



Table of Contents

Business Bill Pay User Guide 3

 Accessing Bill Pay 3

 Add a Payee 3

 Add a Company 3

 Add an Individual 3

 Modify or Delete a Payee 4

 To Delete 5

 To Edit..... 6

 Make a Payment..... 6

 Processing of Payments..... 7

 Modify or Delete a Payment 8

 To Delete 8

 Researching Current and Historical Payment Information 8

 Scheduled Transactions 9

 Payment History..... 9

 Modify or Delete a Funding Account 10

 Primary Users..... 11

 Editing Sub-Users..... 11

 Payments 12

 Transfers 13

 Payees 14

 Options..... 15

 Message Center..... 16

 Approve Authority 17

 Account-To-Account Transfers..... 17

 Adding a Transfer Account 18

 Adding a Transfer Account at Another Institution 18

 Making an Account-to-Account Transfer 19

 Make a Payroll Deposit..... 20

 Set Up an eBill..... 21

 Notifications 22



Demos 25

Contact 25

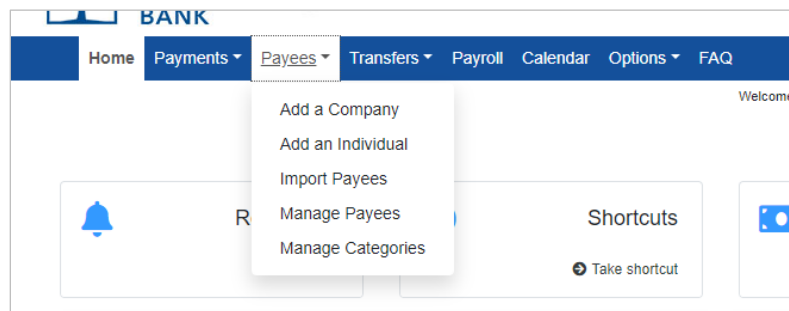
Business Bill Pay User Guide

Accessing Bill Pay

To access bill pay, simply sign in to your business online banking account from HeritageBankNW.com and click on the **Bill Pay** tab.

Add a Payee

1. The first step to making a payment is to add a payee. Go to the **Payees** tab and select **Add a Company** or **Add an Individual Payee**.



Add a Company

1. To add a company, you will be required to input information that can be found on your most recent bill:
 - Payee (company) name
 - Account number
 - Phone number
 - Payee zip code
 - Account holder name

Add an Individual

For individual payees, you can either send them an electronic payment through their bank account or you can mail them a check. If you do an electronic payment, you can have them add their own bank account information or you can add it yourself.



Add an individual

Select a method of payment

Electronic - Sending payments electronically is much more secure than a check in the mail, and it will arrive in as little as 2 business days.

Allow them to provide their banking information

I have the bank account information

Check - I prefer a check be mailed

Mail a check

1. If you have an individual add their own bank account information, you must provide:
 - The individual's email address
 - A one-time keyword of your choosing
 - Share the keyword with the individual
 - The individual will receive an email with a secure link. Using the keyword you provided, the individual can log in and provide his/her bank account information. That bank account information will be securely stored and never displayed to you.

This is a one-time setup process. All future transactions to this individual will result in an email to the individual that you have made a deposit to their specified account.

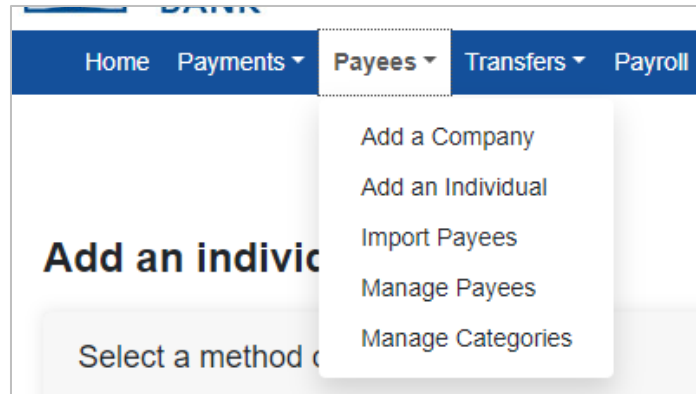
2. If you add an individual's bank account information, you must provide their:
 - Account number
 - Routing number
 - Bank account type

To complete the setup process, you will need to enter a one-time activation code. The code will be sent to you immediately via the delivery method of your choice: phone, text or email.

3. To mail a check, you will need to provide the individual's full name and complete mailing address.

Modify or Delete a Payee

To modify or delete a payee, navigate to the **Payees** tab then click on **Manage Payees** and select **Edit** or **Delete**.



