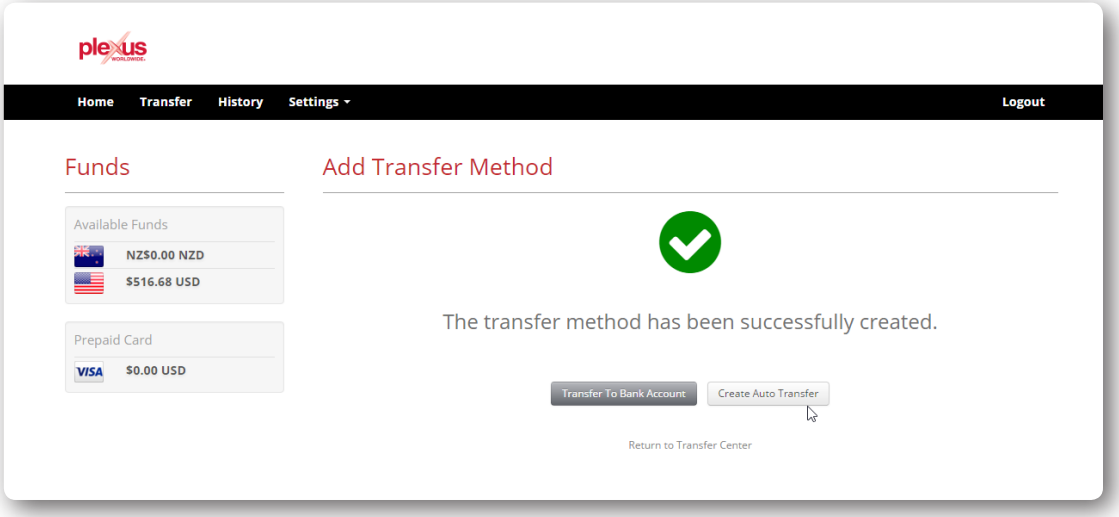
Click on **Continue** to initiate the account creation. You are required to establish an owner for the account. By default, the system will auto-populate the account details of the Pay Portal owner. To confirm that this is the registered owner of the bank account, click on **Confirm**.



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.

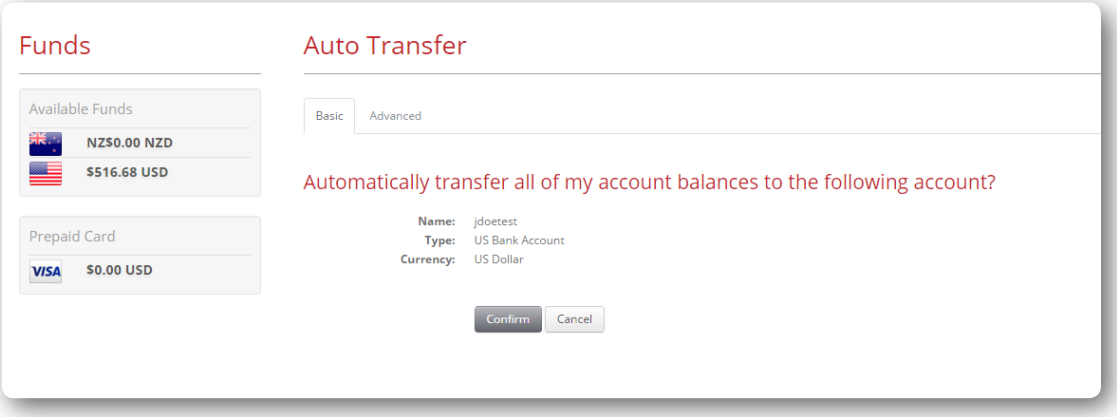
**Note: You have not transferred any funds to this bank account yet. You will need to initiate a one-time transfer or create an auto transfer rule in order to successfully initiate a funds transfer.*



Create an Auto Transfer

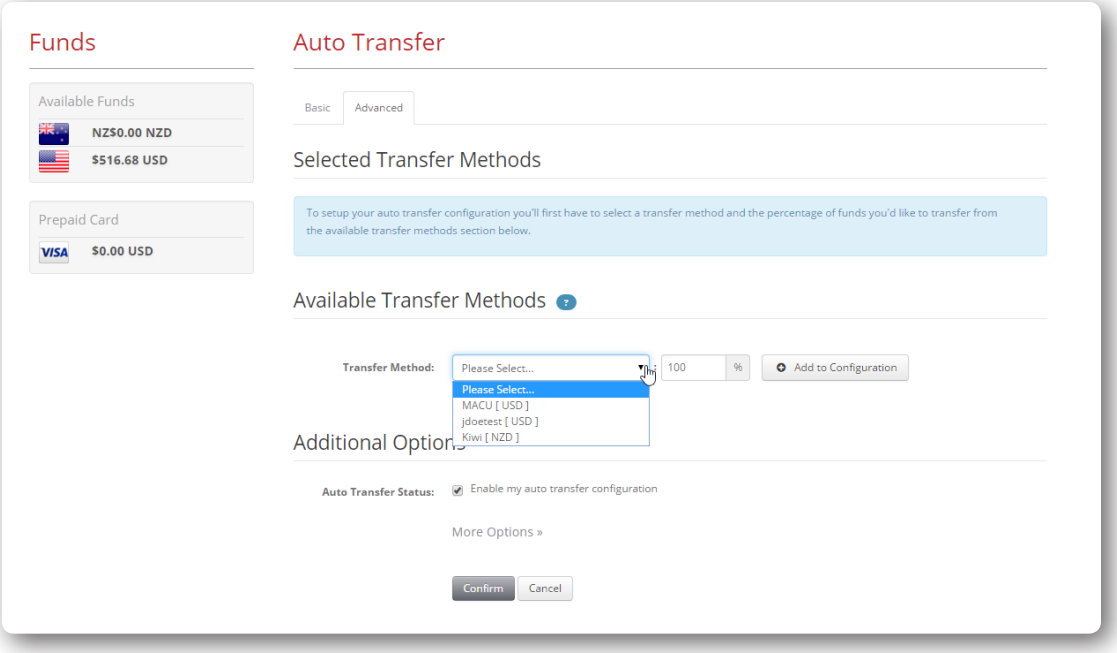
You will have the option to create an auto transfer rule (Auto Cash out) immediately after adding a bank account to your Pay Portal (see screen above). This action can also be set up from the Transfer Center. To access the Transfer Center, click on either Transfer Funds or Transfer from the Home screen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

