

SF Payment Information, Updated 6/24/20, by SThacker

SuccessFactors (SF) Quick Guide: How to Change Payment Information and Bank Details

Instructions for: Changing bank and payment details

What need to be done prior: Activated SF Account

Tools needed: Internet connection, Bank Routing Number and Account Number

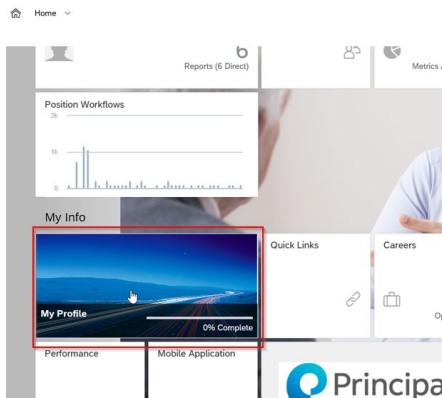
Recommended for: All Employees

Part I: To make changes to your current bank information, proceed with step #1 on page 1.

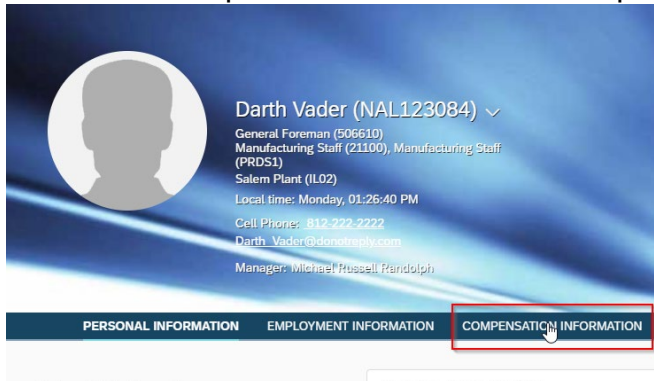
Part II: To add a new payment method, [proceed to step # 1 on page 5 by clicking here.](#)

Part I: Changing current bank information:

1. After logging in, your “Home” page will be displayed. Scroll down to the “My Profile” tile and click.

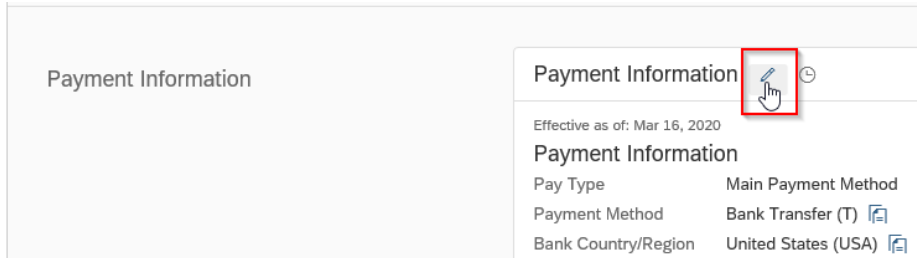


Select the Compensation Information link up along the top.




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2. In the “Payment Information” select the pencil to edit.





Payment Information

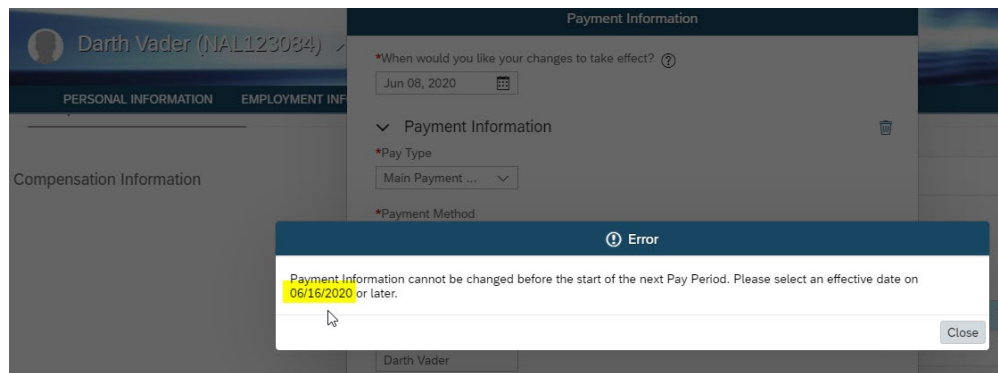
Payment Information 

Effective as of: Mar 16, 2020


Payment Information

Pay Type	Main Payment Method
Payment Method	Bank Transfer (T) 
Bank Country/Region	United States (USA) 

3. The date of the change needs to be the NEXT payroll cycle. It will not allow you to save in the current payroll cycle. If you do not know that date, just click save without making any changes. It will pop up a box that tells you what the next available date is. In this example, we will need to use 6/16/2020.



