

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.

Dashboard	Accounts	Loans	Financial Plan	ning Transfer & Pay	Tools	
Transf	ers					
Make a Transfe	r Scheduled	Activity	More Action	s		
Accounts						
From Account BUSINESS	CHECKI **4	13-0011 🙆	\$0.00 ~	To Account HOLIDAY CLUB **41	3-0039	\$0.06 ~
How Much						
Amount * \$0.02						
When						
Frequency One Time			~	Date * 06-13-2023		Ħ
Memo						
Description (Opt	tional)					



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

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Frequency Weekly	^
Weekly	< ¹
Biweekly	- 1
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

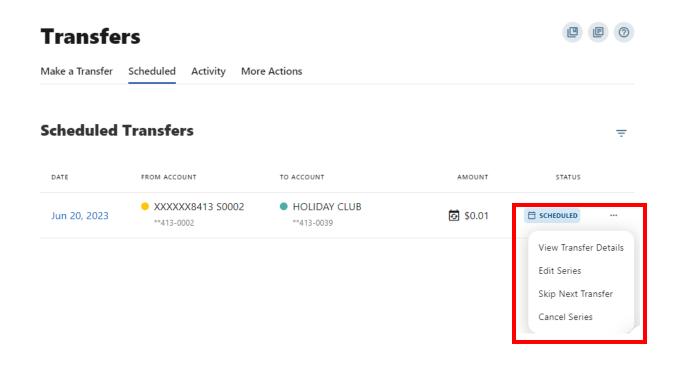
When			
Frequency Weekly	*	Date 06-13-2023	Ë
Series Ends On Date	^	End Date 06-21-2023	Ħ
Never			
On Date	~		
Occurrences			0 / 20

Review Transfer, Submit



Review Transfer	8
Amount \$0.01	
Accounts From Account	Success
From Account • XXXXXXX8413 S0002 **413-0002	Your recurring transfer was scheduled successfully and the first occurrence has been completed.
To Account • HOLIDAY CLUB **413-0039	Confirmation number: 08110175780538
When Series Start Date Jun 13, 2023	
Frequency Weekly	
Series End Date Jul 4, 2023	
• •	Ive Chat
Edit Transfer Submit Trans	fer View Transfer Activity Done

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





To see past transfers, select activity.

