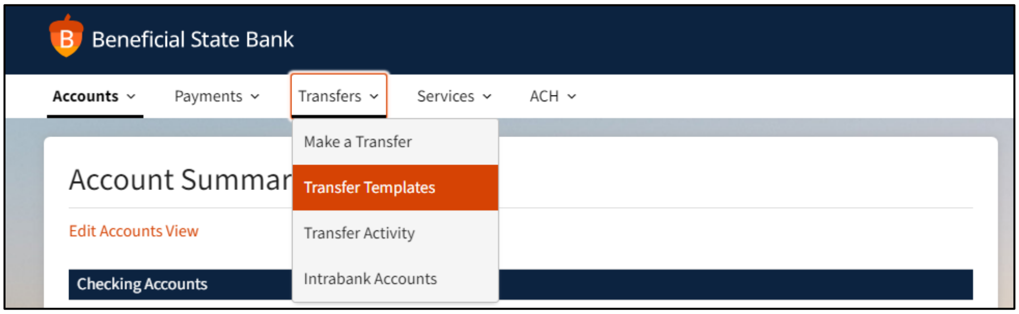
Transfer Templates Guide

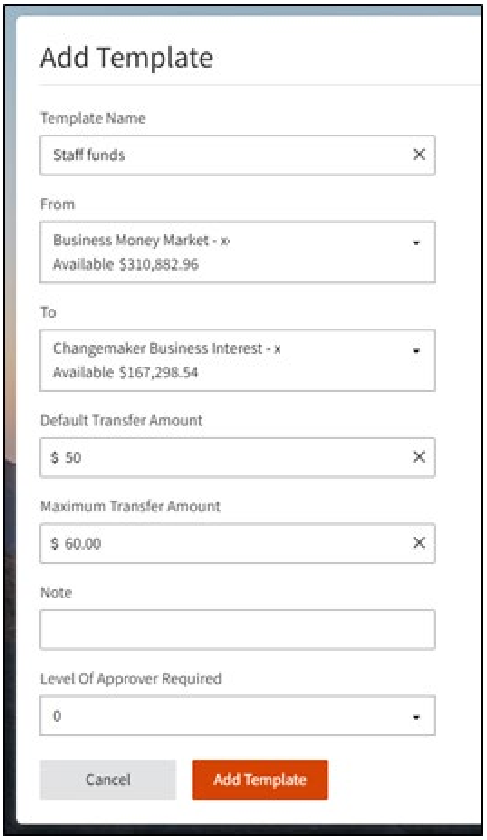
Transfer Templates

1. Log in to Create Digital.
2. Navigate to Transfers → Transfer Templates.



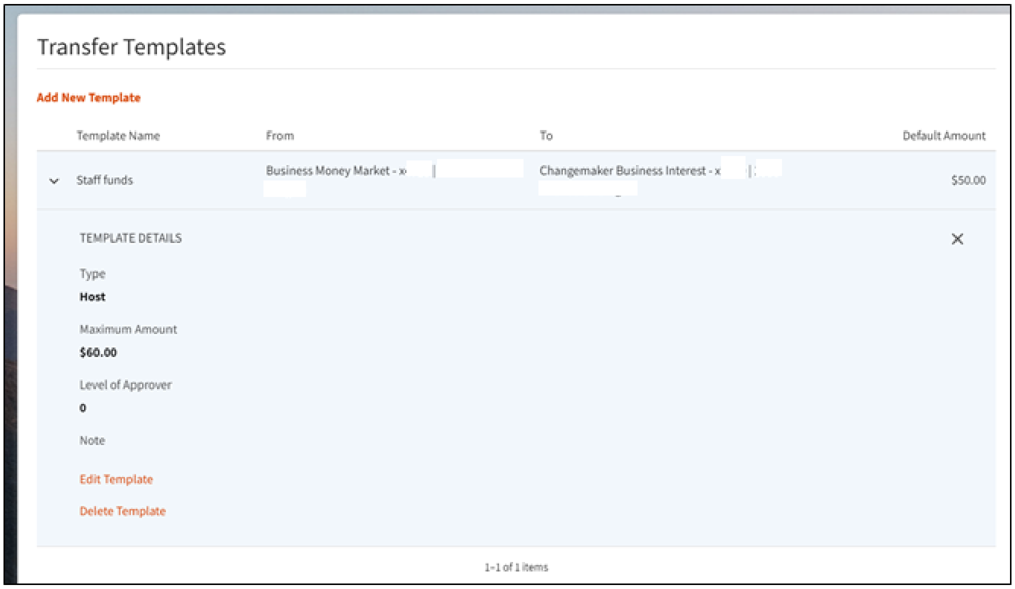
3. Click on “Add New Template.”

