

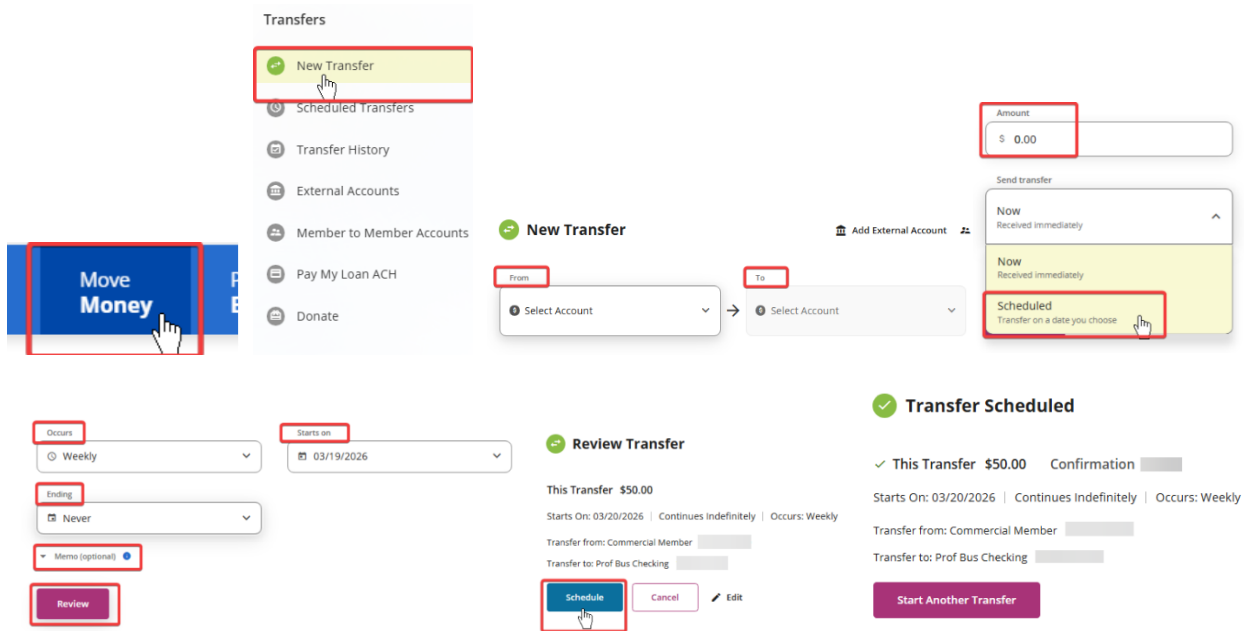
Move Money with Transfers

Set up one-time or recurring transfers to keep your money moving the way you want.

Set Up a Recurring Transfer

1. Select **Move Money** from the main menu
2. Choose **New Transfer**
3. Select your **From** and **To** accounts
4. Enter the **amount**
5. Change the transfer type to **Scheduled**
6. Choose your **frequency**, **start date**, and **end date**
7. (Optional) Add a **memo**
8. Click **Review**, then **Schedule**

Your transfer is set and will run automatically.



Edit a Scheduled Transfer

Need to make a change? You can edit scheduled transfers anytime.

1. Select **Scheduled Transfers** from the menu
2. Click on the transfer you want to update
3. Select **Edit Transfer**
4. Make your updates and save

Your changes will be applied.

The image shows two screenshots of a web application interface for managing scheduled transfers.

Top Screenshot: Scheduled Transfers List

- Left Sidebar (Transfers):** A vertical menu with options: New Transfer, **Scheduled Transfers** (highlighted with a red box), Transfer History, External Accounts, and Member to Member Transfers.
- Main Content Area:** Titled "Scheduled Transfers". It features a search bar, a "Sort & Filter" button, and a table of transfers. A transfer entry is highlighted with a red box: "Bus Sav [redacted] From Bus Check [redacted] | One time | Schedule ID: 94" with a "\$10.00 Scheduled" amount on the right. A mouse cursor is pointing at the entry.

Bottom Screenshot: Edit scheduled transfer form

- Header:** "Edit scheduled transfer"
- Transfer Details:** "Bus Check [redacted] → Bus Sav [redacted]". Below this, "Amount" is set to "\$ 10.00". "Occurs" is set to "One time" (with a lock icon). "Starts on" is set to "04/20/2026" (with a calendar icon).
- Transfer Summary (Left):** A summary box shows "Monday, Apr 20", "Bus Sav [redacted]", "From Bus Check [redacted] | One time | Schedule ID: 94", and a table with columns "Amount", "Occurs", and "Starts on". The values are "\$10.00", "One time", and "4/20/2026".
- Form Fields:** A "Memo (optional)" field with a blue information icon and a character count of "80 character(s) remaining".
- Buttons:** At the bottom, there are three buttons: "Edit Transfer" (purple, highlighted with a red box), "Delete Scheduled Transfer" (white with a trash icon, highlighted with a red box), and "Save Changes" (blue, highlighted with a red box and a mouse cursor). A "Cancel" button is also present.

Delete a Scheduled Transfer

Need to make a change? You can edit scheduled transfers anytime.

1. Select **Scheduled Transfers** from the menu
2. Click on the transfer you want to remove
3. Select **Delete Scheduled Transfer**
4. Confirm your selection

Your transfer will be removed.

The screenshot shows the 'Scheduled Transfers' interface. On the left, a sidebar menu has 'Scheduled Transfers' highlighted with a red box. The main area shows a table of transfers for 'Monday, Apr 20'. One transfer is highlighted in yellow and has a red box around it; a mouse cursor is pointing at it. Below the table, a modal dialog titled 'Delete scheduled transfer' is open. It contains the text 'Are you sure you want to delete this transfer? This action is permanent.' and two buttons: 'Delete Scheduled Transfer' (highlighted with a red box and a mouse cursor) and 'No'.

Transfers

- New Transfer
- Scheduled Transfers**
- Transfer History
- External Accounts
- Member to Member Transfers

Scheduled Transfers

Search Sort & Filter

Monday, Apr 20

Bus Sav [redacted]	From Bus Check [redacted]	One time	Schedule ID: 94	\$10.00	Scheduled
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Monday, Apr 20

Bus Sav [redacted]
From Bus Check [redacted] | One time | Schedule ID: 94

Amount	Occurs	Starts on
\$10.00	One time	4/20/2026

Edit Transfer **Delete Scheduled Transfer**

Delete scheduled transfer ×

Are you sure you want to delete this transfer? This action is permanent.

Delete Scheduled Transfer **No**