



# How to...

## Add a new payee.

SBS Internet banking guides.



## Step 1. ▶ Payees.

The screenshot shows the 'move money' menu open in an account manager interface. The menu options are: transfer, payment, approved payee payment, IRD payment, transfer history, pending payments, **payees** (highlighted), and authorisations. Below the menu, the account manager shows two accounts: 'Transactional' (03-1234-1234567-00) with a current balance of \$500.72 and available funds of \$500.72, and 'i-Save' (03-1234-1234567-01) with a current balance of \$3,037.36 and available funds of \$3,037.36. An orange arrow points from the 'payees' option in the menu to the 'Mrs Sample Name' account header.

▶ Click on the **move money** tab and select **payees** from the drop-down menu. You can make payments from this screen but if you want to make a one-off payment select the type of payment under the **move money** tab.

The screenshot shows the 'payees' screen with a search bar and a table of payees. The table has columns for payee name, payee nickname, account, and action. The first row is highlighted, and a context menu is open over the three orange dots in the action column, showing options: make a payment, edit, copy, and delete.

payee name	payee nickname	account	action
Sample Name		-03-1234-0123456-01	⋮
Company Name		-02-3456-01234	make a payment
Business Name	Business	-01-2345-01234	edit
Sample Name		-06-7891-01234	copy
			delete

**TIP:** By clicking on the three orange dots beside your existing payee, you can also **make a payment**, **edit**, **copy** and **delete** a payee.

## Step 2. ▶ Select payment type.

Depending on the type of payee you want to add select one of the below options:



For an individual.

For a large organisation (i.e. Contact Energy, Spark).

For tax payments to Inland Revenue.

### enter payee details



#### stay scam aware!

before adding or paying a new payee, ensure you

- **verify details:** double check the recipient's account details directly with them.
- **take your time:** scammers will often pressure you to act quickly.
- **think twice:** if something feels suspicious, stop and contact us immediately.

account number \*

payee account name \*

particulars

code

reference

use different details on my statement

add to payee list

payee nickname

press "send for payee verification" to confirm this payee, or "cancel" to discard changes.

SEND FOR PAYEE VERIFICATION

CANCEL

Enter the payee's **account number** and **payee account name**.

Fill in the **particulars**, **reference** and **code** fields. The payee will see these details on their statement. Not all fields are required, however at least one field is required in order for you to make a payment.

If you wish to see different details on your statement, click **use different details on my statement**.

The **payee nickname** is optional and for your statement details only.

Click **SEND FOR PAYEE VERIFICATION**.

### Step 3. ► Payee confirmation.

Confirm if you acknowledge and wish to add this payee

**payee verification complete**

**i match**  
this name and account number match the payee bank's records.

**details entered**

payee name: mr sample name  
account number: 01-1234-0123456-00

i acknowledge that i wish to add this payee.

[click here](#) to learn more about the confirmation of payee (cop) service

**ADD** **CHANGE PAYEE DETAILS**

► Click **ADD**. Your new payee will be added to the payees list, or; click **CHANGE PAYEE DETAILS** to update the payees details. ◀

[click here](#) for more information to CoP SBS.

Add approved payee details:

+ ADD APPROVED PAYEE

### enter approved payee details

please enter the first three characters (including spaces) of the approved payee you wish to search.

Con

Blackley Construction Limited

Consumer Finance Limited

Contact Energy Ltd - Empower

Contact Energy Ltd - Tasman Energy Ltd

Enter the first three characters of the payee name and select the payee.  
Click **CONTINUE**, this will pre-populate the account number and name.

### enter approved payee details

please enter the first three characters (including spaces) of the approved payee you wish to search.

Contact Energy Ltd

#### account number

03-1234-0123456-01

#### particulars

surname, initial

#### code

this field is not required

#### reference

10 digit account number, account id/account number  
located top right hand side of invoice.

use different details on my statement

add to payee list

Fill in the **particulars**, **code** and **reference** fields – under each box there will be an outline of what is required.

Add IRD payee details:

**+ ADD IRD PAYEE**

### enter IRD payee details

#### IRD Number

12345678

The IRD number entered is valid.

#### tax type code \*

rwt - resident withholding tax



- ncp - child support - liable parent
- nrt - non-resident withholding tax
- pie - portfolio investment entity
- rdi - research and development incentive
- reb - rebate payment claim
- rlt - resident land withholding tax
- rul - rulings & determinations
- rwt - resident withholding tax

Enter the **IRD number**.

Enter the **tax type code**.

Click **CONTINUE**. Your new payee will be added to the payees list.

**CONTINUE**



## Check out our full range of 'How to' guides:

[Log in and set up your password](#)

[View accounts, balances and transaction history](#)

[Add a new payee](#)

[Make a payment](#)

[Set up multi-payments](#)

[View and download statements](#)

[Authorise transactions for multiple signatories](#)

You can also follow our 'How to' online videos by visiting our website [sbsbank.co.nz/how-to-guides](https://sbsbank.co.nz/how-to-guides)

If you prefer to chat with our friendly team you can give us a call on **0800 727 2265** and we can talk you through it step-by-step.

