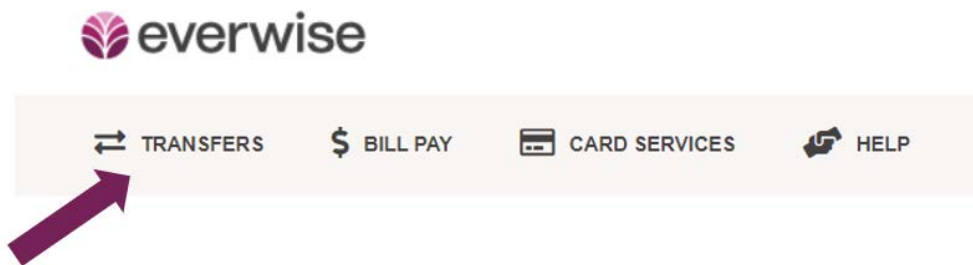


## Transfers Guide

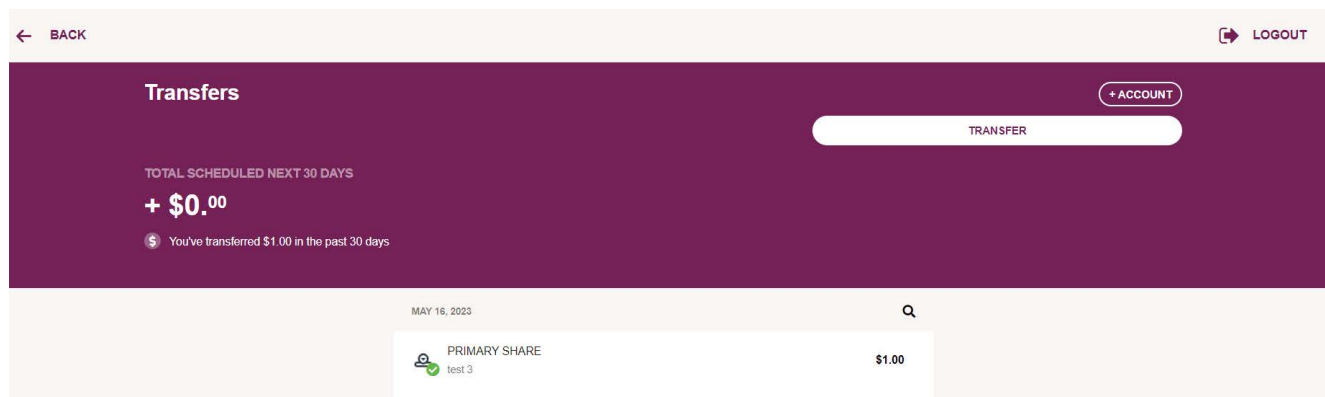
---

This Transfers Guide provides step-by-step instruction for Transfers. Find the Transfers quick link on the navigation bar of your Home Screen in Mobile and Online Banking. The functionality outlined in this document includes: the **Transfers Landing Screen**, **Adding Transfer Accounts**, **Transfer Initiation**, **Alerts**, **Transfer List**, **Transfer Details**, and **Searching Transfers**. Easily access all of these functions by clicking on Transfers (shown below).



### Transfers Landing Screen

Clicking the Transfers link directs you to the Transfers Landing Screen. This screen allows you to view summary information of historical and future-scheduled transfers, add additional transfer accounts, and initiate a new transfer. You can also view a sequential list of transfers and edit scheduled transfers.

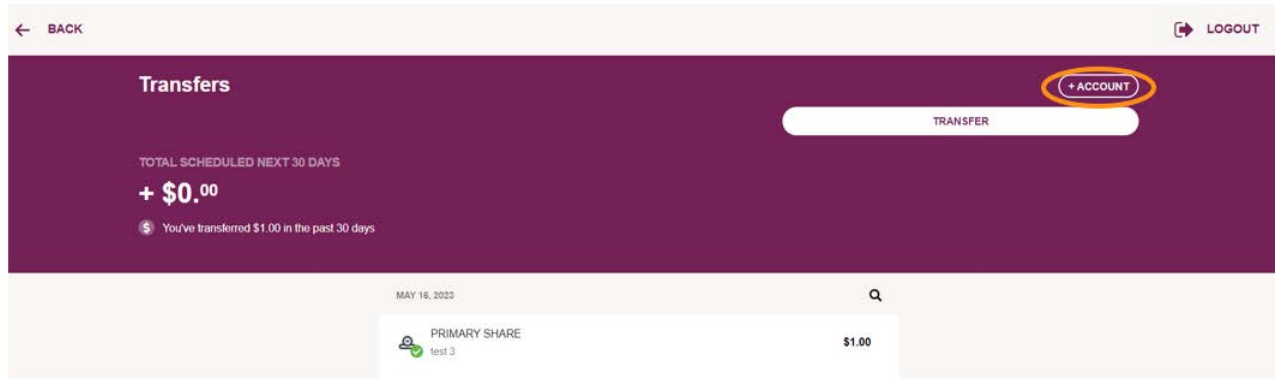


## Adding Additional Transfer Accounts

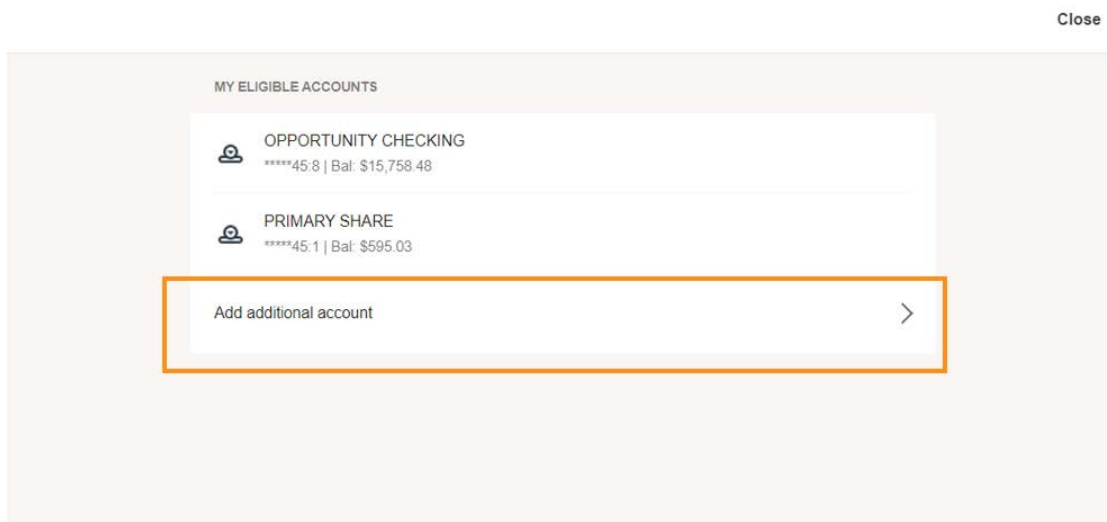
Add accounts belonging to another Everwise Member or your external accounts at other financial institutions to utilize in Transfers.

### To add an Additional Account

1. On the Transfers Screen, click the **+Account** button



2. The Accounts Screen displays. Click **Add additional account** to add an external account. (Or clicking **Close** returns you to the Transfers Screen)



3. Next, click **Add an Everwise Member** to add a Member account or **Add an External Account** to add an account from another financial institution

← Add Account Close

SELECT ADDITIONAL ACCOUNT TYPE TO ADD

Add an Everwise Member Account >

Add an External Account >

**To Add an Everwise Member Account:**

- a. Click **Add an Everwise Member**. The Member-to-Member Transfer Screen displays

← My CU Member Close

Member to Member Transfer

MEMBER NUMBER

Member #

ACCOUNT SUFFIX

Account Suffix

FIRST 3 LETTERS OF THE LAST NAME OR BUSINESS NAME

---

VERIFY MEMBER

- b. Enter the following information:

**Member Number**

Enter the Member Number associated with the account to add.

**Account Suffix or  
Account/Loan Number**

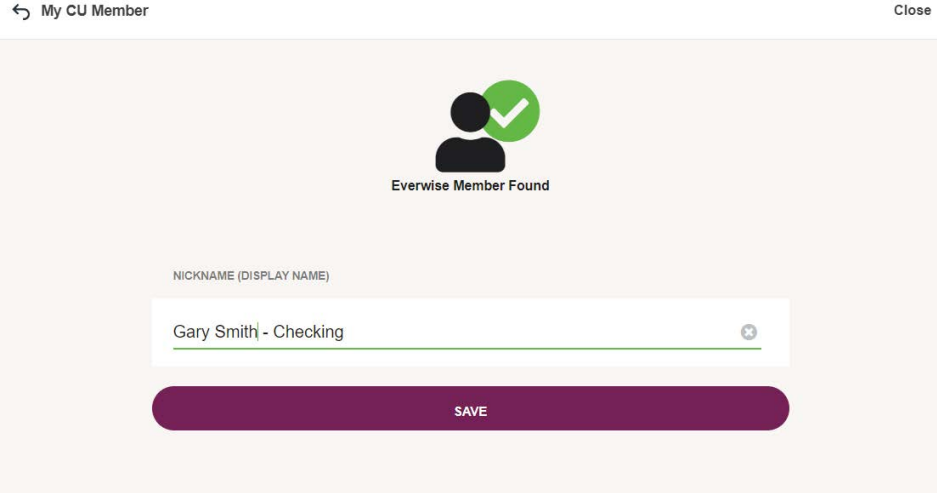
Enter the Acct Suffix associated with the account. This is the number following the colon and may be 1, 2 or 3 digits depending on the type of account. (Digits following colon, i.e., 1234:x) In this example, the x would be the account suffix.


**First 3 Letters of Last Name** Enter the first 3 letters of the Member’s last name, or the first 3 letters of the authorized signer's last name for a business account

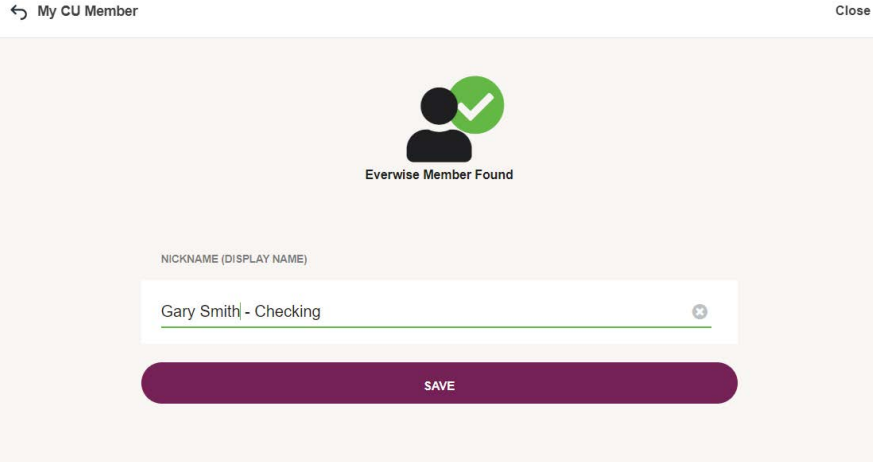
b. Once all fields are complete, click the **Verify Member** button

After clicking Verify Member, a “Searching” message displays while the information is validated. An error message displays if you attempt to add your own account or if invalid Member information is entered. Clicking “Try Again” returns you to the previous screen to re-enter information.

c. If valid information is returned, a success message displays

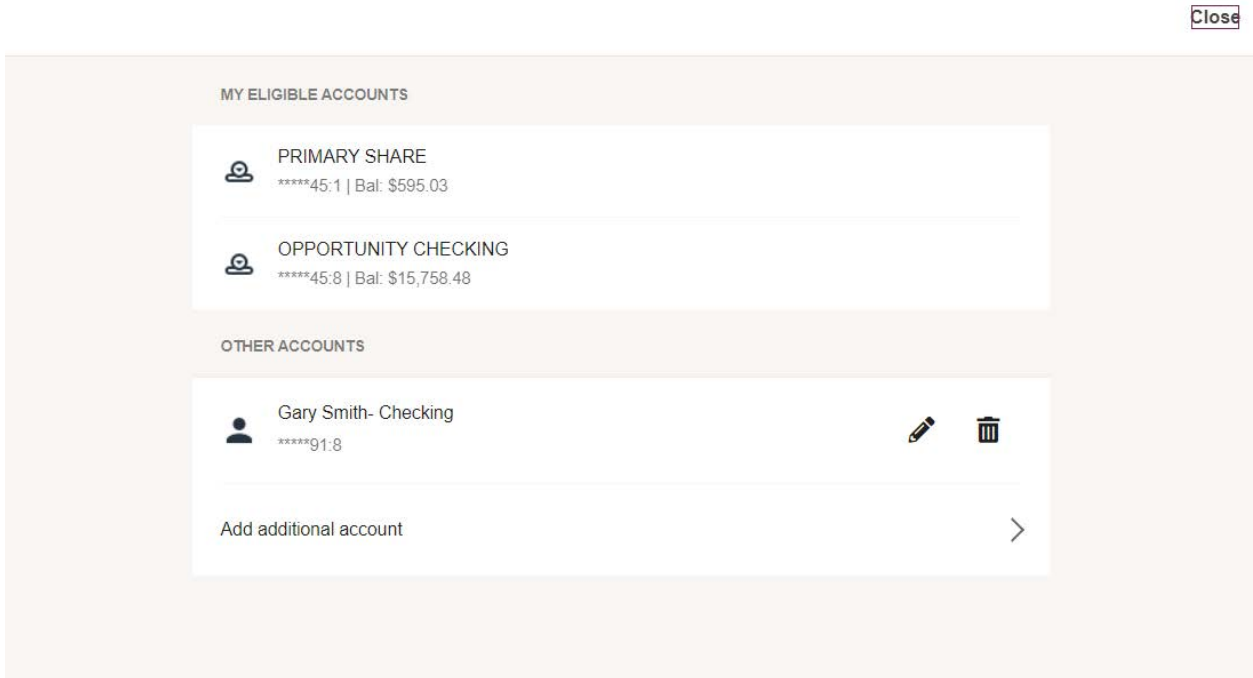


d. To edit the Account Nickname, click the  icon to clear all text, or click into the field and begin typing



e. Click **Save** to proceed

- f. The external Member account now displays on the Accounts List under **Other Accounts**



---

External accounts will display masked account information and will not display any balance information.

---

**To Add an Account from Another Institution by Login Credentials:**


- a. On the Transfers Screen, click **+Account**
- b. Click **Add additional account** under Other Accounts
- c. On the next screen, click **Add an External Account**

SELECT ADDITIONAL ACCOUNT TYPE TO ADD

- Add an Everwise Member Account >
- Add an External Account >

- d. Review the disclosure information, then click **Continue** to proceed, or click the **X** to exit.

