

# How to make payments with People First Bank

We're here to help you make  
payments and transfer funds.



# With the People First Bank App and Online Banking, you can pay what you need, when you need.

## In this guide:

How to transfer money

How to set up scheduled payments

How to set up a recurring payment

How to set up and manage a PayID

How to set up a new payee

How to manage payees

How to search and filter transactions

How to view transaction details

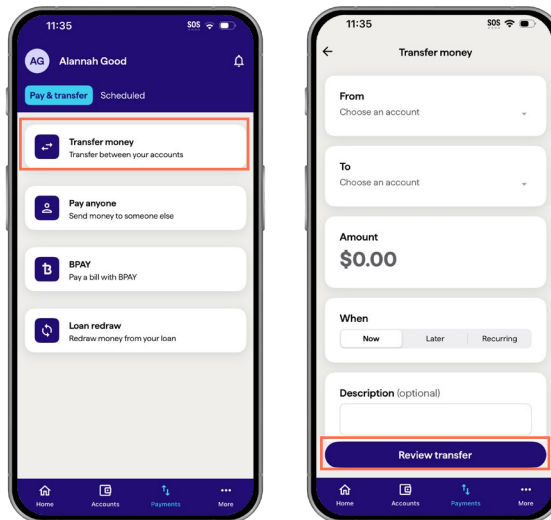
# How to transfer money

Transfer funds between accounts with just a few quick steps in the People First Bank App or Online Banking.

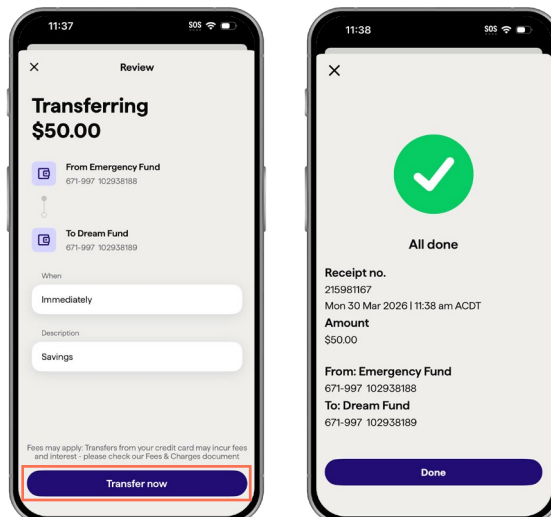
## People First Bank App

1. Log in to the People First Bank App, and select **'Payments'** from the bottom menu, and then **'Transfer money'**.

Enter your **'From'** and **'To'** accounts, the amount, when you want the transfer to occur, and an optional description, and press **'Review transfer'**.

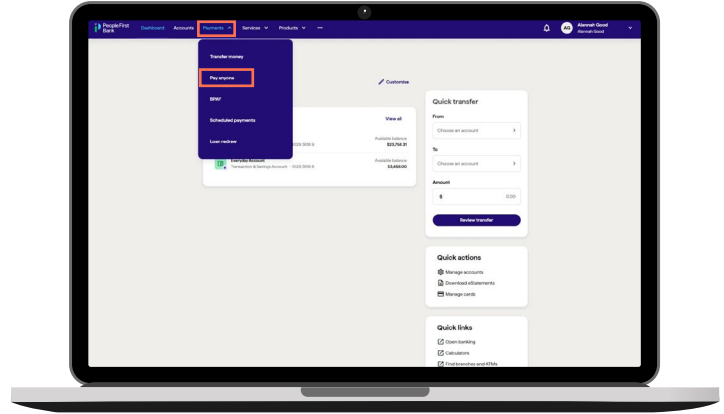


2. Carefully review the details, and press **'Transfer now'**. (If you made a mistake, press the cross (x) in the top left corner to be taken back to the 'Transfer money' screen, for details to be edited).

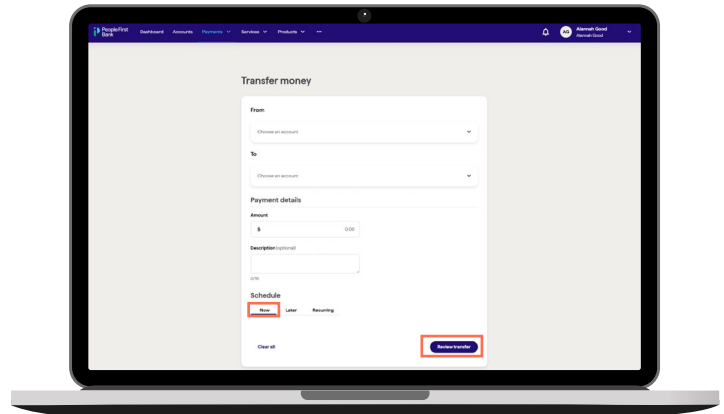


## Online Banking

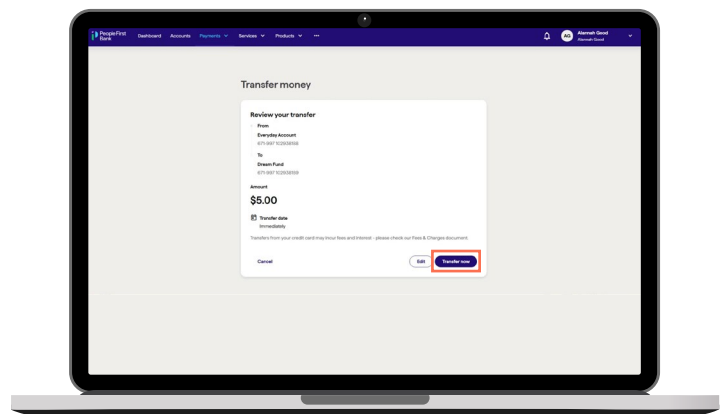
1. Log in to Online Banking, and select the **'Payments'** menu, and then **'Pay anyone'**.



2. Enter your **'From'** and **'To'** accounts, the amount, the frequency, and an optional description, and press **'Review transfer'**.



3. Carefully review the details, and press **'Transfer now'**. (If you made a mistake, press the **'Edit'** button, and re-do step 2 with the correct details).



