

An aerial photograph of a large body of water, likely a lake or a wide river, with numerous small, dark islands scattered throughout. The water is a deep blue-grey color, and the islands are dark green or black. The overall scene is serene and natural.

PRIORITY

PAYMENT SYSTEMS®



PLAID

PLAID INTEGRATION

A New Enhancement for MX™ Merchant



PLAID

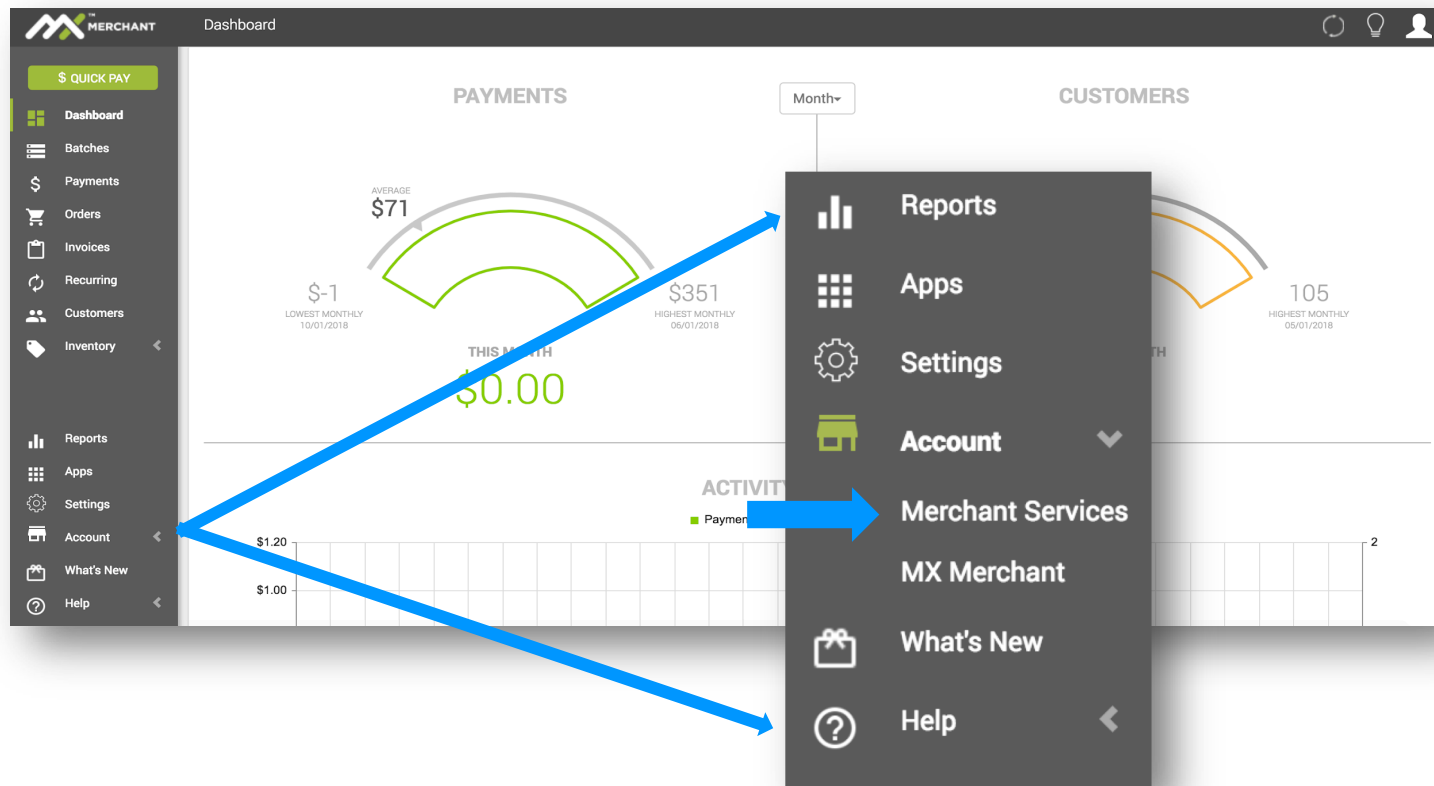
INTEGRATION OVERVIEW

To streamline the process of updating merchant banking information, we have partnered with Plaid. With Plaid, MX™ Merchant instantly and seamlessly authenticates merchant banking information, removing the need to submit paperwork to Priority or take any other additional actions.