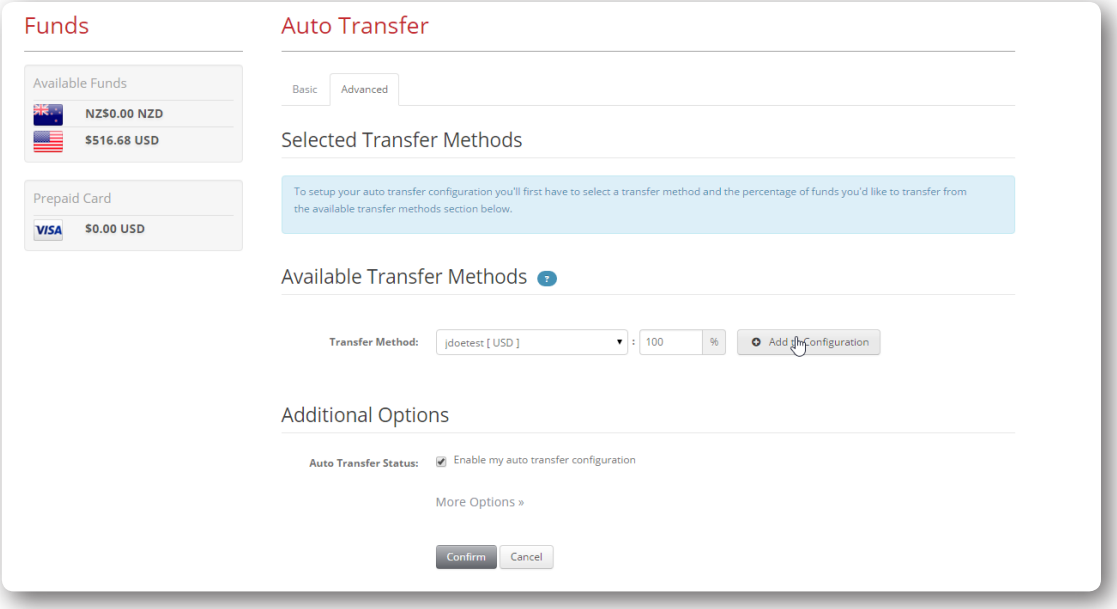
The **Advanced** option allows a member to automatically transfer a percentage of funds from their Pay Portal account to a predetermined account (i.e. prepaid card, bank account). You may Auto Cash out 100% of your account balances to a single account or you may split the Auto Cash out among multiple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



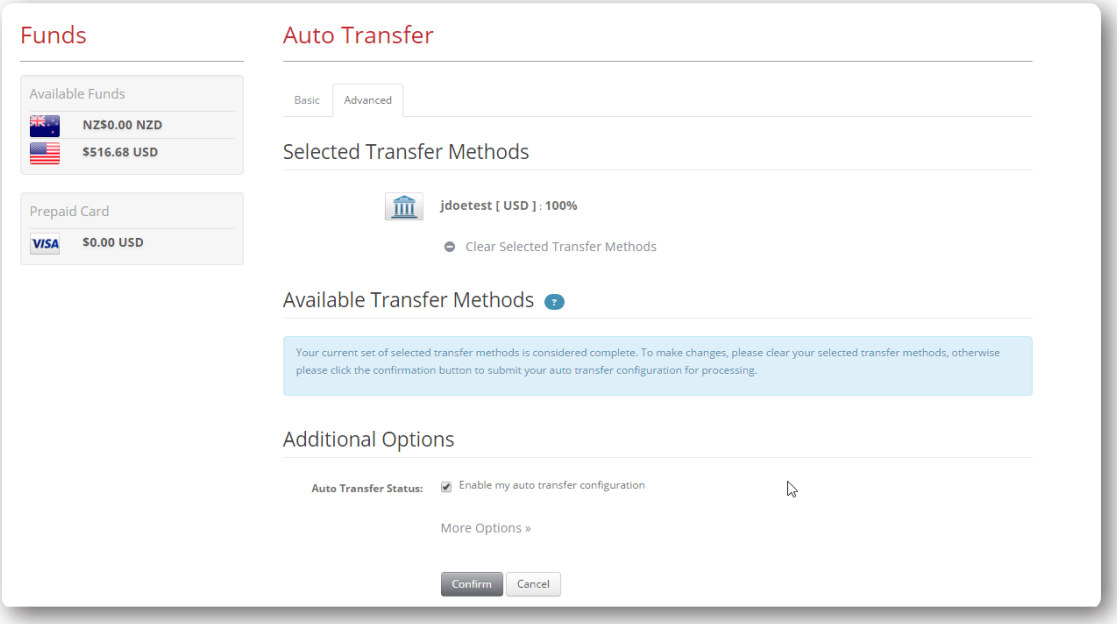
Select where you would like the Auto Cash out to deposit funds by selecting your **Transfer Method** from the dropdown menu. Note: The total Auto Cash out must equal 100%.

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.