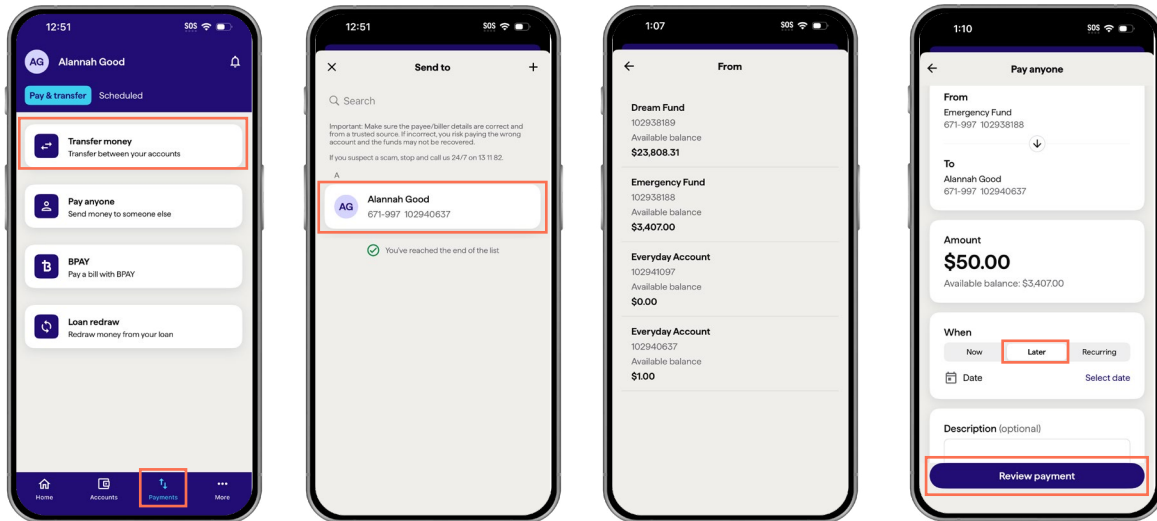
# Set up scheduled payments

Want to set and forget your upcoming payments? Scheduled payments may be the answer.

## People First Bank App

1. Log in to the People First Bank App, and select **'Payments'** from the bottom menu, and then **'Transfer money'**.

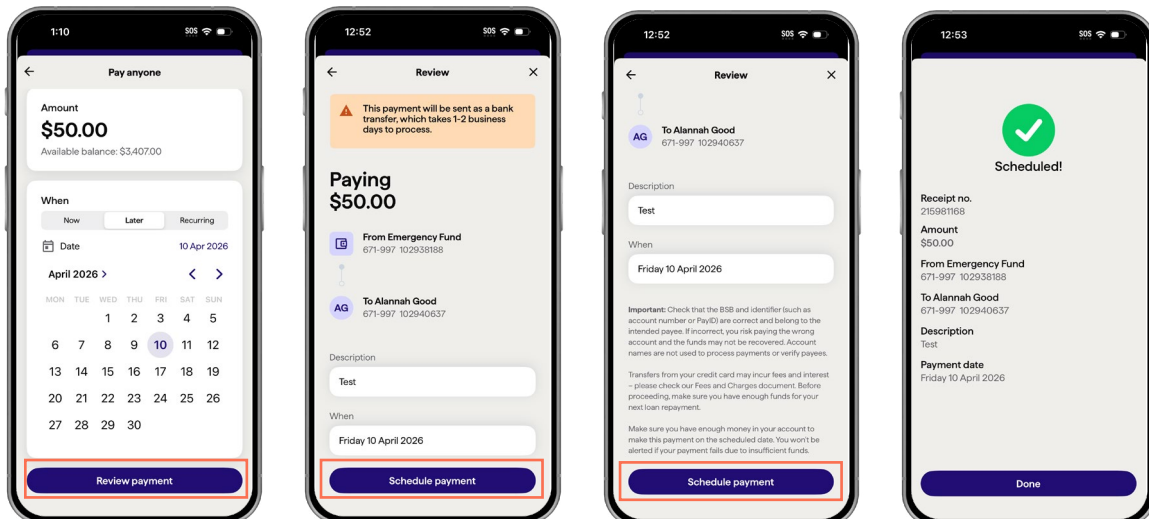
Enter your **'From'** and **'To'** accounts, the amount, and an optional description.



2. Under the **'When'** section, select **'Later'** and press **'Date'**. Select a transfer date then press **'Continue and review'**.

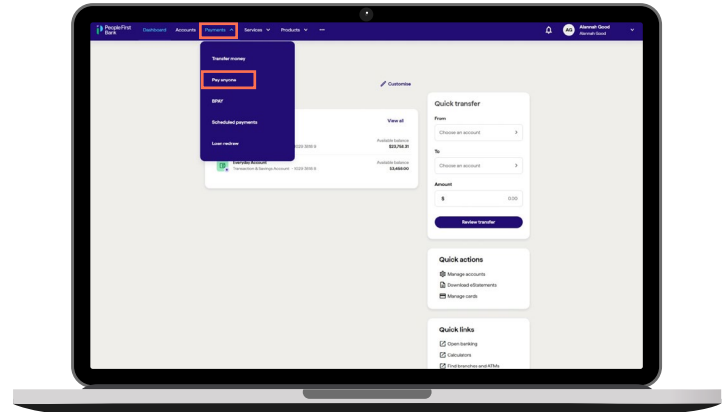
Carefully review the details, and press **'Confirm and schedule'**.

(If you made a mistake, press the cross (x) in the top left, and re-do step 2 with the correct details.)



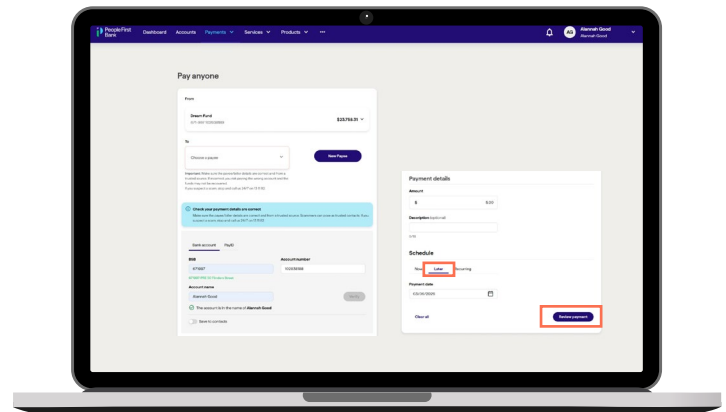
## Online Banking

1. Log in to Online Banking, and select the **'Payments'** menu, and then **'Pay anyone'**.

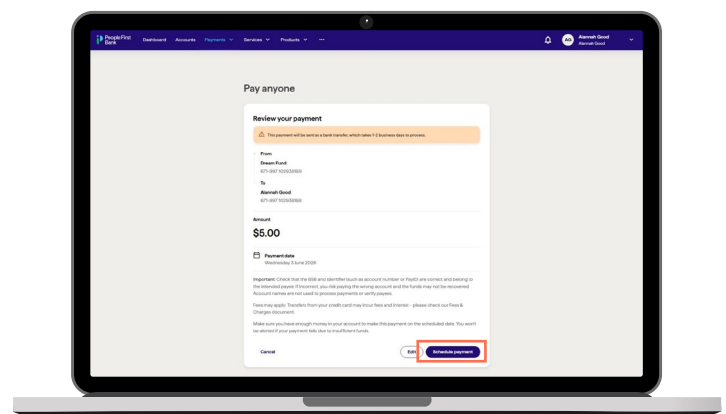


2. Enter your **'From'** and **'To'** accounts, the amount, and an optional description.

Under the **'Schedule'** section, select **'Later'** and enter the desired transfer date and press **'Review payment'**.