✕



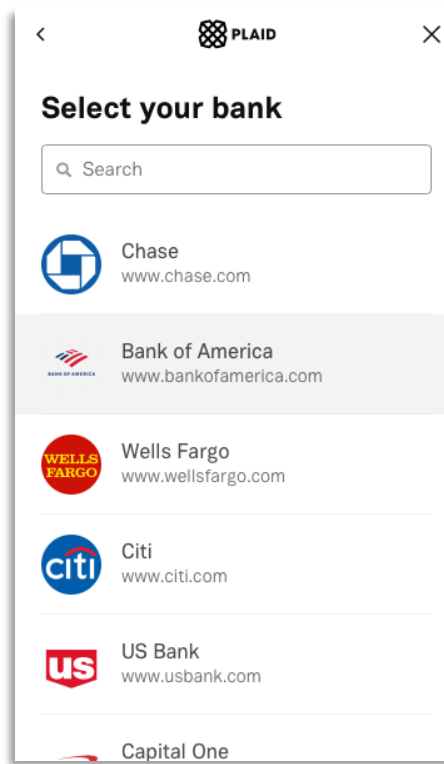
### Teachers Credit Union uses Plaid to link your bank

- ✓ **Secure**  
Transfer of your information is encrypted end-to-end
- ✓ **Private**  
Your credentials will never be made accessible to Teachers Credit Union

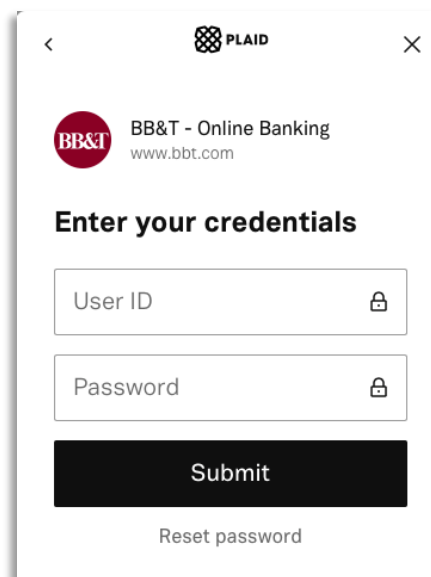
By selecting "Continue" you agree to the [Plaid End User Privacy Policy](#)

**Continue**

- e. On the next screen, select the external financial institution or search by name



- f. Enter the credentials associated with the account, then click **Submit**



- g. Proceed with any additional verification steps, then click **Submit** once completed

The first screenshot shows the 'Verify your identity' screen. At the top, there is a back arrow, the PLaid logo, and a close button. Below that is the BB&T logo and the text 'BB&T - Online Banking www.bbt.com'. The main heading is 'Verify your identity' followed by the question 'Where would you like to send your security code?'. There are three options: 'Text' (selected with a blue circle), 'Phone', and 'Email'. Each option has a phone or email icon to its right. At the bottom is a black 'Continue' button.

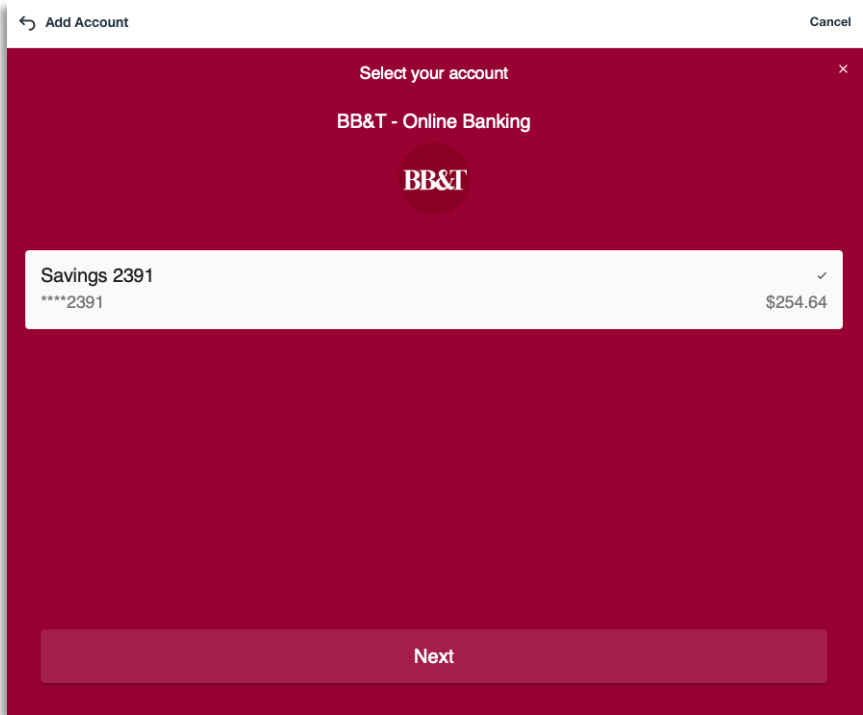
The second screenshot shows the 'Verify Phone Number' screen. It has the same header as the first. The main heading is 'Verify Phone Number' followed by the instruction 'Enter the security code sent to (\*\*\*) \*\*\*-2061'. There is a text input field with the placeholder 'Code' and a lock icon. Below the input field is a black 'Submit' button.

- g. Once all requirements of the external institution are met, a success message displays. Click **Continue** to proceed

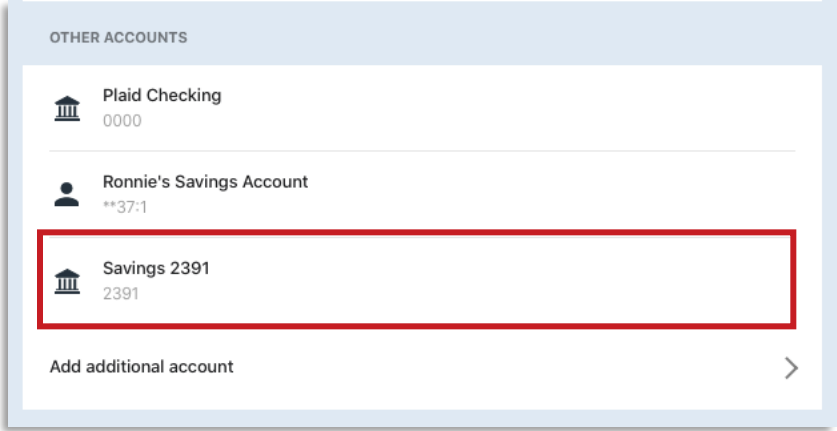
The success message screen has the PLaid logo and close button at the top. In the center is a bar chart icon with a green checkmark. Below it is the heading 'Success!' and the message 'Your account has been successfully linked to Teachers Credit Union'. At the bottom is a black 'Continue' button.



h. Select the external account to add, then click **Next**



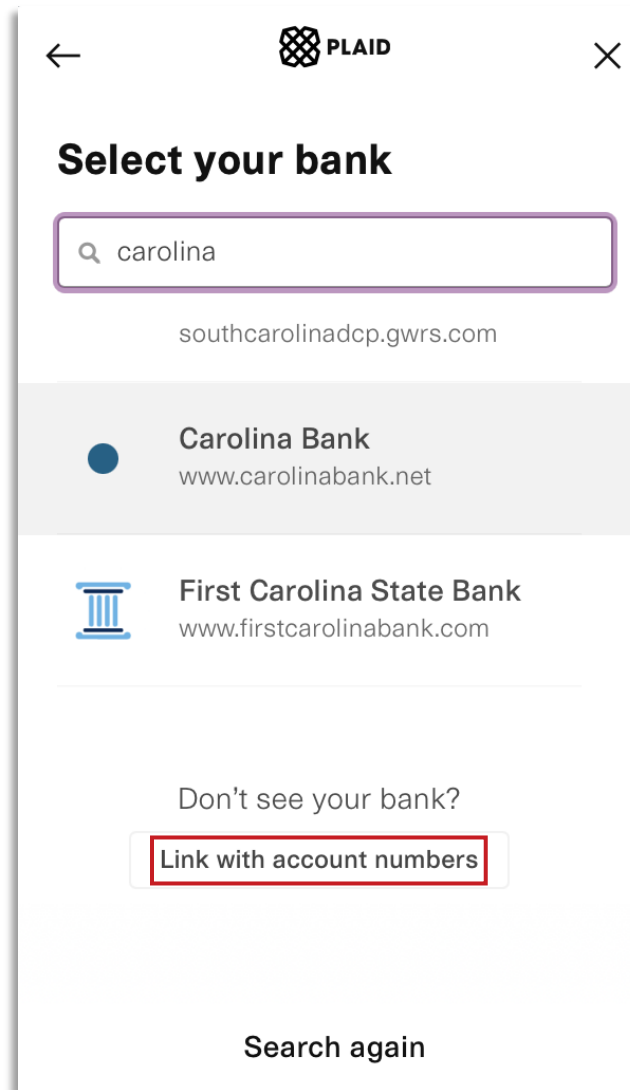
i. The account now displays on your Accounts List



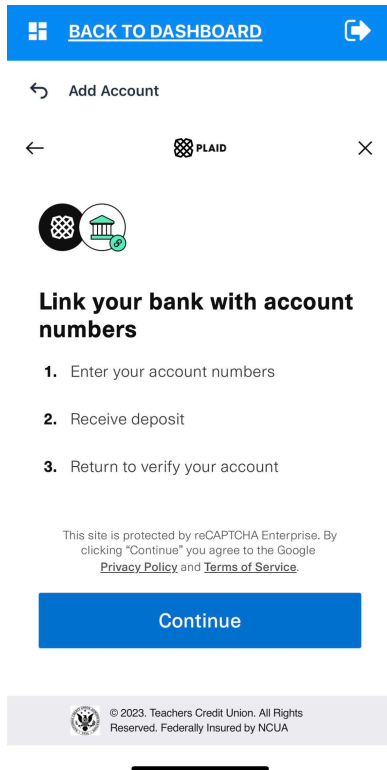
### To Add an Account from Another Institution with Microdeposits:

**Note:** Microdeposits can take 1-3 days to arrive at your other financial institution and will be in amounts less than \$1.00. Microdeposits must be validated within 3 to 5 business days after they arrive at your institution or they will expire.

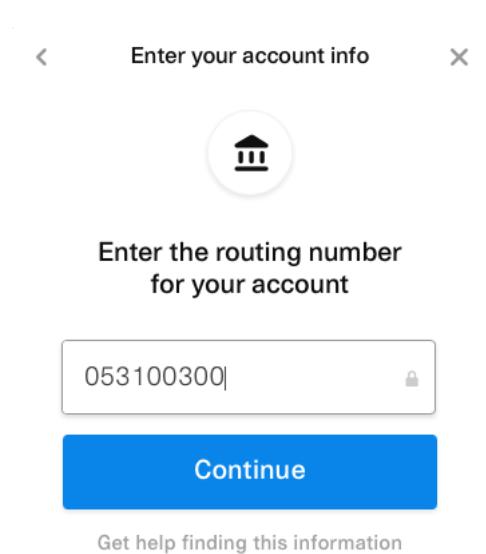
- a. On the Transfers Screen, click **+Account**
- b. Click **Add additional account**
- c. On the next screen, click **Add an External Account**, then click **Continue**
- d. Search for the financial institution, then click **Link with account numbers**



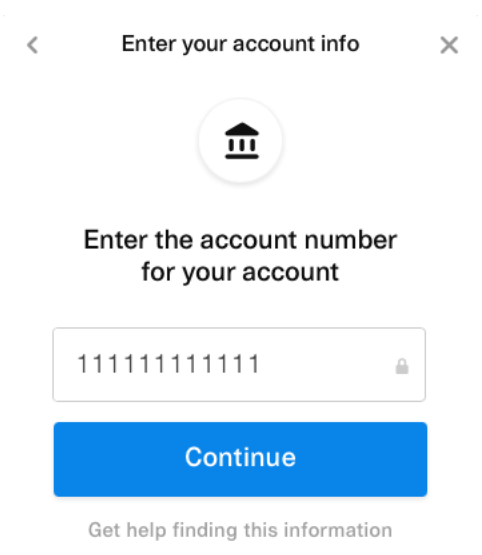
e. Review the information on the following screen, then click **Continue**



f. Enter the routing number for the account, then click Continue

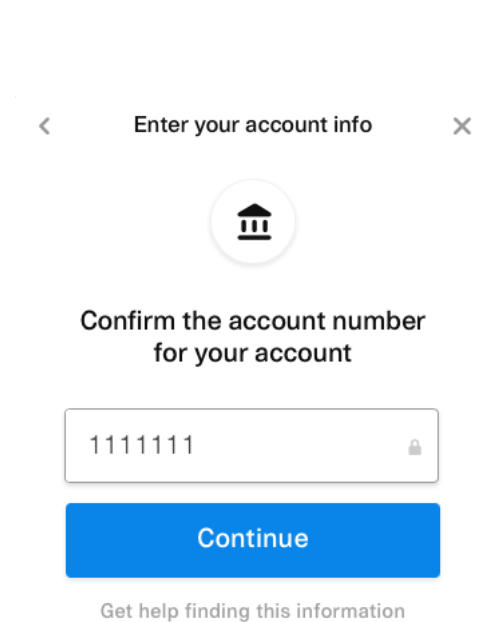


g. Enter the account number, then click Continue



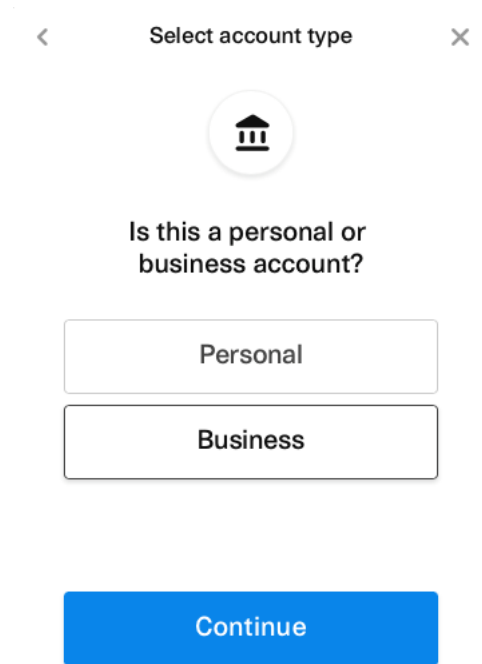
The screenshot shows a mobile application interface with a white background. At the top, there is a navigation bar with a left-pointing chevron, the text "Enter your account info", and a right-pointing chevron. Below the navigation bar is a circular icon containing a black silhouette of a classical building with three columns. Underneath the icon, the text "Enter the account number for your account" is centered. A text input field follows, containing the number "111111111111" and a small lock icon on the right. Below the input field is a prominent blue button with the word "Continue" in white. At the bottom of the screen, there is a link that says "Get help finding this information".

h. Re-enter the account number for confirmation, then click Continue




The screenshot shows a mobile application interface similar to the previous one. It has the same navigation bar with "Enter your account info" and the same building icon. The text below the icon reads "Confirm the account number for your account". The text input field now contains the number "1111111" and a lock icon. Below the input field is a blue button with the word "Continue" in white. At the bottom, the link "Get help finding this information" is present.

i. Next, select Personal or Business as the account type, then click



< Select account type X



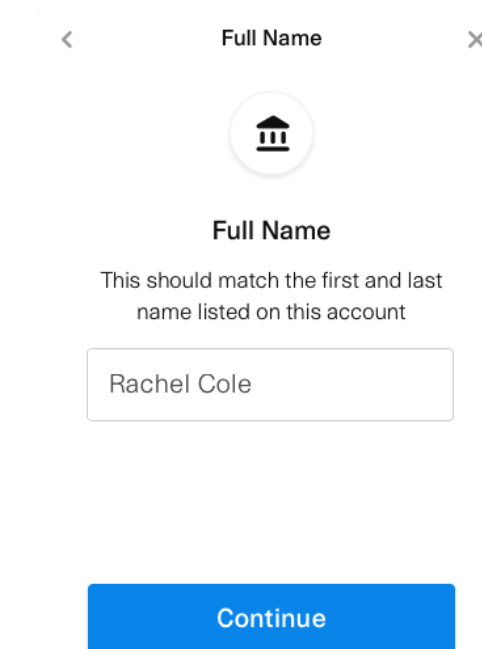
Is this a personal or business account?

