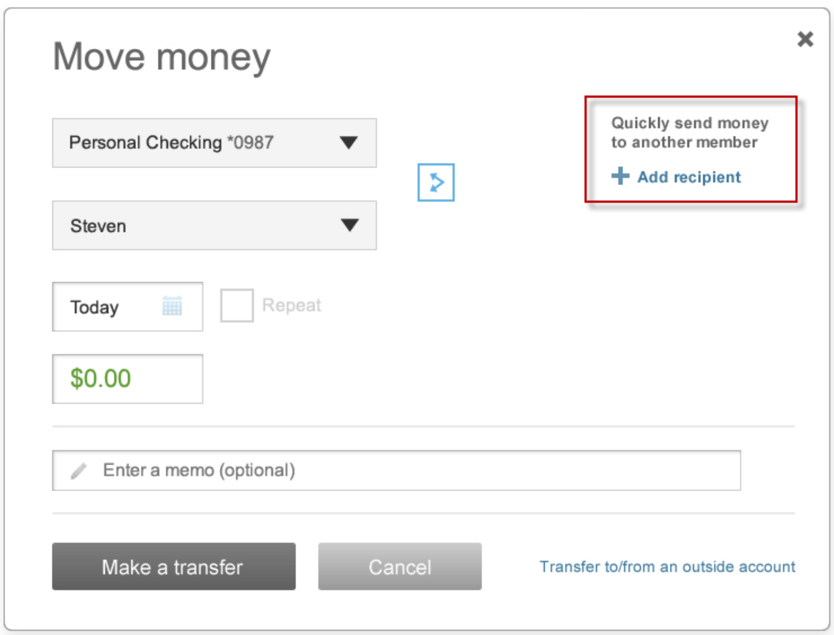
Transfer Money – Adding and Managing Recipients

Adding Recipients

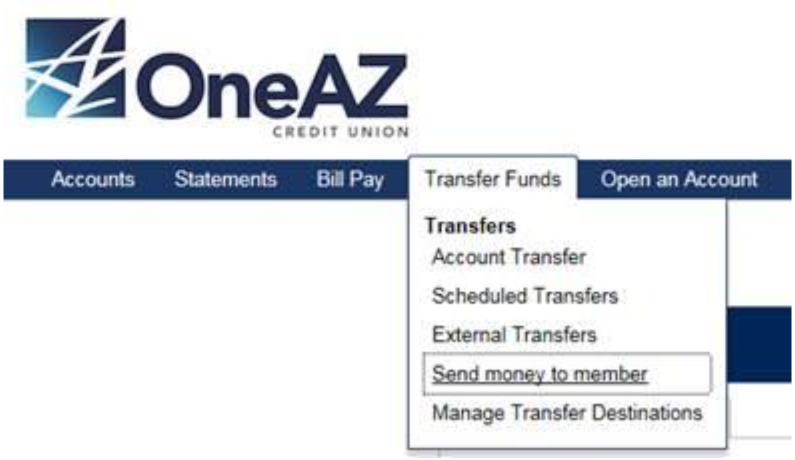
There are three access points within Online Banking that can be used to add recipients:

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

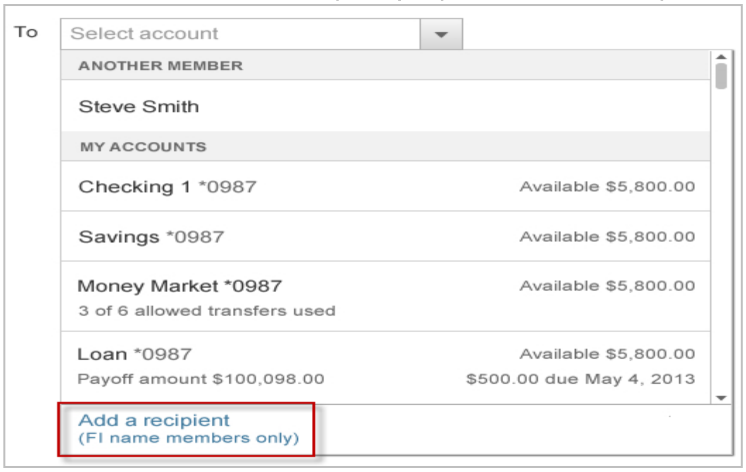
1. Link on the Move Money pop-up



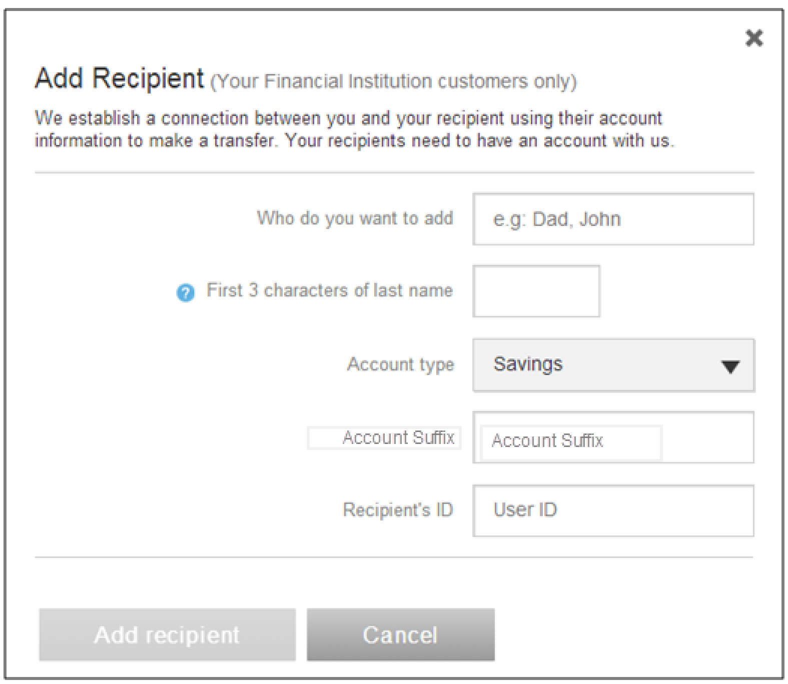
2. Main Navigation under the *Transfer Funds* tab



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

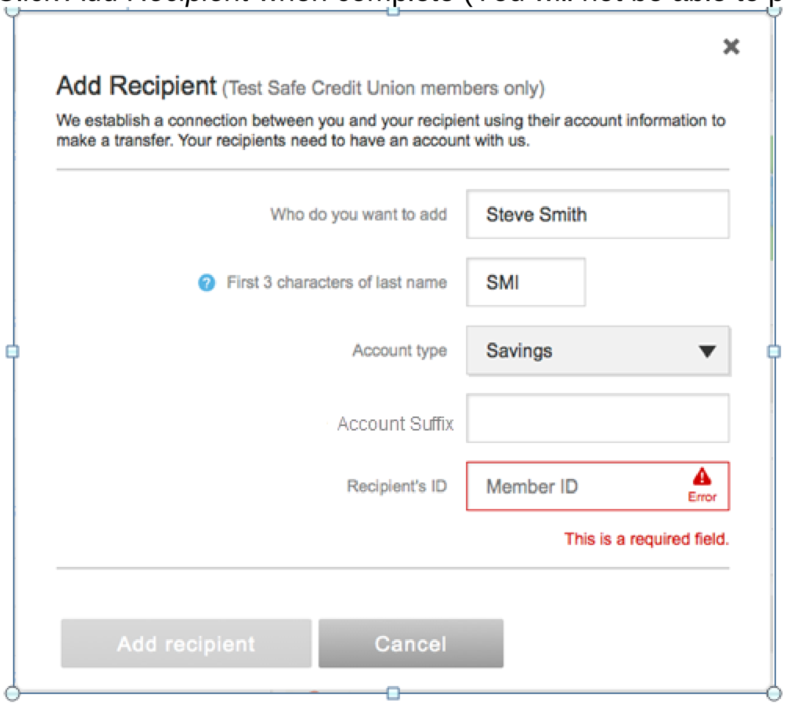


All 3 access points open an *Add Recipient* pop-up.



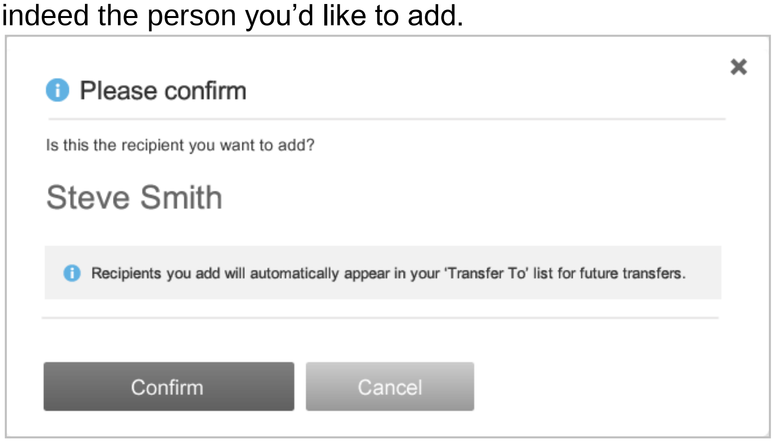
All fields on the *Add Recipient* pop-up are required. You can only add checking and savings accounts.