3. Review the transfer details and press **'Schedule payment'**.



# Set up recurring payments

Have a recurring payment you want to set-and-forget?

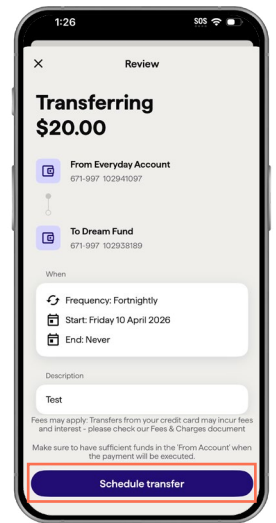
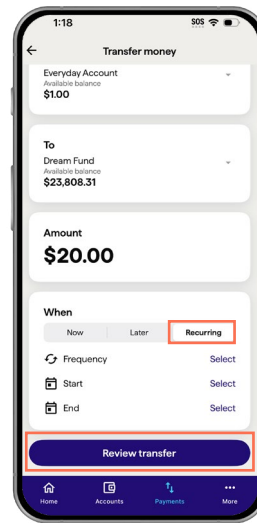
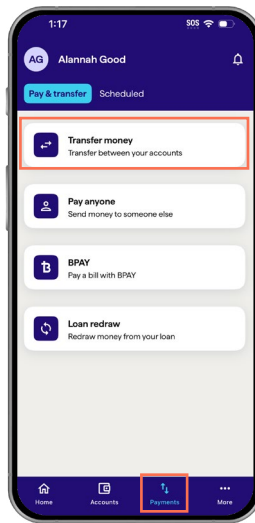
Easily manage your recurring payments in the People First Bank App and Online Banking.

## People First Bank App

1. Log in to the People First Bank App, and select **'Payments'** from the bottom menu, and then **'Transfer money'**.

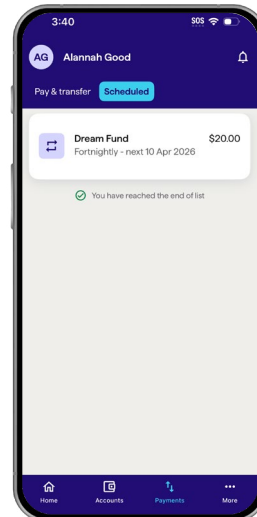
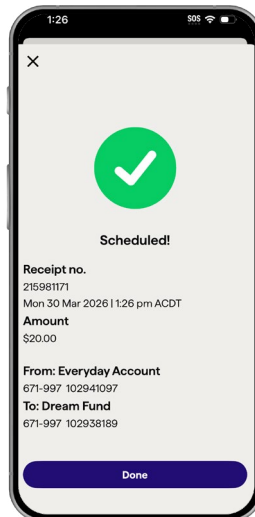
Enter your **'From'** and **'To'** accounts, the amount, and an optional description.

Under the **'When'** section, select **'Recurring'**. Select a transfer frequency and start and end date. Press **'Continue and review'**.



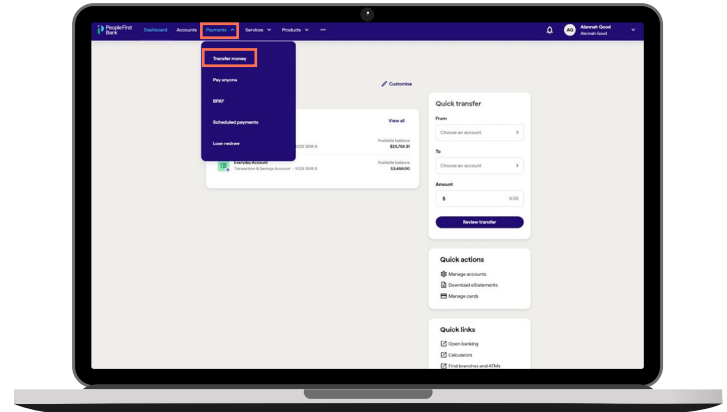
2. Carefully review the details, and press **'Confirm and schedule'**. (If you made a mistake, press the cross (x) in the top left, and re-do step 2 with the correct details.)

You can view and manage your scheduled payments by selecting **'Payments'** from the bottom menu, and then **'Scheduled'**.

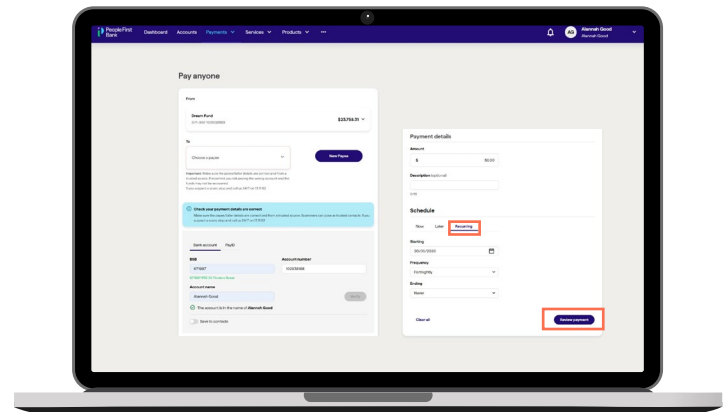


## Online Banking

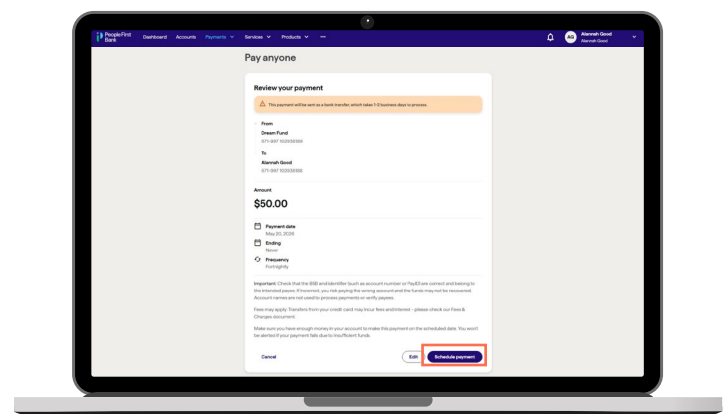
1. Log in to the People First Bank Online Banking, and select **'Payments'** from the top menu, and then **'Transfer money'**.