Personal


**Business**

Continue

j. Enter the First and Last Name associated with the account, then click Continue



< Full Name X



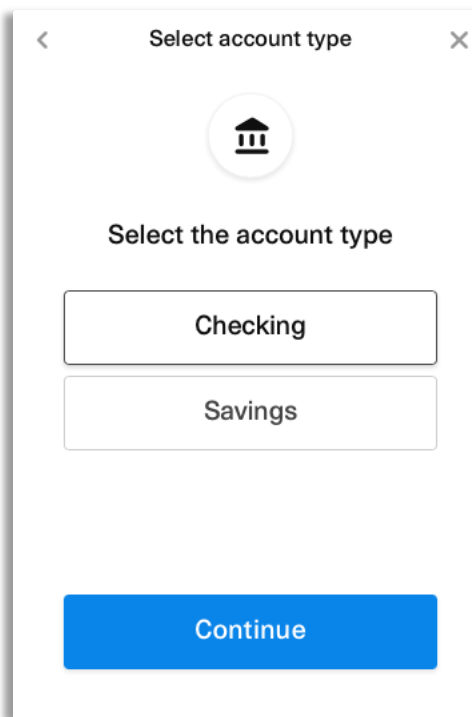
**Full Name**

This should match the first and last name listed on this account

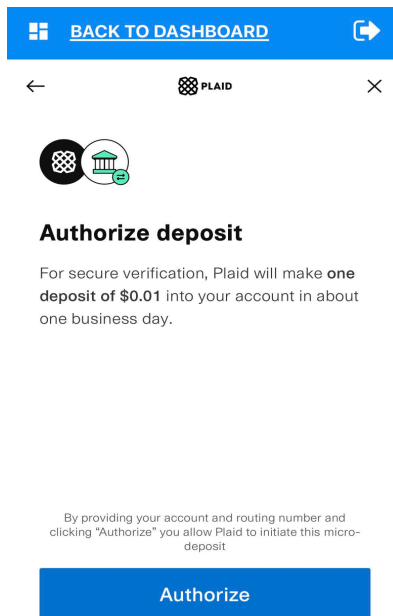
Rachel Cole

Continue

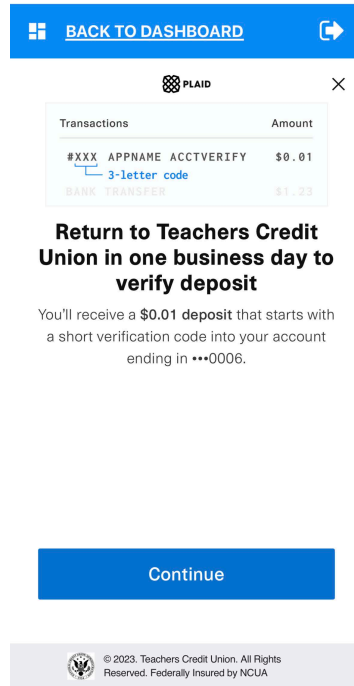
k. Select the account type, then click Continue



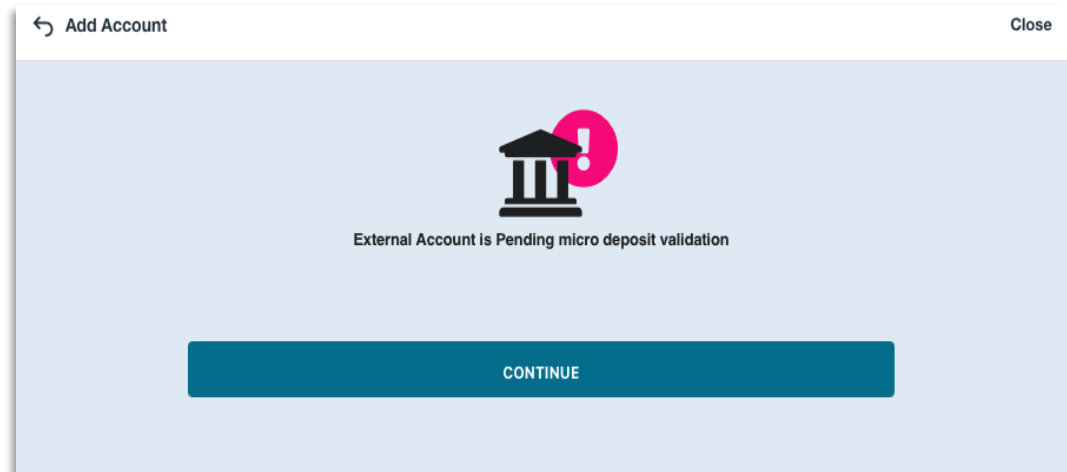
l. Review the authorization disclosure, then click **Authorize** to proceed



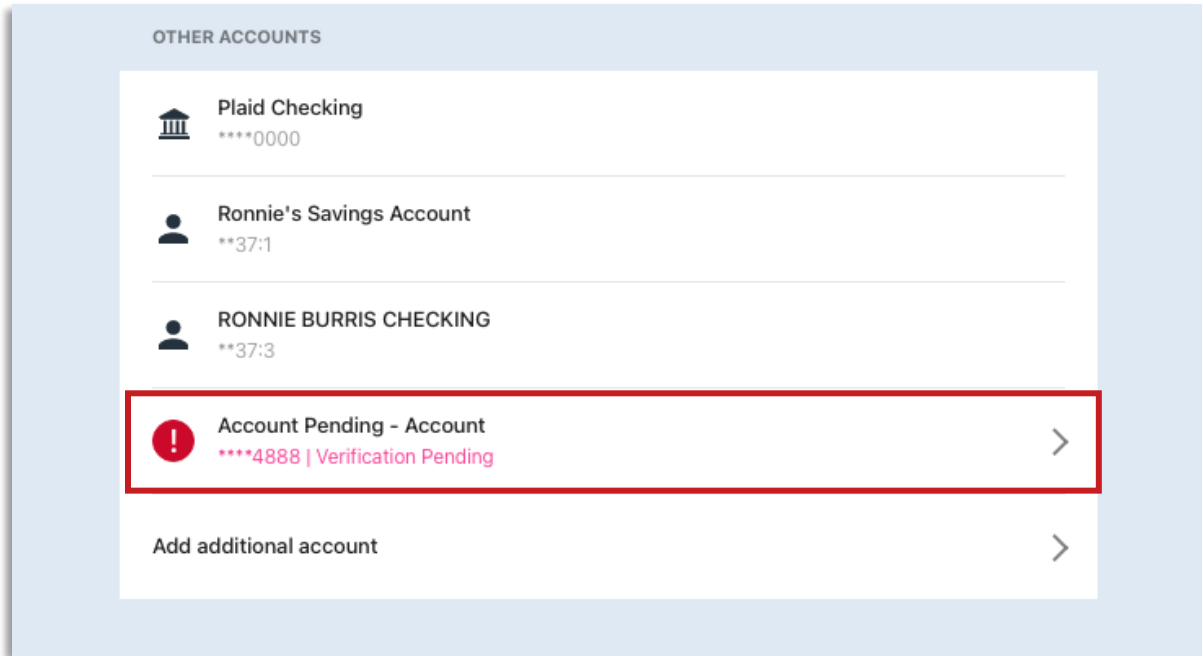
m. A deposit verification message displays. Click **Continue** to proceed



n. The pending microdeposit validation screen displays. Click **Continue** to proceed

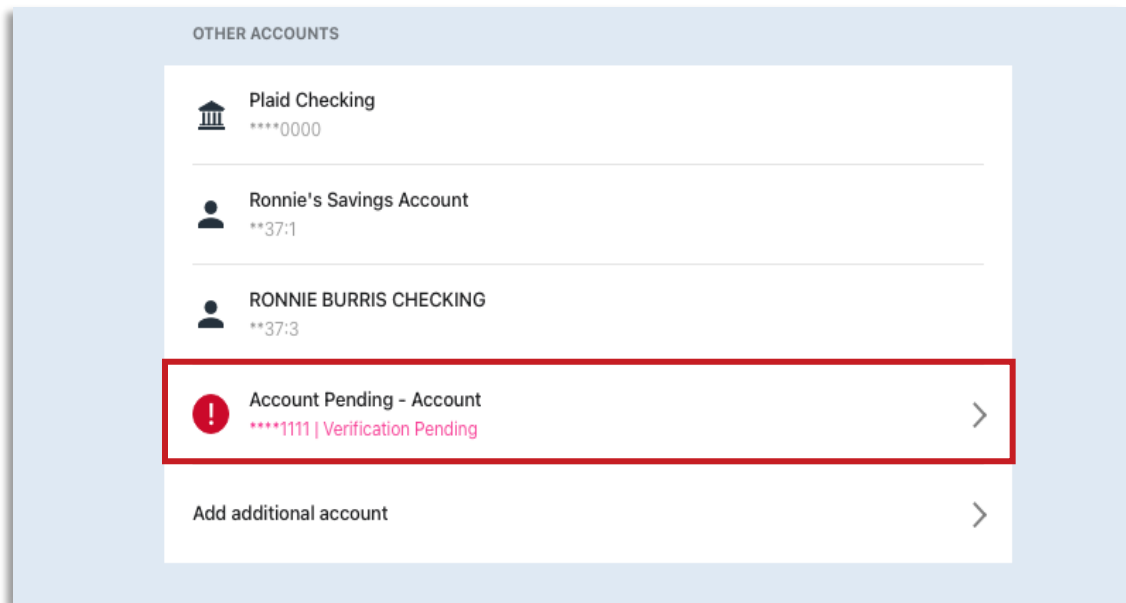


- o. The account displays as an account pending verification under Other Accounts



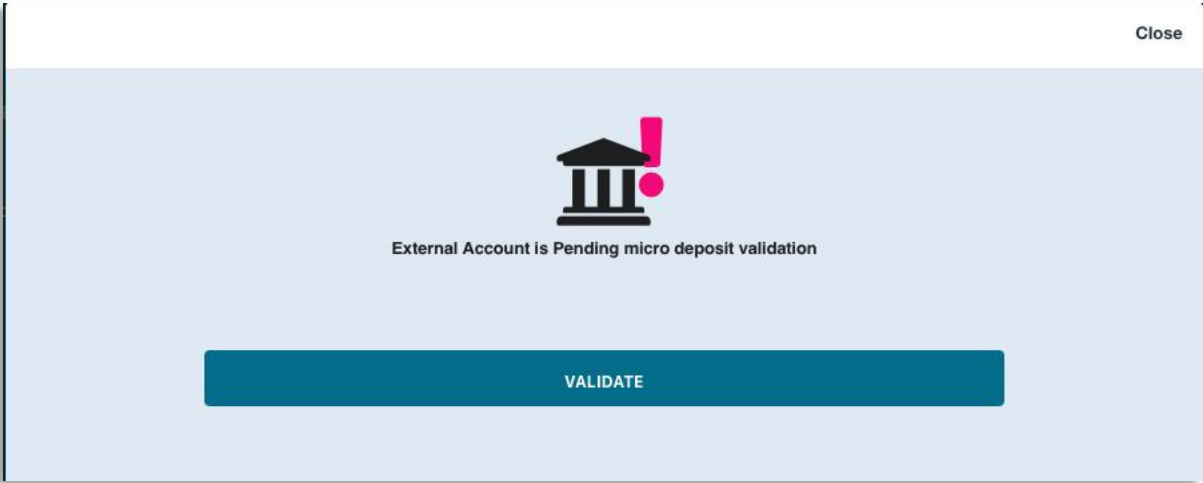
### To Validate an Account by Microdeposits

1. On the Transfers screen, click **+Account**
2. Locate and click the account to verify under **Other Accounts**

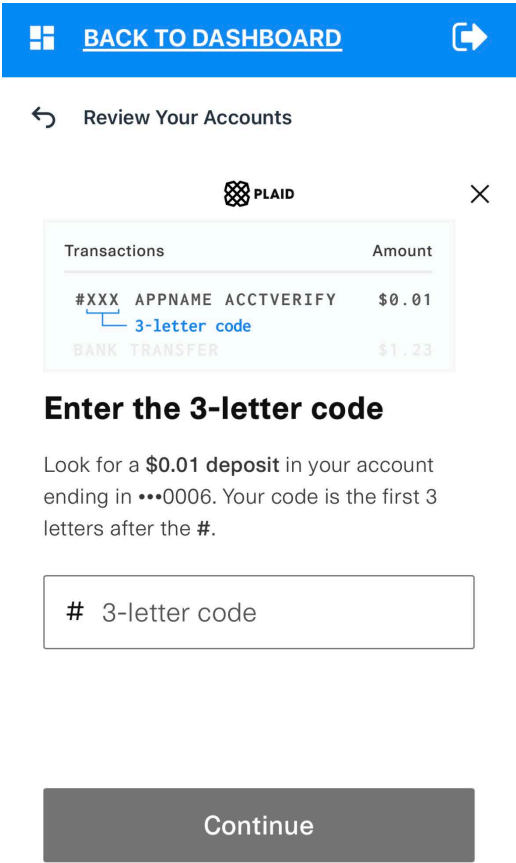




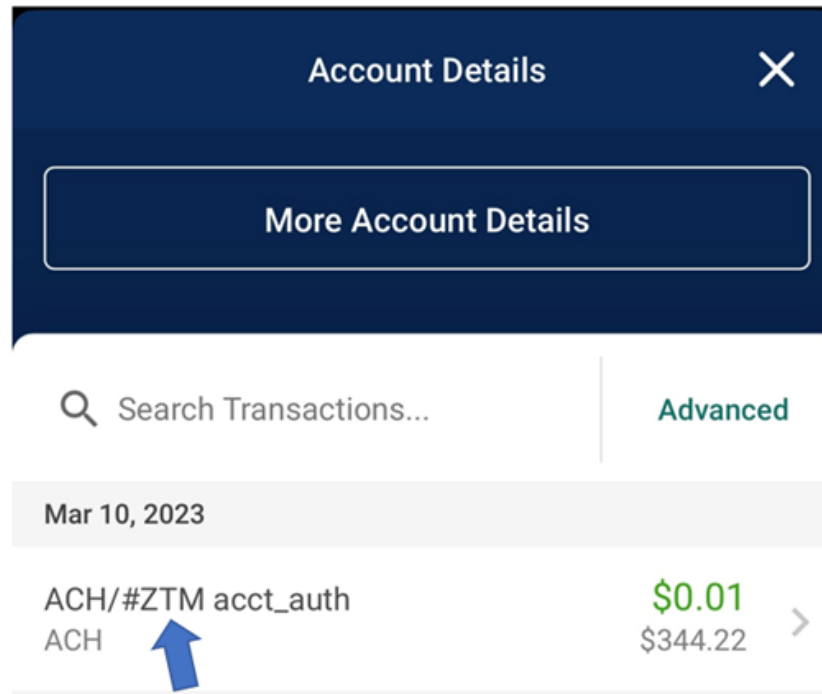
3. The microdeposit validation screen displays. Click **Validate** to proceed



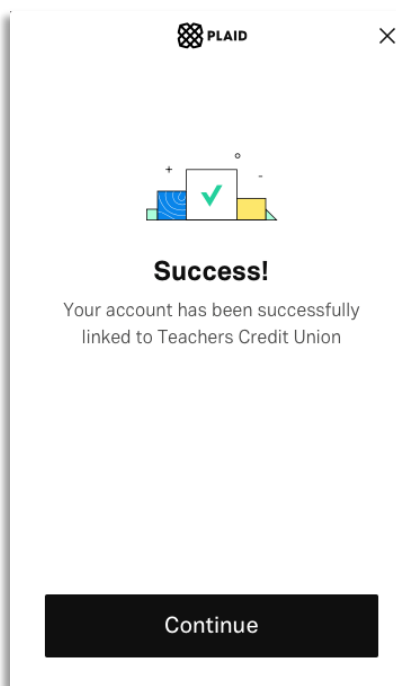
4. On the next screen, enter your 3-letter code listed after the # sign found in the transaction details of your external account., then click **Continue**.



