AdelFi's Online Banking User Guide: Pay & Transfer



Welcome to the AdelFi Banking Online User Guide!

We're excited to introduce our upgraded online banking platform, designed to enhance your digital banking experience. Our goal is to provide you with a convenient, user-friendly environment that allows you to manage your personal and business finances anytime, anywhere.

This guide will help answer your questions as you navigate our new banking platform. Thank you for being a part of the AdelFi Banking community!





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Standard One-time or Recurring Transfers

Standard transfers allow you to perform both one-time and recurring transfers, as well as loan payments.

- 1. Select the Transfer Type.
- 2. Choose the Source Account from the "From" dropdowr menu.
- 3. Select the Destination Account from the "To" dropdow menu
- 4. Enter the Amount you want to transfer.
- 5. Choose the Date (or Start Date) for the transfer.
- 6. Select the Frequency for how often the transfer will repeat. If prompted, choose the Ending Date for the recurring transfer based on your selected frequency. Yo can also add a memo (optional).
- 7. Click the Review Transfer Button.

- Daily Weekly
- . **Every Other Month**
 - **Every Four Weeks**
- **Biweekly**
- Monthly

- End of Month
- **Ouarterly Every Six Months**
- Yearly

1.	Select the fransier type.		
2.	Choose the Source Account from the "From" dropdown		
_	menu.	s adelfi	
3.	Select the Destination Account from the "Io" dropdown		
	menu.	Home Pay & Transfer Statements & Documents Account Services Finance	ial Stewardship Tools Open Accounts Pilot F
4.	Enter the Amount you want to transfer.		
5.	Choose the Date (or Start Date) for the transfer.		
6.	Select the Frequency for now often the transfer will	Transfers	
	repeat. If prompted, choose the Ending Date for the	Make a Transfer Scheduled Activity Multi Transfer Templates Link Transfer Account	
	can also add a momo (ontional)		
7	Click the Review Transfer Button	Transfer Type	
8	A Review Transfer window will display allowing you to	Silgre nansier	
0.	either edit or submit the transfer	From Account	3
		Adel Checking ***2617 Z 07.39 Evans Savings ***21	190.03
You	can set up transfers or payments to move funds between	How Much	
acco	ounts that you own (i.e. primary or joint ownership). Using	Amount * \$20.00	
the "Frequency" dropdown, you can create any of the following			
twe	ve transfer scenarios:	When O	
		Frequency Date * One Time 07-15-2024	E
•	One Time • Semi Monthly		
•	Daily • Every Other Month	Memo	
•	Weekly • Every Four Weeks	Description (Optional) Chores Review Transfe	×
•	Biweekly • Quarterly		
•	Montniy • Every Six Months	Learn more about our Transfer Policy and Limits	
•	End of Month • fearly		,
		Review Transfer Accounts	
		Adel Checking ***2617	
		To Account	
		 Evans Savings ***2156 	
N A	omo for Transfors	When	
			8
An optional memo can be added to any transfer. This can be used to enter specific			
info	rmation about the transfer that you may want to record for full	are reference. This	
and Activity tab (Activity tab on mobile) under the transfer detail, and in the Monthly Statements			
Jiai	emento.		

Edit Transfe