Payment Information

*When would you like your changes to take effect? 

Jun 08, 2020

Payment Information

*Pay Type
Main Payment ...

*Payment Method

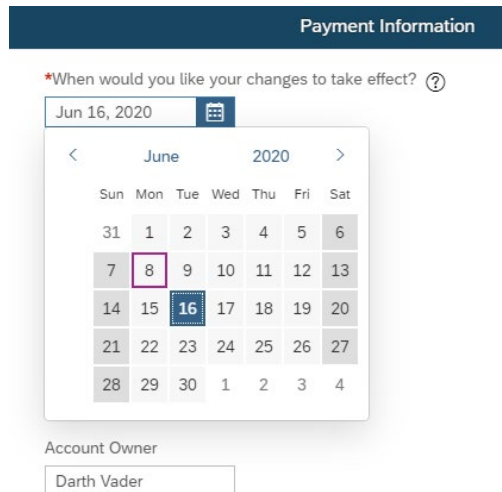
Error

Payment Information cannot be changed before the start of the next Pay Period. Please select an effective date on 06/16/2020 or later.


Close

Note: Select close after reviewing the date.

4. Place the next pay period date in the box for when the changes will take effect.



Payment Information

*When would you like your changes to take effect? 

Jun 16, 2020

< June 2020 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4

Account Owner


Darth Vader


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Note: Please remember, you must always have one main payment bank listed. If you need to add additional banks, please go to page 5 of this instruction.

5. Select “Show 8 more fields” to expand the existing bank details (for example the bank routing numbers).


Payment Information


*When would you like your changes to take effect? 

Jun 16, 2020 


▼ Payment Information 

*Pay Type
Main Payment ... ▼

*Payment Method
Bank Transfer (T) 

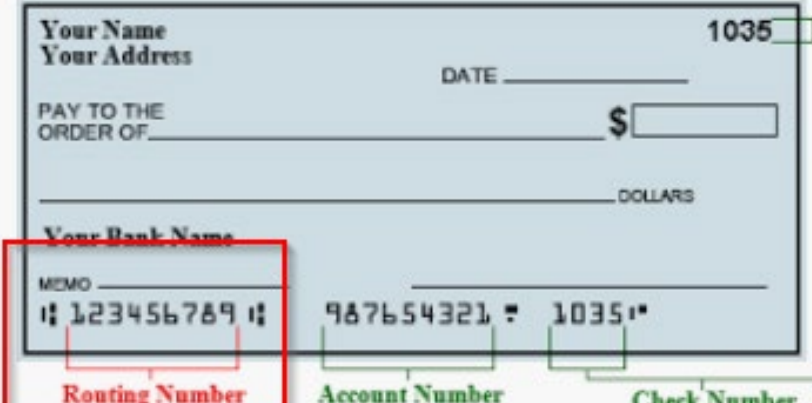
*Bank Country/Region
United States (U... ▼ 