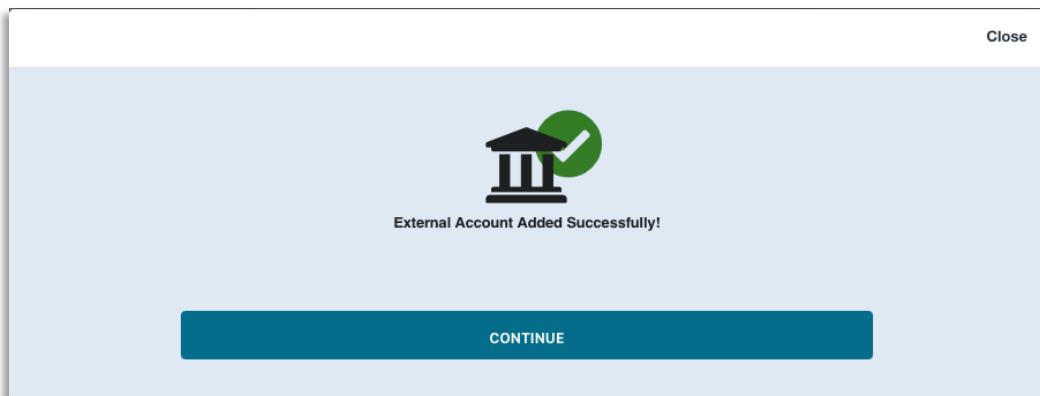
Here's an example of where to find the 3-letter code on an external account:



5. A success message displays, click **Continue** to proceed

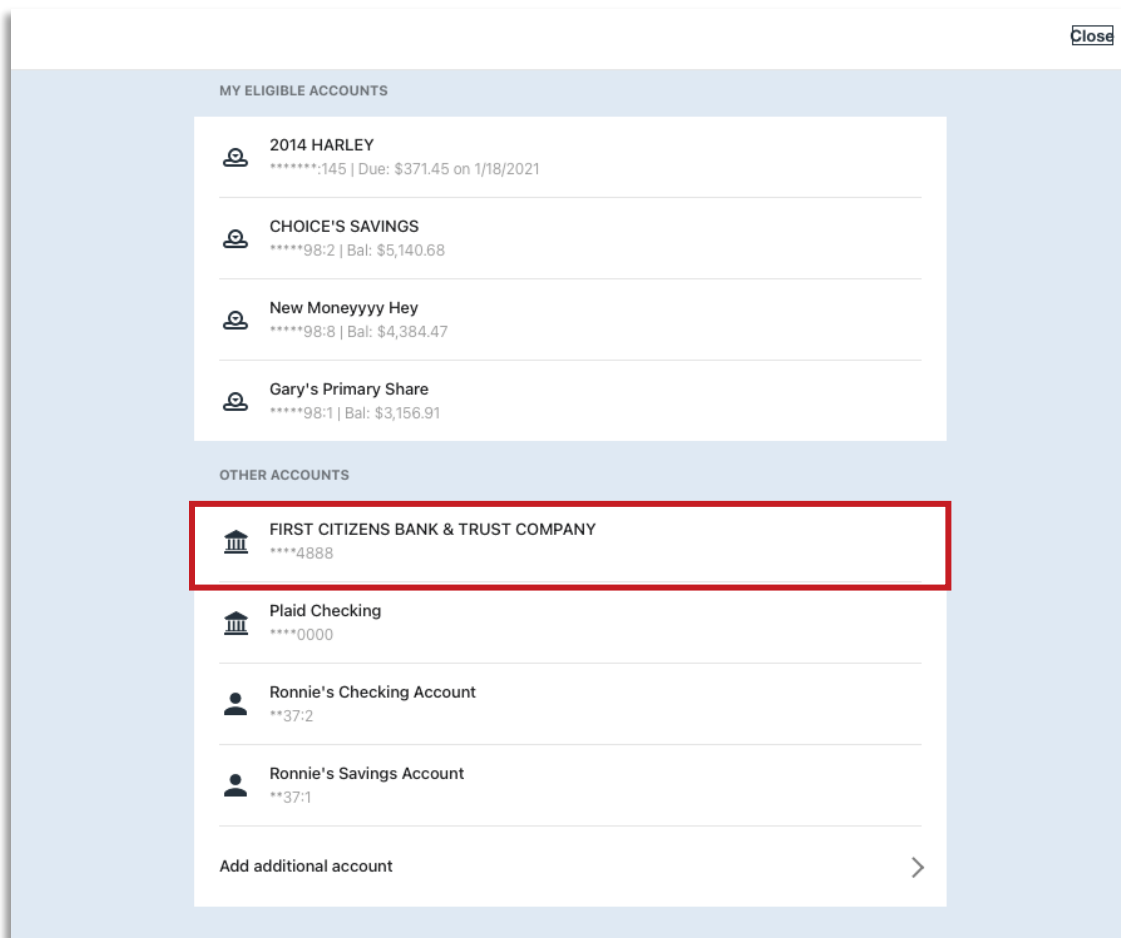



6. Click **Continue** on the next screen to return to the Transfers Screen

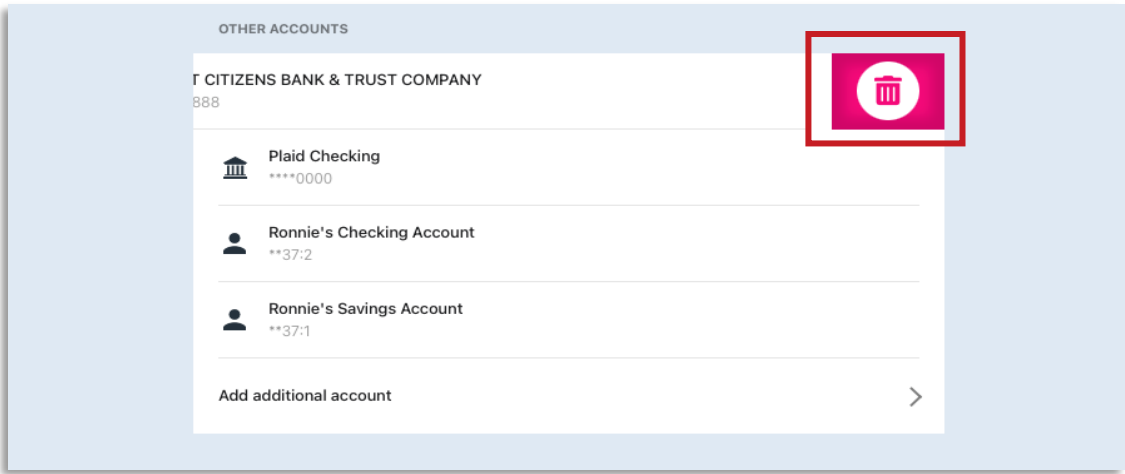


### To Remove a Linked External Account

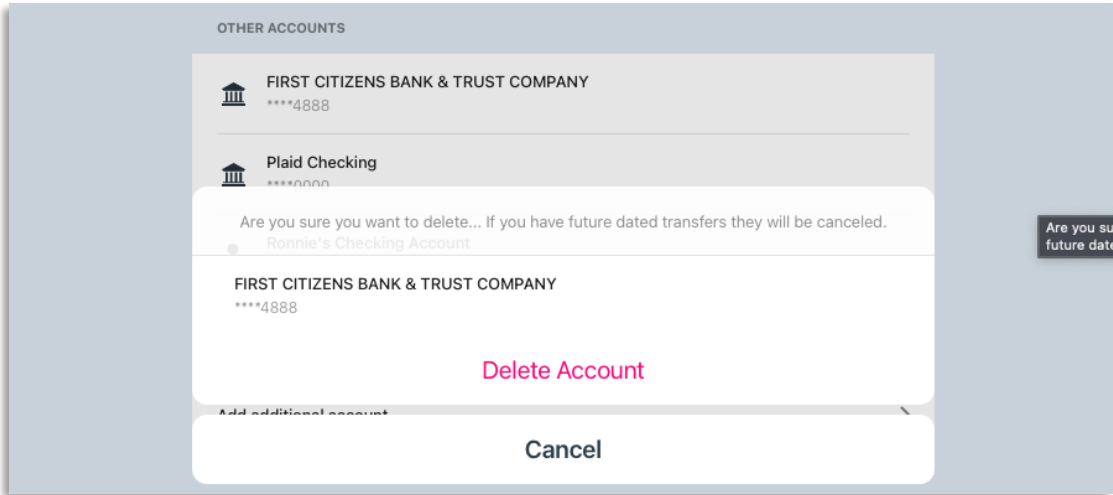
1. On the Transfers screen, click **+Account**
2. Locate the account to remove under **Other Accounts**
3. Click and hold the account to remove, then drag or swipe right-to left



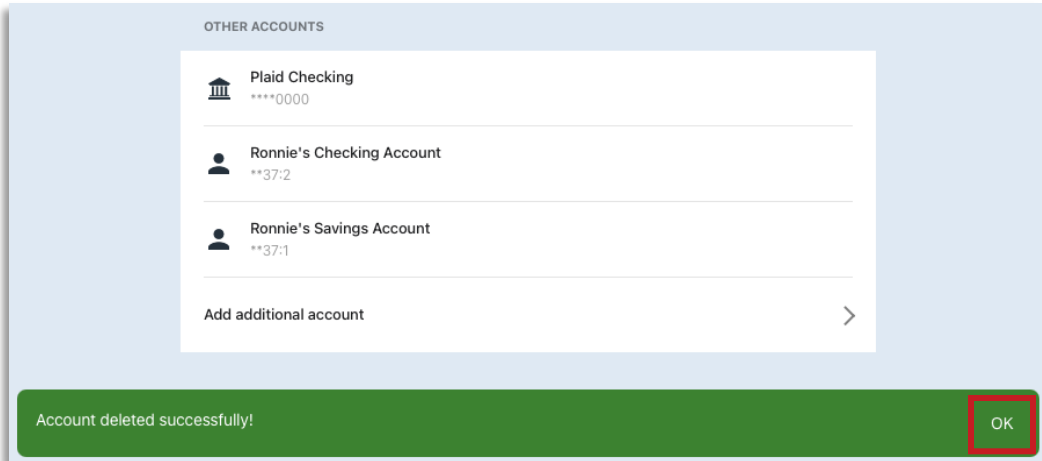
4. The delete icon displays 



5. A confirmation displays. Click **Delete Account** to proceed with removing the account, or click **Cancel** to retain the account



6. A confirmation for the deletion occurs. Click **OK** to hide the message



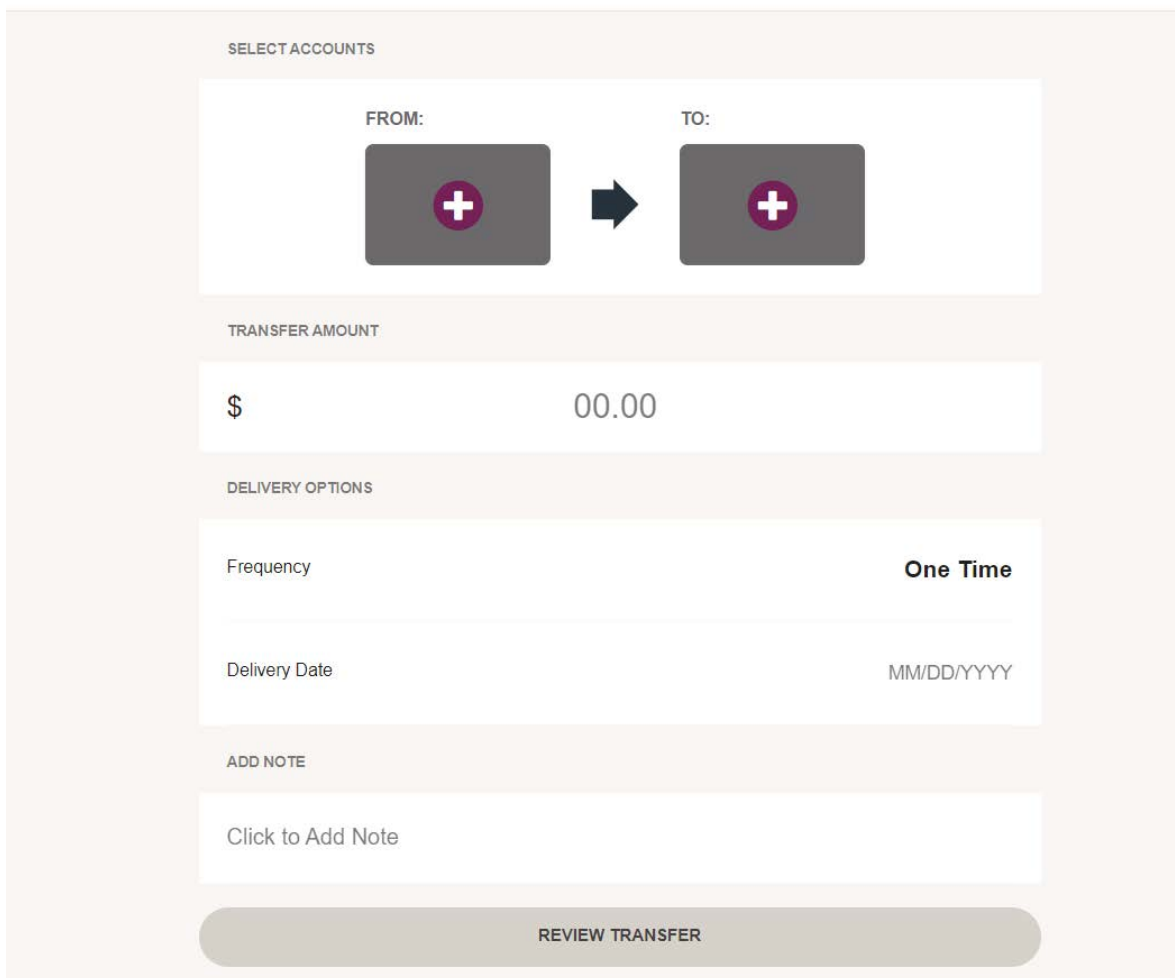
## Transfer Initiation


The Transfers Screen allows you to initiate Transfers between accounts. To initiate a Transfer:

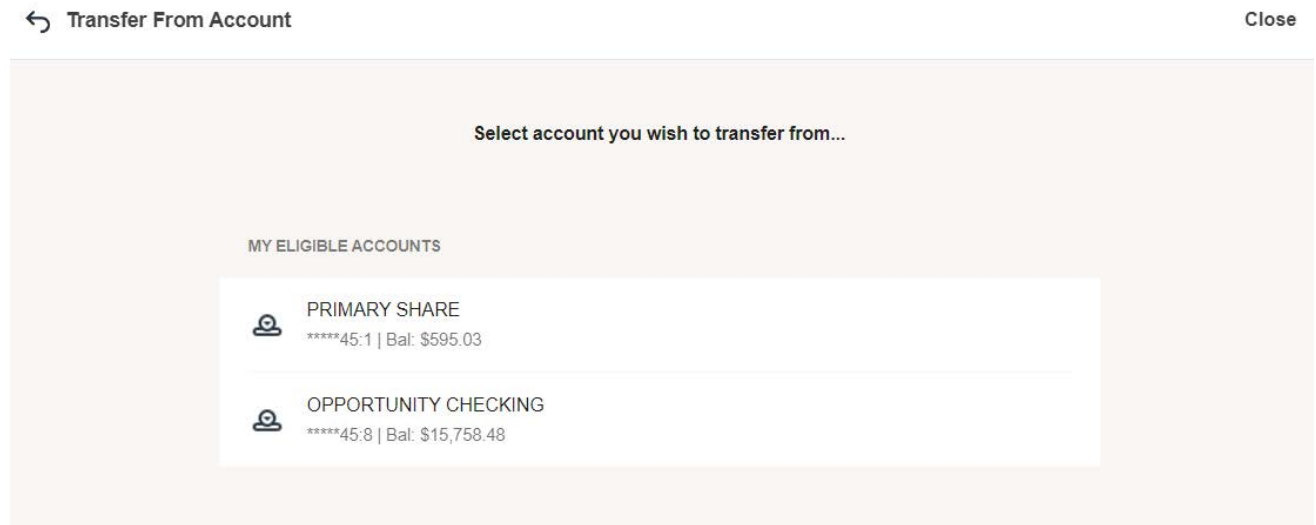
1. On the Transfers Screen, click the **Transfer** button



2. The Start Transfer Screen displays



3. Click the  icon in the **From:** section to view the list of available accounts to transfer from. **My Eligible Accounts** lists internal accounts. **Other Accounts** lists external accounts.