Manage payees

[+ Add payee](#) [Print](#)

Show all payees

[All payees](#) [Companies](#) [Individuals](#)

All Payees

Payees	Account number	Additional items			
Chase (Electronic)	*****8467	Category: Credit Cards Last paid: N/A	Pay	Edit	Delete
AT&T (Electronic)	*****8467	Category: Utilities Last paid: N/A	Pay	Edit	Delete
Moe's Mowers (Check)	*****8467	Category: Expenses Last paid: N/A	Pay	Edit	Delete
Waverly Water Co. (Check)	*****8467	Category: Utilities Last paid: N/A	Pay	Edit	Delete
Vern's Fertilizer (Check)	*****8467	Category: Expenses Last paid: N/A	Pay	Edit	Delete
Seed Indeed Co. (Check)	*****8467	Category: Expenses Last paid: N/A	Pay	Edit	Delete
Cellular One (Check)	*****8467	Category: Utilities Last paid: \$65.00 on 8/14/2023	Pay	Edit	Delete

To Delete

1. Select **Delete** from the All Payees tab.
2. Confirm deletion of the payee. Note: Deleting a payee will cancel any scheduled payments to that payee.



To Edit

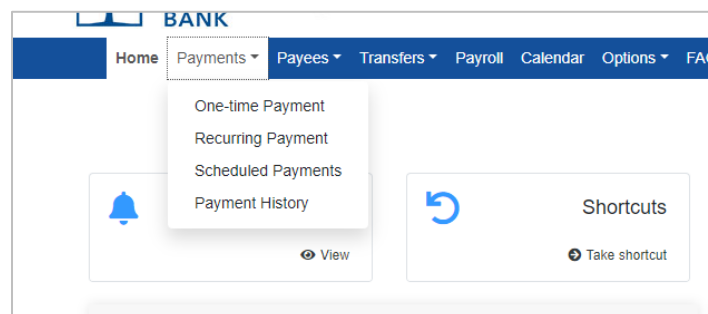
1. Available fields to edit are the account holder name, payee nickname, payee account number, category and default pay from account.
2. Select **Edit** from the All Payees tab.
3. Make the necessary edits and click **Save**. Note: the payee name, phone number and address will need to be changed by clicking the **Submit a Payee Change Request** link as shown below.

The screenshot shows a modal window titled "Edit" with a close button (X) in the top right corner. The form contains the following fields and options:

- Account holder name:** Text input field containing "Joe's Landscaping".
- Payee nickname:** Text input field containing "Chase".
- Payee account number:** Text input field containing "6412546878467".
- Category:** Dropdown menu with "Credit Cards" selected.
- Default pay from:** Dropdown menu with "Primary Checking" selected.
- Need to change more info about this payee?:** A blue link labeled "Submit a payee change request."
- Buttons:** "Cancel" and "Save" buttons at the bottom right.

Make a Payment

1. Add the person or company you wish to pay using the steps above.
2. Go to the **Payments** tab.
3. You can choose to make a single payment (one-time payment) or a recurring payment (recurs on a regular basis). For recurring payments, you can also select the payment frequency and the series end date.





4. Then enter:
 - The account you want to pay from
 - The amount of the payment
 - The date of the payment
5. Review the payment details.

Payment summary

Our goal is to deliver your payment securely and quickly.

Some payments will process using a single-use, pre-paid card, which means you will not recognize card numbers within payment confirmation communications you receive.

Payee	From account	Amount*	Process*
Cellular One <small>Check ****8467 Last paid: 6/14/2023 Amount paid: \$65.00</small>	Primary Checking	\$	6/26/2023 <small>Est arrival: 6/30/2023</small> Remove

[Invoice/Comment](#)

[Back](#) [Review](#) [Pay all](#)

By clicking Pay all, you authorize us to debit the indicated account for the amount of each payment.

6. Click **Submit** to schedule the payment. Each payment will have a confirmation number.

Processing of Payments

Some payments are made by check, but most scheduled payments are sent electronically and funds are withdrawn from your account on the process date.

The processing date depends on whether it's an electronic payment or a check payment.

- Electronic Payments – the process date is two days prior to the due date
- Check Payments – the process date is determined by the location of the payee and the past history of delivery.

Payment summary

Our goal is to deliver your payment securely and quickly.

Some payments will process using a single-use, pre-paid card, which means you will not recognize card numbers within payment confirmation communications you receive.

Payee	From account	Amount*	Process*
Cellular One <small>Check ****8467 Last paid: 6/14/2023 Amount paid: \$65.00</small>	Primary Checking	\$	6/26/2023 <small>Est arrival: 6/30/2023</small> Remove
American Express <small>Check ****8467 Last paid: N/A Amount paid: N/A</small>	Primary Checking	\$	6/26/2023 <small>Est arrival: 6/28/2023</small> Remove
AT&T	Primary Checking	\$	6/26/2023 Remove

[Invoice/Comment](#)



Modify or Delete a Payment

To modify or delete a payment, navigate to the **Payments** tab and select **Scheduled Payments**.