Account Owner
Darth Vader

Show 8 more fields 

Add Payment Information
Cancel Save

6. Verify you know your bank's routing number.

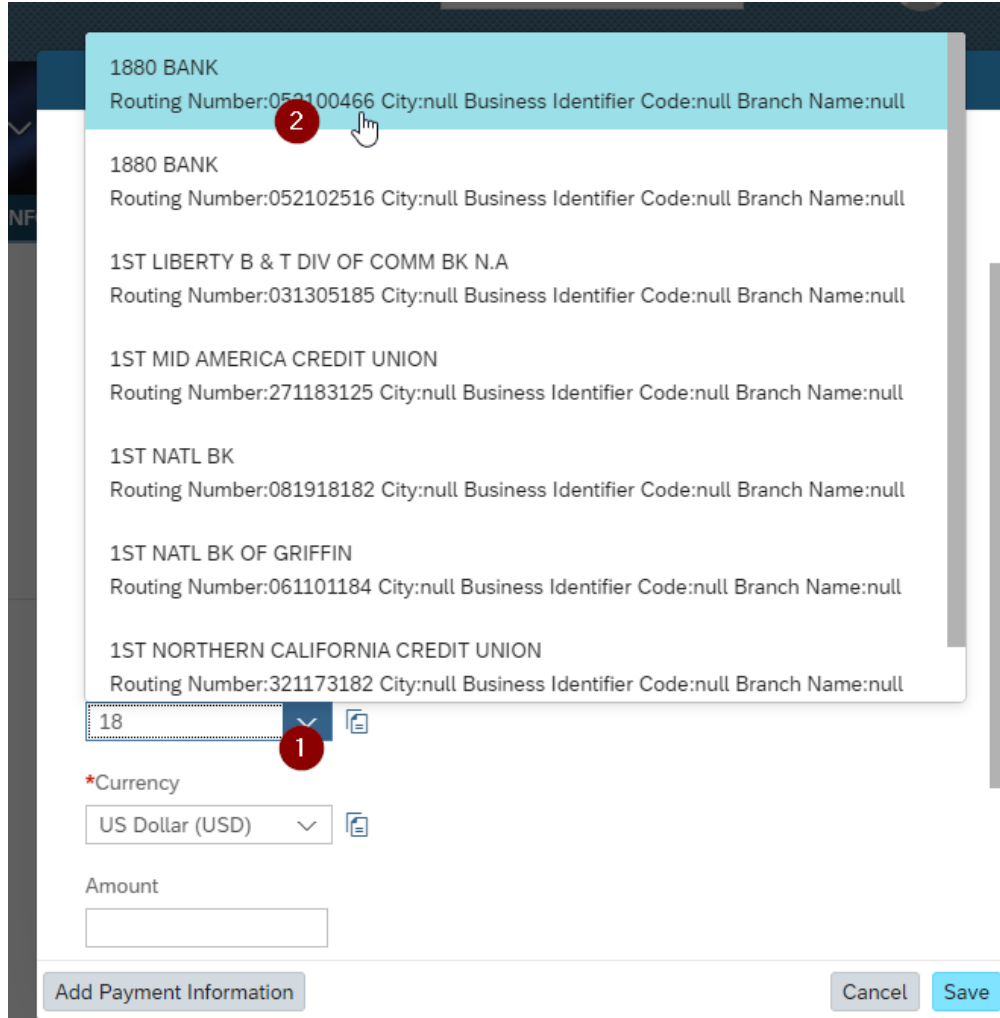


The image shows a check with the following fields and labels:

- Your Name**: _____
- Your Address**: _____
- DATE**: _____
- 1035**: (Top right corner)
- PAY TO THE ORDER OF**: _____
- \$**: _____
- DOLLARS**: _____
- Your Bank Name**: _____
- MEMO**: _____
- 123456789**: (Routing Number, highlighted with a red box and label)
- 987654321**: (Account Number, highlighted with a green box and label)
- 1035**: (Check Number, highlighted with a green box and label)

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7. In the Bank field, start typing the bank name if you are needing to change the Main Bank type. Click on your bank you need to change it to.



1880 BANK
Routing Number:052100466 City:null Business Identifier Code:null Branch Name:null

1880 BANK
Routing Number:052102516 City:null Business Identifier Code:null Branch Name:null

1ST LIBERTY B & T DIV OF COMM BK N.A
Routing Number:031305185 City:null Business Identifier Code:null Branch Name:null

1ST MID AMERICA CREDIT UNION
Routing Number:271183125 City:null Business Identifier Code:null Branch Name:null

1ST NATL BK
Routing Number:081918182 City:null Business Identifier Code:null Branch Name:null

1ST NATL BK OF GRIFFIN
Routing Number:061101184 City:null Business Identifier Code:null Branch Name:null

1ST NORTHERN CALIFORNIA CREDIT UNION
Routing Number:321173182 City:null Business Identifier Code:null Branch Name:null

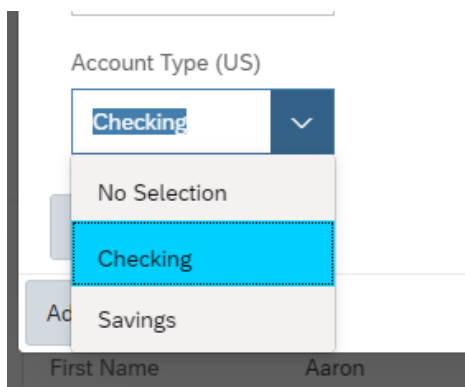
18

*Currency
US Dollar (USD)