2. Enter your **'From'** and **'To'** accounts, the amount, and an optional description.  
  
Under the **'When'** section, select **'Recurring'**.  
Select a transfer frequency and start and end date.  
Press **'Review payment'**.



3. Carefully review the details, and press **'Schedule payment'**.  
(If you made a mistake, press the cross (x) in the top left, and re-do step 2 with the correct details.)



# How to set up and manage a new PayID

PayID allows you to link financial accounts to more common information such as your mobile number or email address. With PayID, you'll be able to receive payments without sharing your BSB and account number. You can also send money to others using their PayID.

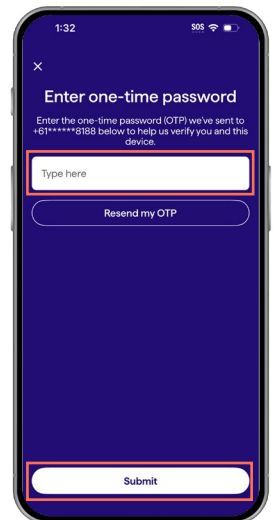
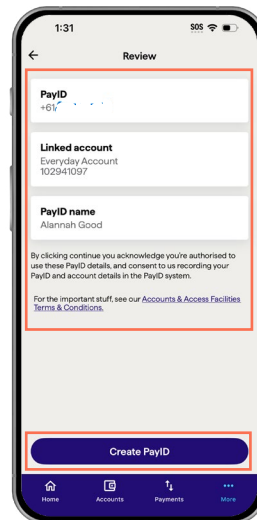
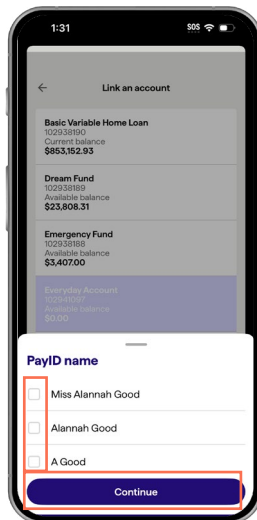
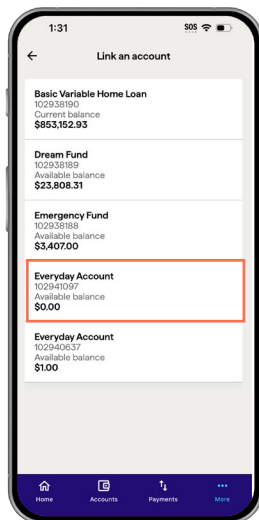
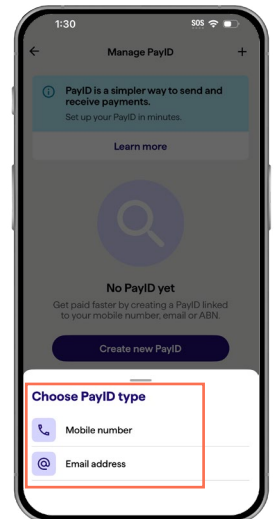
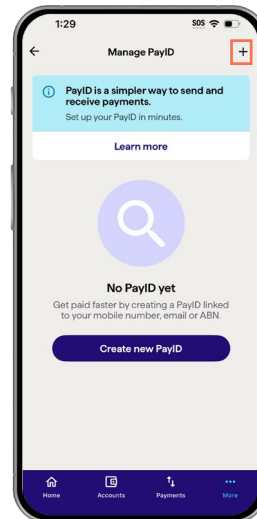
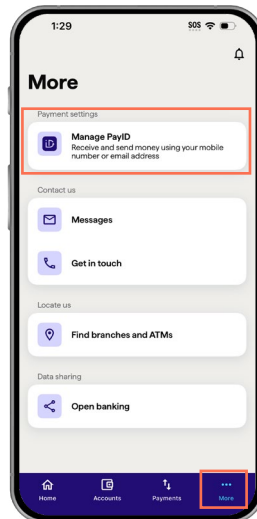
## People First Bank App

1. Log in to the People First Bank App and select **'More'** from the bottom main menu.

Select **'Payment Settings'**, then **'Manage PayID'**.

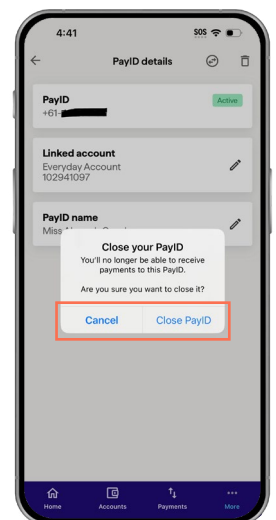
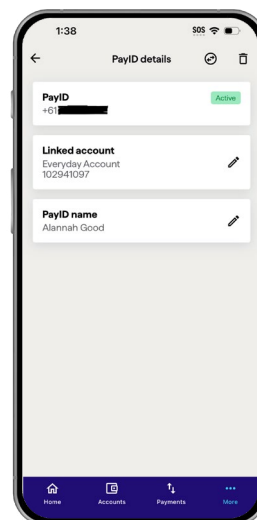
Tap the plus sign (+) at the top right corner of the Manage PayID screen, select whether you'd like your PayID to be a mobile number or email address, and follow the prompts.

Follow the prompts to verify the PayID.



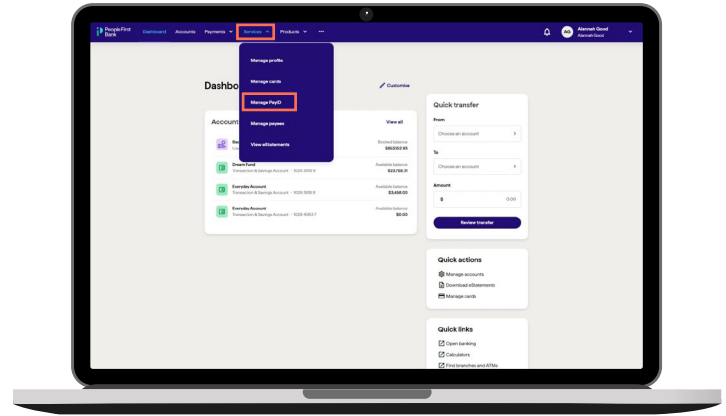
2. To manage your PayID, navigate to **'Manage PayID'** and select pencil icon.

You can edit your PayID name or the account the PayID is linked to.

