Broadview
Federal Credit Union

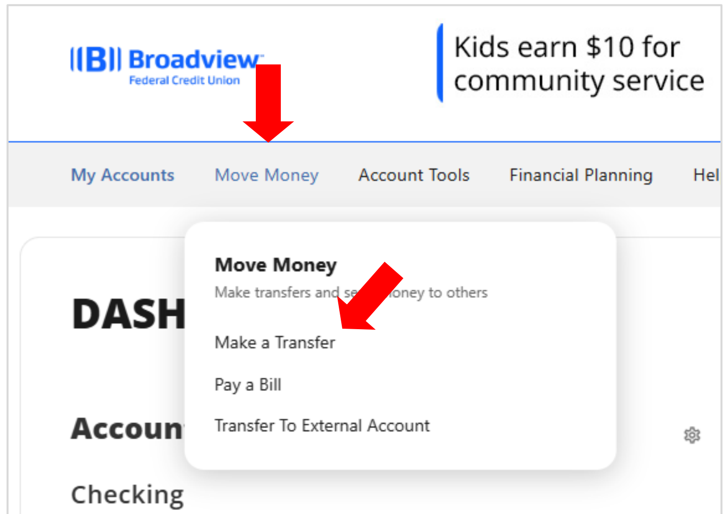
# Business Online Banking
# Cross Account Transfer Quick Guide

This **quick guide** will give you an overview of the Cross Account Transfer process and adding Recurring Transfers in Business Online Banking. For all features and details, please refer to the **Business Online Banking Master User Guide.**

Login to Business Online Banking via the website at www.broadviewfcu.com.

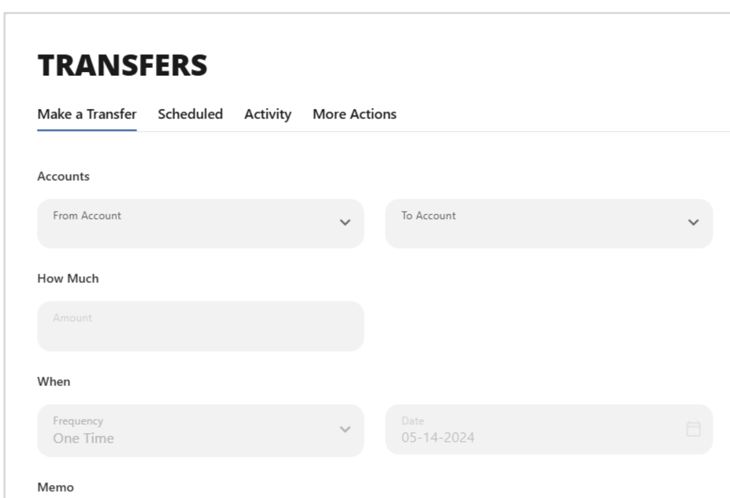
Click on the **Move Money** tab.

The drop-down menu provides several options. For Transfers, Click on **Make a Transfer.**




In the **Transfers** section, you have four options which include:

- **Make a Transfer** – make and set up Transfers.
- **Scheduled** – view your scheduled transfers.
- **Activity** – view your transfer history.
- **More Actions** – add a Loan Payment Account for transfer.

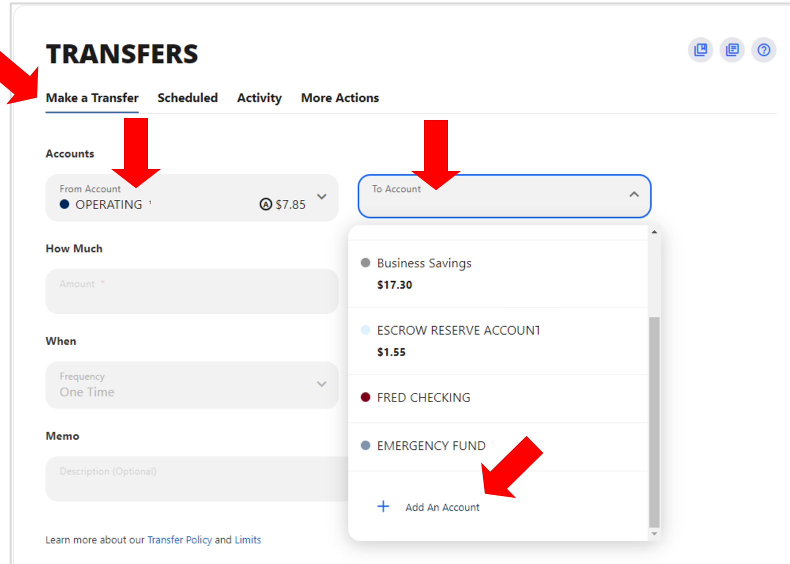


To add a **Recurring Transfer** or “**Cross Account Transfer”** and/or to update the date and frequency of a recurring Transfer:

Click **Make a Transfer**.

