George   Transfers & Orders   Transferring with George

Transfer with Templates

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With George it is possible to make transfers with pre-defined templates to avoid typos and save time.

Below you will find relevant information on your templates and how to use them. You will find all information on how to organise your transfer templates here.

How You Can Create A Template

Templates can be created in the last step of any transfer at the end of the form. You can simply click the checkbox "Template", enter a name for

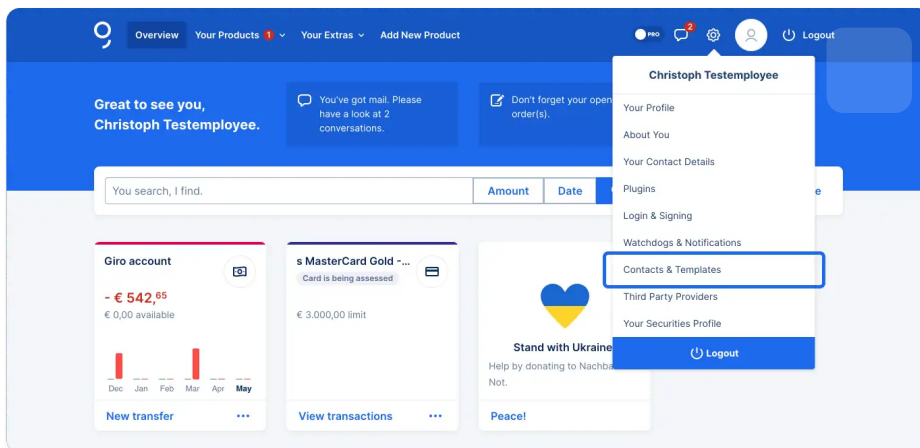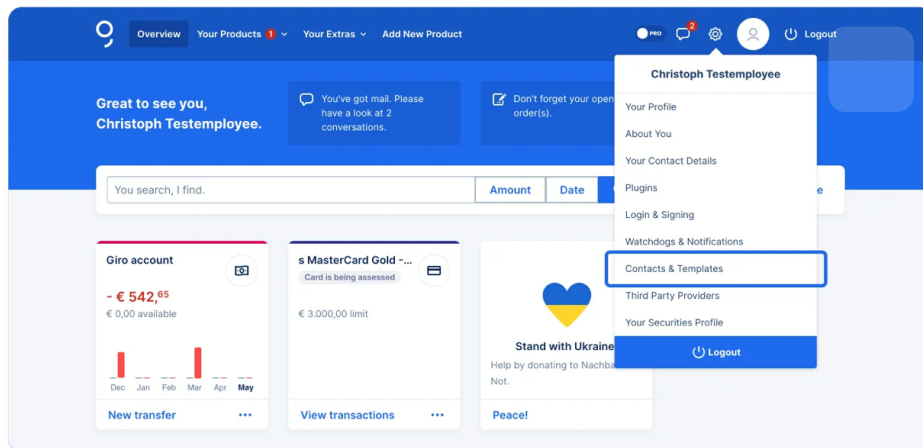## Read this article in

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the template and click either "**Save & new**" or "**Sign**". Your template will then be saved in your **address book** and is connected to the respective **contact**.

How You Can Access Your Templates

If you want to use one of your saved templates, you will have to navigate to your **Contacts & templates.**

1. Go to your **Profile**. You can click on your photo/user icon on the top of your **Overview** and then click on "Profile".

2. On the left-hand menu, you will find the item "**Contacts & templates**". Click on it.

3. You will now see your most used contacts. You can also filter by "**Templates**" within the dropdown menu on top. By selecting "**Templates**", you will see all your templates.

How You Can Use Your Templates

App

If you want to use one of your templates, you can use them via a **New transfer**.

To use your template via a new transfer:

1. Create a new transfer in the George App.

2. George asks you now to create a new manual transfer, to transfer via Scan & Pay, or to **use a template**.

3. You can now search for the right template or select one of the templates you already see below.

4. On the next screen, you can check your transfer and edit it if necessary.

5. You can now check your transfer and edit it or **sign** it.

Web Browser

If you want to use one of your templates, you can **either** use them via your **Address book** or via a **New transfer**.

1. To use your template via the address book:

1.1 If you want to use them via your address book, navigate to your profile and then to "**Contacts & templates**" and filter by "**Templates**".

1.2 By clicking on the respective template, you can see the template details.

1.3 Click then on the top right button called "**+ New transfer**".

1.4 You now have to select from which account your transfer should be executed. Click on "**Next**".

1.5 George will now pre-fill the transfer with the template details.

1.6 Finally, you can check your transfer and edit it or **sign** it.

2. To use your template via a new transfer:

2.1 You can use your templates also via creating a **new transfer**.

2.2 In the transfer form, you can click on the

address book icon next to the name field and again, filter by templates.

2.3 You will now see all your templates. Select the right one.

2.4 George will now pre-fill the transfer with the template details.

2.5 You can now check your transfer and edit it or **sign** it.

Immediately, you will see this transfer in your **order list**. If you want, you can also execute orders as **Instant Payment (SEPA)** within the SEPA area.

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