

Multiple Account Transfers

Multiple Account Transfers Template Creation

1. Under the *Move My Money* tab, click “Between Accounts”. Then under the *Multi-Account Transfers* tab, click “Create Template”.

Funds Transfer

Individual Transfers **Multi-Account Transfers**

Search **Create Template** Transfer Funds

2. Enter a *Template Name* and *Memo*. For each transfer you would like to send, fill out the *From Account*, *To Account*, and *Amount*. Click “+ Add Another Transfer” to add another. Click “Save” once done.

Template Name Template Access Rights
1 of 1 users selected

Origination Details

Memo **Push Memo to All**

Transfers (3)

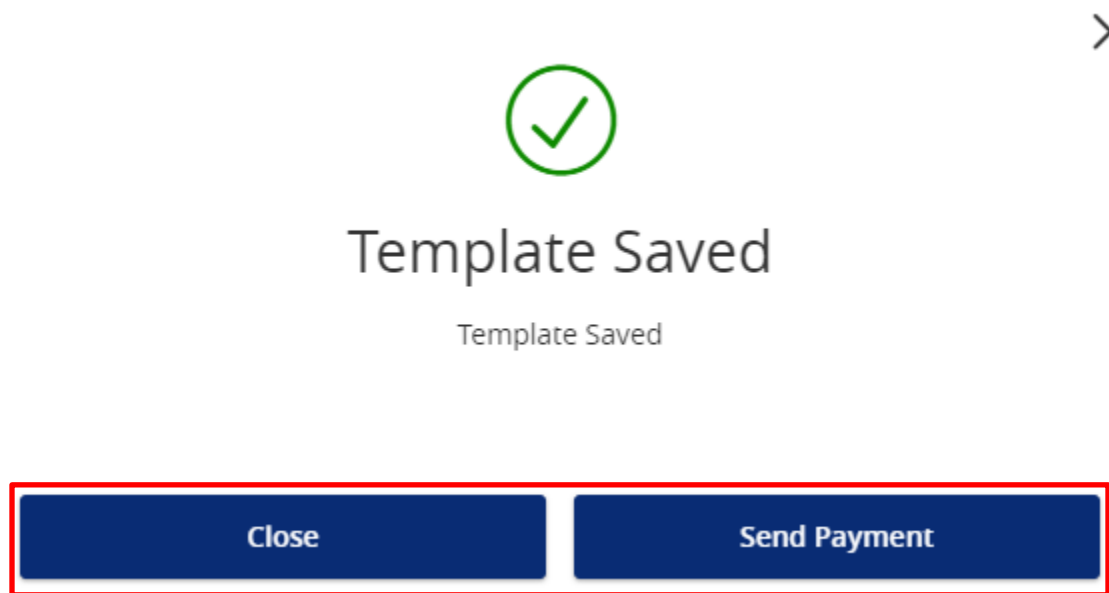
From Account	To Account	Amount	
Main acct DDA-XXXXX6789 \$1000.00	Second checking DDA-XXXXX9999 \$500.00	<input type="text" value="\$100.00"/>	Test ⋮
Second savings SAV-XXXXX4321 \$2000.00	Primary savings SAV-XXXXX1111 \$1500.00	<input type="text" value="\$200.00"/>	Test ⋮
Primary savings SAV-XXXXX1111 \$1500.00	Main acct DDA-XXXXX6789 \$1000.00	<input type="text" value="\$300.00"/>	Test ⋮

+ Add another transfer

\$600.00
3 transfers Cancel **Save**

NOTE: *Push Memo To All* adds the memo to all transactions in the template.

3. To go back to the *Funds Transfer* section, click “Close”. To move forward with the payment, click “Send Payment”.



4. Input your *Transfer Date* for the transfers. If it’s a recurring transfer, click “Set Schedule”. Then select your *Frequency* and the *End Date*. Once done, click “Save”.

Multi Transfer Test (Funds Transfer)

[Edit Template](#)

Origination Details

Transfer Date

☒ Use same Date for all transfers

Recurrence

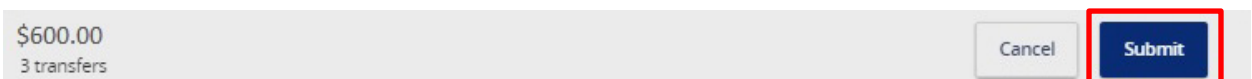
[Set schedule](#)

11/15/2019



NOTE: If you uncheck *Use Same Date For All Transfers* you can select different dates for each transfer.

5. Once complete, click “Submit” to send the transfers.



Creating a One-Time Multiple Account Transfer

1. Under the *Move My Money* tab, click “Between Accounts”. Then under the *Multi-Account Transfers* tab, click “Transfer Funds”.

Funds Transfer

Individual Transfers

Multi-Account Transfers

Create Template

Transfer Funds

2. Input your *Transfer Date* for the transfers. For each transfer you would like to send, fill out the *From Account*, *To Account*, and *Amount*. Once done, click “Submit”.

Funds Transfer

Origination Details

Transfer Date

☒ Use same Date for all transfers

Recurrence

None

Memo

Push Memo to All

Transfers (3)

Find accounts in transfer

From Account	To Account	Amount	
<input type="text" value="Search by name or num"/>	<input type="text" value="Search by name or num"/>	<input type="text" value="\$0.00"/>	⋮
<input type="text" value="Search by name or num"/>	<input type="text" value="Search by name or num"/>	<input type="text" value="\$0.00"/>	⋮
<input type="text" value="Search by name or num"/>	<input type="text" value="Search by name or num"/>	<input type="text" value="\$0.00"/>	⋮

\$0.00
3 transfers

Cancel

Submit

NOTE: *Push Memo To All* adds the memo to all transactions in the template.