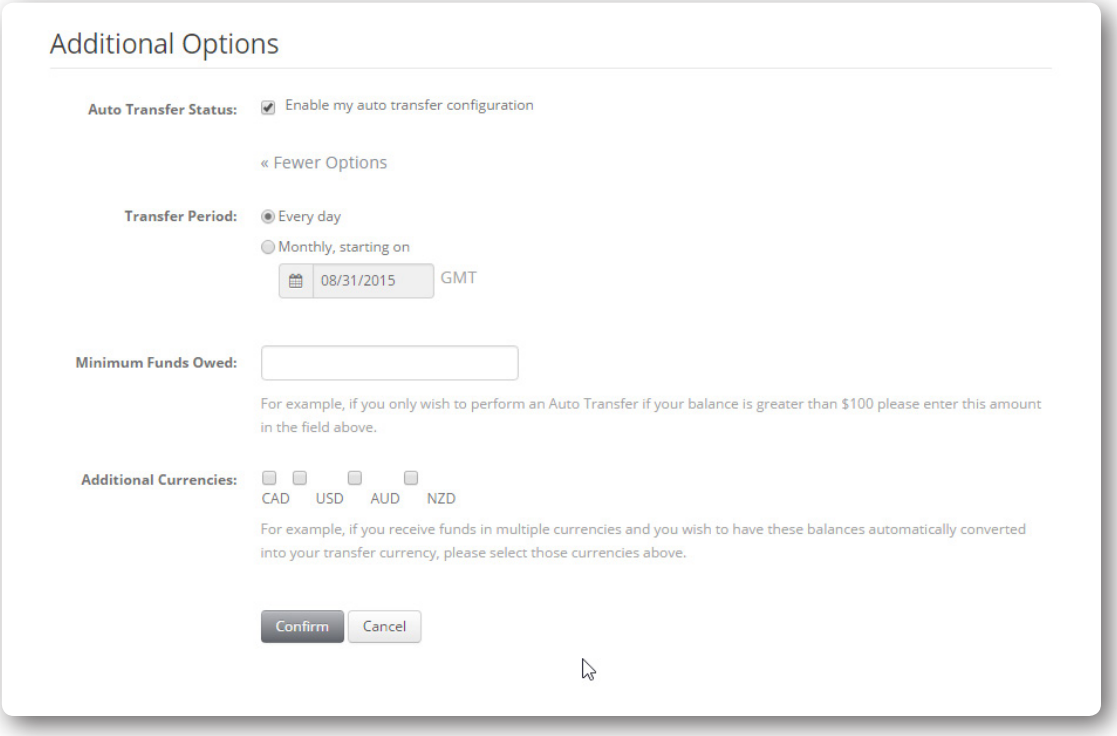


Both Auto Cash out transfer parameters will now be visible under the **Selected Transfer Methods** area. Your current set of selected transfer methods is considered complete. If you should wish to make changes to these settings, please click on **Clear Selected Transfer Methods**. This will clear all 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.



**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:



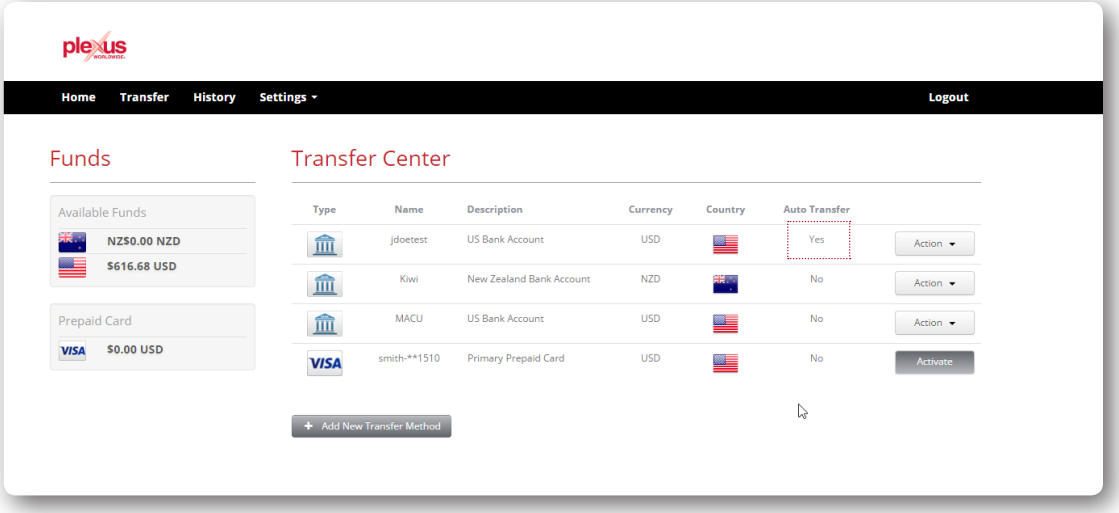
Transfer Period: Members can schedule their auto transfer to take place on a monthly schedule rather than a daily basis. To do this, select the **Monthly, starting on** option. This will unlock the calendar.

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
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Logout
Funds
Available Funds
NZ$0.00 NZD
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Prepaid Card
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Transfer Center
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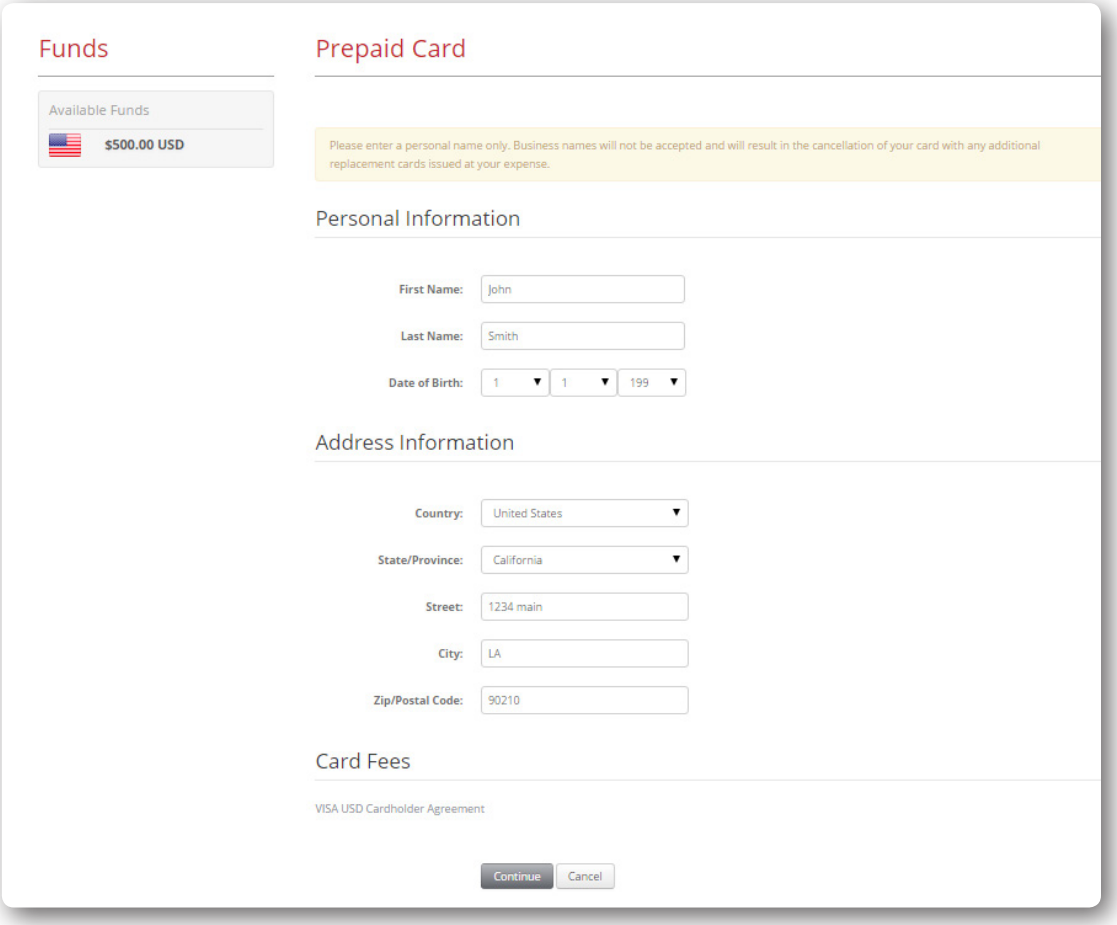
Name
Description
Currency
Country
Auto Transfer
jdoetest
US Bank Account
USD
Yes
Action
Kiwi
New Zealand Bank Account
NZD
No
Action
MACU
US Bank Account
USD
No
Action
smith-**1510
Primary Prepaid Card
USD
No
Activate
Add New Transfer Method