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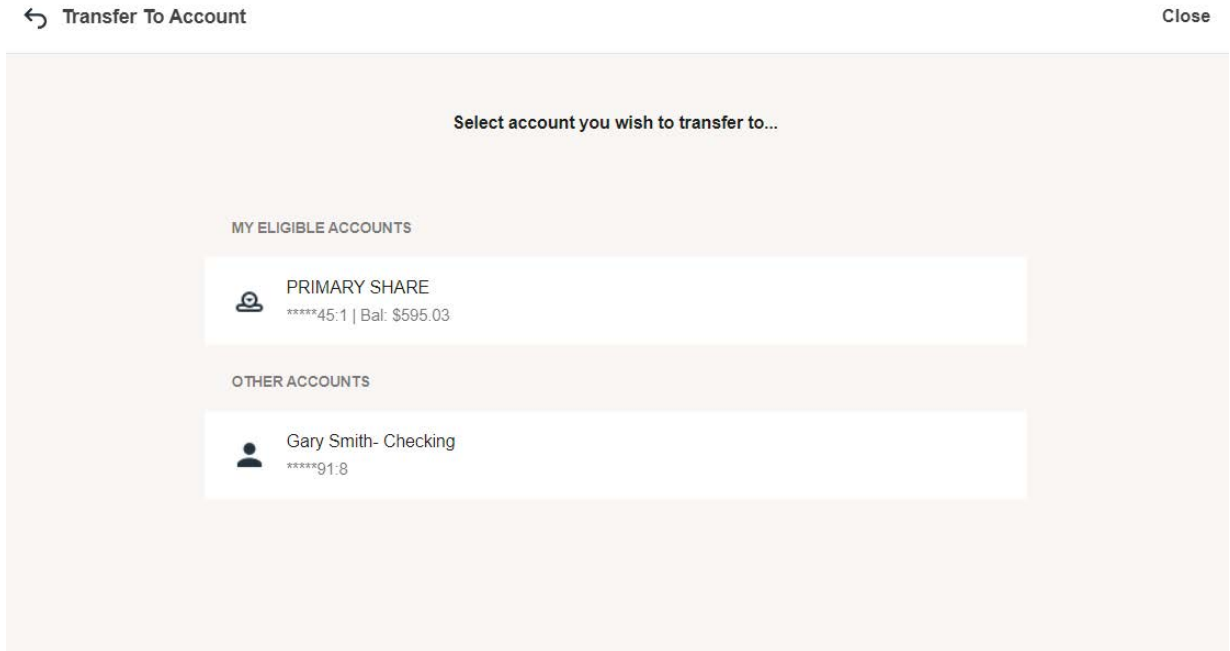
Your internal accounts will display masked account numbers along with balance summary information.

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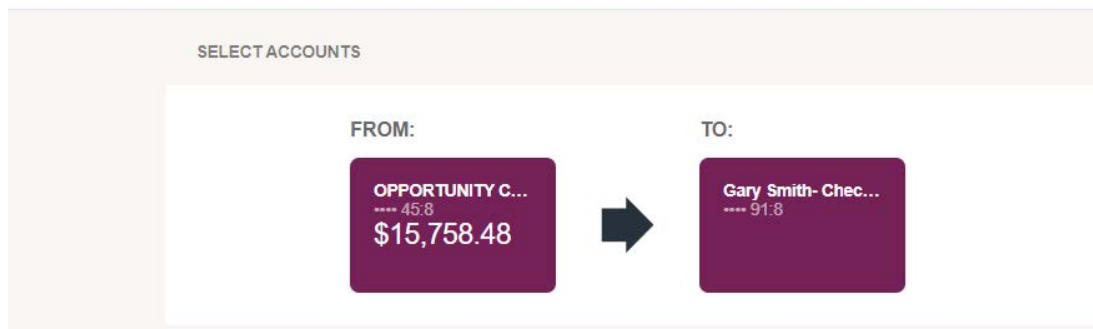
4. Click or tap the account to transfer funds from. The selected account updates in the **From:** section



- Next, click the  icon in the **To:** section to view the list of available accounts to transfer funds to from the list of **My Eligible Accounts** or **Other Accounts**



- Click or tap the account to transfer funds to. The selected account updates in the **To:** section



- Next, enter the **Transfer Amount** in dollars



8. For **One Time** transfers (the default option), enter the **Delivery Date** or select using the calendar

The screenshot shows a form with the following sections:

- TRANSFER AMOUNT:** \$ **75.00**
- DELIVERY OPTIONS:**
  - Frequency: [Empty field]
  - Delivery Date:** 06/07/2023

A calendar for June 2023 is open, showing the date 06/07/2023 selected. The calendar header includes "June 2023", "June", and "2023". The days of the week are listed as Su, Mo, Tu, We, Th, Fr, Sa. The dates shown are 28, 29, 30, 31, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 1.

9. For recurring transfers, click **One Time** to view and select additional frequency options

The screenshot shows the **DELIVERY OPTIONS** section of the form:

- Frequency:** A dropdown menu is open, showing the following options: **One Time** (highlighted), One Time, Daily, Weekly, Monthly, Quarterly, Annually, 1st Of Month, Last Day Of Month, 1st & 15th Of The Month, 15th & Last Day Of Month, Every Other Week, and Semi-Annually.
- Delivery Date:** [Empty field]
- ADD NOTE:** Click to Add Note
- REVIEW TRANSFER:** A purple button at the bottom.

10. Select the **Start Date** and **End Date** for the recurring transfer

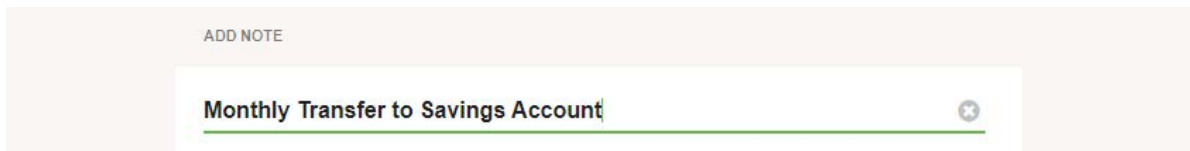
The screenshot shows the **DELIVERY OPTIONS** section of the form with the following values:

- Frequency:** Monthly
- Start Date:** 06/07/2023
- End Date:** 09/07/2023



For recurring transfers, first delivery of the transfer will occur on the Start Date. If the transfer frequency includes the 1<sup>st</sup>, 15<sup>th</sup>, or Last Day of the Month, the first delivery of the transfer will occur on the next upcoming date. For example, if the Frequency is set as 1<sup>st</sup> and 15<sup>th</sup> of the Month and the Start Date is entered as the 12<sup>th</sup>, the first delivery will occur on the 15<sup>th</sup> since it is the next upcoming date.

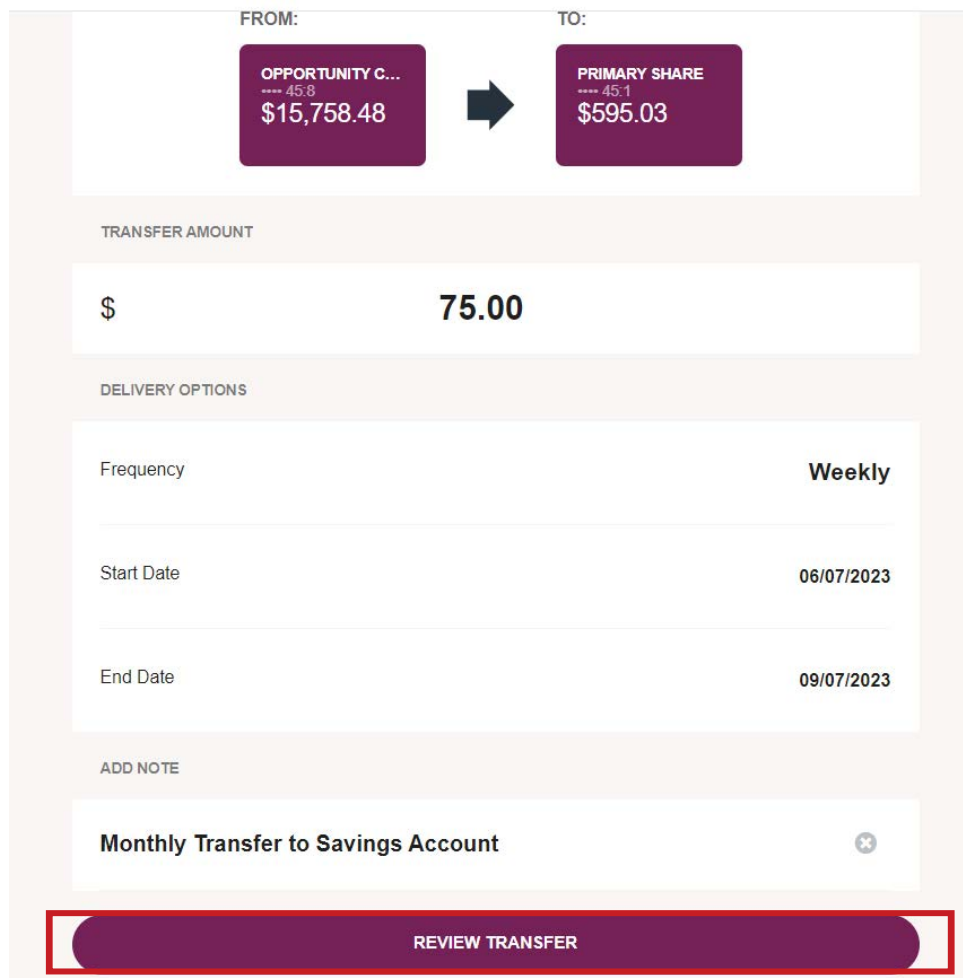
11. Click or tap into the **Add Note** field to attach a note to the Transfer, if desired



ADD NOTE

Monthly Transfer to Savings Account

12. Once all fields are complete, click **Review Transfer**



FROM: OPPORTUNITY C...  
--- 45:8  
\$15,758.48

TO: PRIMARY SHARE  
--- 45:1  
\$595.03

TRANSFER AMOUNT

\$ 75.00

DELIVERY OPTIONS

Frequency	Weekly
Start Date	06/07/2023
End Date	09/07/2023

ADD NOTE

Monthly Transfer to Savings Account

**REVIEW TRANSFER**

13. The next screen displays the entered transfer information. Click **Submit Transfer** to continue, **Review Transfer** to return to the prior screen to make changes, or **Cancel** to exit without submitting the Transfer

Review Transfer

Close

Confirm transfer details

FROM: OPPORTUNITY C... 458 \$15,758.48

TO: PRIMARY SHARE 451 \$595.03

AMOUNT \$75.00

FREQUENCY Weekly

START DATE June 7, 2023

END DATE September 7, 2023

NOTE Monthly Transfer to Savings Account

SUBMIT TRANSFER

14. After clicking Submit, the Transfer details display. Click **Done** to return to the Transfers Screen

Close

Your Transfer has been scheduled!

FROM: OPPORTUNITY C... 458 \$15,758.48

TO: PRIMARY SHARE 451 \$595.03

AMOUNT \$75.00

FREQUENCY Weekly

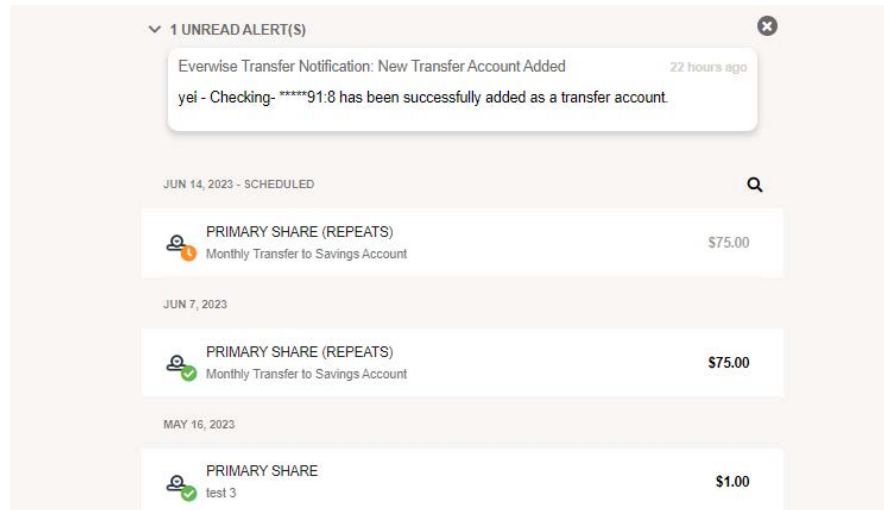
START DATE June 7, 2023

END DATE September 7, 2023

NOTE Monthly Transfer to Savings Account

DONE


## 15. The Transfer displays as scheduled in the Transfer List

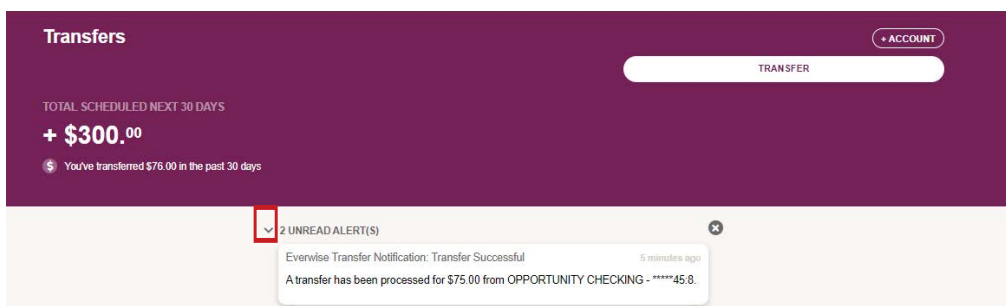


Once a Transfer is successfully initiated, you will be notified. You can configure your alerts from the hamburger menu in the top right corner of your Home Screen by selecting Manage Alerts to customize which Transfer alerts you receive and the delivery method.

