

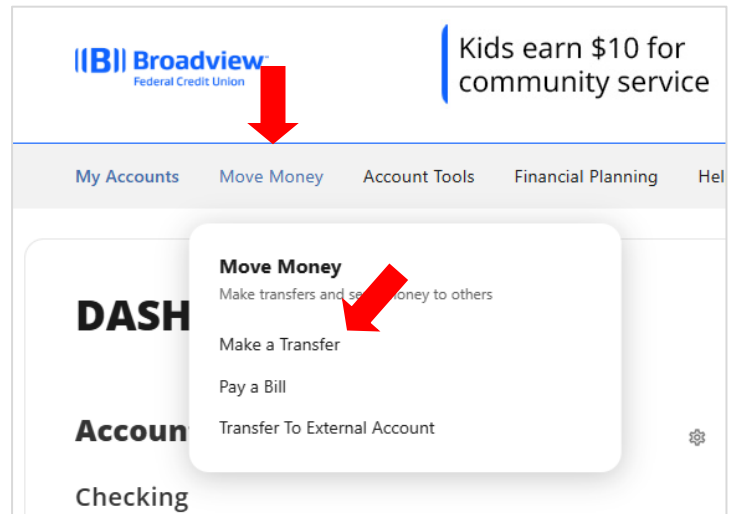
## Business Online Banking Cross Account Transfer Quick Guide

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](http://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.

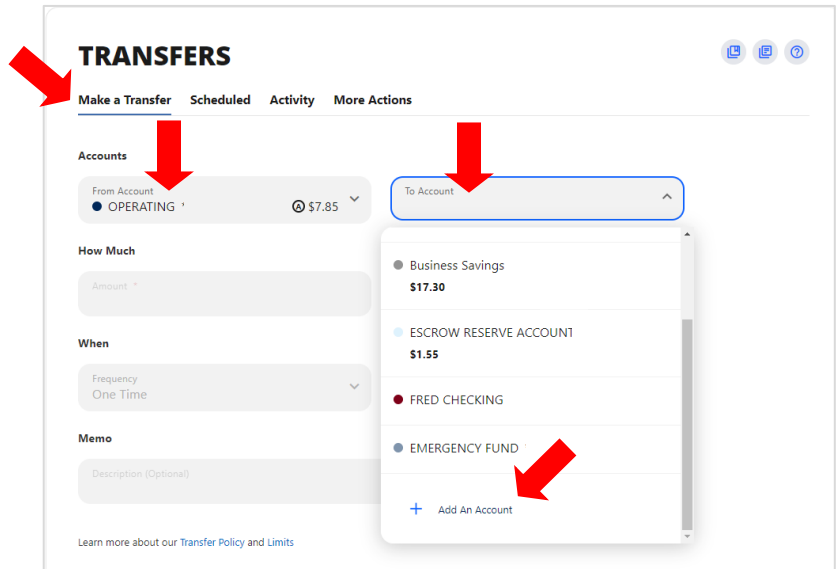
A screenshot of the "TRANSFERS" section in the Broadview Business Online Banking interface. The title "TRANSFERS" is at the top. Below it are four tabs: "Make a Transfer" (which is selected and underlined), "Scheduled", "Activity", and "More Actions". The main content area is divided into sections: "Accounts" with "From Account" and "To Account" dropdown menus; "How Much" with an "Amount" input field; "When" with a "Frequency" dropdown menu set to "One Time" and a "Date" field set to "05-14-2024"; and a "Memo" field at the bottom.

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**.

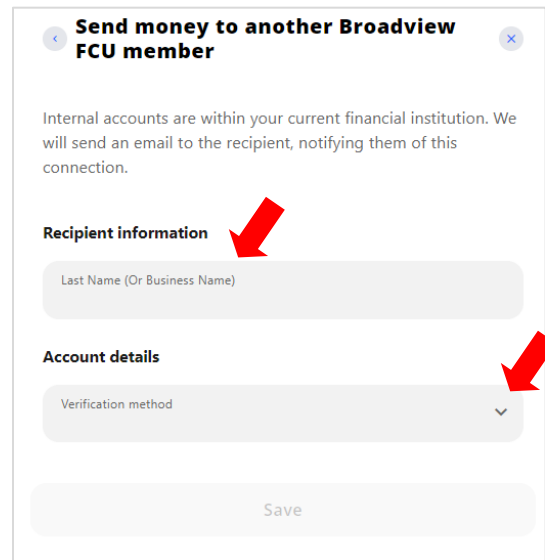
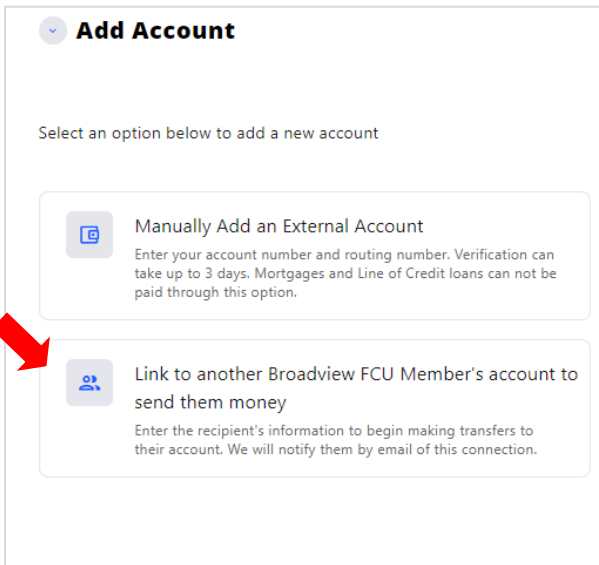
Choose the **From Account** from the dropdown menu.

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**.

Internal accounts are within your current financial institution. We will send an email to the recipient, notifying them of this connection.

**Recipient information**

Last Name (Or Business Name)  
Testor

**Account details**

Verification method  
Account

Account Number  
1234567890

Save Account For Future Use

Nickname  
Testor

Let's Chat!

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.

You will receive an automated call at (518) with the code dictated to you.

Send Code

Cancel

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**.

### TRANSFERS

Make a Transfer | Scheduled | Activity | More Actions

Accounts

From Account | To Account

How Much

Amount

When

Frequency: One Time | Date: 05-14-2024

Memo