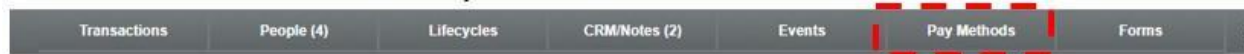


## How to Add a New Bank Account – Online Banking Option (PLAID)

- After logging in to your VBS Shulcloud account, click on "My Payment Methods" menu option within your account
- Click on "Add New Payment Method" then click on "Add payment method to this gateway"




### Saved Payment Methods

**Lawrence Estes**  
1609 Calumet St 77004 07/24  
Preferred Payment Method  
Gateway: SIP

Update  
Delete

1609 Calumet St 77004  
Gateway: SIP

eCheck   
Update  
Delete

**Lawrence Estes**  
1609 Calumet St 77004  
Gateway: SIP

eCheck  
Verify Micro Deposits  
Update  
Delete

+ Add New Payment Method

Select a gateway to add a new payment method.

Plaid Test eCheck Only

Add payment method to this gateway

Click on “Choose Account with PLAID” and click on “Continue”

Add Payment Method


Add Payment Method To: ACH/E-Check

Account Type

Personal ▾

Using a new bank account for an E-Check payment requires account validation prior to use via Plaid.  
[Learn More?](#)  
*Note: Plaid instant validation must be done by the account holder and requires secure validation using online banking login information.*

Choose Account with



PLAID

☐

I authorize Valley Beth Shalom or their agent to debit my account in the amount above via e-check as soon as I click the button below. I agree that e-check transactions I authorize comply with all applicable law.

