

Accessing Transfers

One-time or scheduled transfers (SRTs) may be made from multiple locations throughout Online Banking:

- **Make a transfer** navigation option under Move Money
- **Transfer** button on the home page
- **Transfer** button on the Account History page
- **QuickPeek** link from My Accounts widget

Transfer Options

If your financial institution offers Intra-FI transfers (from one user to another within your FI) and/or External Transfers, these options will display on the transfer screen.

Setting Up a Recurring Transfer

To set up a recurring transfer, select the frequency, start date, and ending options. To change these details, click the link next to the **Repeat** box.

Success Message

A success message will display once the transfer has been set up. Your financial institution may also display custom messaging in the window.

View Scheduled Transfers
 Scheduled transfers may be viewed from the **Move Money** menu in Online Banking.

Scheduled Transfers						Make a Transfer
Amount	From	To	Frequency	Memo		
February 15, 2018						
🔄 \$1.11	Personal Checking *9022	My Visa12 1316	Twice a month on the 1st and 15th until I cancel		Edit	Cancel
February 21, 2018						
🔄 \$34.00	Business Checking NEW 1315	Personal Checking *9022	Every week on Wednesday until I cancel	why not test memo	Edit	Cancel
February 26, 2018						
🔄 \$1.11	ADVANTAGE 50 CHECK 0009	Hidden Business Savings *7263- *9023	Every 2 weeks on Monday until I cancel	Test	Edit	Cancel
🔄 \$10.00	Business Checking NEW 1315	ADVANTAGE 50 CHECK 0009	Every 2 weeks on Monday until 08/08/2018		Edit	Cancel
Expired transfers						
🔄 \$1.00	ABS Accounts *0027	Simulator Checking *0001	Every week on Monday until I cancel			Delete
\$1.00	Simulator Checking *0001	ABS Account *0026	Just once			Delete
\$5.00	ABS Account *0026	Simulator Savings *0002	Just once			Delete
🔄 \$25.00	Account not found	Account not found	Every week on Wednesday until I cancel			Delete

Transfer Options
 Expired transfers are transfers that have completed their cycle or were cancelled by the system*. These transfers are available to view until the user deletes them from the list.
 * NOTE: See the Transfers Processing Quick Help Guide for more information.

Edit / Cancel
For clients with Responsive User Interface:
 A scheduled transfer may be edited or cancelled from this screen.
For clients with Non-Responsive Interface:
 Transfers may be cancelled from this screen. To make an "edit," users need to cancel the transfer, then set it back up via Make a Transfer.