

ClickSWITCH

Direct Deposit Switch Scenarios

Scenario 1: Known Organization with No Split

1. Select a Verified result from the company search and click Continue.

So, who pays you?

Search for depositors like your employer, social security benefit or other recurring deposits below to get started.

Select  Verified results to make your switch go even faster.

University of Minnesota Payroll Services 178 D

PREVIOUS

CONTINUE

2. Select an account and click Continue.

Where would you like your deposit to go?

Select from the options below to continue making the switch.

SELECT ACCOUNT

DEMO Checking - 123456789 (Checking) ▼

CONTINUE

PREVIOUS

SAVE & CONTINUE LATER

3. Answer form questions and click Continue.

Great! Lets get some info about your switch for University of Minnesota

You might want to have an old paystub handy to help you answer.

SSN*

6789123123

Employee ID Number

123

*Indicates required field.

CONTINUE

PREVIOUS

SAVE & CONTINUE LATER





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4. Confirm the Switch and Deposit Information and click Submit.

So, just to confirm.

So, who pays you?	 Edit Switch
DEPOSITOR	University of Minnesota
SSN	6789123123
EMPLOYEE ID NUMBER	123

Deposit Information	 Edit Deposit Information
DEPOSIT TO:	DEMO Checking - x6789 (Checking)
DEPOSIT DESCRIPTION:	Remainder

SUBMIT

PREVIOUS

SAVE & CONTINUE LATER

5. Your direct deposit is on its way!



Your direct deposit is on its way!

ADD ANOTHER DIRECT DEPOSIT

IM DONE FOR NOW

ClickSWITCH


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Scenario 2: Unknown Organization – Google Result

1. Select a Google result (non-verified) from the company search and click Continue. You will see a Google result after clicking “See More Results” at the bottom of a Verified company list if companies in your area match what’s been typed in.

So, who pays you?

Search for depositors like your employer, social security benefit or other recurring deposits below to get started.

Select  Verified results to make your switch go even faster.

2. Provide the type of deposit you are receiving and click Continue.

So, who pays you?

The depositor you have selected is not yet in our database. Please add as much of the following information as you can to help us identify this depositor in the Notes section below.

DEPOSITOR:

MINNESOTA ZOO GIFT SHOP

ADDRESS:

13000 Zoo Boulevard
Apple Valley, MN 55124-4621
US

(651) 431-3090

WEBSITE:

https://shop.mnzoo.org/en_US/



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3. Select an account and either select "Remainder" for the full amount to be deposited or choose to deposit a certain amount or percentage into that account. Click Continue.

Where would you like your deposit to go?

Select from the options below to continue making the switch.

SELECT ACCOUNT

DEMO Checking - 123456789 (Checking) ▼

SELECT SPLIT TYPE ⓘ

AMOUNT

PERCENTAGE

REMAINDER

Remainder

CONTINUE

PREVIOUS

SAVE & CONTINUE LATER

4. Answer form questions and click Continue.

Great! Lets get some info about your switch for
Minnesota Zoo Gift Shop

You might want to have an old paystub handy to help you answer.

SSN - Last 4*

6789

ID Number

123

*Indicates required field.

CONTINUE

PREVIOUS

SAVE & CONTINUE LATER





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5. Confirm the Switch and Deposit Information and click Submit.

So, just to confirm.

So, who pays you?		 Edit Switch
DEPOSITOR	Minnesota Zoo Gift Shop	
SSN - LAST 4	6789	
ID NUMBER	123	


Deposit Information	 Edit Deposit Information
DEPOSIT TO:	DEMO Checking - x6789 (Checking)
DEPOSIT DESCRIPTION:	Remainder

SUBMIT

PREVIOUS

SAVE & CONTINUE LATER

6. Your direct deposit is on its way!



Your direct deposit is on its way!

ADD ANOTHER DIRECT DEPOSIT

TM DONE FOR NOW

ClickSWITCH

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Scenario 3: Unknown Organization – Create a New Depositor

1. Select “Not here? Create a new depositor” at the bottom of the company search field. If your depositor is neither verified nor a Google result, you will select this final option. After clicking this option, you’ll be taken to the below page where the company information needs to be filled in. Click Continue.

So, who pays you? ⓘ

Manually enter your depositor information below.

House of Lilies ⓘ

MAILING ADDRESS

123 Demo Lane

Address Line 2 (optional)

Address Line 3 (optional)

Demo

Minnesota ▼

55555-

United States ▼

PHONE NUMBER

(555) 555 5555

<https://houseoflilies.org>

Payroll ⓘ

*Indicates required field.

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CONTINUE

2. The remaining steps are the same as steps 2-5 in Scenario 1.



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Scenario 4: Depositor that allows a split

1. Select a verified company and click Continue.

So, who pays you?