Scheduled payments						
Search filter			Print			
Payee	Amount	Process date				
American Express Check Confirmation # 40	\$999.00	07/05/2023	Details	Approve	Edit	Stop
AT&T Check Confirmation # 2	\$65.00	06/29/2023	Details	Edit	Stop	
Chase Check Confirmation # 1	\$150.00	06/29/2023	Details	Edit	Stop	
MasterCard Check Confirmation # 41	\$999.00	07/11/2023	Details	Approve	Edit	Stop
Moe's Mowers Check Confirmation # 3	\$200.00	07/03/2023	Details	Edit	Stop	
Seed Indeed Co. Check Confirmation # 6	\$50.00	07/10/2023	Details	Edit	Stop	
Vern's Fertilizer Check Confirmation # 5	\$250.00	07/10/2023	Details	Edit	Stop	
Waverly Water Co. Check Confirmation # 4	\$50.00	07/05/2023	Details	Edit	Stop	
Subtotal	\$2,763.00		Primary Checking *****1232			

To Delete

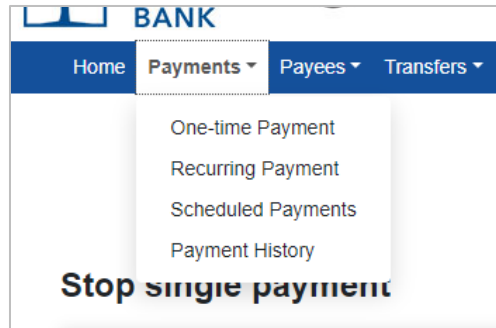
1. Select **Stop** to the right of the scheduled payment.

Scheduled payments						
Search filter			Print			
Payee	Amount	Process date				
American Express Check Confirmation # 40	\$999.00	07/05/2023	Details	Approve	Edit	Stop

2. Select **Submit** to confirm deletion. The next screen will confirm deletion.

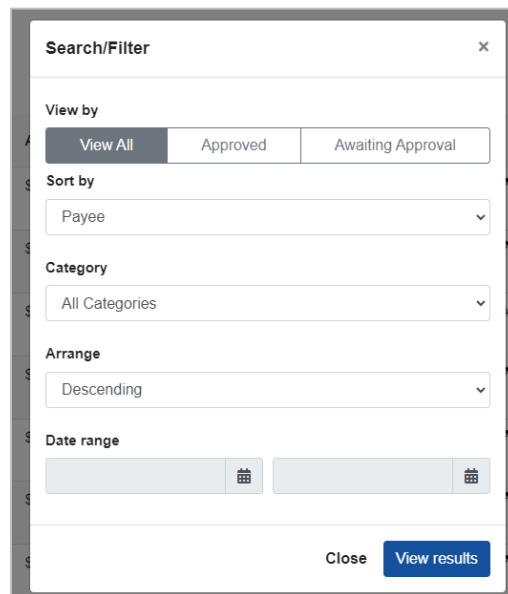
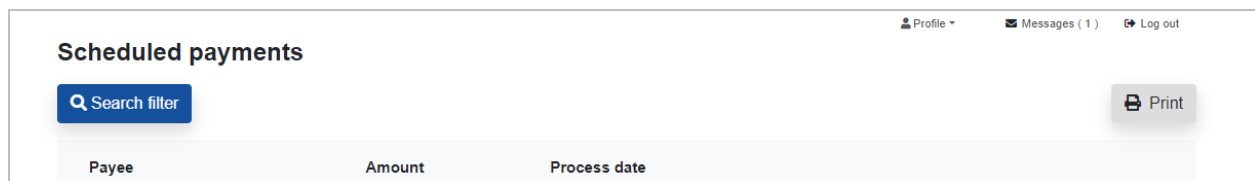
Researching Current and Historical Payment Information

To view schedule payments or transaction history, navigate to the **Payments** tab and select either **Scheduled Transactions** or **Payment History**.