4. Create your template

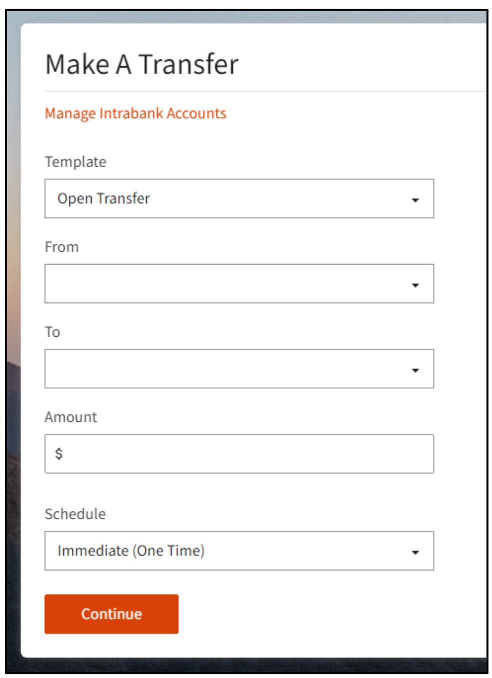


- **Default Transfer Amount** cannot be greater than **Maximum Transfer Amount**. Create Digital has a validation on these values.
- **Level Of Approver Required**. Value can be 0, 1 or 2.
    - 0 = No approval required.
    - 1 = Requires another business user to approve.
    - 2 = Requires 2 business users to approve.

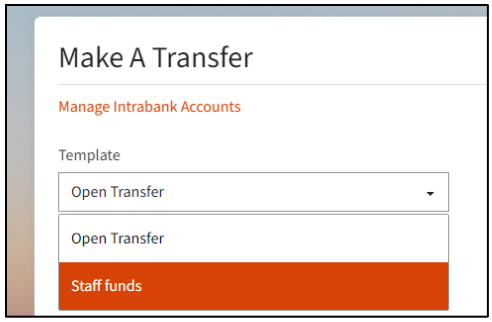
5. After creation, the user can manage the template. “Edit” or “Delete.”



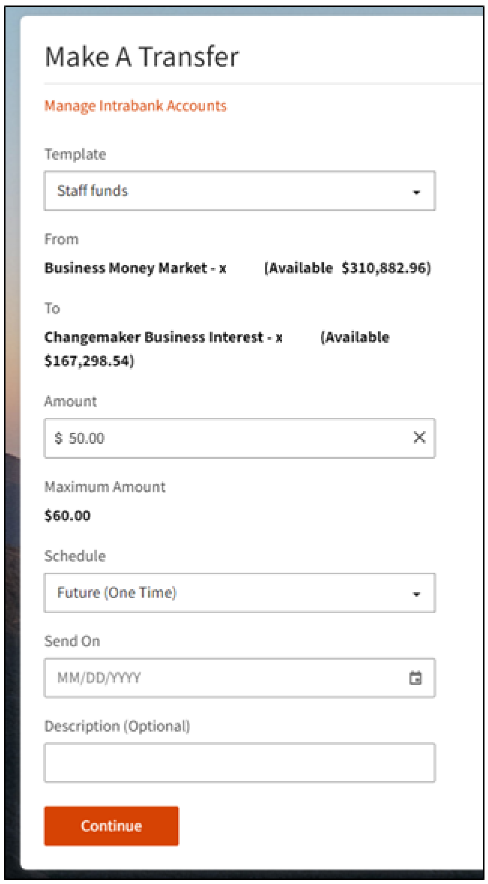
6. Use the template.
    a. Navigate to Transfers → Make a Transfer.



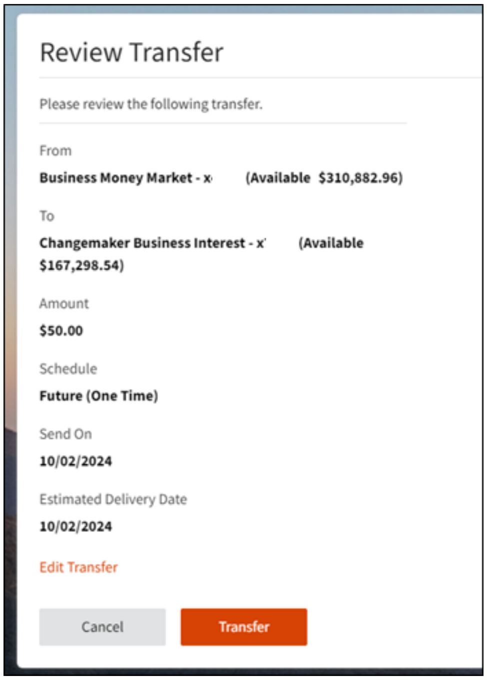
b. Select your template.



c. Verify the values and schedule options.



a. Continue and confirm your transfer.

