



TREASURY SOLUTIONS

How to Create and Manage Beneficiaries

Beneficiaries are the accounts or wallets you send funds to from your Orbital accounts. Setting them up correctly ensures your payments are routed to the right destination. You can set up both **fiat accounts** (like bank accounts) and **crypto wallets** as beneficiaries.

Once a beneficiary is created, you can easily reuse it for future payments, which speeds up your workflow and reduces the risk of errors. Within the Client Portal, you have full control to add new beneficiaries, manage existing ones, and remove those you no longer need.

How to Add a New Beneficiary

1. Navigate to **Treasury Solutions** → **Beneficiaries** from the left-hand menu.
2. Click **Create beneficiary** to open the Add New Beneficiary dialog.

4. Once your details is entered correctly, click **Add Beneficiary**.
5. Due to compliance regulations, you may be required to confirm your identity after adding a new beneficiary. This is a necessary security step. Once your verification is complete, the new beneficiary will appear in your list with a "New" status until it is fully verified and active.

Beneficiaries Create Beneficiary

Search by beneficiary name, account number or currency. Filter

Beneficiary Name	Currency	Account number	Status
John M Smith	ETH	0x8f823203e04	New
Ms USDOT TRC - 0871237	USDT (TRC20)	0x8f823203e04	New
Ms ETH 0871237	ETH	0x8f823203e04	New

Understanding Beneficiary Statuses

Your beneficiaries will display different statuses depending on their approval stage:

- **New:** A newly created beneficiary currently being reviewed by Orbital. Payments to beneficiaries with "New" status will not be processed until approved.
- **Approved:** An Orbital-approved beneficiary ready for payments.
- **Rejected:** The beneficiary has been rejected by Orbital. Any pending payments to rejected beneficiaries will be cancelled.

How to Delete a Beneficiary

When you need to remove outdated beneficiaries or clean up your payment destinations, you can delete them from your account. Keep in mind that this action cannot be undone, if you need to use the same counterparty again, you'll need to re-add them as a new beneficiary.



You cannot directly edit existing beneficiary details. To modify information for an approved beneficiary, you must delete the existing record and create a new beneficiary with the corrected details.

1. In the **Beneficiaries** table, find the beneficiary you want to delete. You can use the filter options to help locate them if needed.
2. Click the trash can icon next to the beneficiary's entry. A confirmation dialog will appear. Click "**Delete Beneficiary**" to permanently remove it from your list.

By following these steps, you can efficiently manage your beneficiaries in the Orbital Client Portal, ensuring accurate and secure payments for all your transactions.

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