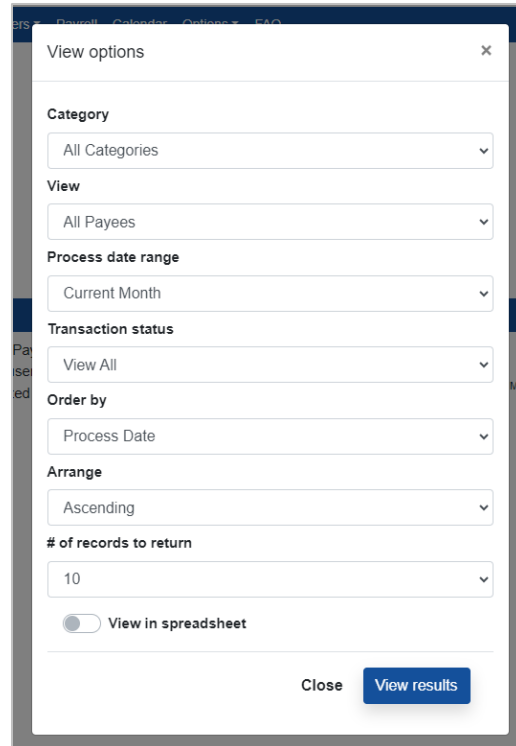
Scheduled Transactions

Once you select the **Scheduled Transactions**, all your payments will be listed. There is a search filter button if you have a lot of payments scheduled. Enter the criteria and click to view the results.



Payment History

You can search for historical transactions by category, payee and process date range and transaction status. You can arrange them by process date, paid from account and confirmation number. You can also opt to view them in a spreadsheet.



View options

Category
All Categories

View
All Payees

Process date range
Current Month

Transaction status
View All

Order by
Process Date

Arrange
Ascending

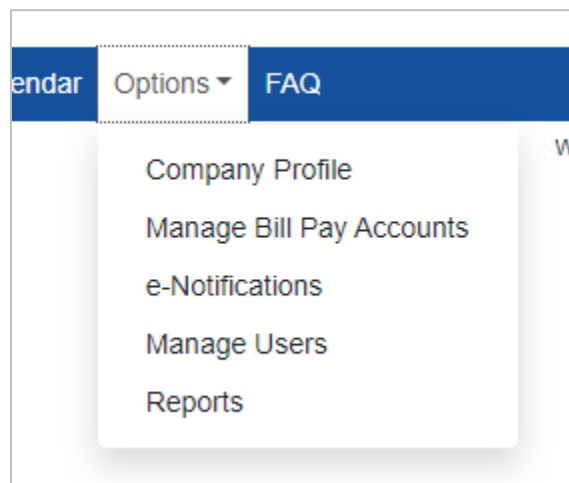
of records to return
10

View in spreadsheet

Close View results

Modify or Delete a Funding Account

To modify or delete a funding account, go to the **Options** tab and select **Manage Bill Pay Accounts**. Click either **Edit** or **Delete** to the right of the account.





Primary Users

Primary users (admins) will complete an enrollment form accessed through business online banking. The primary user will receive an email when their enrollment has been completed.

Note: Sub-users must be established users within Heritage Direct with bill pay permissions before they are in the bill pay system. Sub-users must complete the enrollment process in the bill pay system before the primary user can entitle and edit them.

Once the primary user has been created, they will have to ability to manage sub-users and define what specific action they can take in business bill pay.

Editing Sub-Users

1. Go to the **Options** tab and select **Manage Users**. The primary user will need to answer a challenge question to proceed.
2. Select permission settings for the user you wish to edit from the list.

Manage users					
Last name	First name	User ID	Last login		
Smith <small>Primary User</small>	Laurie	626202314294486	5/30/2023	Edit	Permissions
Doe	John	626202314294486-1	6/23/2023	Edit	Permissions
Smith	Cash	626202314294486-2	6/17/2023	Edit	Permissions
Winslow	Frank	626202314294486-3	6/24/2023	Edit	Permissions
Cash	Lisa	626202314294486-4	6/18/2023	Edit	Permissions
Johnson	Jane	626202314294486-5	6/10/2023	Edit	Permissions
Johnson	Joe	626202314294486-6	6/7/2023	Edit	Permissions
Cook	Jim	626202314294486-7	6/21/2023	Edit	Permissions
Smith	Suzy	626202314294486-8	6/25/2023	Edit	Permissions

3. Select the type of activity you want to add or remove specific settings for.



The screenshot displays the user management interface for a Business Bill Pay user. At the top, there are navigation links for Profile, Messages (1), and Log out. The main section is titled "User Information" and shows the user's name as "Cash Smith" and their user type as "Custom". A "Restore Permissions" button is located below this information. A note states: "To edit permissions: Use the tabs below to add or remove permissions. The current permissions will be pre selected." Below this note are several tabs: "User information", "Payments & payroll", "Transfers", "Payees", "Options", "Message center", and "Approve authority". The "Current Permissions" section is expanded, showing a list of permissions with checkmarks indicating they are active. The permissions are organized into categories: Payments, Payroll, Transfers, Payees, Options, Message Center, and Approve Authority.

User Information

User name Cash Smith

User type Custom

Restore Permissions

To edit permissions: Use the tabs below to add or remove permissions. The current permissions will be pre selected.