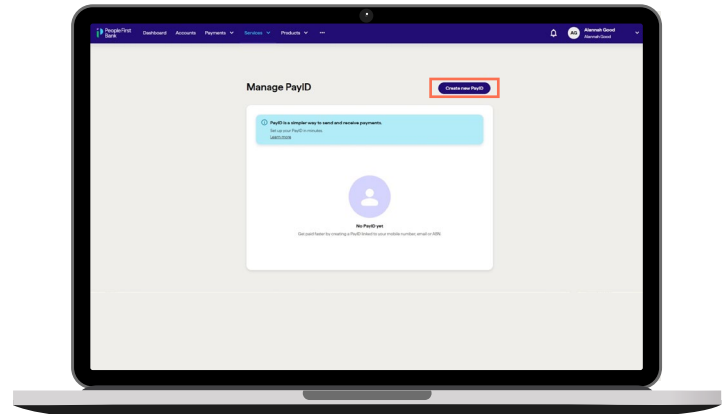


## Online Banking

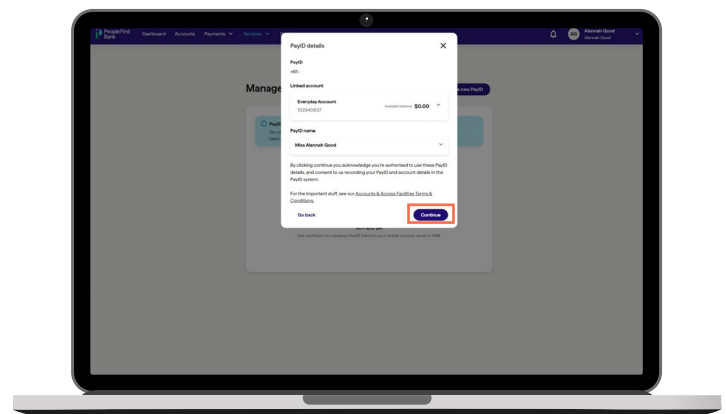
1. Log on to Online Banking, and select the **'Services'** menu, and **'Manage PayID'**.



2. Create a new PayID by clicking **'Create new PayID'**.

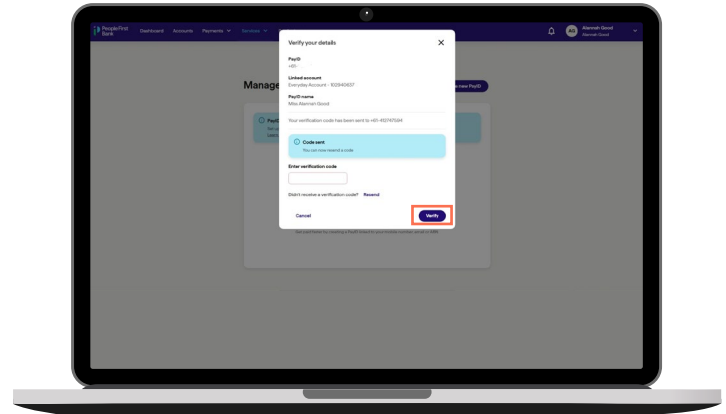


3. Select whether you'd like your PayID to be phone or email, and follow the prompts. Press **'Verify'**.

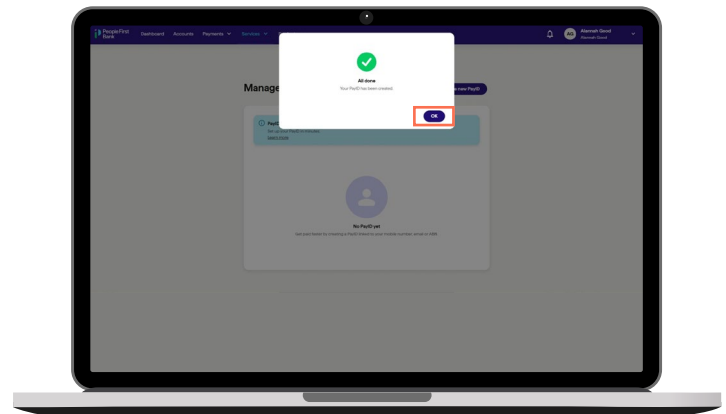


## Online Banking

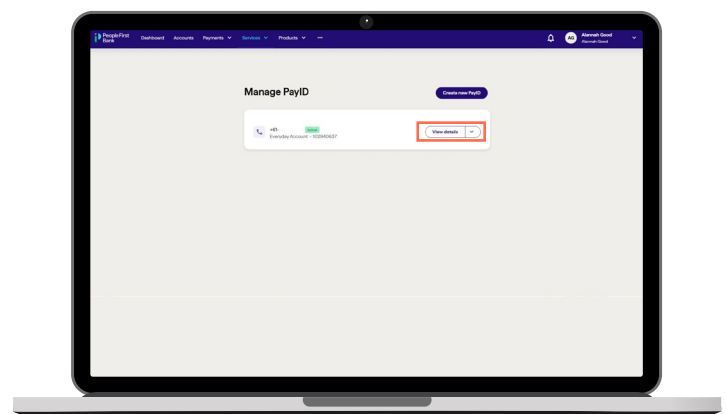
- You will be asked to verify this PayID method. Follow the prompts and press **'Verify'**.



- Once verified, review your PayID and follow the prompts to finalise your PayID. Press **'Ok'**.



- To manage your PayID, navigate to the **'Manage PayID'** page, and click **'View details'**. From the drop-down box you can also transfer or remove your PayID.



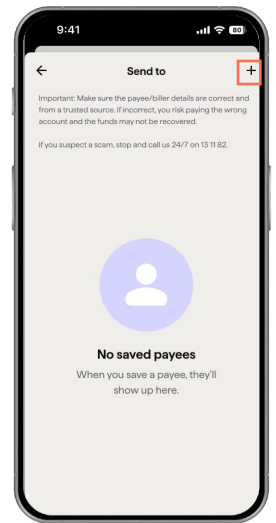
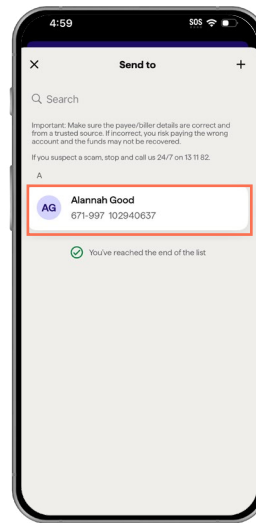
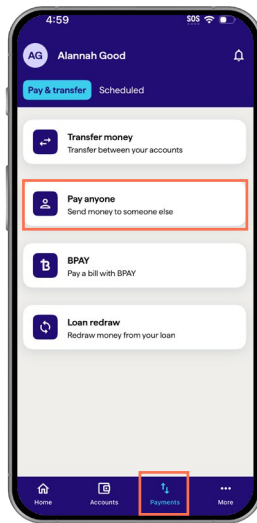
# Set up new payees

Pay anyone with the People First Bank App and Online Banking by simply setting up a new payee. Note that a second-tier authentication will need to be completed for first time payees. [See 'Authenticating New Payees' in the 'Keeping your Banking Safe' guide.]