Amount

Add Payment Information Cancel Save

8. From Account Type you can change from Checking to Savings or vice versa.



Account Type (US)

Checking

No Selection

Checking

Savings

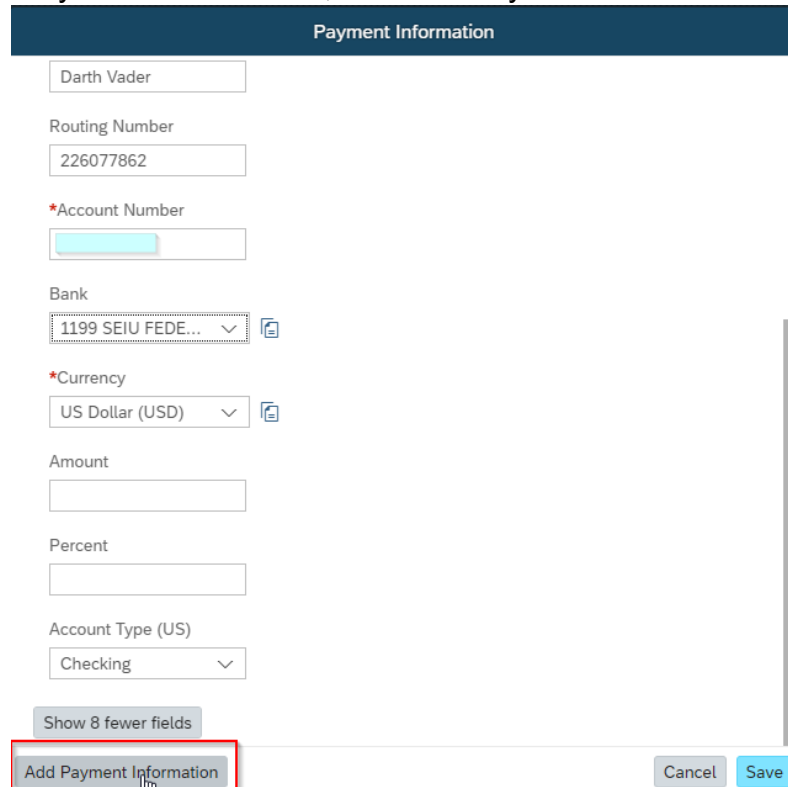
First Name Aaron

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IMPORTANT NOTE: The first bank must **ALWAYS** be labeled as **MAIN** and cannot contain an amount or percent.

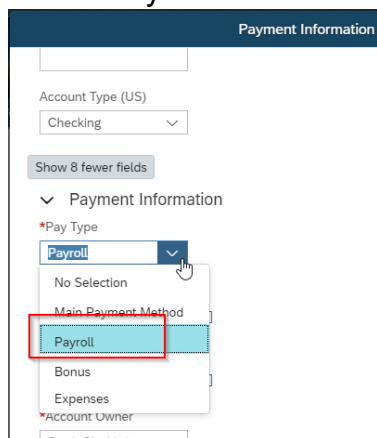
Part II: Add a new payment method:

1. Select "Add Payment Information", from the Payment Information dialog box.



IMPORTANT NOTE: Always chose **payroll** for the second type. ***You cannot have two MAIN PAYMENT METHODS.***

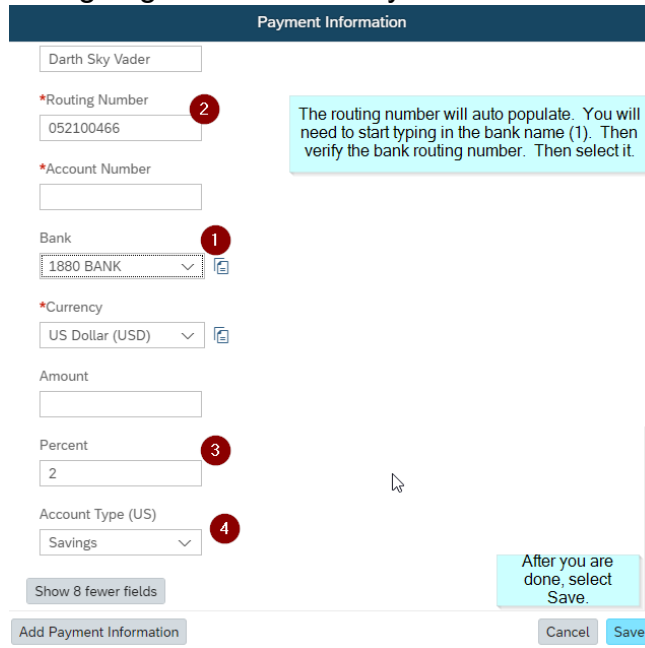
2. Select Payroll from the Pay Type.