2



## Easily and safely add your eCheck account via **Plaid**

### ✓ Secure

Transfer of your information is encrypted end-to-end

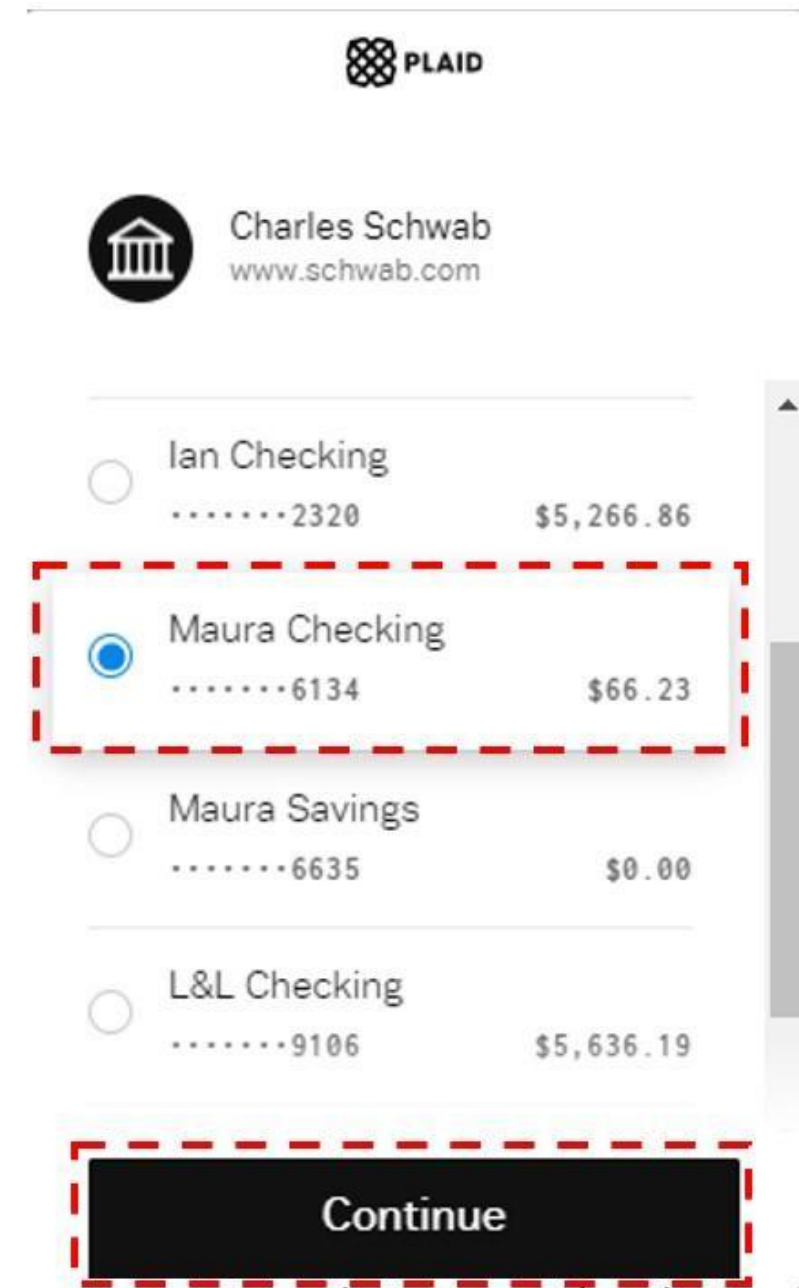
### ✓ Private

Your credentials will never be made accessible to ShulCloud


By selecting "Continue" you agree to the [Plaid End User Privacy Policy](#)

**Continue**

- Enter bank name in the Search bar/Enter bank login ID & Password/Click "Submit"  
NOTE: Screen updates with "Sending credentials" message
- Select desired account by clicking button to left of the account then clicking "Continue"  
NOTE: Below "Account Type" the message "Your account ending in xxxx has been chosen." Appears



PLAID

 Charles Schwab  
www.schwab.com

☐ Ian Checking  
.....2320 \$5,266.86

☒ Maura Checking  
.....6134 \$66.23


☐ Maura Savings  
.....6635 \$0.00

☐ L&L Checking  
.....9106 \$5,636.19

**Continue**



- Complete the name and address details
- Click "Save Payment Method"
- Credit Cards screen is refreshed with new saved payment methods. Accounts validated via Plaid have the Plaid logo and name w/in the saved payment method box

**Lawrence Estes**  
1609 Calumet St 77004 07/24  
Preferred Payment Method  
Gateway: SIP




Update  
Delete

1609 Calumet St 77004  
Gateway: SIP

Update  
Delete

**Lawrence Estes**  
1609 Calumet St 77004  
Gateway: SIP



Verify Micro Deposits  
Update  
Delete

+ Add New Payment Method

**Select a gateway to add a new payment method.**

Plaid Test eCheck Only ▼

Add payment method to this gateway

## How to Add a New Bank Account - Manual Option (Without Using Online Banking)

If your bank is not visible or you do not elect to use the Plaid process, you will have the option to add the payment method manually by clicking on “Didn’t see your bank in Plaid?”. This will present the traditional screen to manually add your banking information and validate via Micro Deposits.


Add Payment Method

Add Payment Method To: Credit Card/ACH

Type
☐ Credit Card
☒ E-Check

Account Type
Personal

שול קלוד - ShulCloud Sandbox validates each bank account entered using Plaid.
[Learn More?](#)

Choose Account with

**PLAID**

Didn't see your bank in Plaid?

NOTE: We can validate your bank account using micro deposits. Micro deposits are small amounts deposited and removed from your bank account, usually 2 and generally less than a dollar, to verify your account after you supply your banking information in this form. Micro deposits usually take 1-3 days to be deposited and removed from your account, so you'll need to come back and verify them once you receive them in order to use your account.

☐ I authorize שול קלוד - ShulCloud Sandbox or their agent to debit my account in the amount above via e-check as soon as I click the button below. I agree that e-check transactions I authorize comply with all applicable law.

First Name
Larry

Last Name
Estes

Address

City
Atlanta

Zip

State
Georgia

Country
United States

Phone

Email Receipt to
lestes@shulware.com

Save Payment Method
Cancel

Add Payment Method

Add Payment Method To: Credit Card/ACH

Type ☐ Credit Card ☒ E-Check

Account Type 

Personal

שול קלד - ShulCloud Sandbox validates each bank account entered using Plaid. [Learn More?](#)

ABA Routing Number

[Where do I find this?](#)

Bank Account Number

[Where do I find this?](#)

NOTE: We can validate your bank account using micro deposits. Micro deposits are small amounts deposited and removed from you bank account, usually 2 and generally less than a dollar, to verify your account after you supply your banking information in this form. Micro deposits usually take 1-3 days to be deposited and removed from your account, so you'll need to come back and verify them once you receive them in order to use your account.

☐ I authorize שול קלד - ShulCloud Sandbox or their agent to debit my account in the amount above via e-check as soon as I click the button below. I agree that e-check transactions I authorize comply with all applicable law.

First Name

Larry

Last Name

Estes

Address

City

Atlanta

Zip

State

Georgia

Country

United States

Phone

Email Receipt to

lestes@shulware.com

Save Payment Method

Cancel

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