## People First Bank App

1. Log in to the People First Bank App, and select **'Payments'** from the bottom menu, and then **'Pay anyone'**.

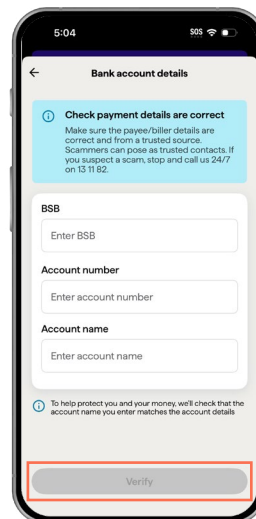
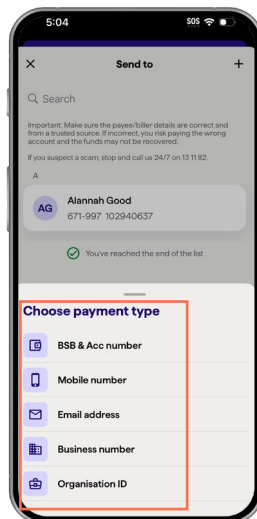
In the **'Send to'** section, which will bring up your saved payees. Add a new payee by pressing the plus symbol (+) at the top right.



2. Enter your payee's details of your chosen payment type and then review the information to ensure it is correct and press **'Verify'**.

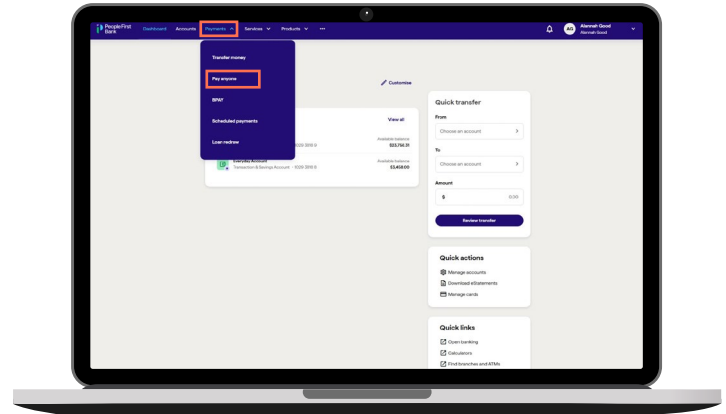
Check the details look right and save the new contact to your contacts list by pressing the toggle. (Green toggle means the contact will be saved once you have completed the payment.)

You will be asked to authorise any transaction to a new payee.

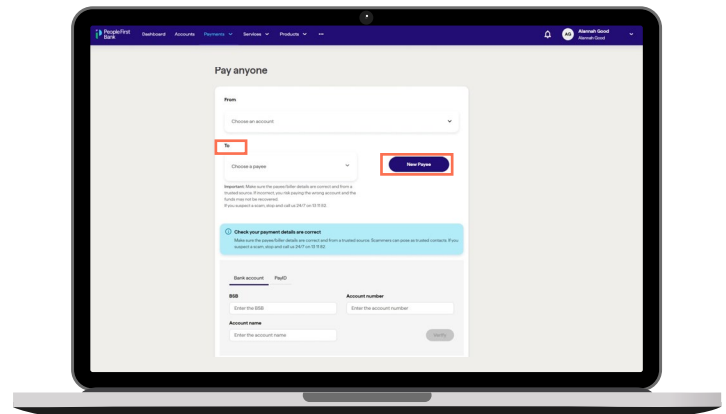


## Online Banking

1. Log in to Online Banking, and select the **'Payments'** menu, and then **'Pay anyone'**.

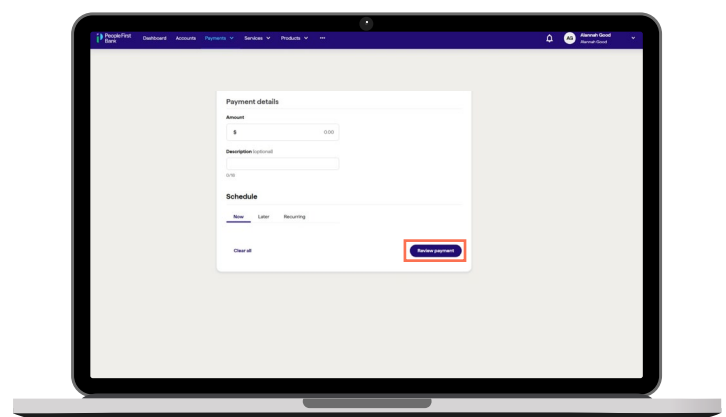


2. Next to the **'To'** section, click **'New payee'**.



3. Enter your payee's details of your chosen payment type and complete the payment.

You will be asked to authorise any transaction to a new payee.

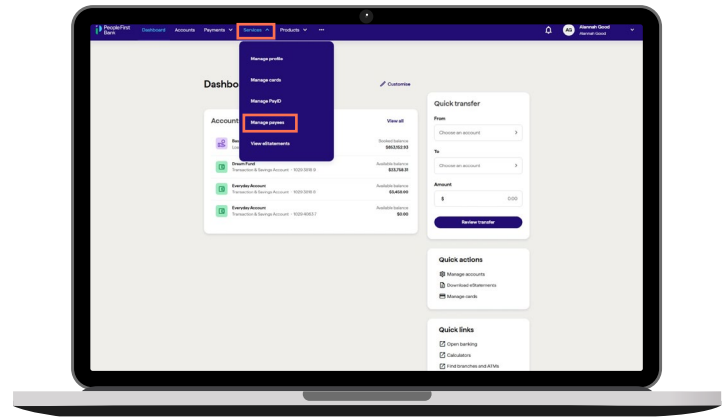


# Manage payees

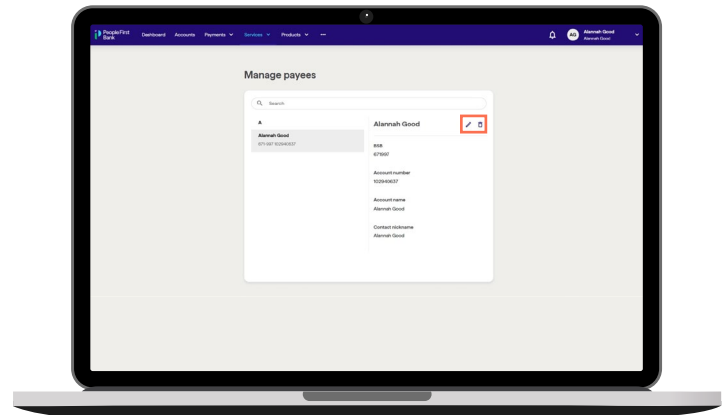
Has one of your payees changed their banking details? Or do you need to remove them from your payees list? You can manage that in Online Banking.