HOW IT WORKS

Select "Account" on the left hand navigation and then "Merchant Services."





HOW IT WORKS

Users with Admin access may update Business Information, Owners Information, choose a Statement delivery method and update banking information. Select "Change Bank Account" to begin updating banking information.

The image shows a screenshot of the PLAID admin interface. On the left, a sidebar menu has "General" selected. The main content area is titled "Statements" and contains several sections: "Business Information" (MXM Team - TSYS (DO NOT REMOVE), (800) 935-5961, 300 MAIN ST, NORTH LAWRENCE NY 30302), "Owner" (John Rocker, (972) 616-7777, ***-**-3333, matt.burgess+rxmteamtsys@pps.io, 2505 STRATFORD DR, AUSTIN TX 78746), "Location Time Zone" (Eastern Time (GMT-05:00)), "Statement Delivery" (Paperless Statements, View Notifications), and "Bank Accounts" (Fees/Deposits: Bank Name : Delta Community Credit Union, Account number: *****78, Routing number: *****6789, Account Type: Checking, Change Bank Account). A blue arrow points from the "Change Bank Account" link in the "Bank Accounts" section to a callout box on the right. The callout box is titled "Bank Accounts" and contains the same "Fees/Deposits" information as the screenshot, with a blue arrow pointing to the "Change Bank Account" link.

Section	Details
Business Information	MXM Team - TSYS (DO NOT REMOVE) (800) 935-5961 300 MAIN ST NORTH LAWRENCE NY 30302
Owner	John Rocker (972) 616-7777 ***-**-3333 matt.burgess+rxmteamtsys@pps.io 2505 STRATFORD DR AUSTIN TX 78746
Location Time Zone	Eastern Time (GMT-05:00)
Statement Delivery	Paperless Statements View Notifications
Bank Accounts	Fees/Deposits Bank Name : Delta Community Credit Union Account number: *****78 Routing number: *****6789 Account Type: Checking Change Bank Account



HOW IT WORKS

Next, select which bank account type(s) to be updated. One or both may be selected:

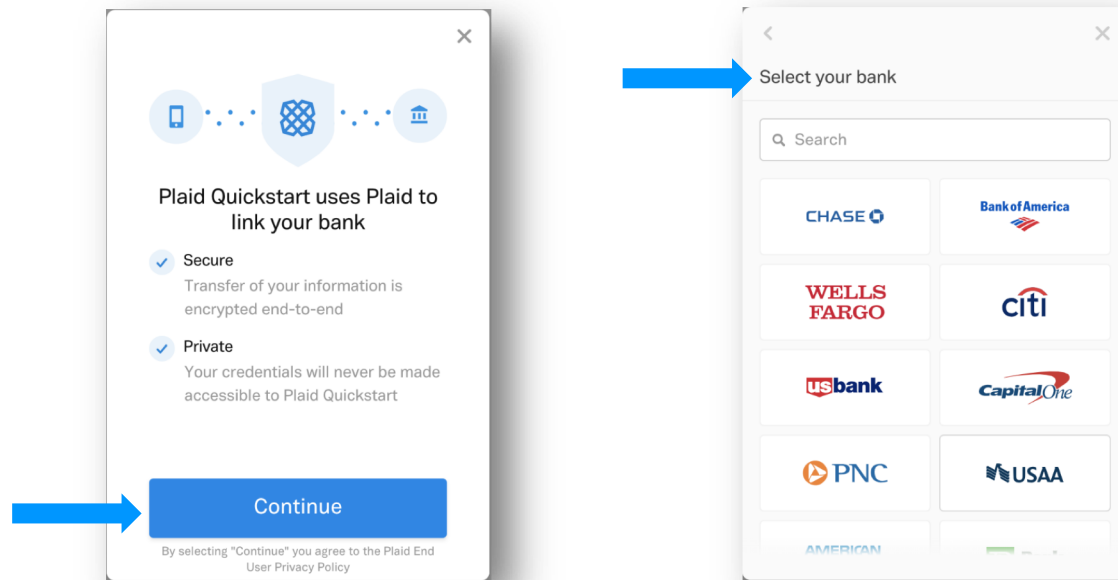
- Fees - the bank account Priority debits for fees and account charges.
- Deposits - the bank account to which Priority deposits your batches.

