

**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	<a href="#">Cancel</a>
February 21, 2018						
🔄 \$34.00	Business Checking NEW 1315	Personal Checking *9022	Every week on Wednesday until I cancel	why not test memo	Edit	<a href="#">Cancel</a>
February 26, 2018						
🔄 \$1.11	ADVANTAGE 50 CHECK 0009	Hidden Business Savings *7263- *9023	Every 2 weeks on Monday until I cancel	Test	Edit	<a href="#">Cancel</a>
🔄 \$10.00	Business Checking NEW 1315	ADVANTAGE 50 CHECK 0009	Every 2 weeks on Monday until 08/08/2018		Edit	<a href="#">Cancel</a>
Expired transfers						
🔄 \$1.00	ABS Accounts *0027	Simulator Checking *0001	Every week on Monday until I cancel			<a href="#">Delete</a>
\$1.00	Simulator Checking *0001	ABS Account *0026	Just once			<a href="#">Delete</a>
\$5.00	ABS Account *0026	Simulator Savings *0002	Just once			<a href="#">Delete</a>
🔄 \$25.00	Account not found	Account not found	Every week on Wednesday until I cancel			<a href="#">Delete</a>

**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.