## Transfer Alerts

The Transfers Screen houses an Alerts section to notify Members of transfer-related activity and other information as configured by the Credit Union. To access unread alerts:

1. Multiple alerts display in a collapsed view. To expand, click the  next to the number of unread alerts



2. Click or tap the alert to view more information

The type of alert determines where the Member is directed after clicking the alert. Account addition alerts direct the Member to the Accounts List. Initiated or scheduled alerts direct the Member to the Transfers Details screen.

3. Alternatively, click the  to clear all unread alerts

## Transfer List

The Transfer List displays past and future-scheduled transfers within a 30-day period. Please note: this list includes transfers sent or scheduled through the Transfers tile and does not include the transfers you have received. All transfers received can be found in your Account tile, where the date and amount of the transaction will be provided.

Transfers display in sequential order by date. You can view the transfer status, “Transfer to” account, transfer amount, and note (if added). If a note is not added, the “Transfer from” account displays. Go to the Searching Transfers section to learn how to search for more transfers using the Search Field or by applying filters.



Date	Status	Description	Amount
JUN 14, 2023	SCHEDULED	PRIMARY SHARE (REPEATS) Monthly Transfer to Savings Account	\$75.00
JUN 7, 2023	Successful	PRIMARY SHARE (REPEATS) Monthly Transfer to Savings Account	<b>\$75.00</b>
MAY 16, 2023	Successful	PRIMARY SHARE test 3	<b>\$1.00</b>

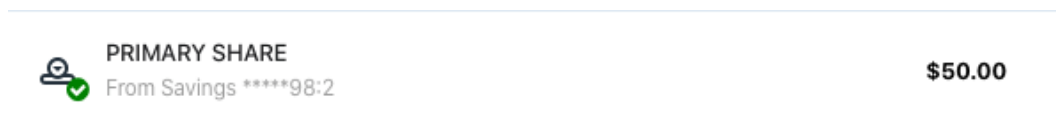
### Transfer Status Icons


You can view the Transfer Status according to the icons listed on the Transfer List. Failed transfers display a red exclamation point and the transfer amount displays in red.



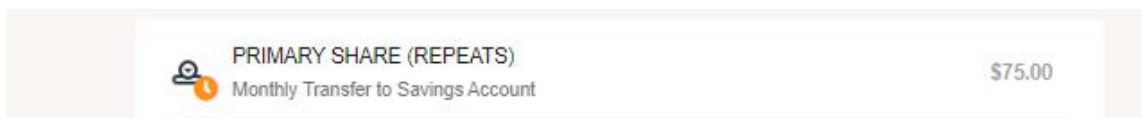
	<b>CHOICE SAVINGS (REPEATS)</b> From Checking 0000	<b>\$6.50</b>
---	---	---------------


Successful transfers display a green checkmark, and the transfer amount displays in bold.



	<b>PRIMARY SHARE</b> From Savings *****98:2	<b>\$50.00</b>
---	--	----------------

Scheduled transfers that have not yet cleared display the Transfer icon with an orange clock symbol. The transfer amount remains gray until the transfer occurs.



	PRIMARY SHARE (REPEATS) Monthly Transfer to Savings Account	\$75.00
---	--	---------

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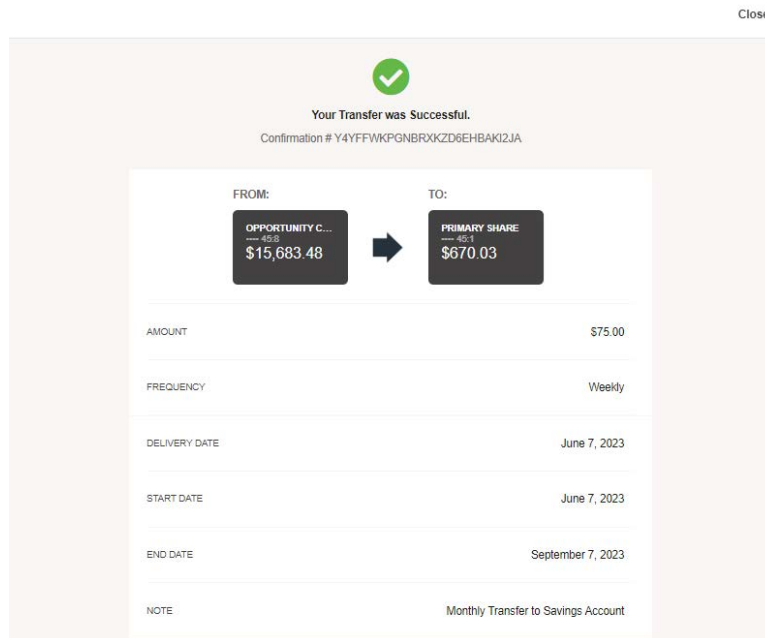
A same-date transfer will show as scheduled until the transfer occurs, depending on the time that it is processed. With recurring transfers, the initial transfer in the series will show the green checkmark once processed. The next transfer in the series will display within the 30-day period. The pending transfers in the series remain gray and will not show the checkmark until processed and cleared.

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## Transfer Details

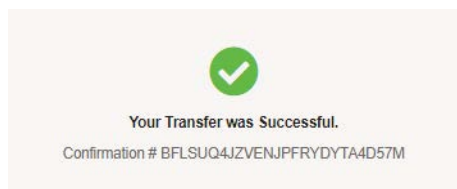
You can select a transfer from the Transfers List to view Transfer Details. The Transfer Details screen displays the Transfer Status, Next Scheduled Date (if applicable), Transfer From: and To: accounts, Amount, Frequency, Delivery Date, Start Date and End Date (for recurring transfers), and Notes entered.

**Please note:** Transfers received are not included in your Transfers Tile. You will not find them on the Transfers List and will not be able to see any details within Transfer Details. All transfers received can be found in your Account tile, where the date and amount of the transaction will be provided.

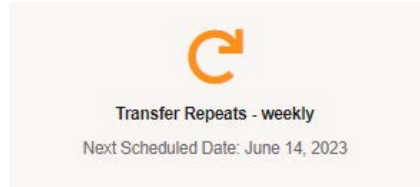


## Transfer Status Icons

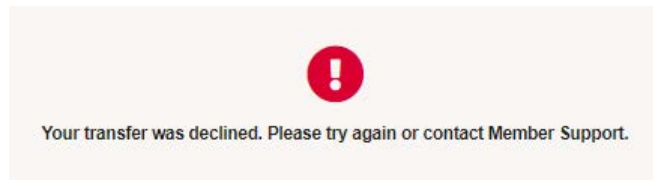
**Completed Transfers** display a checkmark and the confirmation number.



**Recurring Transfers** display an arrow, the transfer frequency, and the next scheduled date.



**Failed or declined Transfers** display an exclamation point and direct you to try again or contact Member Support.



### Editing and Canceling Transfers

You may edit scheduled transfers that have not been processed.

**To edit a transfer:**

1. Click the scheduled transfer to edit on the Transfers List, then click **Edit**

Close

Next Scheduled Date: June 14, 2023

FROM:	→	TO:
<div style="border: 1px solid #333; padding: 5px; background-color: #333; color: white; width: fit-content; margin: 0 auto;">OPPORTUNITY C... *** 45:8 \$15,675.48</div>		<div style="border: 1px solid #333; padding: 5px; background-color: #333; color: white; width: fit-content; margin: 0 auto;">PRIMARY SHARE *** 45:1 \$670.03</div>
AMOUNT		\$75.00
FREQUENCY		Weekly
START DATE		June 7, 2023
END DATE		September 7, 2023
NOTE		Monthly Transfer to Savings Account

EDIT OPTIONS

Edit Transfer

Cancel Transfer

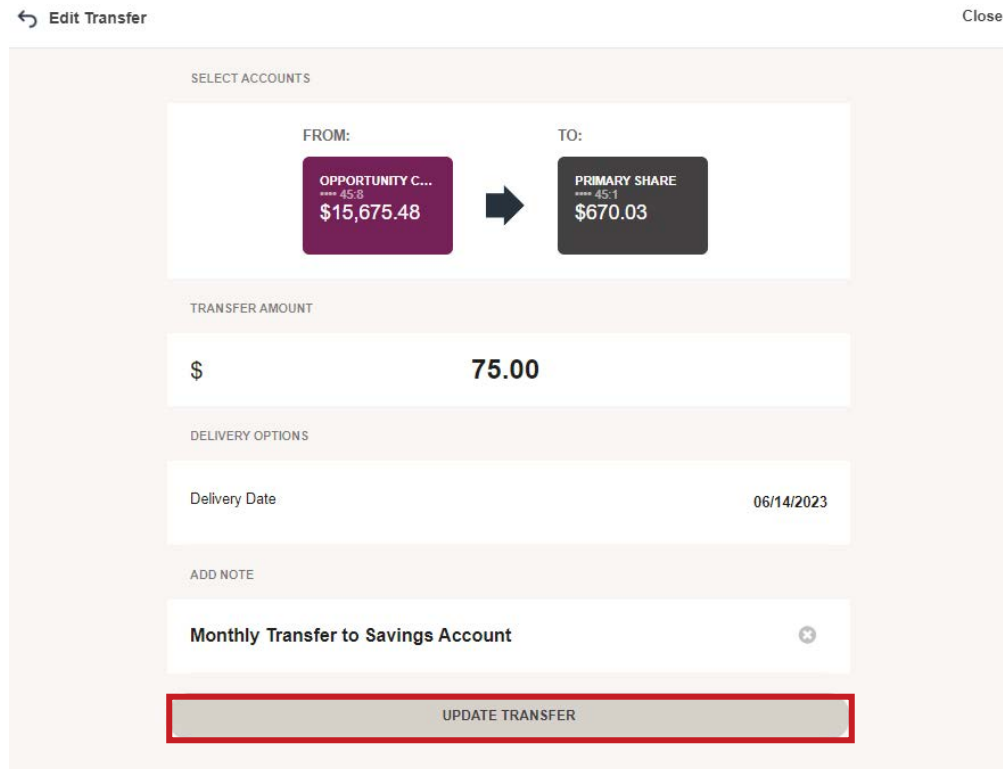
---

Scheduled transfers for external accounts are not editable the same day that they are initiated. However, they may be edited the day after they are initiated.

---

**For One-Time Transfers:**

- a. Edit the transfer information, then click **Update Transfer** when finished



- b. Review the updated information, then click **Submit Transfer** or click **Review Transfer** to make additional edits  
*(Image on next page)*

← Review Transfer Close

Confirm transfer details

FROM: TO:

OPPORTUNITY C...  
\*\*\*\* 45:8  
**\$15,675.48**

➔

PRIMARY SHARE  
\*\*\*\* 45:1  
**\$670.03**

---

AMOUNT \$75.00

---

DELIVERY DATE June 15, 2023

---

NOTE Monthly Transfer to Savings Account

**SUBMIT TRANSFER**

c. A success message displays. Click **Done** to return to the Transfers Screen

Close

Your Transfer has been scheduled!

FROM: TO:

OPPORTUNITY C...  
\*\*\*\* 45:8  
**\$15,675.48**

➔

PRIMARY SHARE  
\*\*\*\* 45:1  
**\$670.03**

---

AMOUNT \$75.00

---

DELIVERY DATE June 15, 2023

---

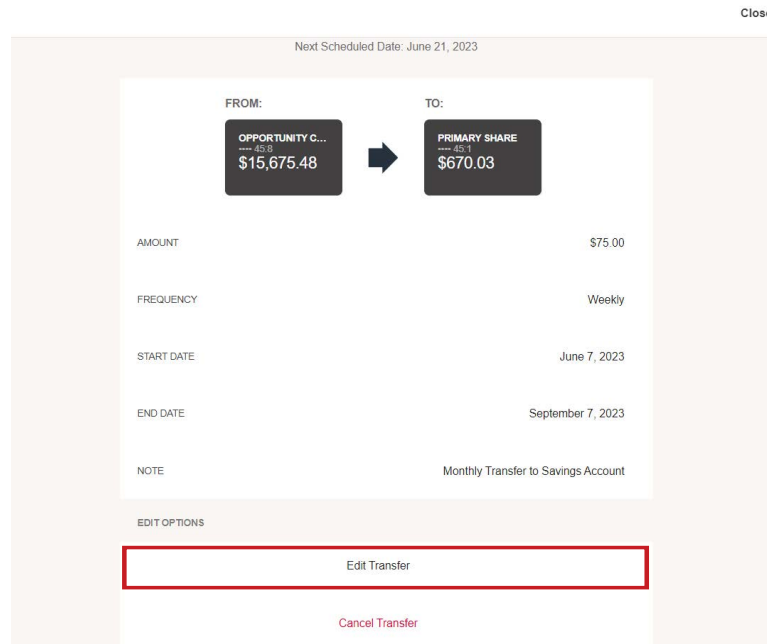
NOTE Monthly Transfer to Savings Account

**DONE**

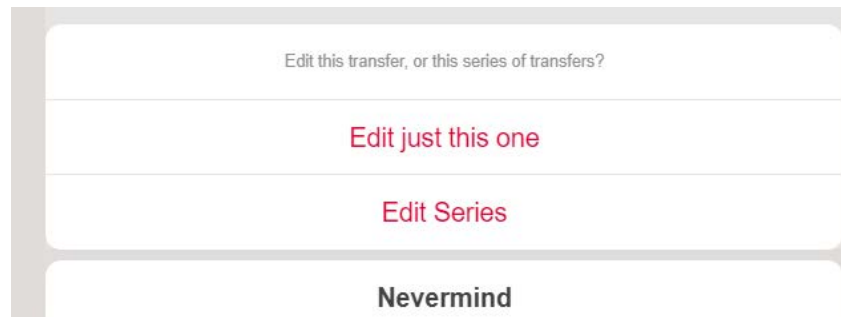


**To edit recurring transfers:**

- a. Click the scheduled transfer to edit on the Transfers List, then click **Edit Transfer**



- b. Next, select whether to **Edit just this one** (the displayed Transfer) or to **Edit Series**, or click **Nevermind** to return to the previous screen



- c. Edit the information, then click **Update Transfer** when finished  
(Image on next page)