## Online Banking

1. Log in to Online Banking, select the **'Services'** menu, and **'Manage payees'**.



2. Click on the payee you wish to manage. Use the pencil icon to edit a payee's details, or the bin icon to delete a payee.



# Search or filter transactions

Looking for a particular transaction? The People First Bank App and Online Banking have you covered.

## People First Bank App

1. Log in to the People First Bank App, and select **'Accounts'** from the bottom menu.

Select the account that you want to view and filter transactions.

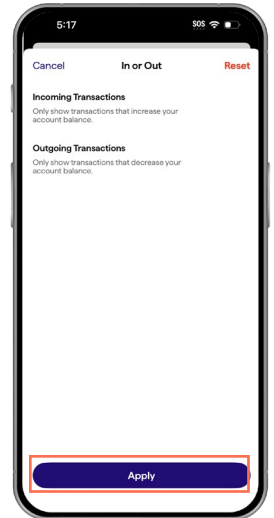
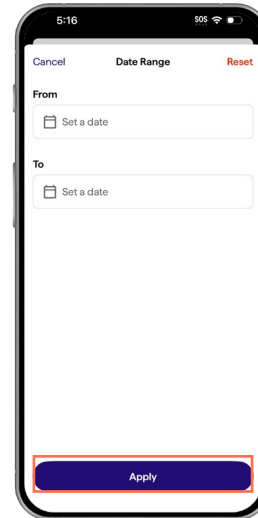
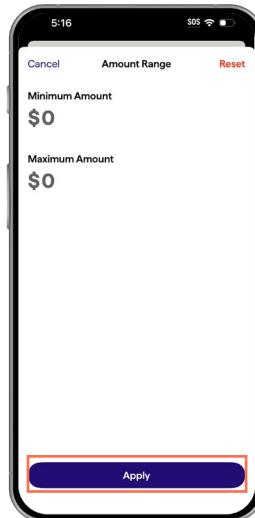
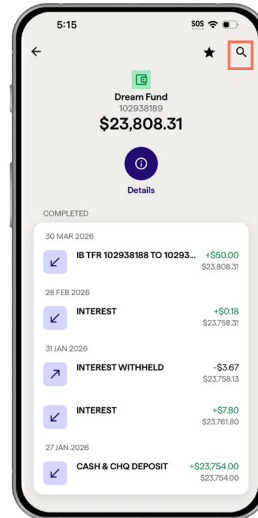
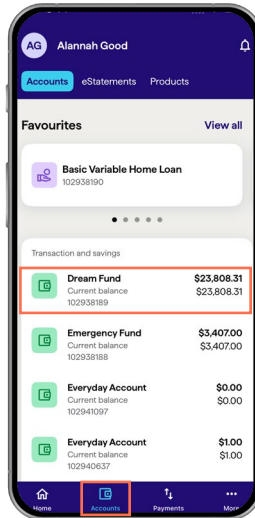
Select the magnifying glass icon on the top right of the Account screen.

Use the search bar to type in a specific term you wish to search for, or use pre-set filters to filter transactions.

**'Amount'** will prompt you to select a minimum and maximum amount filter.

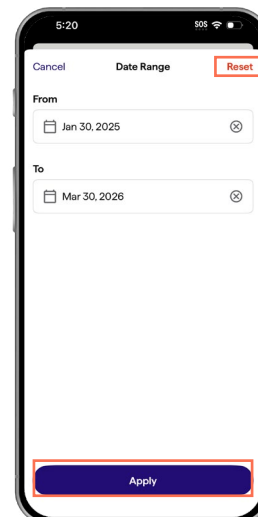
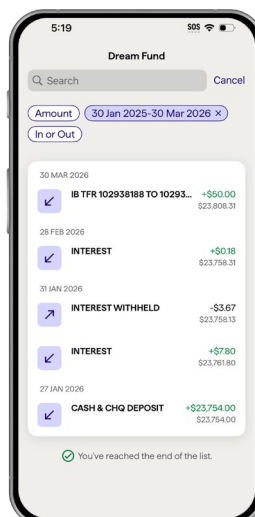
**'Date'** will prompt you to select a date range filter.

**'In or Out'** will allow you to filter by incoming or outgoing transactions.



2. Once you've set your filter, click **'Apply'** to see the filtered view of your transactions.

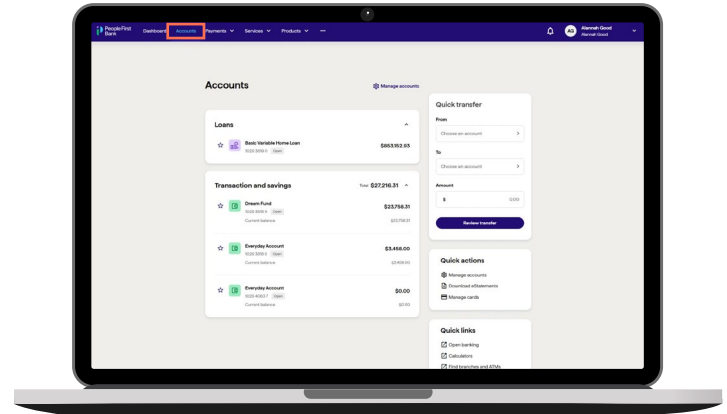
You can remove the filter by pressing the highlighted filter and then **'Reset'** and **'Apply'**.



## Online Banking

1. Log in to Online Banking and select the **'Accounts'** tab at the top menu.

Select the account that you want to view and filter transactions from the accounts list.

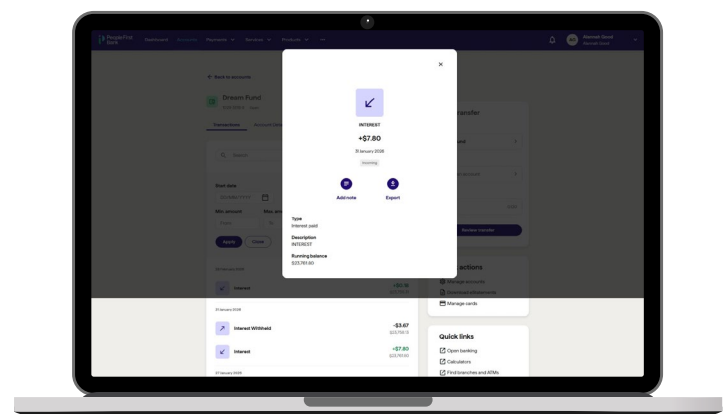
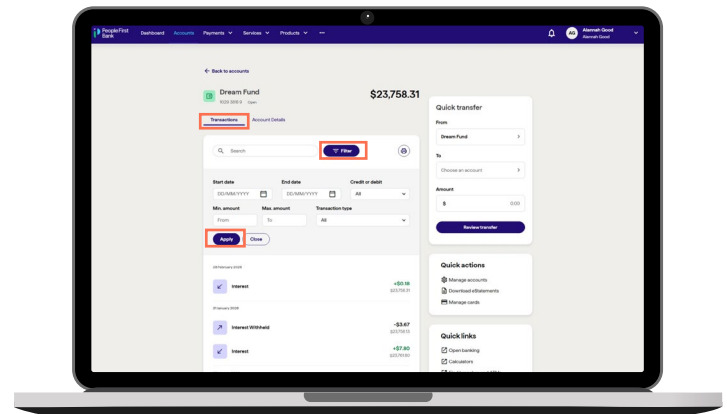


2. Ensure you've selected the **'Transactions'** tab at the top of your account page.

Use the search bar to type in a specific term you wish to search for. Or, click the **'Filter'** button for more specific filters.