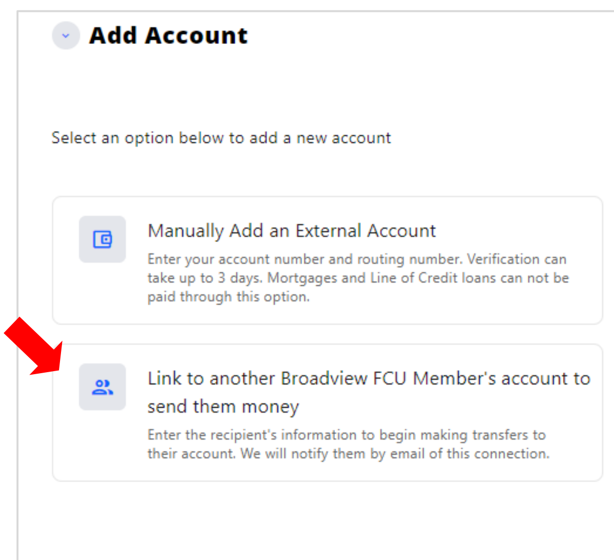
Choose the **From Account** from the dropdown menu.

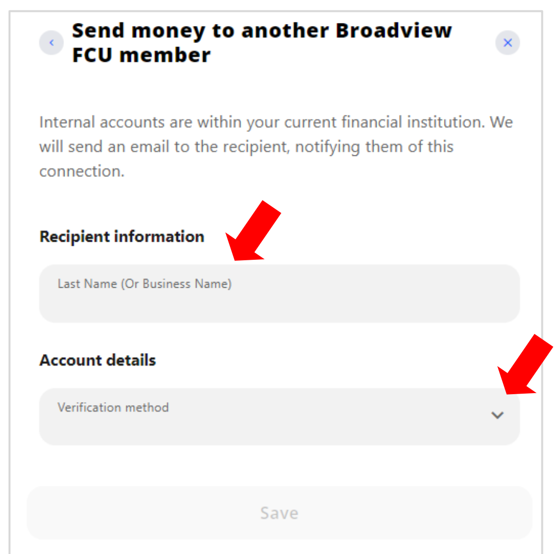
Choose **Add An Account** from the **To Account** dropdown menu.




Click **Link to Another Broadview Member’s account**.

The **Send money to another Broadview FCU Member** screen will pop up.



Complete the **Recipient information**. Last Name of the Member OR the Business Name.

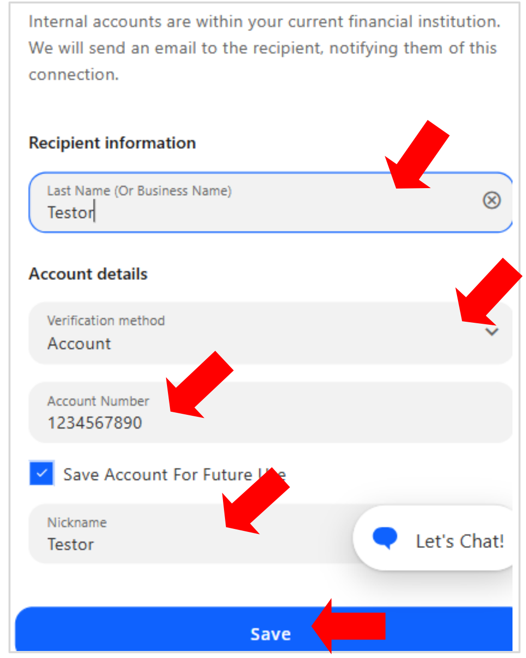
Under **Account details,** select the **Verification method** of Account.

Enter the Broadview FCU **Account Number** of the person or business receiving the funds.

You have the option to **Save** the information for future use. Check this box if applicable.

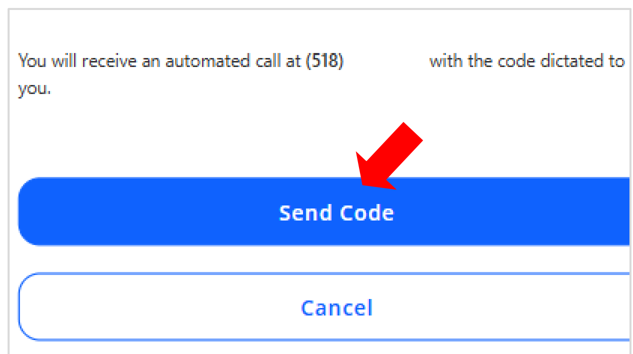
The **Nickname** will be the same as the Recipient's information. If you wish to change it, you can enter the information under **Nickname.**

Click **Save.**




A verification code will be sent to the primary phone number on the account. Verify the number.

Click **Send Code.**




Enter the **code** into the next screen to complete the set up.

Return to the **Make A Transfer** tab to set up your Transfer.

Choose the **From Account.**
Choose the **To Account.**
Choose **How Much.**
Choose **Frequency.**
Choose **When.**

Click **Review Transfer.**

Click **Save.**