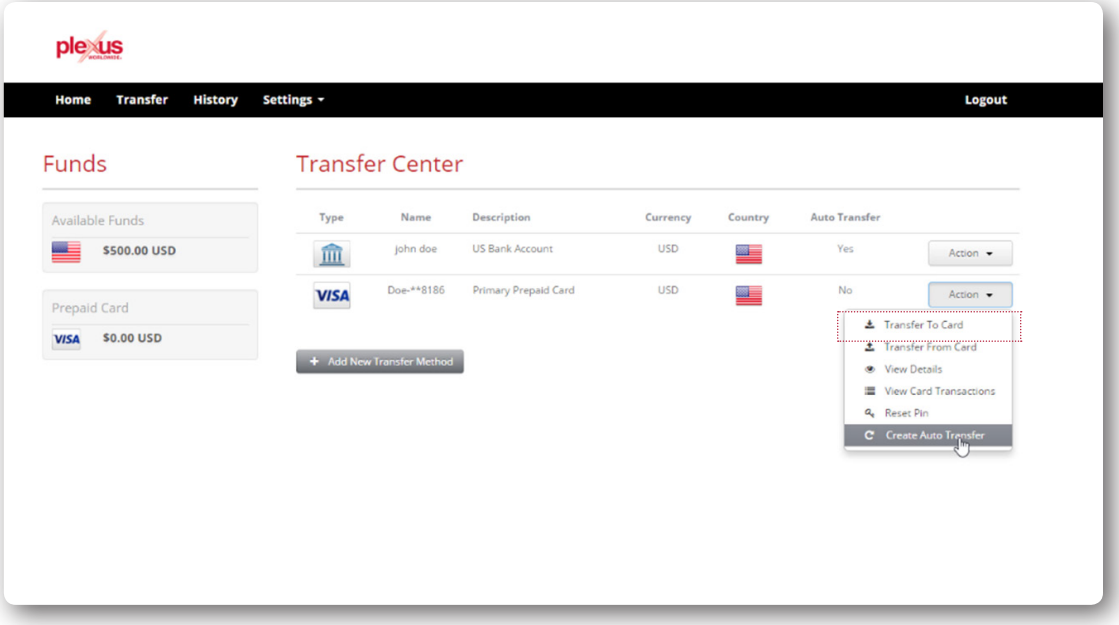
Transfer to a Prepaid Card

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**.



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.

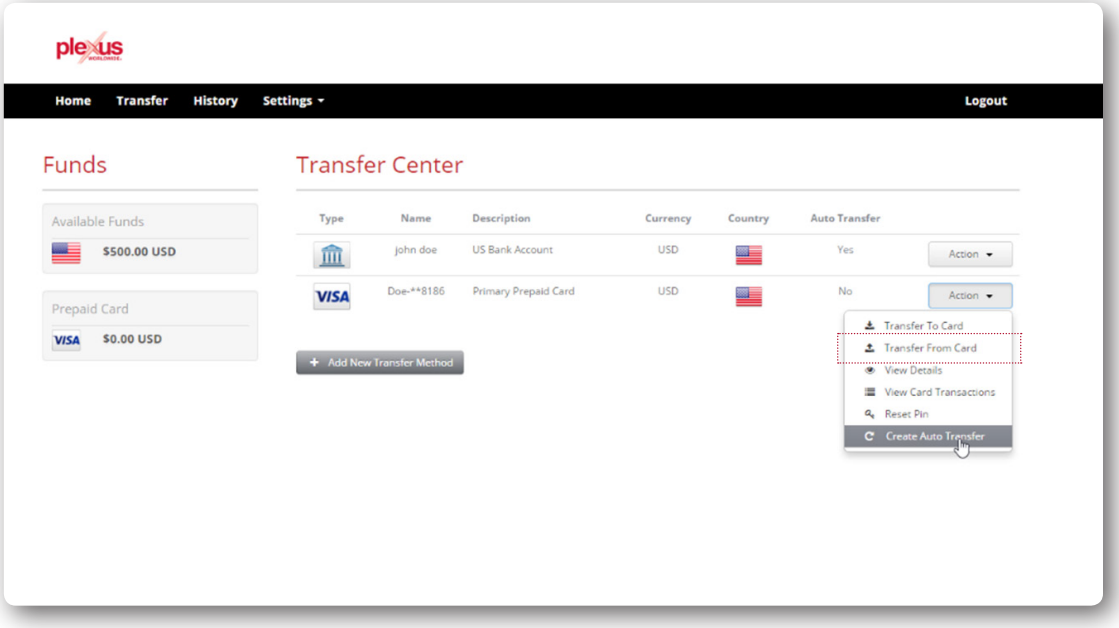
Note: The* **From *dropdown menu may be disabled (as it is in this example). This is because there is only one transfer method available. This field will be enabled once additional transfer methods are activated and loaded with funds (e.g. a bank account).*