User information Payments & payroll Transfers Payees Options Message center Approve authority

Current Permissions

- Payments
 - ✓ Schedule Bill Payments (all)
 - ✓ Schedule Email Payments(all)
 - ✓ Establish Payment Caps(all)
 - ✓ Designate Pay From Accounts
 - ✓ Payment History
- Payroll
 - ✓ Payroll Deposits
 - ✓ Add Employees
- Transfers
 - ✓ Add Transfer Accounts
 - ✓ Schedule Transfers (all)
 - ✓ Establish Transfer Caps (all)
 - ✓ Transfer History
- Payees
 - ✓ Manage Payees
- Options
 - ✓ Access Reports
 - ✓ Update Company Info
 - ✓ Manage Billpay Users
 - ✓ Manage Pay From Accounts
 - ✓ Schedule Reminders
- Message Center
 - ✓ Access Message Center
- Approve Authority
 - ✓ Approve Transactions

Payments

- Schedule Bill Payments – allow user to schedule payments to any payee or to specific payees that you choose
- Schedule Email Payments – allow user to schedule payments to all email payees or to specific email payees that you choose
- Establish Payment Caps – set specific payment caps for each payee or set a payment cap that applies to all payees. The user will not be able to exceed this cap when scheduling payments.
- Designate Pay from Accounts – determine which accounts the user can make payments from
- Payroll Deposits – Allow the user to create payroll payments
- Payment History – Allow viewing of past payments



Edit Payment Permissions

User name Cash Smith
User type Custom

[Restore Permissions](#)

[User information](#) [Payments & payroll](#) [Transfers](#) [Payees](#) [Options](#) [Message center](#) [Approve authority](#)

Schedule bill payments

[Schedule to all bill payees](#) [Schedule to specific bill payees](#)

Schedule email payments

[Schedule to all email payees](#) [Schedule to specific email payees](#)

Establish payment caps

Payment caps allow you to set a specific amount that Cash Smith cannot exceed when scheduling payments to particular payees.

Payee payment cap

\$ 250,000.00

[Payment Cap to all bill payees](#) [Payment Caps to specific bill payees](#)

Designate pay from accounts

The designated pay-from accounts will grant permission for Cash Smith to use those accounts when submitting payments. If no account is selected, payments from all associated accounts will be permitted. When selecting one or more accounts, payments from only those accounts will be permitted.

Hobby Account + Payroll +

[Admin user list](#) [Cancel](#) [Save](#)

Transfers

- Add Transfer Account – allow access to add transfer accounts
- Schedule Transfer – allow scheduling of transfers from all or only specific accounts
- Establish Transfer Caps – allow transfers to all up to the limit or designate which transfer accounts are available and caps for each
- Transfer History – allow viewing of transfer history



Edit Transfer Permissions

User name Cash Smith
User type Custom

Restore Permissions

User information Payments & payroll **Transfers** Payees Options Message center Approve authority

Add transfer accounts

Schedule Transfer

All transfer accounts Specific transfer accounts

Establish transfer caps
Transfer caps allow you to set a specific amount that Cash Smith cannot exceed when scheduling transfers.

Transfer cap
\$ 250,000.00

Cap all transfers Cap specific transfers

Transfer History

Admin user list Cancel Save

Payees

- Manage Payee – allow sub-user to manage payees
Note: It's recommended to restrict the combined permissions of "adding payees" and "scheduling payments" to only owners, managers, or highly trusted individuals in your organization to prevent fraud.
- Manage Employee – allow sub-users to manage employees in the payroll module



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Options

- Access Reports – access to the payments processed, payment changes, payments stopped, payees added, transfers processed, and outstanding check reports
- Update Company Info – ability to change company address details
- Manage Bill Pay Users – ability to edit sub-user profiles
- Manage Pay from Accounts – ability to add, edit, and delete pay from accounts
- Schedule Reminders – ability to add and delete reminders for bills, transfers, and individuals



Edit Option Permissions

User name Cash Smith

User type Custom

Restore Permissions

User information Payments & payroll Transfers Payees Options Message center Approve authority