If you click the **'Filter'** button, you'll be prompted to enter start end dates, transaction types or minimum and maximum amounts. You can set as many filters as you'd like.

Click **'Apply'** to see the filtered view of your transactions.



# View transaction details

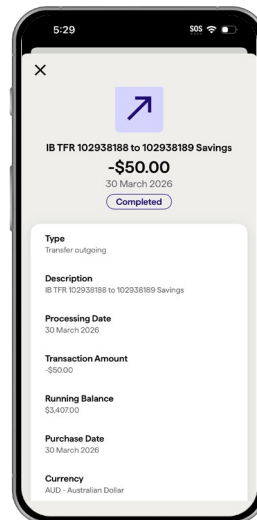
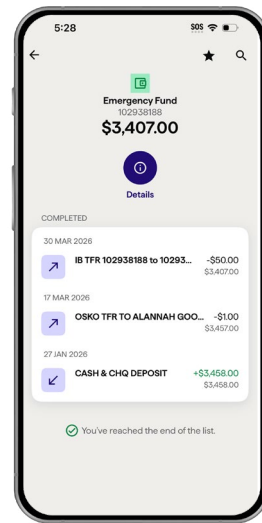
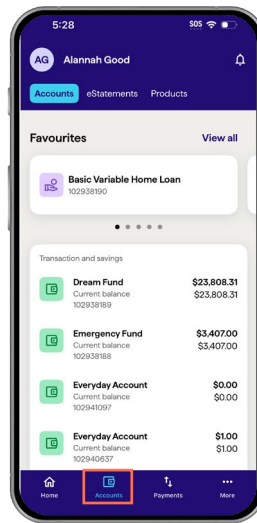
You can get more information about a particular transaction by selecting it within the App or Online Banking.

## People First Bank App

1. Log in to the People First Bank App and select **'Accounts'** from the bottom menu.

Select the account that you'd like to view transaction details for.

Select the transaction you'd like to know more about. A popup will appear showing you a description, processing date, transaction amount, purchase date, currency and status.

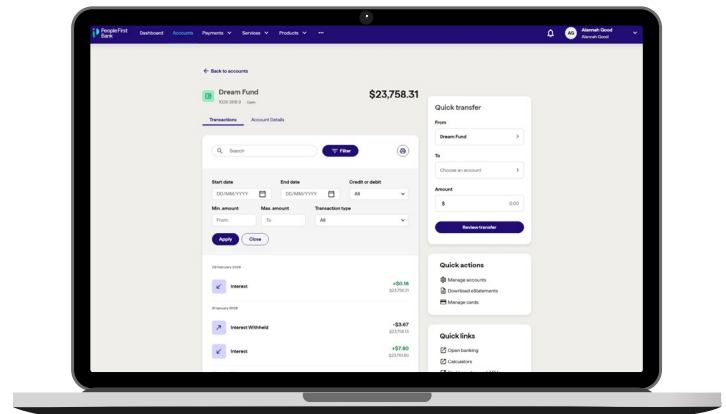
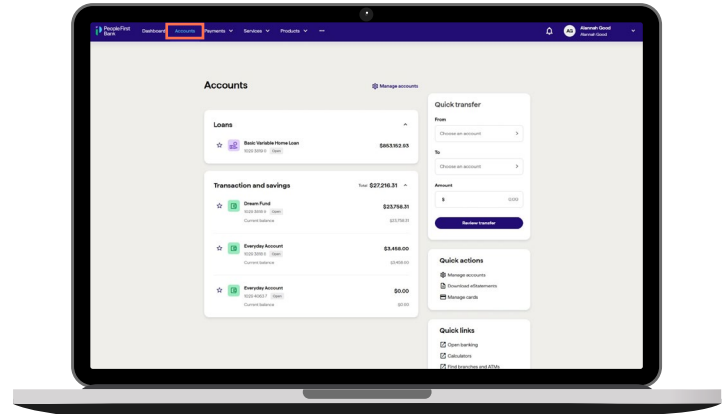


## Online Banking

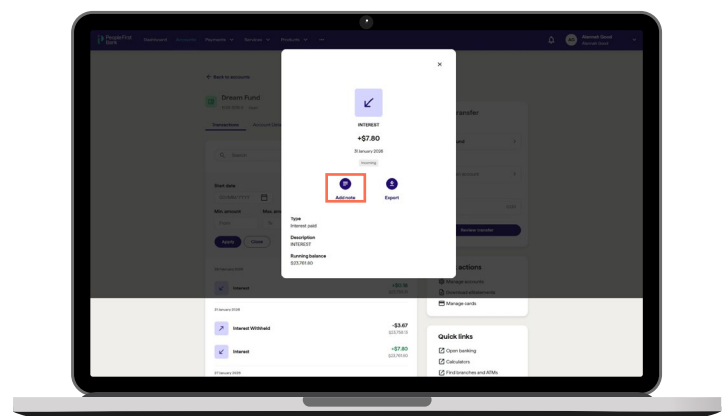
1. Log in to Online Banking and select '**Accounts**' from the top menu.

Select the account that you'd like to view transaction details for.

Click on the transaction you'd like to know more about. You'll see data on whether the transaction was incoming or outgoing, the date, and a transaction identifier.



2. You can use the '**Add note**' button to make notes on transactions.





# Need some help? No worries.

We're here to help. Here are a few ways you can get the help you need:

- **View our Welcome Hub:**  
Check out [peoplefirstbank.com.au/help-and-support/support-topics/welcome](https://peoplefirstbank.com.au/help-and-support/support-topics/welcome)
- **View our FAQs:**  
Some of our most frequently asked questions are answered at [peoplefirstbank.com.au/help-and-support/support-topics](https://peoplefirstbank.com.au/help-and-support/support-topics)
- **Give us a call:** Give our Customer Hub a call on 13 11 82. We're available 24/7.
- **Chat to us in person:**  
Drop into your local branch and our friendly team can help you navigate the new App and Online Banking systems.