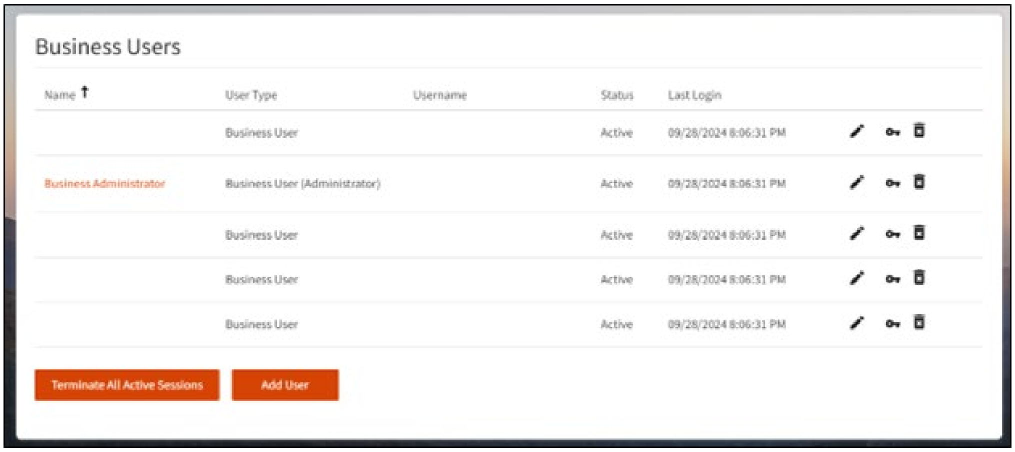


Note: If the **Number of Approval Required** Entitlement for Transfers is set to 1 or 2, this transfer will require approval even though was not defined when the template was created.

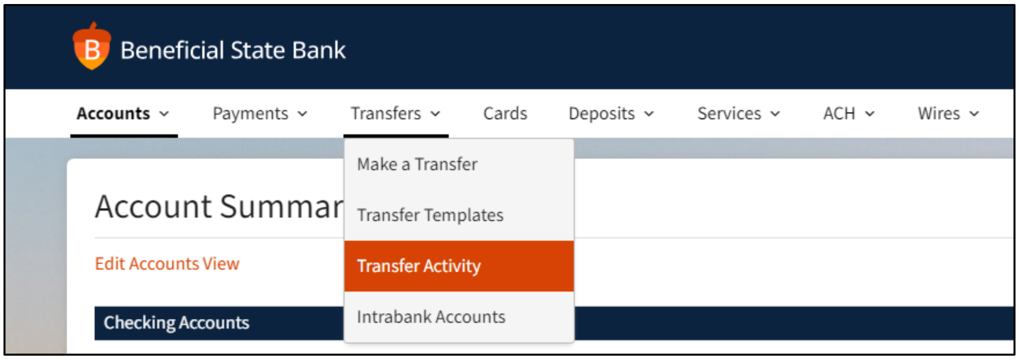
Transfer Approvals

To approve transfers if the entitlement for transfers is set to 1 or 2, users will need to:

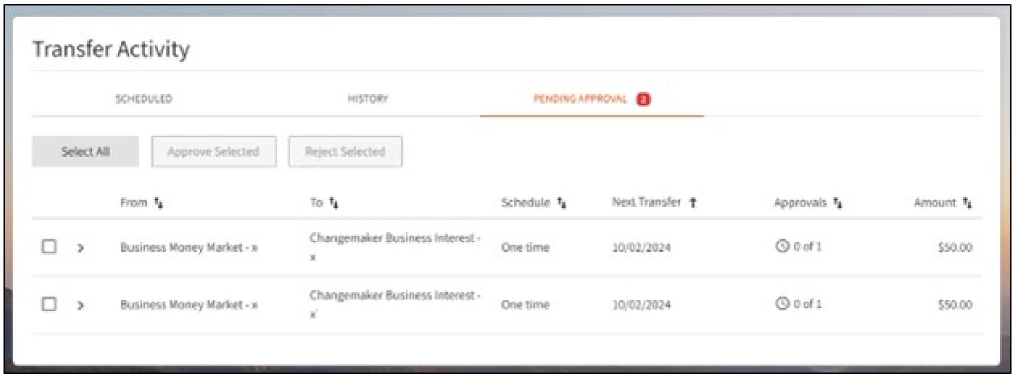
1. Ask another business user to approve the transfer, usually an Admin will have this authority.
2. Ask your business user to request another user to approve those transfers. You can confirm if the business has additional users by looking at “Business Details” on the “Business Users” module.



