

Quick Transfer Step 1: Click the **Transfer Widget** in the blue widgets menu on the left of your screen.

Dashboard

My Accounts

Account Name	Balance
Savings	\$2,312.87
S0000 PRIMARY SH 89-0000	\$1,557.87
CHRISTMAS CLUB 89-0001	\$755.00
Checking	\$80.42
S0020 CHECKING 89-0020	\$80.42
Loans	\$8.88
2013 FORD EDGE LIMITED 89-0001	\$8.88

Financial News

ORB Financial Sponsors Credit Unions for ...
ORB Financial is very active in raising money for Children's Miracle Network through Credit Unions for Kids, a national CMN sponsor.
January 21, 2014

Information Regarding Year End Tax Docu...
Read this important article about year end tax documents for your Forms 1099, 1098 and 5498.
January 21, 2014

Last 7 days

19 transfers \$75.00

Logged in 8 times

Quick Transfer Step 2: In the left column, click **the account/share** in which you wish to transfer **FROM**.

Transfers

Quick Classic Scheduled History

Today September 26 Occurs Once Reason None

From

Account Name	Balance
S0000 PRIMARY SH 89-0000	\$1,552.87
CHRISTMAS CLUB 89-0001	\$755.00
S0020 CHECKING 89-0020	\$80.42
L0010 VISA 89-0010	\$387.02

To

S0000 PRIMARY SH 89-0000	\$1,557.87
CHRISTMAS CLUB 89-0001	\$755.00
S0020 CHECKING 89-0020	\$80.42
Saved Account 1 04-0020	
Saved Account 2 44-0020	
2013 FORD EDGE LIMITED 89-0001	\$8.88
L0010 VISA	

Quick Transfer Step 3: In the center column, select the **amount as listed in predetermined increments** that you wish to transfer.

The screenshot shows the 'Transfers' interface with the 'Quick' tab selected. The 'From' column lists accounts: S0000 PRIMARY SH (\$1,552.87), CHRISTMAS CLUB (\$755.00), S0020 CHECKING (\$80.42), and L0010 VISA (\$387.02). The 'Amount' column has a grid of predetermined increments: \$20, \$40, \$60, \$80, \$100, \$200, \$300, \$400, \$500, \$1000, \$2000, \$3000, \$4000, \$5000, and Other... The 'Reason' column lists: S0000 PRIMARY SH (\$1,557.87), CHRISTMAS CLUB (\$755.00), S0020 CHECKING (\$80.42), Saved Account 1 (04-0020), Saved Account 2 (44-0020), and 2013 FORD EDGE LIMITED (\$8.88). A callout box points to the \$80 amount option.

Quick Transfer Step 4: In the right column, click **the account/share** in which you wish to transfer **TO**.

The screenshot shows the 'Transfers' interface with the 'Quick' tab selected. The 'From' column lists accounts: S0000 PRIMARY SH (\$1,552.87), CHRISTMAS CLUB (\$755.00), S0020 CHECKING (\$80.42), and L0010 VISA (\$387.02). The 'Amount' column has a grid of predetermined increments: \$20, \$40, \$60, \$80, \$100, \$200, \$300, \$400, \$500, \$1000, \$2000, \$3000, \$4000, \$5000, and Other... The 'Reason' column lists: S0000 PRIMARY SH (\$1,557.87), CHRISTMAS CLUB (\$755.00), S0020 CHECKING (\$80.42), Saved Account 1 (04-0020), Saved Account 2 (44-0020), 2013 FORD EDGE LIMITED (\$8.88), and L0010 VISA. A callout box points to the S0020 CHECKING account option.

Quick Transfer Step 5: Review that your selections to make sure they are correct. Click the **Make Transfer** button at the bottom right.

The screenshot shows the 'Transfers' page with a sidebar on the left containing navigation options: DASHBOARD, ACCOUNTS, TRANSFERS, BILL PAY, POINTS FOR PERKS, and MORE... The main content area is titled 'Transfers' and includes tabs for Quick, Classic, Scheduled, and History. Below the tabs are three configuration boxes: 'Today' (September 26), 'Occurs' (Once), and 'Reason' (None). The 'From' section lists four accounts: S0000 PRIMARY SH (\$1,552.87), CHRISTMAS CLUB (\$755.00), S0020 CHECKING (\$80.42), and L0010 VISA (\$387.02). The 'Amount' section has a grid of buttons ranging from \$20 to \$5000, with \$80 selected. The 'To' section lists five destinations: S0000 PRIMARY SH (\$1,557.87), CHRISTMAS CLUB (\$755.00), S0020 CHECKING (\$80.42), Saved Account 1 (\$0.00), and Saved Account 2 (\$0.00). A blue callout box points to the 'Make Transfer' button with the text 'Verify Selections and Click "Make Transfer"'. A legend at the bottom left indicates 'A' for available balance and an external account icon.

Quick Transfer Final Step: When your transfer has successfully completed you will see a **green box** notifying you at the top of screen.

The screenshot shows the 'Transfers' page after a successful transfer. A green notification banner at the top left contains a checkmark icon and the text 'Transfer completed successfully.' with a close button (X) on the right. A blue callout box points to the banner with the text 'This Will Notify You That Your Transfer was Completed'. The main content area is the same as in the previous screenshot, but the 'From' section now shows S0000 PRIMARY SH with an available balance of \$1,472.87, and the 'To' section shows S0000 PRIMARY SH with a balance of \$1,477.87.