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

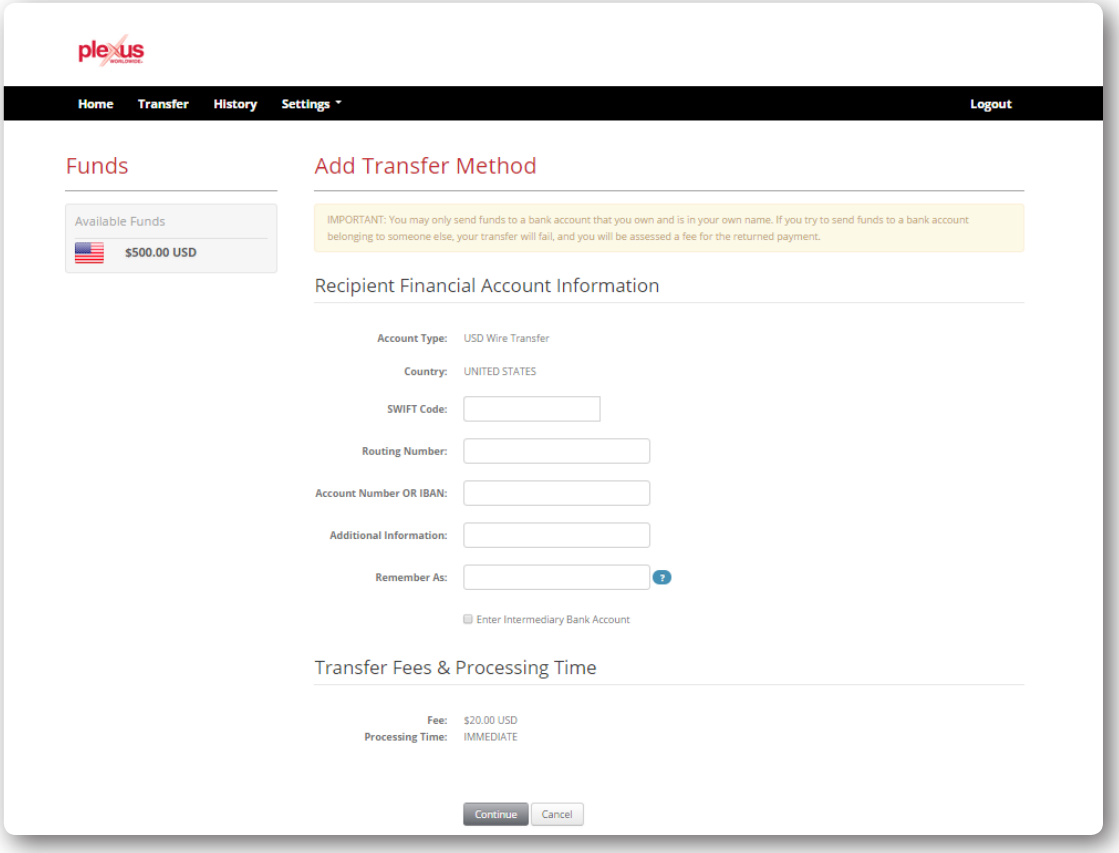
Note: The* **To *dropdown menu may be disabled. This is because there is only one transfer method available (your Pay Portal account). This field will be enabled once additional transfer methods are activated (e.g. a bank account). If the field is enabled, select where you would like to transfer the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

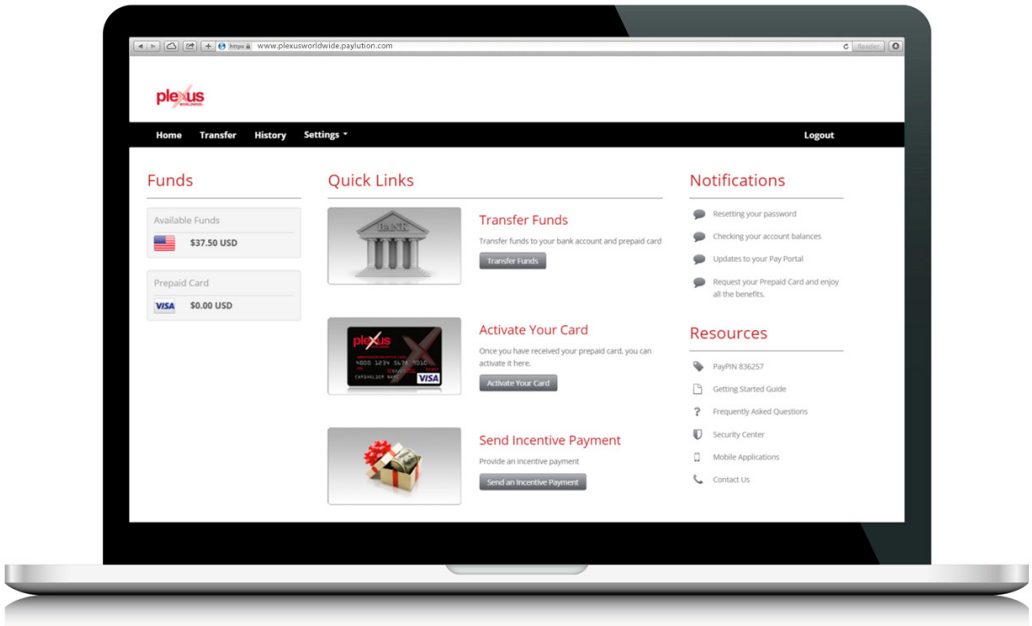
If you wish to add a **Wire Transfer** as a transfer method for your account, you will be required to fill out the recipient's account information. You can also view the fees and estimated processing times at the bottom of the page.