SELECT ACCOUNTS

FROM: OPPORTUNITY C... \$15,675.48 → TO: PRIMARY SHARE \$670.03

TRANSFER AMOUNT: \$ 75.00

DELIVERY OPTIONS: Delivery Date 06/21/2023

ADD NOTE: Monthly Transfer to Savings Account

UPDATE TRANSFER

**One-time Transfer**

FROM: OPPORTUNITY C... \$15,675.48 → TO: PRIMARY SHARE \$670.03

TRANSFER AMOUNT: \$ 75.00

DELIVERY OPTIONS: Frequency Weekly, Start Date 06/07/2023, End Date 10/07/2023

ADD NOTE: Monthly Transfer to Savings Account

UPDATE TRANSFER

**Recurring Transfer**

For recurring transfers, only the FROM account, Amount and End Date are editable. If the Frequency or TO account is no longer correct, you will need to cancel the series and re-initiate the recurring transfer.

d. Next, click **Submit Transfer**

Confirm transfer details

FROM: OPPORTUNITY C... \$15,675.48 → TO: PRIMARY SHARE \$670.03

AMOUNT: \$75.00

DELIVERY DATE: June 21, 2023

SUBMIT TRANSFER

**One-time Transfer**

Confirm transfer details

FROM: OPPORTUNITY C... \$15,675.48 → TO: PRIMARY SHARE \$670.03

AMOUNT: \$75.00

FREQUENCY: Weekly

START DATE: June 7, 2023

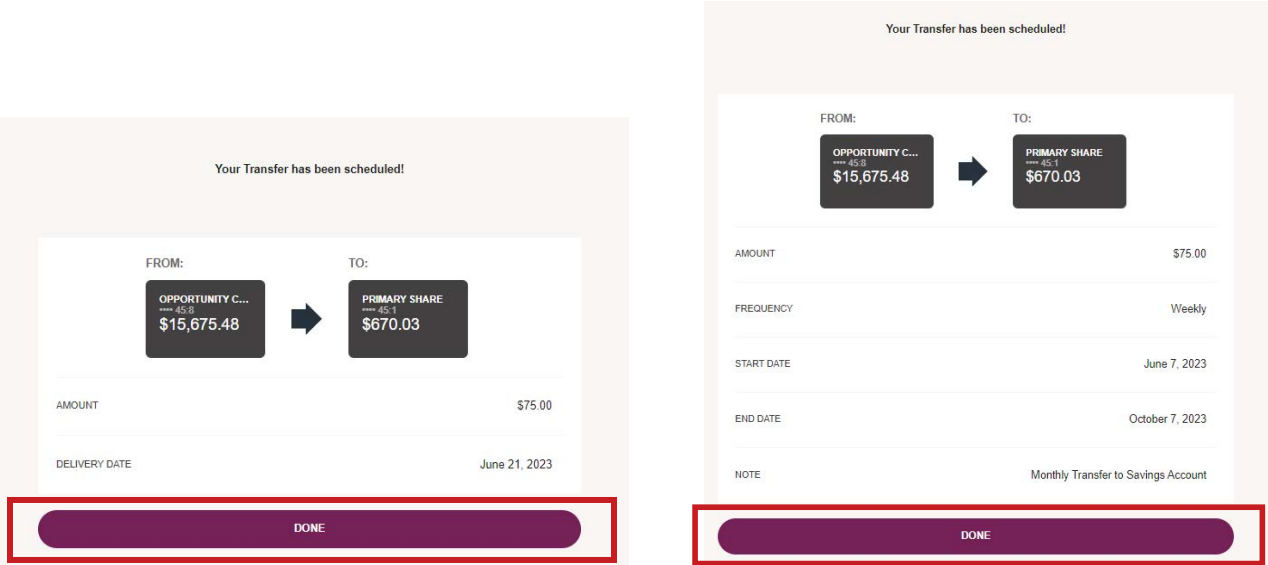
END DATE: October 7, 2023

NOTE: Monthly Transfer to Savings Account

SUBMIT TRANSFER

**Recurring Transfer**

e. A success message displays. Click **Done** to return to the Transfers Screen

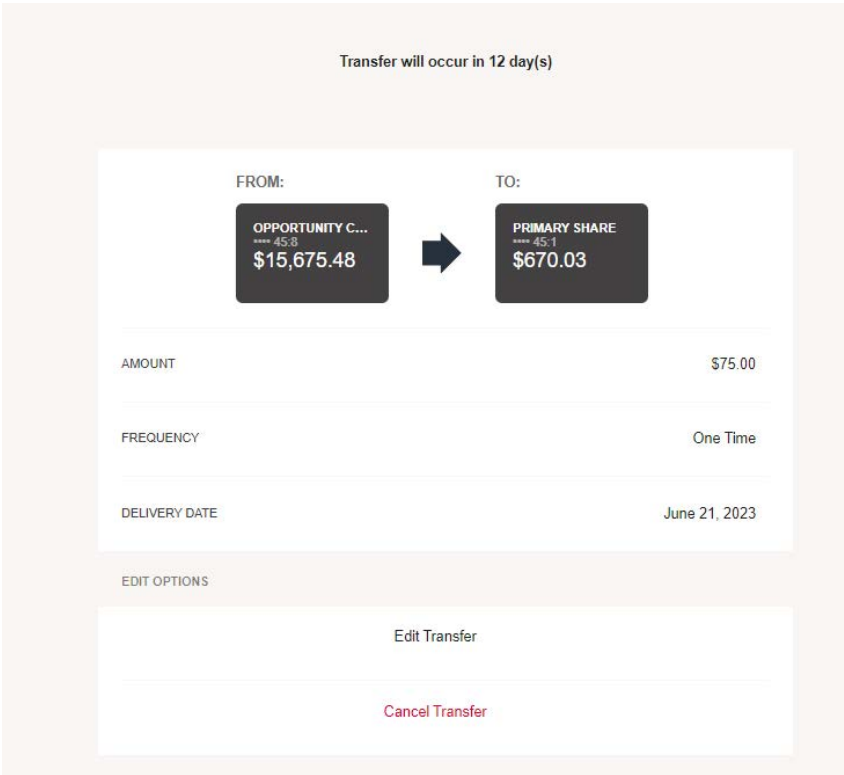


*One-Time Transfer*

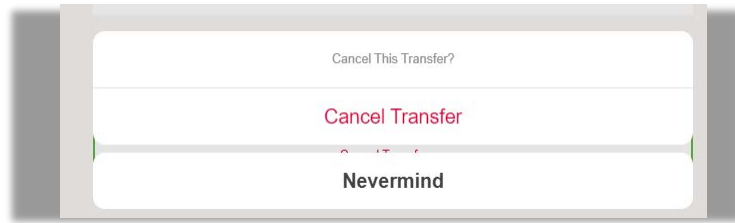
*Recurring Transfer*

To cancel a one-time:

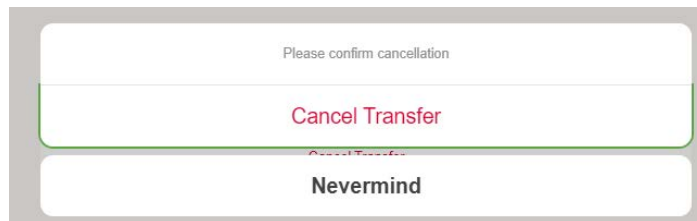
1. Click the scheduled transfer to edit on the Transfers List, then click **Cancel Transfer**



2. Click **Cancel Transfer** to proceed or click **Nevermind** to return to the previous screen



3. Click **Cancel Transfer** again to proceed



4. The one-time scheduled transfer is now canceled and no longer displays in the Transfers List



Date	Description	Amount
JUN 21, 2023 - SCHEDULED	PRIMARY SHARE (REPEATS) Monthly Transfer to Savings Account	\$75.00
JUN 7, 2023	PRIMARY SHARE (REPEATS) Monthly Transfer to Savings Account	\$75.00
MAY 16, 2023	PRIMARY SHARE test 3	\$1.00
MAY 16, 2023	PRIMARY SHARE test	\$1.00
MAY 16, 2023	PRIMARY SHARE test	\$1.00

**To cancel a transfer in a series:**

1. Click the scheduled transfer to edit on the Transfers List, then click **Cancel**

The screenshot shows a transfer details form. At the top, it displays 'FROM:' and 'TO:' with corresponding account information and balances. Below this, there are fields for 'AMOUNT', 'FREQUENCY', 'START DATE', 'END DATE', and 'NOTE'. At the bottom, there is an 'EDIT OPTIONS' section with buttons for 'Edit Transfer' and 'Cancel Transfer'.

FROM:	TO:
OPPORTUNITY C... **** 45:8 \$15,675.48	PRIMARY SHARE **** 45:1 \$670.03

AMOUNT	\$75.00
FREQUENCY	Weekly
START DATE	June 7, 2023
END DATE	October 7, 2023
NOTE	Monthly Transfer to Savings Account

EDIT OPTIONS

Edit Transfer

Cancel Transfer

2. Next, select whether to **Cancel This Transfer?** (the displayed transfer) or to **Cancel This Series of Transfers?**, or click **Nevermind** to return to the previous screen

The screenshot shows a confirmation dialog box with the title 'Cancel this transfer, or this series of transfers?'. It contains three buttons: 'Cancel This Transfer?', 'Cancel This Series of Transfers?', and 'Nevermind'.

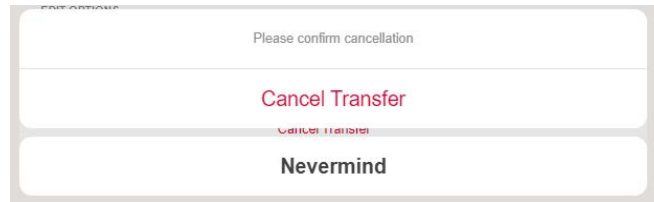
Cancel this transfer, or this series of transfers?

Cancel This Transfer?

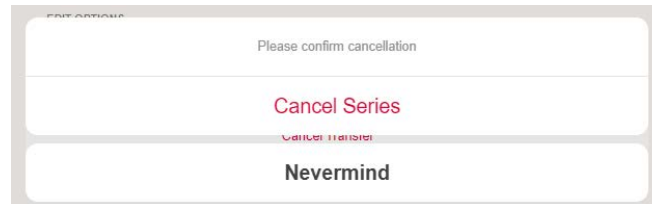
Cancel This Series of Transfers?

Nevermind

- a. If canceling the displayed transfer, click **Cancel Transfer** to confirm.



- b. If canceling the series of transfers, click **Cancel Series**.



5. The Transfer List refreshes, and the canceled transfers no longer display

## Searching Transfers

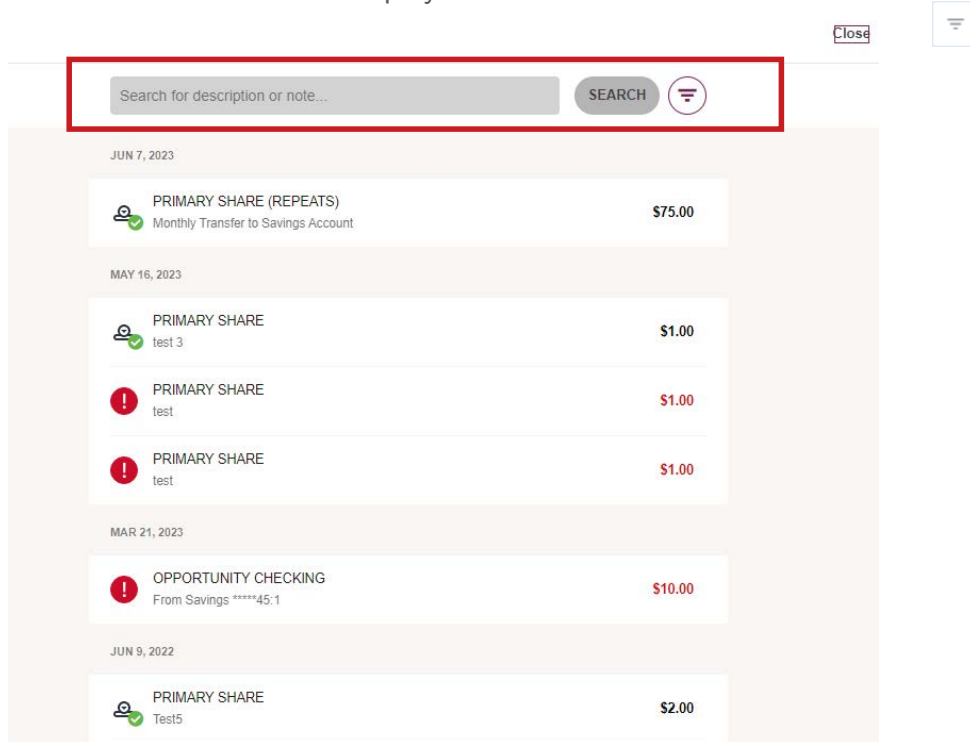
The Transfers Search screen allows you to search for Transfers by keywords using the Search Field, or by applying filters.

**Please note:** The transfers you have received are **not** included in your Transfers Tile and are therefore not searchable within the Transfers tile. All transfers received can be found in your Account tile, where the date and amount of the transaction will be provided.

1. On the Transfers Screen, click the **Magnifying Glass** above the Transfers List

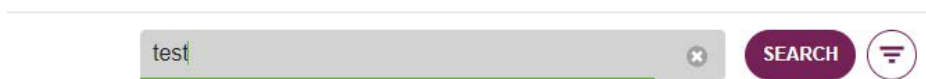


2. The Transfer Search screen displays with the **Search Field** and **Filters Icon**

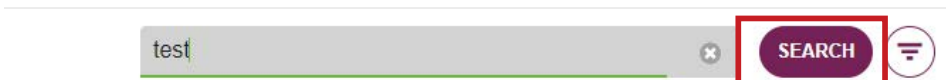


To search by Keyword:

a. Click into the **Search Field** and Enter the keyword or phrase to search by

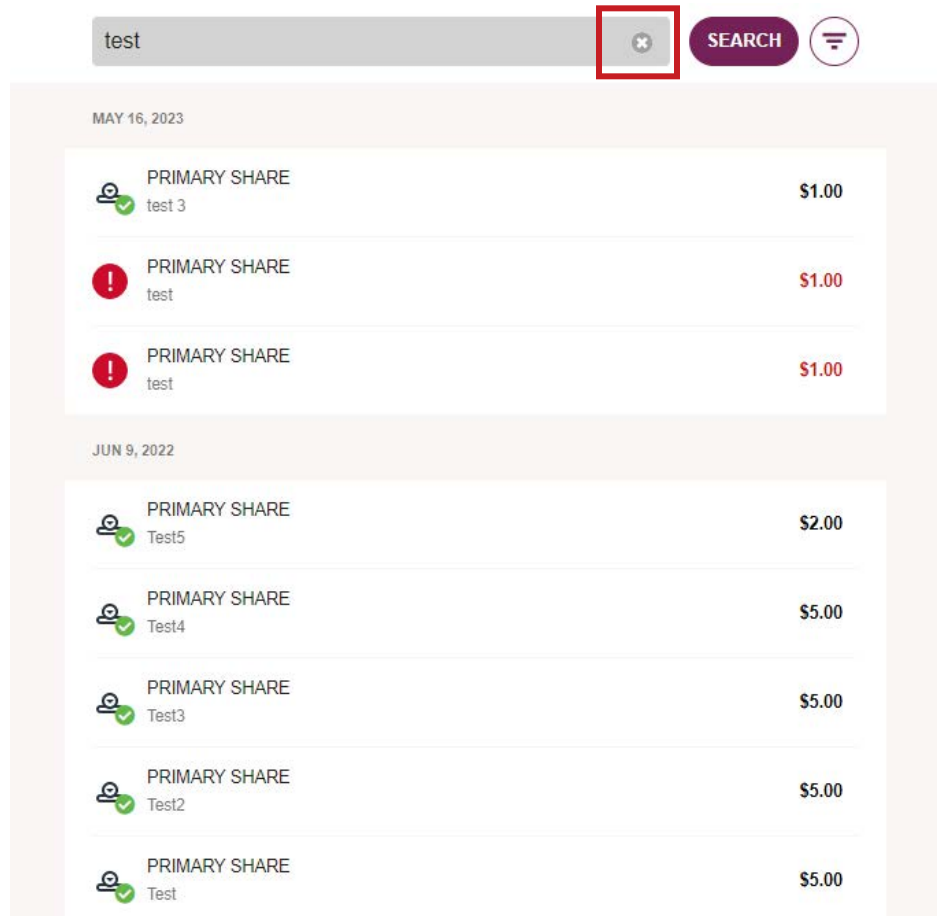



b. Click **Search**



c. The Transfers List refreshes to display matching results

*(Image on the next page)*



- d. Click the  icon to clear the Search Field to enter a new search, or click **Close** to return to the Transfers screen

