



Making Transfers

You will select Transfer & Pay, Make a Transfer then select the account you want to transfer from on the left column using drop down arrow, then select the account to transfer to from the right column input the amount, date, review transfer.

The accounts listed are all your accounts as well as any external accounts you have set up and any other member accounts you have saved to transfer to in the future.

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Transfers

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Accounts

From Account

BUSINESS CHECKI... **413-0011 \$0.00 ▼

To Account

HOLIDAY CLUB **413-0039 \$0.06 ▼

How Much

Amount *
\$0.02

When

Frequency
One Time ▼

Date *
06-13-2023

Memo

Description (Optional)



You can set up recurring transfers by changing the frequency, select the arrow

When

Frequency
Weekly

^

Weekly

✓

Biweekly

Monthly

End of Month

Semi Monthly

Every Other Month

Every Four Weeks

If setting up recurring transfers, note you can select and End Date or by Number of Occurrences

When

Frequency
Weekly

▼

Date
06-13-2023

📅

Series Ends
On Date

^

End Date
06-21-2023

📅

Never

On Date

✓

Occurrences

0 / 20

Review Transfer, Submit

Review Transfer

Amount

\$0.01

Accounts

From Account

● XXXXXX8413 S0002
**413-0002

To Account

● HOLIDAY CLUB
**413-0039

When

Series Start Date
Jun 13, 2023

Frequency
Weekly

Series End Date
Jul 4, 2023



Success

Your recurring transfer was scheduled successfully and the first occurrence has been completed.

Confirmation number: 08110175780538

Live Chat

Live Chat

Edit Transfer

Submit Transfer

View Transfer Activity

Done

Once you have set up recurring transfers, you can view/cancel/edit them under scheduled tab.

Transfers



Make a Transfer Scheduled Activity More Actions

Scheduled Transfers



| DATE | FROM ACCOUNT | TO ACCOUNT | AMOUNT | STATUS |
|--------------|----------------------------------|------------------------------|----------|-----------------|
| Jun 20, 2023 | ● XXXXXX8413 S0002 **413-0002 | ● HOLIDAY CLUB **413-0039 | 📅 \$0.01 | 📅 SCHEDULED ... |

View Transfer Details
Edit Series
Skip Next Transfer
Cancel Series



To see past transfers, select activity.

Transfers



Make a Transfer Scheduled Activity More Actions

Transfer Activity



| DATE | FROM ACCOUNT | TO ACCOUNT | AMOUNT | STATUS |
|--------------|----------------------------------|------------------------------|----------|------------------------------|
| Jun 13, 2023 | ● XXXXXX8413 S0002 **413-0002 | ● HOLIDAY CLUB **413-0039 | 📅 \$0.01 | ✔ SUCCEEDED ... |

View Transfer Details

Transfer Details

\$0.01

✔ SUCCEEDED

Accounts

From Account

● XXXXXX8413 S0002 **413-0002

To Account

● HOLIDAY CLUB **413-0039

When

Transfer Date

Jun 13, 2023

Series End Date

Jul 4, 2023

Confirmation Number

08110175780538

Scheduled by

NOT ACCOUNT

Scheduled on

Jun 13, 2023

Frequency

Weekly