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



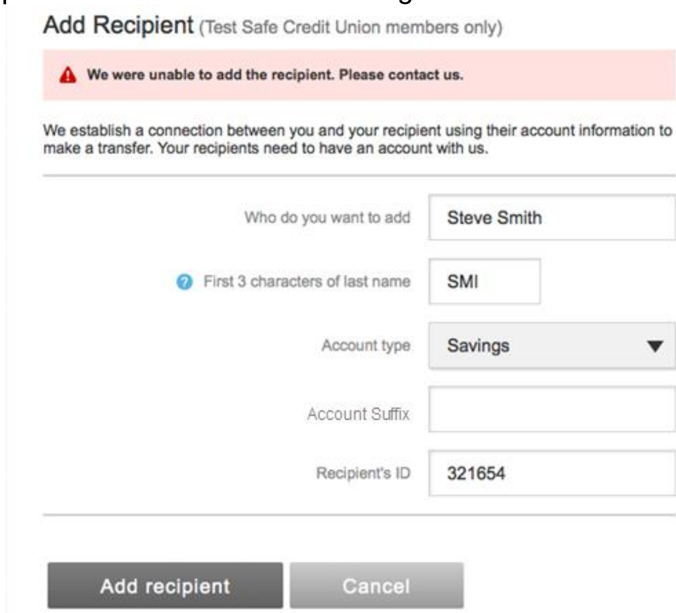
After clicking the *Add Recipient* button on the *Add Recipient* pop-up, you will be presented with a *Please confirm* screen.

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.

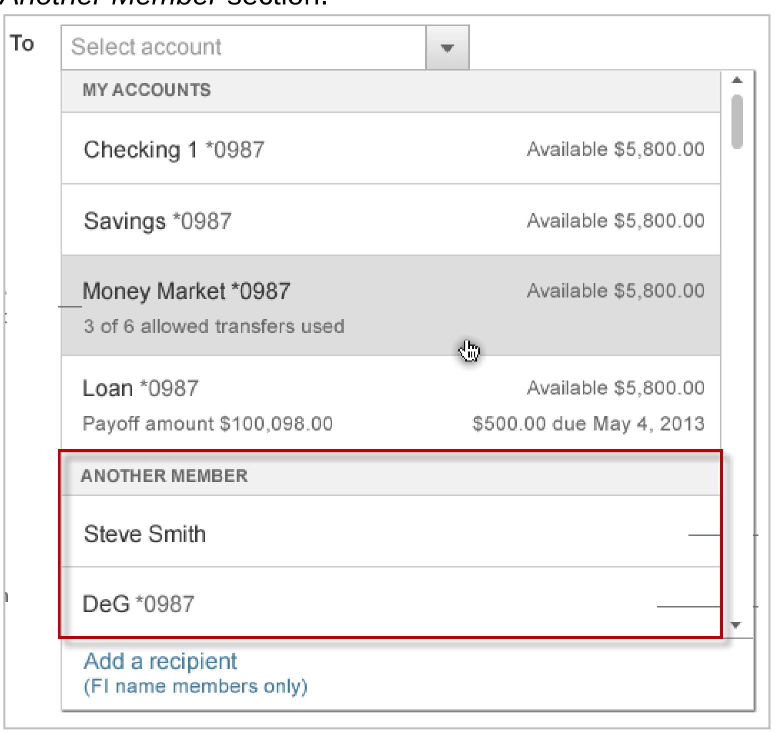


After you click *Confirm*, recipient is added and you will be taken back to the *Move Money* pop-up.