Access reports

Update company info

Manage bill pay users

Manage pay from accounts

Schedule reminders

Admin user list Cancel Save

Message Center

- Access to the secure message center

Edit Message Center Permissions

User name Cash Smith

User type Custom

Restore Permissions

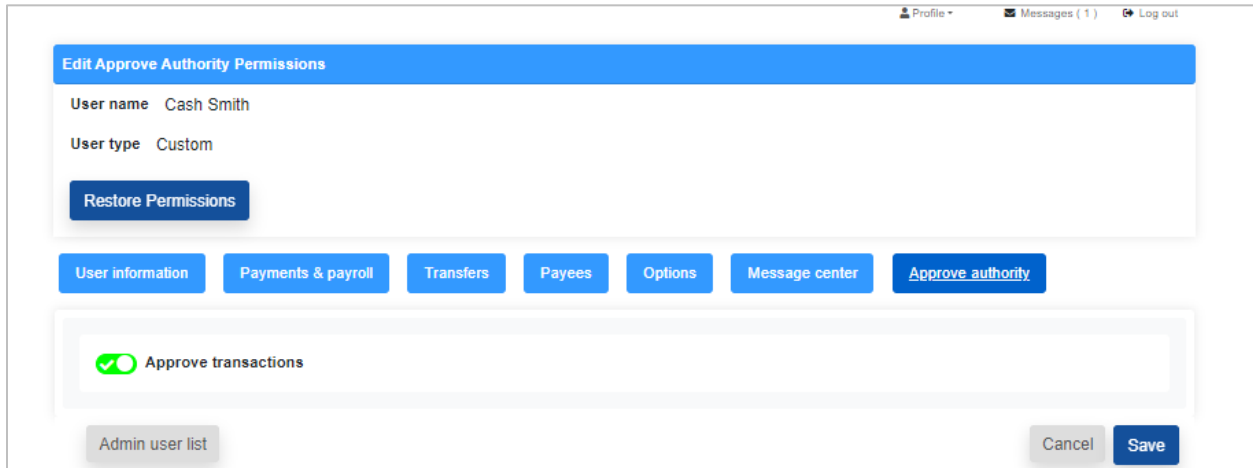
User information Payments & payroll Transfers Payees Options Message center Approve authority

Message center

Admin user list Cancel Save

Approve Authority

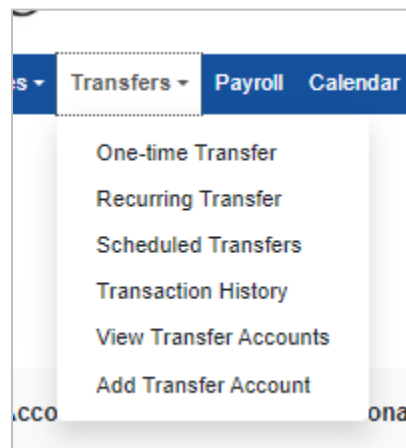
- Allow user to approve transactions



The screenshot shows a web interface for editing permissions. At the top, there are links for 'Profile', 'Messages (1)', and 'Log out'. Below is a blue header 'Edit Approve Authority Permissions'. The user details are 'User name: Cash Smith' and 'User type: Custom'. A 'Restore Permissions' button is present. A row of tabs includes 'User information', 'Payments & payroll', 'Transfers', 'Payees', 'Options', 'Message center', and 'Approve authority'. The 'Approve authority' tab is active, showing a toggle switch for 'Approve transactions' which is currently turned on (green). At the bottom, there are 'Admin user list', 'Cancel', and 'Save' buttons.

Account-To-Account Transfers

1. Go to the Transfers tab and select **View Transfer Accounts**.



2. You will first need to set up your transfer account from Heritage Bank or another institution.



Transfer accounts

Add a transfer account

Where is your transfer account located?

At my institution

By adding an account from Heritage Bank NW, you will be able to pay bills and transfer funds. Please enter your account information on the next screen.

[Go there now](#)

At another institution

You can add a transfer account that is located at another institution. Please enter your account information on the next screen.

[Go there now](#)

Adding a Transfer Account

1. Fill in the account details and click submit.
2. You will receive a secure message once the account has been added and it will now appear in your menu of transfer accounts.

Transfer accounts

Add a transfer account

Important information
To add an account from Heritage Bank NW, please complete the information below.

Account holder name *

Account nickname *

Account type *

Account number *

Confirm account number *

[Review](#)
[Submit](#)

Adding a Transfer Account at Another Institution

1. Fill in the account details and click submit.



2. You will receive a secure message once the account has been added at the other institution and it will now appear in your menu of transfer accounts.

Profile - Messages (1) Log out

Transfer accounts

Add a transfer account

Setup a transfer account
To add an account outside of Heritage Bank NW to transfer to, please complete the form below.

Account holder name *

Account nickname *

Account type *

Financial institution name *

Routing number *

Confirm routing number *

Account number *

Confirm account number *

Making an Account-to-Account Transfer

To make a single transfer:

1. Select **One-Time Transfer** from the transfer menu.
2. Choose the account to transfer from, the account to transfer to, dollar amount, and process date.
3. Review the information carefully and click submit.



One-time transfer

+ Add transfer entry

From account * To account * Amount * Select date *

Select an account Select an account \$ 6/26/2023

Review Submit

To make a recurring transfer:

1. Select **Recurring Transfer** from the transfer menu.
2. Choose the account to transfer from, the account to transfer to, dollar amount, recurrence frequency, number of payments, and end date (if applicable).
3. Choose the series options in case the payment date falls on a holiday or weekend.
4. Review the information carefully and click submit.