3. Once the business users log into Online Banking follow these steps:
   a. Navigate to Transfers → Transfer Activity.

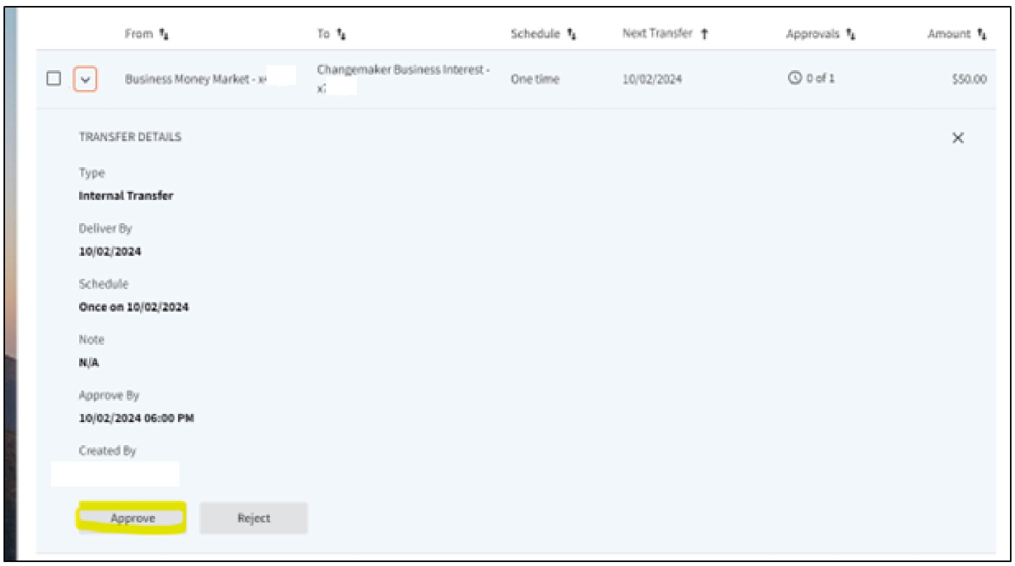


b. Switch to the “Pending Approval” tab.

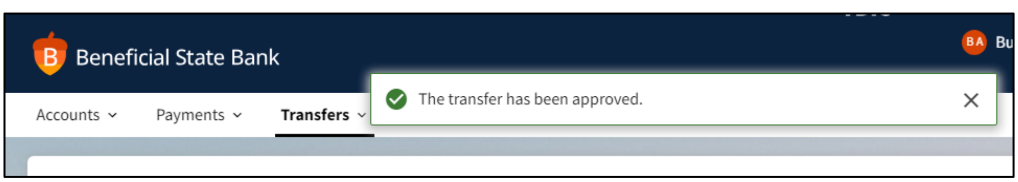


c. Select the transfer you want to approve. There are 2 options to do this:

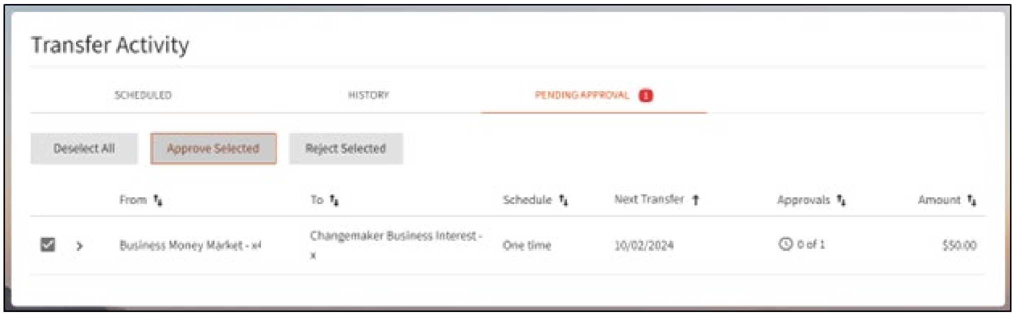
   i. Expand the transfer details and click on “Approve.”



- After clicking “Approve,” the user will get the following message.



ii. Select the checkbox and click on “Approve Selected” (this can be used to approve multiple transfers at the same time).



- After clicking “Approve,” the user will get a confirmation message.