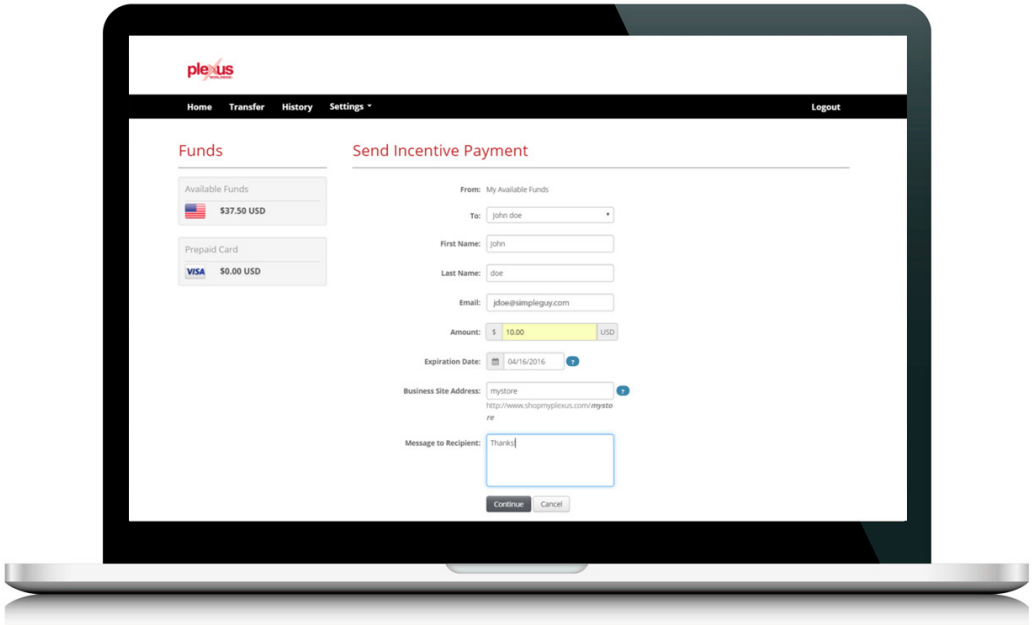
Incentives

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.

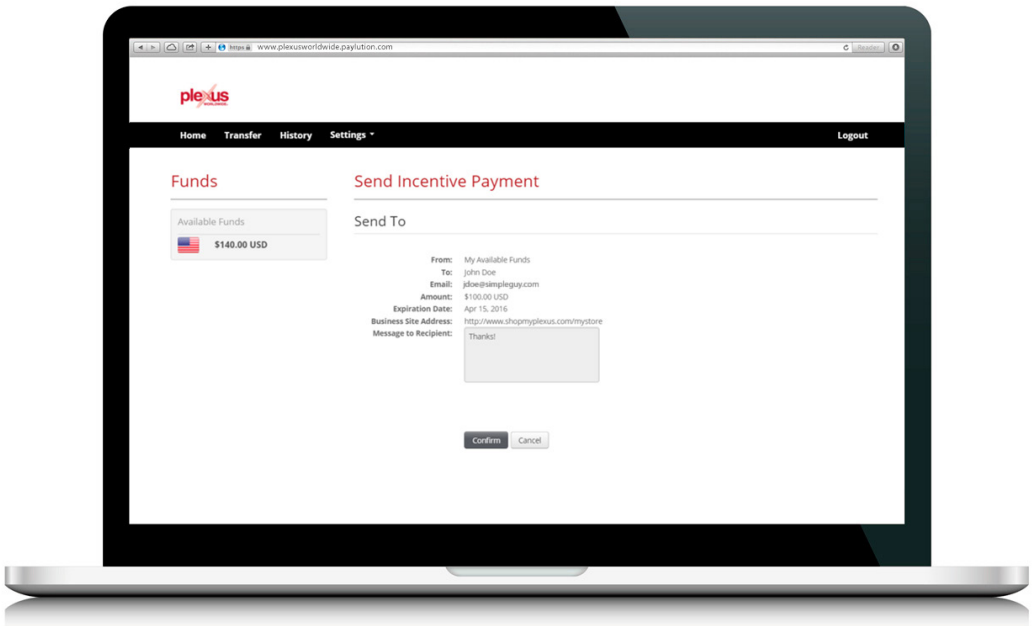
To get started, select **Send Incentive**, under the **Incentive** heading.



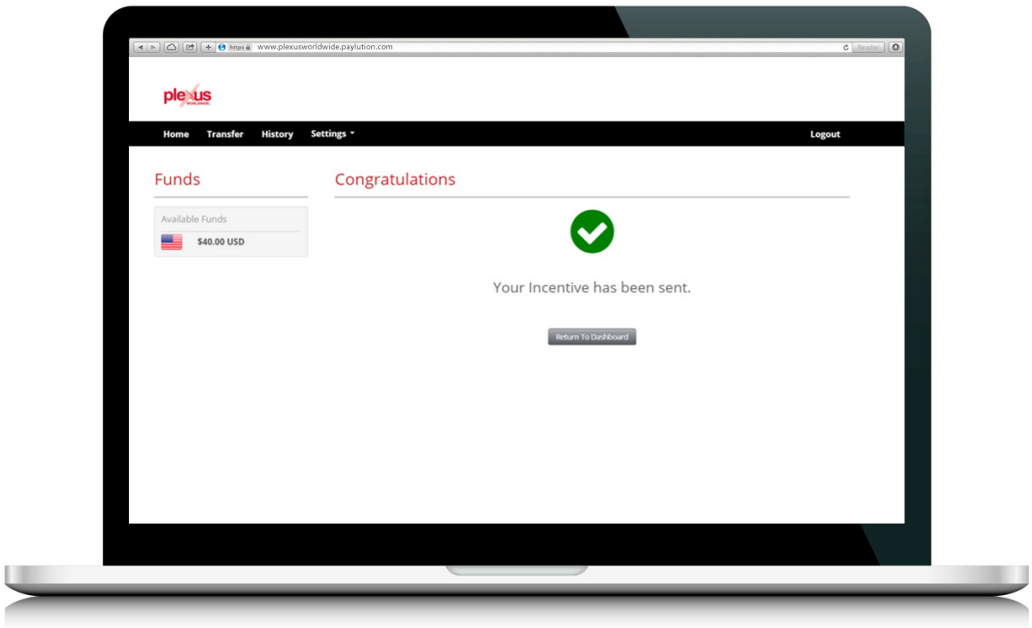
Once you click on **Send an Incentive Payment**, you will be required to fill in the appropriate information for the transaction. The information requested is minimal. Just fill in the amount, the recipient's name and email address, and select an expiration date for the Incentive. Please also note that 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.



