



Transfer Money – Adding and Managing Recipients

Adding Recipients

There are three access points within Online Banking that can be used to add recipients:

1. Link on the *Move Money* overlay
2. Main navigation under the *Transfer Funds* tab
3. Link on the *Move Money* pop-up *To* account dropdown

1. Link on the Move Money pop-up

Move money

Personal Checking *0987

Steven

Today Repeat

\$0.00

Enter a memo (optional)

Make a transfer Cancel [Transfer to/from an outside account](#)

Quickly send money to another member
[+ Add recipient](#)

2. Main Navigation under the *Transfer Funds* tab





3. Link on the *Move Money Pop-up To* account dropdown

To

ANOTHER MEMBER	
Steve Smith	

MY ACCOUNTS	
Checking 1 *0987	Available \$5,800.00
Savings *0987	Available \$5,800.00
Money Market *0987 3 of 6 allowed transfers used	Available \$5,800.00
Loan *0987 Payoff amount \$100,098.00	Available \$5,800.00 \$500.00 due May 4, 2013

[Add a recipient \(FI name members only\)](#)

All 3 access points open an *Add Recipient* pop-up.

Add Recipient (Your Financial Institution customers only)

We establish a connection between you and your recipient using their account information to make a transfer. Your recipients need to have an account with us.

Who do you want to add

Account type

Account Suffix

Recipient's ID

All fields on the *Add Recipient* pop-up are required. You can only add checking and savings accounts.



Click *Add Recipient* when complete (You will not be able to proceed if you do not complete all field).

Add Recipient (Test Safe Credit Union members only)

We establish a connection between you and your recipient using their account information to make a transfer. Your recipients need to have an account with us.

Who do you want to add

First 3 characters of last name

Account type

Account Suffix

Recipient's ID **Error**

This is a required field.

After clicking the *Add Recipient* button on the *Add Recipient* pop-up, you will be presented with a *Please confirm* screen.

The confirmation screen will present the recipient's name and will prompt you to confirm that this is indeed the person you'd like to add.

Please confirm

Is this the recipient you want to add?

Steve Smith

Recipients you add will automatically appear in your 'Transfer To' list for future transfers.

After you click *Confirm*, recipient is added and you will be taken back to the *Move Money* pop-up.



If *Add Recipient* flow was not successful (i.e., couldn't verify recipient's account details), you will be presented with an error message:

Add Recipient (Test Safe Credit Union members only)

⚠ We were unable to add the recipient. Please contact us.

We establish a connection between you and your recipient using their account information to make a transfer. Your recipients need to have an account with us.

Who do you want to add:

First 3 characters of last name:

Account type:

Account Suffix:

Recipient's ID:

If adding the recipient was successful, the newly added recipient will appear in the *To* drop-down in the *Another Member* section.

To:

MY ACCOUNTS

Checking 1 *0987	Available \$5,800.00
Savings *0987	Available \$5,800.00
Money Market *0987	Available \$5,800.00
3 of 6 allowed transfers used	
Loan *0987	Available \$5,800.00
Payoff amount \$100,098.00	\$500.00 due May 4, 2013

ANOTHER MEMBER

Steve Smith	
DeG *0987	

[Add a recipient](#)
(FI name members only)

You can proceed with making a transfer as you would do with any other transfer in the *Move Money* pop-up. The added recipient will always appear in the *To* drop down.

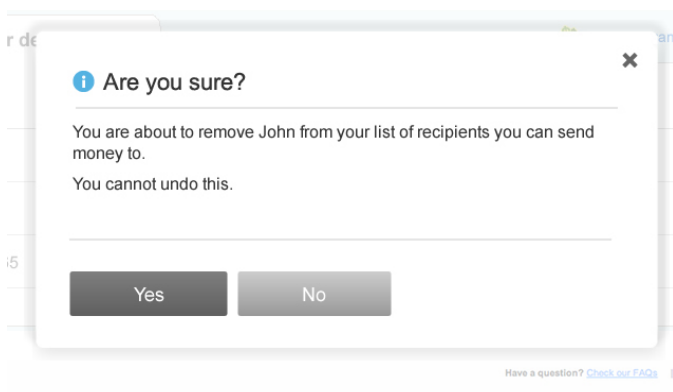
Managing Recipients via the Manage Transfer Destinations Page

The *Manage transfer destinations* page is accessible through a link under the *Transfers Funds* tab on the main navigation. The page shows a list of recipients you have previously added. The list of recipients is displayed in the same order as in the *To* drop-down menu under the *Move Money* pop-up. For each recipient you will see:

- Nickname that you chose for this recipient
- Account type
- Account suffix
- Last 4 digits of recipient's ID
- Remove link

Manage transfer destinations				
Recipients				
Test Business Acct	Savings	00	*2736	Remove
Test Virtual	Savings	00	*4270	Remove
Test Virtual Checking	Checking	75	*4270	Remove

If you click the *Remove* link on the right of each recipient, a confirmation pop up appears.



If you confirm the action, a success or error message will appear with the status. The message will stay on the screen for 10 seconds and then fade out.

Manage transfer destinations

✔ Recipient was removed successfully.

Recipients

Dad	Checking	S0	*****0978	Remove
John	Savings	S4	*****7345	Remove
Mary Matisse	401K	*1234	*****0346	Remove

⚠ We were unable to remove the recipient. Try again later.

If you have no recipients set up, or if you just deleted all recipients, you will be presented with a message stating *You currently have no recipients set up.*

Manage transfer destinations

You do not have any transfer destinations setup.