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



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

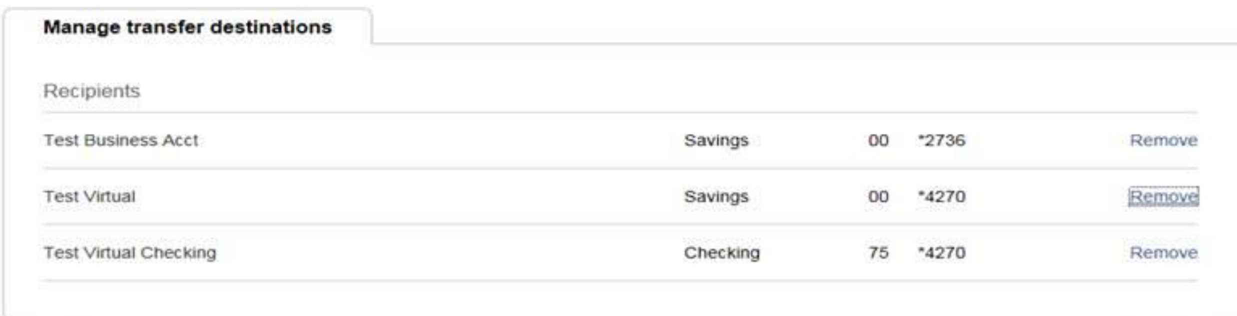


You can proceed with making a transfer as you would do with any other transfer in the *Move Money* pop-up. The added recipient will always appear in the *To* drop down.

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:

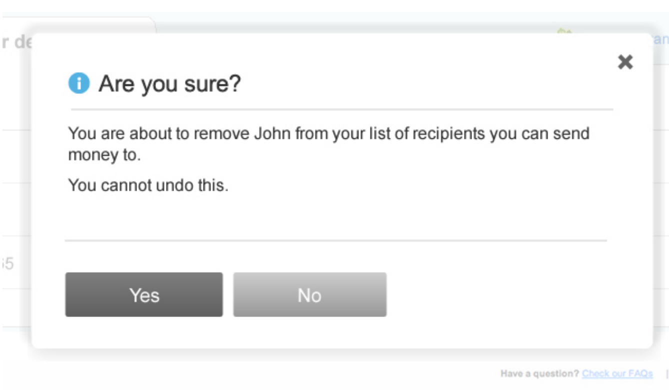
- Nickname that you chose for this recipient
- Account type
- Account suffix
- Last 4 digits of recipient's ID
- Remove link


Manage transfer destinations

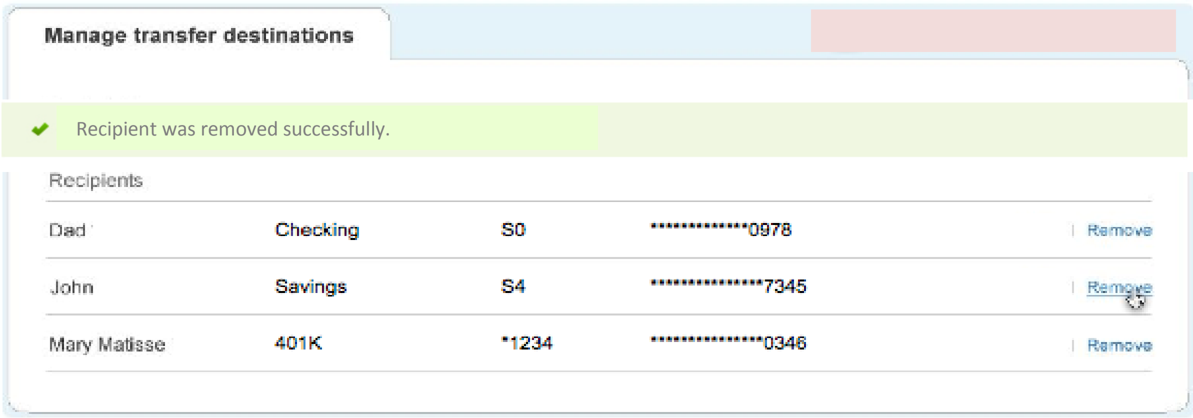
Recipients

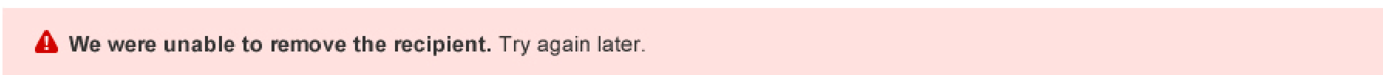
Test Business Acct	Savings	00	*2736	Remove
Test Virtual	Savings	00	*4270	Remove
Test Virtual Checking	Checking	75	*4270	Remove

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.





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*.