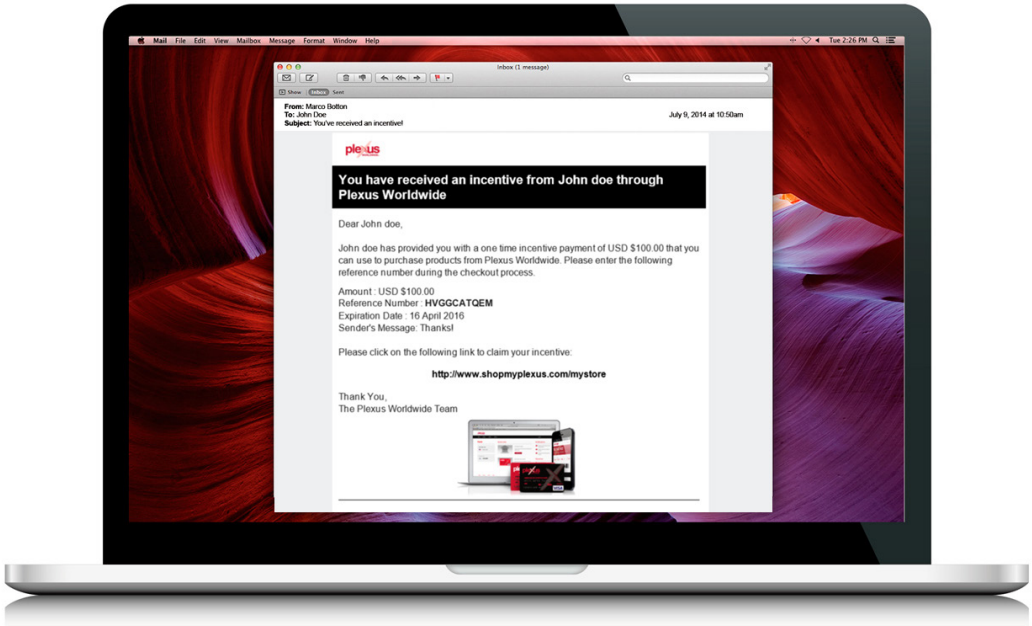
You will then click on **Continue**, and be prompted to **Confirm** the transaction.



You will then view the confirmation page:

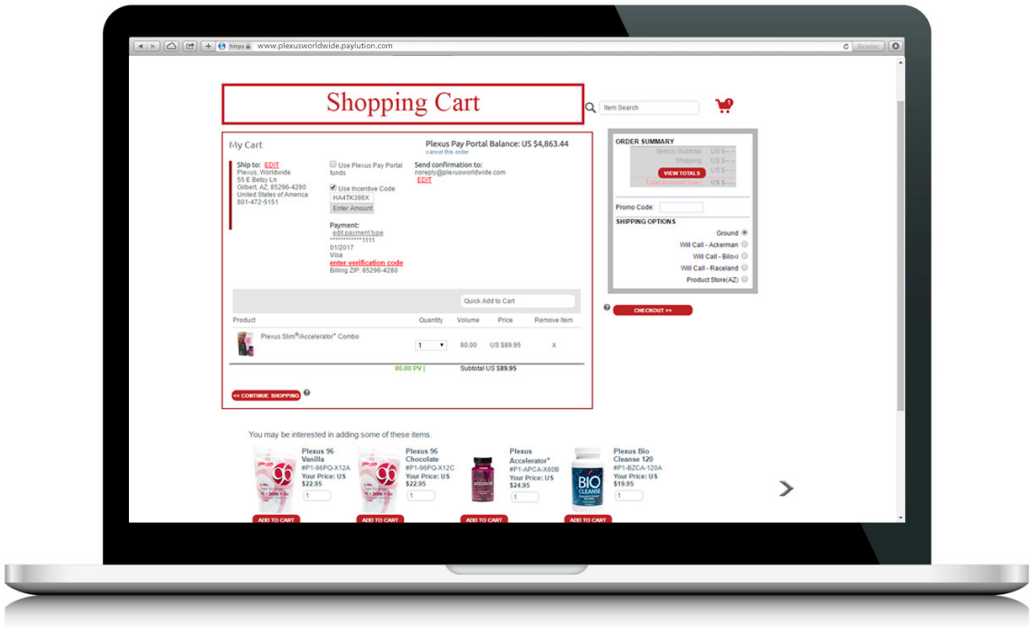


The potential ambassador will now receive a system- generated email notification to their email inbox informing them that they have received their incentive (see below). You will be able to view all of your Incentive transactions from within your regular transaction **History** page.