Recurring transfer

Details

Transfer from* Transfer to* Amount*

Select account Select account \$

Add comment

Series options

What if the payment falls on a holiday or weekend?

Pay before Pay after

Frequency settings

Frequency*

Select frequency

Would you like this series to end?*

No

On this date

After a set # of payments

Review Submit

Note: Account-to-account transfers have a default limit of \$2,500 per day.

Make a Payroll Deposit

1. Go to the **Payroll** tab.
2. Select **Payroll Deposits**.
3. If this is your first payroll deposit, the payroll setup wizard will walk you through a simple three-step process.



4. First, set up the payroll schedule.
5. Once complete, you will be taken to the **Payroll Deposits** page. From here, you can:
 - Pay employees
 - View and edit employee information
 - Edit your payroll schedule
 - View scheduled deposits
 - View payroll history

The screenshot shows a 'Payroll' dashboard for 'Joe's Landscaping'. It contains six summary cards:

- Total employees:** 5. Includes 'Edit' and 'Add' buttons.
- Payroll schedule:** Monthly on the last business day. Includes an 'Edit' button.
- Next payroll:** 6/30/2023. Includes a 'Schedule new' button.
- Past payroll:** 6/20/2023. Includes a 'View history' button.
- Extra payroll:** None. Includes a 'Schedule new' button.
- All scheduled payroll:** Includes a 'View' button.

Note: Payroll must be submitted and approved by 1:00 pm PT two days prior to the effective date. The Payroll automation feature cannot accept a NACHA file. Please contact us for additional information to determine which option will best fit your payroll needs.

Set Up an eBill

1. Before setting up an eBill, you must first add a payee. To do this, follow the steps above in the **Add a Payee** section.

Payee	Account Number	Additional Items
Electric Bill (Check) setup eBill PDF	*****3455	Category: Unassigned Last Paid: N/A
Gas Bill (Check) setup eBill PDF	*****4567	Category: Unassigned Last Paid: N/A
Phone Bill (Check) setup eBill PDF	*****3444	Category: Unassigned Last Paid: N/A

2. Now you'll see an eBill sign up window where you'll need to enter your login credentials for the payee's website.

3. Then you will be asked to confirm your eBill account. You will see the biller name, account name and your account number.
4. Once you've validated that your account is correct, click **Complete Setup**.
5. You will then receive a confirmation email. You will continue to receive paper statements from your payee unless you contact your payee to stop sending statements.
6. When your eBill payee has been added and confirmed, you can simply select the pay link under the payee's name to schedule a payment.

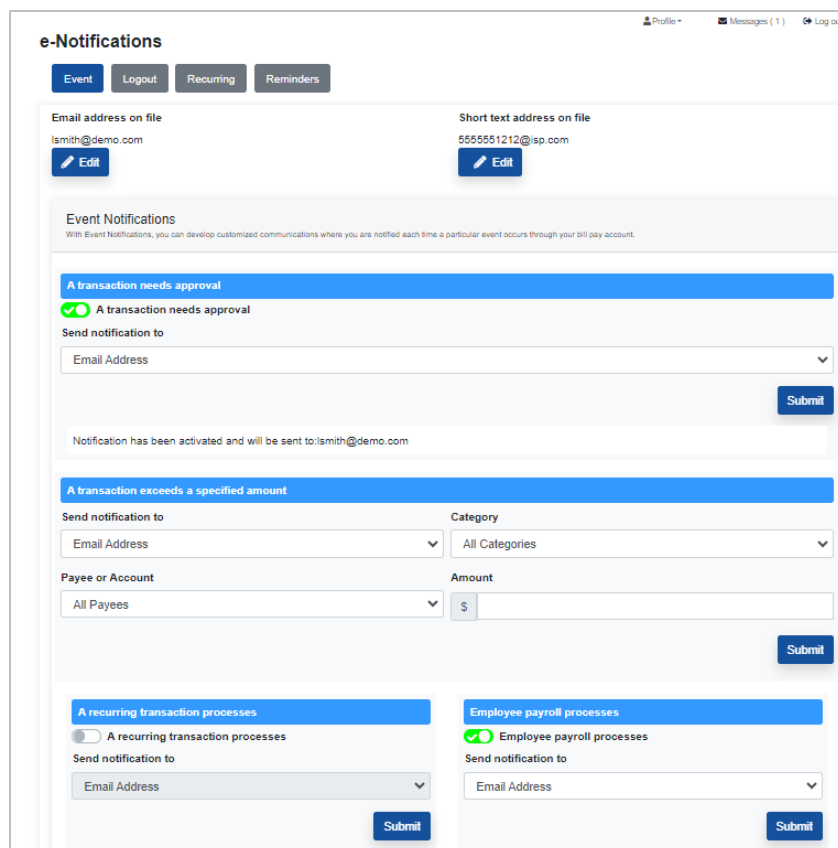
Notifications

Notifications allow the business to monitor activity and assist with detecting fraud on their bill pay account. Notifications can be sent by email, text message, or both. To configure your notifications, navigate to the **Options** tab and select **e-Notifications**.

