

# Transfers Quick Reference Guide

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## **Transfers Quick Reference Guide**

#### **Accessing Transfers**

- There are multiple ways to access Transfer options: Dashboard Cards, Dashboard Icons, and the left side menus.
  - Use the dashboard cards or icons to access the "Make a transfer" screen.
  - Use the Transfers option on the left side menus to access the full transfer screen.



#### **View Upcoming Transfers**

#### **Desktop View**

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**Mobile View** 

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## **Making Transfers**

- You must click on the Transfers from the left Menu to access the full transfer page
- View Scheduled Transfers in list view, or using the calendar.
- View your added external accounts and add external accounts by clicking + External account
- Click Make a transfer to start the transfer process

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rom	¢ι	Checking \$	Only the transfers	next sche s.	duled tra	nsaction i	is shown	for your r	recurring
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mount	\$	5.00							





### **Making Transfers**

- Create One-time, scheduled or recurring transfers
- Use this option to transfer funds between your own accounts. You can create a one-time, scheduled, or recurring transfer.
- Step 1: Select the From and To accounts
  - NOTE: You may also transfer From/To previously set up external accounts – *see next page*
- Step 2: Enter your transfer amount
- Step 3: Click More Options to expand options for Frequency, Schedule date, and memo. Click *Submit*

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#### **External Transfers**

- You must first set up an external account.
- Use this option to transfer funds between your GRB accounts and accounts at other Financial Institutions.
- Add External account clicking + *External account* on the transfer page.
  - You can also view and add external accounts by clicking on your name from the bottom of your menu, go to Settings and select Add Account





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## **Adding External Transfers**

 Step 1: Complete the requested information on your external account and click Submit. You will be asked to enter your password.

Account name	Lyons	$(\checkmark)$
Routing no. ①	022304616 THE LYONS NATIONAL BANK	Deposits sent We've sent two small deposits to verify your Checking
Account no. ①	)04	account. When they arrive in 1-3 business days you'll need to confirm the amounts. By confirming these deposits you acknowledge you have legal access to this
Account type	Checking >	account. You have until December 3 to confirm the deposit amounts.

 Step 2: Two micro deposits will be sent to your external account for verification. When you receive these deposits, go back to the External Transfers in GRBbank enter the amounts and verify your accounts. Click *Confirm*

LYONS THE LYONS NATION	IONAL BANK		Rename	
TYPE		ACCOUNT NUMBER	ROUTING NUMBER	
Checking		04	022304616	
We've sent two he amounts. B December 3 to	o small deposits to v By confirming these confirm the deposit	erify your account. When they deposits you acknowledge you amounts.	arrive in 1-3 business days you'll need to confirm I have legal access to this account. You have until	You're ready to transfer! You can now transfer with this account. This account's
We've sent two he amounts. B December 3 to	0 small deposits to v 3y confirming these confirm the deposit	erify your account. When they deposits you acknowledge you amounts.	arrive in 1-3 business days you'll need to confirm I have legal access to this account. You have until	You're ready to transfer! You can now transfer with this account. This account's transfers may take 1-3 business days to process.

• **Step 3:** If the deposits match, you will receive notification that you're ready to transfer!





## **Transfers FAQs**

- Q. How do I transfer money between my accounts at another bank with online banking?
- A. We have great options for moving money between your accounts at another bank.
  - External Transfers allow you to transfer funds to and from your GRB accounts and your accounts at other financial institutions. To add an external transfer account, you may do so in the Transfers section by clicking + External account on desktop or Add External account on mobile.
  - Bill pay allows you to send money to another account via our Pay a person option. To access all pay a person options, click on *Payments* on the left or flyout menu in mobile. Select *+ New payee* on desktop, or *Add a Payee* on mobile.

#### Q. How do I transfer funds between accounts?

A. For internal transfers between your GRB accounts, you can do this from the Dashboard Transfers Card, or by clicking on Transfers on the left or flyout menu. Select *Make a transfer* and choose your From and To accounts. Then choose the amount you'd like to transfer and frequency options under "More options" if applicable. Click Submit.

#### Q. What is the cut off time for transfers?

A. You may make transfers 24/7. Any transfers made before 10:00 p.m. will be credited the same business day. Transfers scheduled on weekends or bank holidays will be credited the next business day.







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