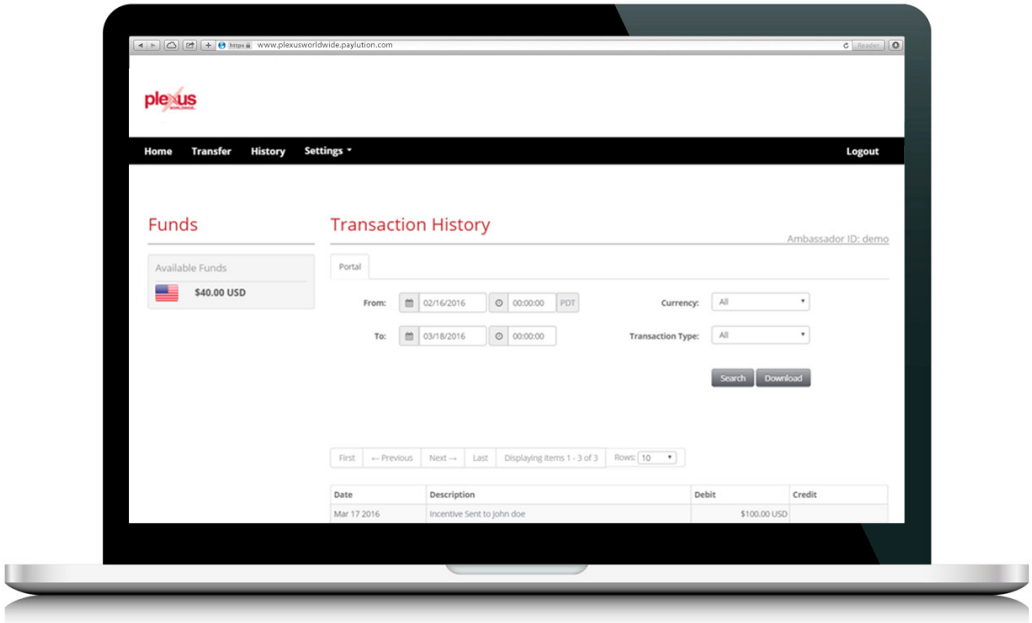


The email will contain an incentive or **coupon** number, which the recipient will use on the Plexus website at checkout (see image below). After the potential ambassador has made their selection on the Plexus website, they will have the opportunity to enter the coupon number before confirming their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

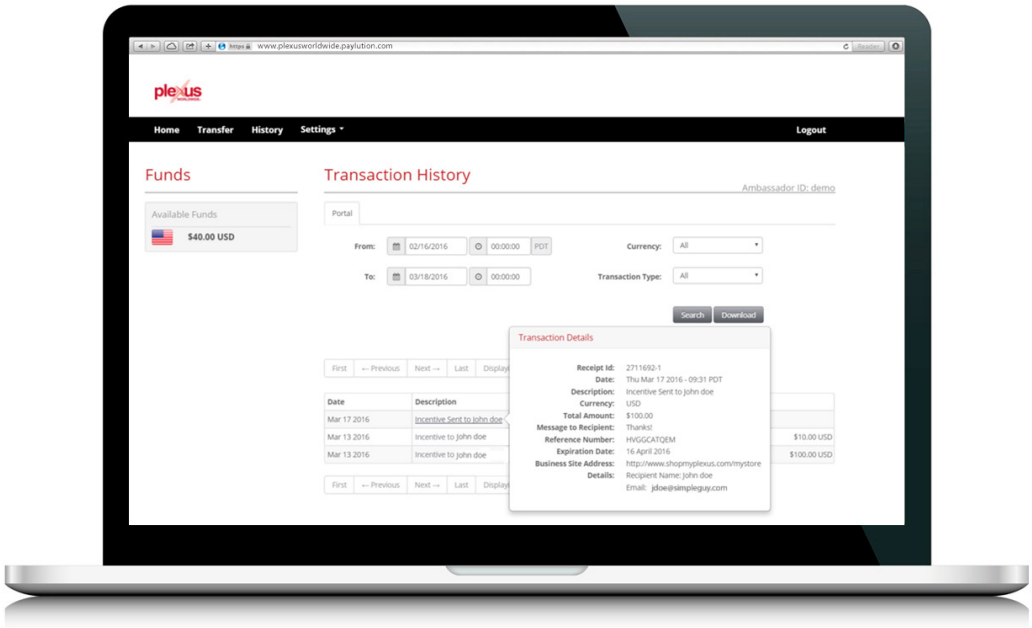
Please note that Incentive funds must be spent in one transaction by the receiver. If the total amount is not used, the remainder will be credited back to the sender's Pay Portal funds, and will no longer be available to the potential ambassador. As the sender, you will see the refunded amount which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



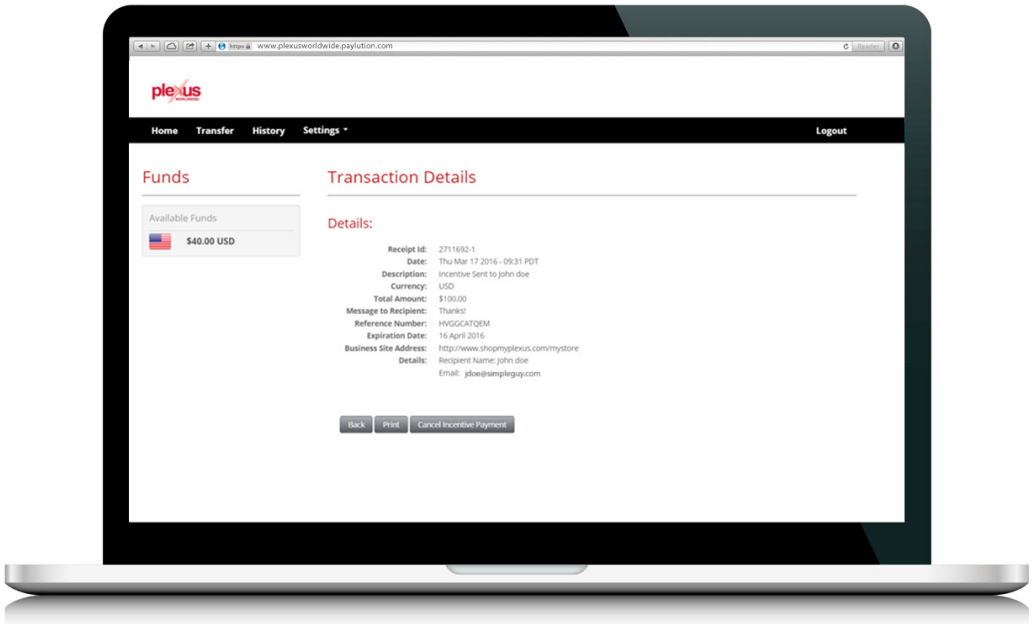
To view your Incentive transactions from your Pay Portal, navigate to **History**. You can filter to specifically search for **'Incentive'** transactions.



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.