The notifications “a transaction needs approval,” “payee information has been updated,” “added payees,” and “added transfer accounts” cannot be turned off.

There are four types of notifications available:

1. Event – notifications are sent when the subscriber customizes their preferences for the particular activities below.



e-Notifications Profile Messages (1) Log out

Event Logout Recurring Reminders

Email address on file: lsmith@demo.com Edit

Short text address on file: 5555551212@isp.com Edit

Event Notifications
With Event Notifications, you can develop customized communications where you are notified each time a particular event occurs through your bill pay account.

A transaction needs approval
 A transaction needs approval
Send notification to: Email Address Submit
Notification has been activated and will be sent to:lsmith@demo.com

A transaction exceeds a specified amount
Send notification to: Email Address Submit
Category: All Categories
Payee or Account: All Payees
Amount: \$ Submit

A recurring transaction processes
 A recurring transaction processes
Send notification to: Email Address Submit

Employee payroll processes
 Employee payroll processes
Send notification to: Email Address Submit



A single transaction processes
 A single transaction processes
Send notification to
Email Address
Submit

A new message in my message center
 A new message in my message center
Send notification to
Email Address
Submit

A transfer account is approved
 A transfer account is approved
Send notification to
Email Address
Submit

A pay from account is approved
 A pay from account is approved
Send notification to
Email Address
Submit

Notification has been activated and will be sent to: lsmith@demo.com

Payroll employee's information has been updated
 Payroll employee's information has been updated
Send notification to
Both
Submit

Notification has been activated and will be sent to: lsmith@demo.com & 5555551212@isp.com

Payee information has been updated
 Payee information has been updated
Send notification to
Email Address
Submit

Notification has been activated and will be sent to: lsmith@demo.com

Payee or account is activated with an activation code
 Payee or account is activated with an activation code
Send notification to
Email Address
Submit

Notification has been activated and will be sent to: lsmith@demo.com

Email payee completes authentication
 Email payee completes authentication
Send notification to
Email Address
Submit

Notification has been activated and will be sent to: lsmith@demo.com

2. Logout – this is sent each time the subscriber signs out of bill pay and generates a summary of the activities in that session. Added payees and transfer accounts are a default notification and cannot be turned off.



The screenshot shows the 'e-Notifications' page with the 'Logout' tab selected. It includes fields for 'Email address on file' (ismith@demo.com) and 'Short text address on file' (5555551212@isp.com), both with 'Edit' buttons. Below is the 'Logout Notifications' section, which states: 'At the end of each bill pay session, you can receive a customized email summary of your bill pay activities.' A blue bar prompts the user to 'Please select which items you would like to receive each time you log out.' Below this are seven toggle options: 'Scheduled transactions', 'Added payees', 'Added transfer accounts', 'Deleted payees', 'Deleted transfer accounts', 'Skipped and stopped transactions', and 'Added admin users'. A 'Submit' button is located at the bottom right.

3. Recurring – this is sent on the frequency of the subscriber's choice.

The screenshot shows the 'e-Notifications' page with the 'Recurring' tab selected. It includes the same email and short text address fields as the previous screenshot. Below is the 'Recurring Notifications' section, which states: 'These email notifications will provide a list of bill pay information in which you customize how often it is received.' There are three notification categories, each with a 'How often' dropdown menu and a 'Submit' button: 1. 'A list of all scheduled payments and transfers' with a 'Select Frequency' dropdown. 2. 'A list of all payees, transfer accounts and employees' with a 'Select Frequency' dropdown. 3. 'A list of all transaction history' with a 'How often' dropdown (labeled 'Select Frequency'), a 'Category' dropdown (set to 'All Categories'), and a 'Payee or account' dropdown (set to 'All Payees').



4. Reminders – these are reminders to pay a bill with the option to add the reminder to their Microsoft Outlook calendar.

e-Notifications Profile Messages (1) Log out

Event Logout Recurring **Reminders**

Email address on file
lsmith@demo.com
[Edit](#)

Short text address on file
5555551212@isp.com
[Edit](#)

Reminders Notifications
You can schedule reminders for each time you need to schedule a payment or transfer funds.

[+ Add reminder](#)

Pay to	Category	Reminder date	Frequency	Send to
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Demos

Please [view a short video](#) to see the enhanced features and benefits of business bill pay or experience an [interactive demo](#).

Contact

If you have any questions, please email BusinessBillPay@HeritageBankNW.com or call 844.510.4659.