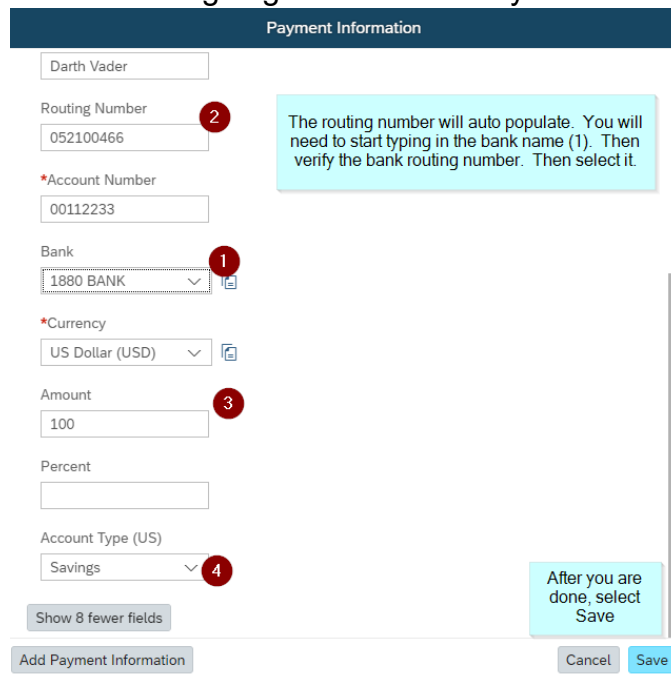
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- Continue to fill out the information the same way as shown for Main. However, for the other types you will need to define the amount or percent, it can only be one or the other.

Example A: Shows 2% going to the secondary bank.

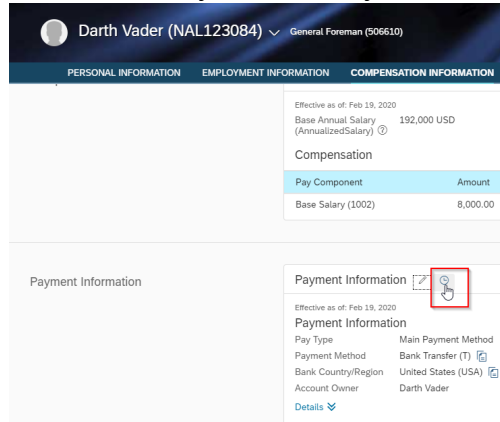


Example B: Shows 100 dollars going to the secondary bank.



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- To view your changes, click the history icon in Payment Information.



Darth Vader (NAL123084) General Foreman (506610)


PERSONAL INFORMATION EMPLOYMENT INFORMATION COMPENSATION INFORMATION

Effective as of: Feb 19, 2020
Base Annual Salary (Annualized Salary) 192,000 USD

Compensation



Pay Component	Amount
Base Salary (1002)	8,000.00

Payment Information





Payment Information 

Effective as of: Feb 19, 2020

Payment Information

Pay Type Main Payment Method
Payment Method Bank Transfer (T) 
Bank Country/Region United States (USA) 
Account Owner Darth Vader
[Details](#)

- The Change History record will show a snapshot of changes that were made.

Change History	Payment Information Changes
Jun 16, 2020	Effective as of: Feb 19, 2020
Effective end date Dec 31, 9999	Payment Information
Feb 19, 2020	Pay Type Main Payment Method
	Payment Method Bank Transfer (T) 
	Bank Country/Region United States (USA) 
	Account Owner Darth Vader
	Routing Number 257079033
	Account Number 00112233
	Bank 167TH TFR FEDERAL CREDIT UNION 
	Currency US Dollar (USD) 
	Amount -
	Percent -
	Account Type (US) Checking
Insert New Record	Delete Edit

This completes the Change Bank and Payment Details.