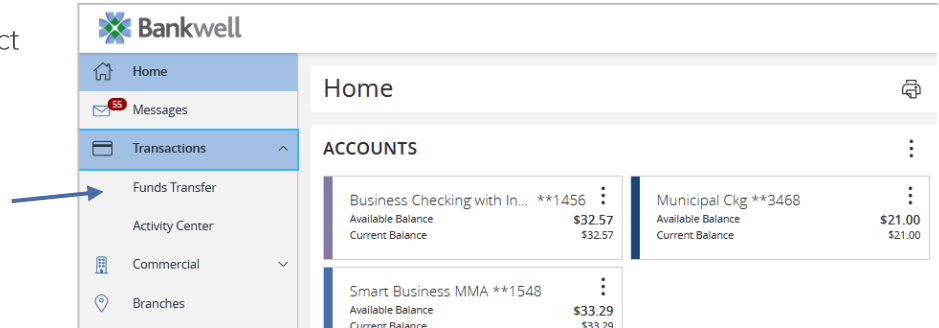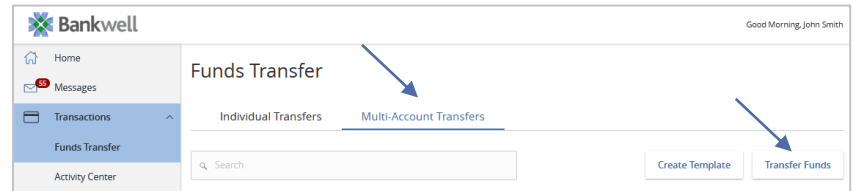## *Transfer Funds*

1. Select the 'Transactions' menu, then select 'Funds Transfer'.
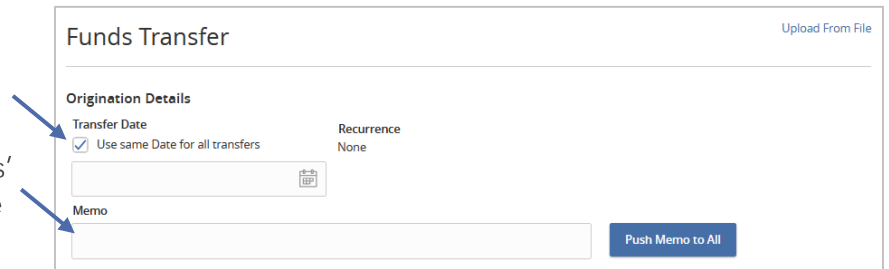

2. Select the 'Multi-Account Transfers' tab.

3. Select 'Transfer Funds'.

4. Click the 'Use same Date for all transfers' check box to automatically set the same date for all transfers being initiated.

   Or leave the 'Use same Date for all transfers' check box unselected to individually set the date for each transfer.

   Optional: Enter a memo and click 'Push Memo to All' to automatically push the same memo to all transfers listed.

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5. Select the 'From' and 'To' Account for each transfer.

6. Enter the Amount for each transaction.

7. Review the information on the screen for accuracy, and select submit.

Note: Funds transfers are processed in the order that they appear on the screen.

Creating a Template

8. To create a transfer template, select 'Create Template'

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9. Enter the 'Template Name'

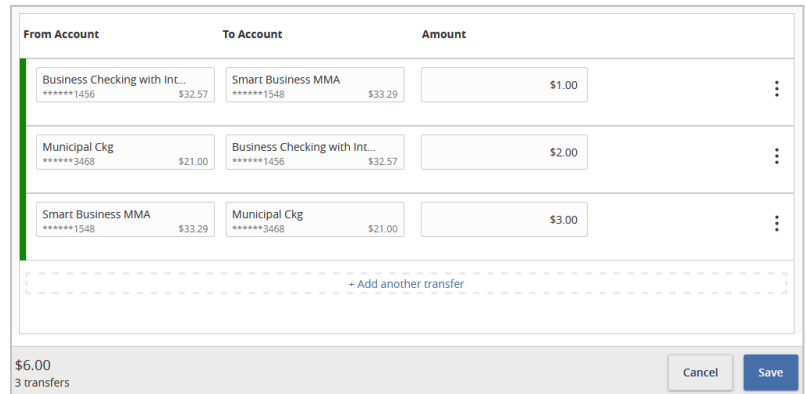10. Select the link below 'Template Access Rights' to designate the users who should have access to the template.

Funds Transfer

Template Properties

Template Name

Template Access Rights
2 of 2 user roles selected

11. Select the 'From' and 'To' Account for each transfer.
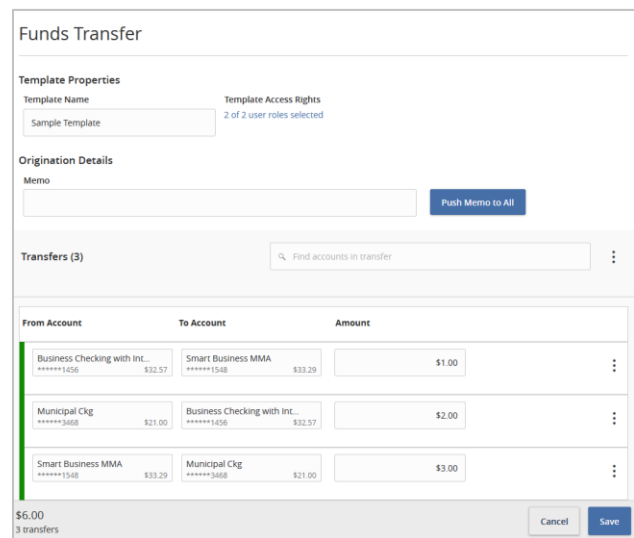
12. Enter the Amount for each transaction.

13. Review the information for accuracy. Then select 'Save'

Note: Funds transfers are processed in the order that they appear on the screen.

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