A screenshot of a web application dialog box titled "BANK ACCOUNT TYPES". The dialog box has a close button (X) in the top right corner. Below the title, there is a prompt: "Select the bank account types you would like to change." Below this prompt are two radio button options: "Deposits" and "Fees". Below the radio buttons is a red rectangular box containing the text: "Please note: On the next step, if you encounter any problems please call 1-855-813-5293 to be helped in updating your bank account." At the bottom of the dialog box are two buttons: "Cancel" and "Next: Select your bank account". The dialog box is overlaid on a blurred background of a web page.



HOW IT WORKS

Next, you will be directed to the Plaid Quickstart pop up. Upon selecting "Continue," select your bank from the list displayed or enter your bank name in the Search field.





HOW IT WORKS

Finally, enter your banking login credentials and Plaid instantly authenticates the bank account information!

The screenshot shows a mobile app interface for logging into a Bank of America account. At the top, there is a red header with a back arrow on the left, the text "Enter your credentials" in the center, and a close "X" icon on the right. Below the header is the Bank of America logo. The main content area has a white background and contains two input fields: the first is labeled "user_good" with "Online ID" and a lock icon to its right; the second is a password field with "Password" and a lock icon to its right. Below the fields is a red "Submit" button and a smaller "Reset password" link.

The screenshot shows a mobile app interface for a successful login. At the top, there is a red header with the text "Success" in the center and a close "X" icon on the right. Below the header is the Bank of America logo. The main content area has a white background and features a large white circle with a red checkmark inside. Below the circle, the text reads "Your account has been successfully linked to Plaid Quickstart". At the bottom, there is a red "Continue" button.



HOW IT WORKS

The last 4 digits of the new bank account and routing number are now displayed for verification.

A screenshot of a web interface for managing a bank account. The interface has two tabs: "General" and "Statements". The "General" tab is active. The account details are as follows:

Section	Details
Business Information	Payment Operations Test Account FD (800) 933-0064 2001 Westside Alpharetta GA 30004
Owner	Anthony Castellanos (678) 820-5615 ***-**-8948 Jonathan.Ingram+FDAUTest@pps.io 123 Test St Milton GA 30004
Location Time Zone	Eastern Time (GMT-05:00)
Statement Delivery	Paperless Statements View Notifications
Funds Deposited to	****0022 ****6789 Checking Edit Bank Information

A callout box titled "Funds Deposited to" with a blue arrow pointing from the "Funds Deposited to" section of the screenshot to the right. The callout contains the following information:

****1533
*****0000
checking
[Edit Bank Information](#)



FREQUENTLY ASKED QUESTIONS

Q: Is Plaid secure?

A: Yes, Plaid tokenizes and encrypts sensitive data.

Q: What if my bank isn't listed?

A: You may type in your bank name in the Search field and click Search. Plaid works with virtually all banks.

Q: Are bank credentials stored or shared?

A: No. Information is not stored by MX Merchant™ or by Plaid.

Q: What if my bank information does not update?

A: If the banking information is entered correctly and verified by Plaid, the reflection will be seen in MX™ Merchant automatically. MX™ Merchant verifies the bank account name provided by Plaid against the Legal Entity name Priority has on file. The bank account details in MX™ Merchant will not update if these do not match.