Search for depositors like your employer, social security benefit or other recurring deposits below to get started.

Select  Verified results to make your switch go even faster.

PREVIOUS

CONTINUE


2. If the company allows a split, you will see the “Add Another Account” verbiage. Select an Account. Select Amount, Percentage or Remainder. If you select Amount or Percentage, you will select another account and determine how much of your DD you want in each account. Select Continue.

Where would you like your deposit to go?

Select from the options below to continue making the switch.


SELECT ACCOUNT

DEMO Checking - 123456789 (Checking)

SELECT SPLIT TYPE 


AMOUNT PERCENTAGE REMAINDER

10

REMOVE ACCOUNT 

SELECT ACCOUNT

DEMO Savings - 654321654 (Savings)

SELECT SPLIT TYPE 

AMOUNT PERCENTAGE REMAINDER

Remainder

CONTINUE

PREVIOUS

SAVE & CONTINUE LATER

3. The remaining steps are the same as steps 3-5 in Scenario 1.



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Scenario 5: Online or Print Only Organization

1. Select a Verified result from the company search and click Continue.

So, who pays you?

Search for depositors like your employer, social security benefit or other recurring deposits below to get started.

Select **(G) Verified** results to make your switch go even faster.

PREVIOUS

CONTINUE

2. Select an account and click Continue.

Where would you like your deposit to go?

Select from the options below to continue making the switch.

SELECT ACCOUNT

DEMO Checking - 123456789 (Checking)

CONTINUE

PREVIOUS

SAVE & CONTINUE LATER

3. If the company requires you to go online or follow some other special instructions to submit your switch, the specific and unique instructions will display. Once you follow the steps on the page, click Complete. If you don't follow the steps now, click Save & Continue.

Great! Here's the information to complete your switch.

The **KROGER** Company requires you to access your online account to switch your direct deposit. Please log in to your account to complete your switch.

[CLICK HERE TO LOG INTO YOUR KROGER ACCOUNT.](#)

To update your information over the phone, please dial **800 952 8889**.

When you are done switching this account you can mark it as completed by clicking the Completed button below

COMPLETE

PREVIOUS

SAVE & CONTINUE LATER



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Scenario 6: Instant Switch

1. Select a Verified result from the company search and click Continue.

So, who pays you?

Search for depositors like your employer, social security benefit or other recurring deposits below to get started.

Select  Verified results to make your switch go even faster.

PREVIOUS


CONTINUE

2. If this is an Instant organization, you will follow specific instructions on the screen, starting with selecting where you want your deposit to go.


✕ Exit

Select your account

Please select where you would like your deposit to go by clicking "Add an account" below.