**To filter by Account:**

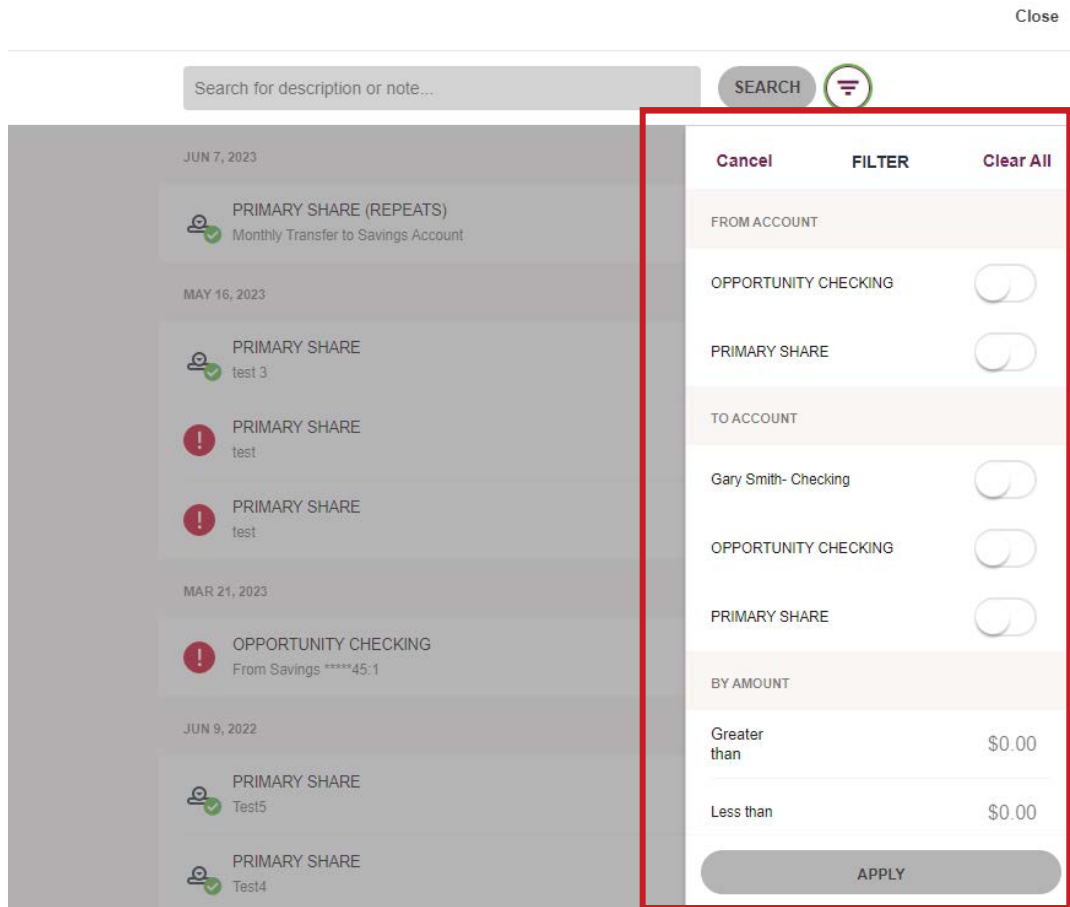
- a. Click the  icon to expand the Filters List



- b. The **From: Account** and **To: Account** filter toggles display

*(Image on the next page)*

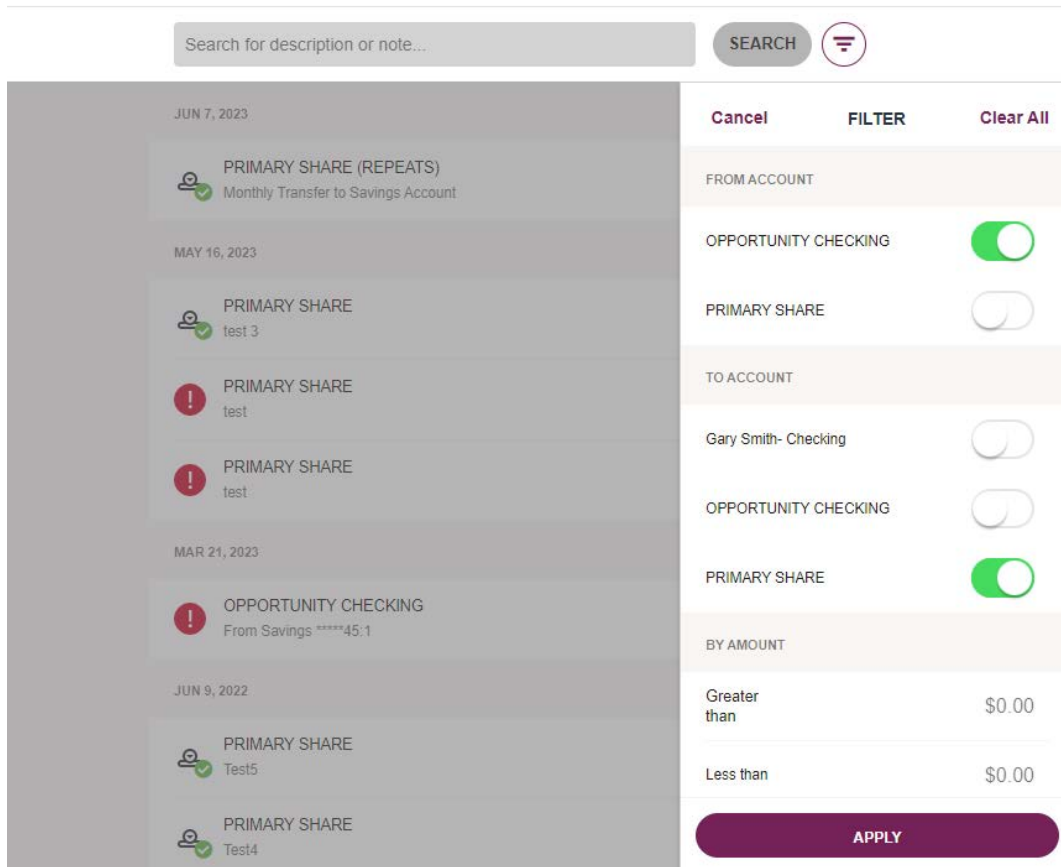




You may need to scroll to view all the available accounts in the From Account and To Account sections.

- c. Click the right-side of the toggle or slide left-to-right next to the account(s) to search by that account. The toggle will turn green to indicate the active filter.

*(Image on the next page)*



- d. Click **Apply** to initiate the search, **Clear All** to remove the filter(s), or **Cancel** to return to the Transfers List

(Image on the next page)

Close

SEARCH
☰

Cancel
FILTER
Clear All

JUN 7, 2023

PRIMARY SHARE (REPEATS)  
Monthly Transfer to Savings Account

MAY 16, 2023

PRIMARY SHARE  
test 3

PRIMARY SHARE  
test

PRIMARY SHARE  
test

MAR 21, 2023

OPPORTUNITY CHECKING  
From Savings \*\*\*\*\*45:1

JUN 9, 2022

PRIMARY SHARE  
Test5

PRIMARY SHARE  
Test4

FROM ACCOUNT

OPPORTUNITY CHECKING

PRIMARY SHARE

TO ACCOUNT

Gary Smith- Checking

OPPORTUNITY CHECKING

PRIMARY SHARE

BY AMOUNT

Greater than \$0.00

Less than \$0.00

APPLY

- e. The Transfers List refreshes to display matching results. To remove applied filters individually, click the X icon next to the filter

Close

SEARCH
☰

FROM: OPPORTUNITY CHECKING
X
TO: PRIMARY SHARE
X

JUN 7, 2023

PRIMARY SHARE (REPEATS) \$75.00  
Monthly Transfer to Savings Account

MAY 16, 2023

PRIMARY SHARE \$1.00  
test 3

PRIMARY SHARE \$1.00  
test

PRIMARY SHARE \$1.00  
test

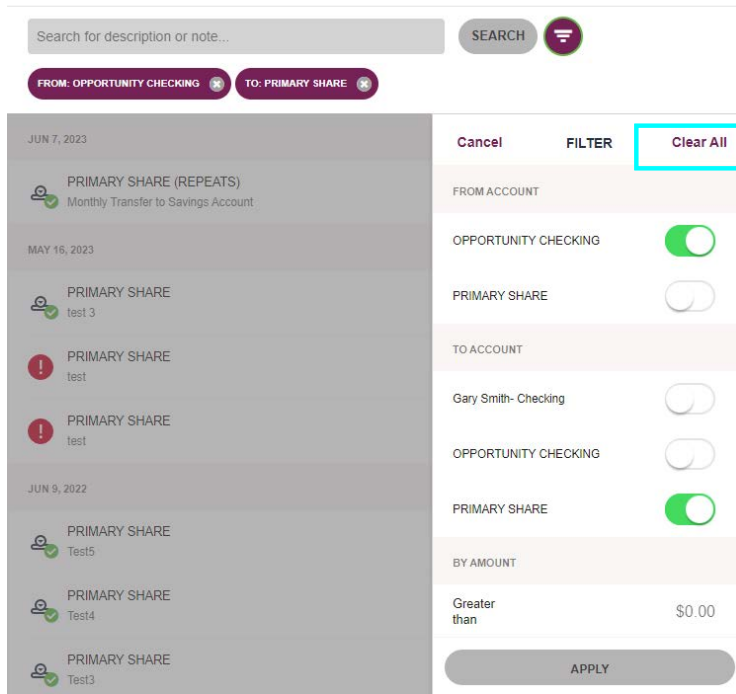
JUN 9, 2022

PRIMARY SHARE \$2.00  
Test5


PRIMARY SHARE \$5.00  
Test4

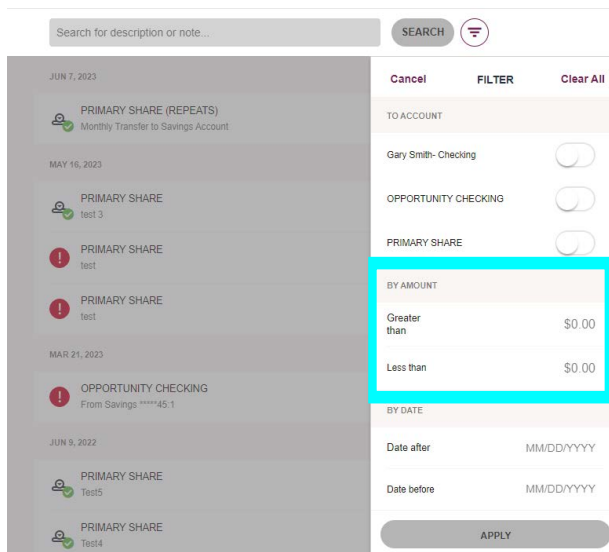
PRIMARY SHARE \$5.00  
Test3

f. To clear all filters, click the  icon and click **Clear All**.



To search by Transfer Amount:

- Click the filter icon 
- Scroll to locate the **By Amount** section



c. Enter the amount(s) to search by in the **Greater than** and/or **Less than** fields

BY AMOUNT	
Greater than	\$1.00
Less than	\$0.00

**Greater than**

BY AMOUNT	
Greater than	\$0.00
Less than	\$1.00

**Less than**

BY AMOUNT	
Greater than	\$1.00
Less than	\$2.00

**Greater than and Less than**

d. Click **Apply** to initiate the search

Close

SEARCH

Cancel	FILTER	Clear All
FROM ACCOUNT		
	OPPORTUNITY CHECKING	<input type="checkbox"/>
	PRIMARY SHARE	<input type="checkbox"/>
TO ACCOUNT		
	Gary Smith- Checking	<input type="checkbox"/>
	OPPORTUNITY CHECKING	<input type="checkbox"/>
	PRIMARY SHARE	<input type="checkbox"/>
BY AMOUNT		
Greater than		\$2.00
Less than		\$0.00
<span>APPLY</span>		

g. The Transfers List refreshes to display matching results. To remove applied filters individually, click the X icon next to the filter


Close

SEARCH

> \$2.00

test 3		
PRIMARY SHARE	test	\$1.00
PRIMARY SHARE	test	\$1.00
MAR 21, 2023		
OPPORTUNITY CHECKING	From Savings *****45:1	\$10.00
JUN 9, 2022		
PRIMARY SHARE	Test5	\$2.00
PRIMARY SHARE	Test4	\$5.00

**To search by date:**

- a. Click the  icon to expand the Filters List
- b. Scroll to locate the **By Date** section

BY DATE


Date after

Date before

**APPLY**

- c. Click into the **Date after** and/or the **Date before** fields and use the calendar to select the date(s) to search by

Close

Search for description or note... **SEARCH** 

**Cancel FILTER Clear All**

TO ACCOUNT

Gary Smith- Checking

OPPORTUNITY CHECKING

PRIMARY SHARE

BY AMOUNT

Greater than

Less than

BY DATE

Date after

Date before

**APPLY**

- d. Click **Apply** to initiate the search
- e. The Transfers List refreshes to display matching results. To remove applied filters individually, click the X icon next to the filter

Close

---

SEARCH
☰

BEFORE: 06/09/2023 ✕
AFTER: 06/01/2023 ✕

✔ test 3

<span style="color: red; font-weight: bold;">!</span>	PRIMARY SHARE test	\$1.00
<span style="color: red; font-weight: bold;">!</span>	PRIMARY SHARE test	\$1.00

MAR 21, 2023

<span style="color: red; font-weight: bold;">!</span>	OPPORTUNITY CHECKING From Savings *****45,1	\$10.00
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JUN 9, 2022

<span style="font-size: 0.7em;">👤</span> <span style="font-size: 0.7em;">✔</span>	PRIMARY SHARE Test5	\$2.00
<span style="font-size: 0.7em;">👤</span> <span style="font-size: 0.7em;">✔</span>	PRIMARY SHARE Test4	\$5.00
<span style="font-size: 0.7em;">👤</span> <span style="font-size: 0.7em;">✔</span>	PRIMARY SHARE Test3	\$5.00
<span style="font-size: 0.7em;">👤</span> <span style="font-size: 0.7em;">✔</span>	PRIMARY SHARE Test2	\$5.00

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Filters may be applied in any combination of From Account, To Account, Amount, and Date.

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