Uber Technologies Inc. / UBER

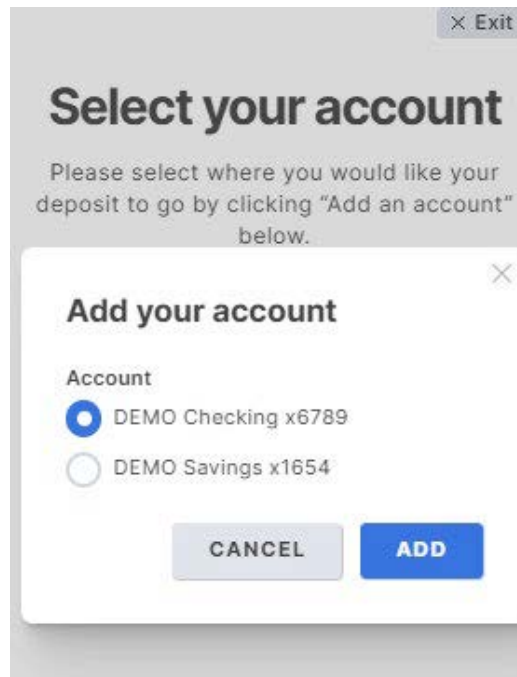


Add an account

ClickSWITCH

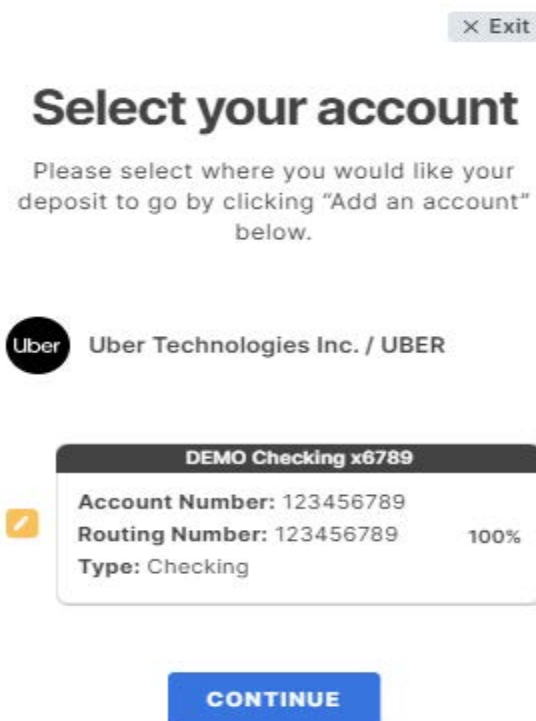
Direct Deposit Switch Scenarios

3. Select the account(s) and click Add.



The screenshot shows a 'Select your account' dialog box with a close button (X Exit) in the top right corner. The main text reads: 'Please select where you would like your deposit to go by clicking "Add an account" below.' Below this text is a sub-dialog box titled 'Add your account' with its own close button (X). Inside the 'Add your account' box, under the heading 'Account', there are two radio button options: 'DEMO Checking x6789' (which is selected) and 'DEMO Savings x1654'. At the bottom of the sub-dialog are two buttons: 'CANCEL' and 'ADD'.

4. Click Continue.



The screenshot shows the 'Select your account' dialog box with a close button (X Exit) in the top right corner. The main text reads: 'Please select where you would like your deposit to go by clicking "Add an account" below.' Below this text is a section for 'Uber Technologies Inc. / UBER' with the Uber logo. Underneath is a box titled 'DEMO Checking x6789' containing the following details: 'Account Number: 123456789', 'Routing Number: 123456789' (with '100%' to its right), and 'Type: Checking'. To the left of this box is a small orange icon of a notepad and pencil. At the bottom of the dialog is a blue 'CONTINUE' button.

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5. Review your Switch Summary.

✕ Exit

Complete your switch

Switch Summary

 Started on February 17, 2022

 Uber Technologies Inc. / UBER

DEMO Checking x6789


Account Number: 123456789
Routing Number: 123456789
Type: Checking

To complete your switch instantly please provide your login credentials for Uber Technologies Inc. / UBER below.

6. If you want to switch instantly, login to your account and click Continue.

To complete your switch instantly please provide your login credentials for Uber Technologies Inc. / UBER below.

connect to



Log In

Email

testtester@test.com

Password

.....

CONTINUE

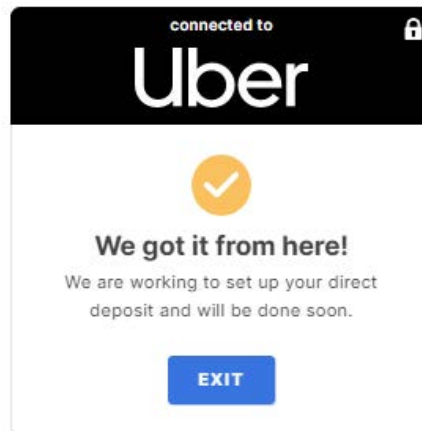


ClickSWITCH

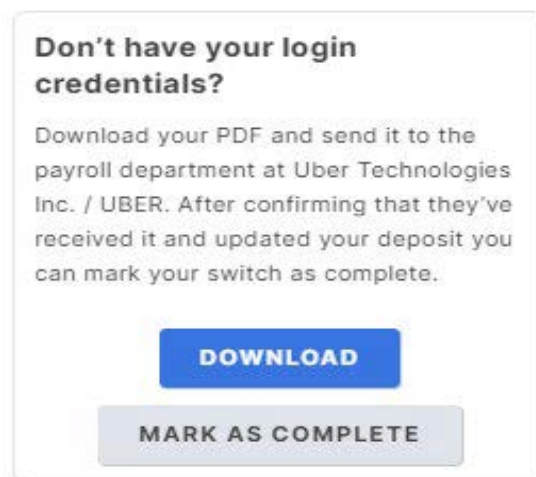
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7. We got it from here displays and automation kicks in to complete the switch in real time.

Complete your switch



8. If you don't have have your credentials, you can download the form and send it to your payroll.



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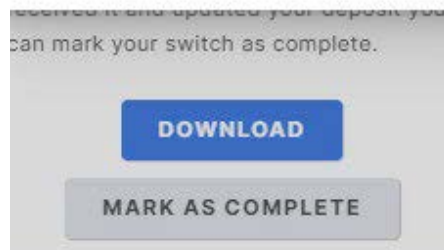
9. If the customer clicks Mark As Complete, they'll get an Are you sure? Message.

Are you sure?

You should only mark the switch as complete after you have submitted the PDF to your employer.

CANCEL

YES



9. After clicking Yes, they'll see the "Your switch was successful" Message.

× Exit



**Your switch was
successful!**

Switch Summary

 Started on February 17, 2022



Uber Technologies Inc. / UBER

DEMO Checking x6789

Account Number: 123456789

Routing Number: 123456789

Type: Checking

