## TN UI Widget Functionality

Let's explore how users can create a transfer request using TN widget. Follow these steps to understand the process:

Finxact Free FI Sign out Transfer Funds Activity Preferences Help

Step 1: Within the TN widget, initiate the transfer request by navigating from below page.

```
Create Transfer
                         * Indicates required field
                                                                                                                                                       Hide Tip
                           1 You can transfer funds into your account
                              Don't get caught with a low balance. You can easily transfer money into your account from
                              your outside bank. Set it up now. So you are ready when you need it.
                           We made two small deposits to your account(s).
                              Your CashEdge, Bank - Test, Savings, XXXXXXXX6768 has been added. Verify this.
                           From*
                            Select From Account
                            Select To Account
                                                                            Add a New Account
                         Amount ($)*
                                                            View limits
                         Send*
                                                   \blacksquare
                          12/13/2023
                         Frequency*
                          Select Frequency
                         You'll see delivery options when you enter your transfer info.
                         Memo to self (optional)
                         (50 characters remaining)
                         Transfer Disclaimer
                           Review
Step 2: Initiate a transfer request by choosing the "From account" (Host) from which you
```

From\* Select From Account My Finxact Free FI Accounts

Your CashEdge , Bank - Test, Savings, XXXXXXXXX6768 has been added. Verify this.

CHECKING1, XXXXXX9577 \$ 44,475.00 CHECKING2, XXXXXX5499 \$ 44,475.00

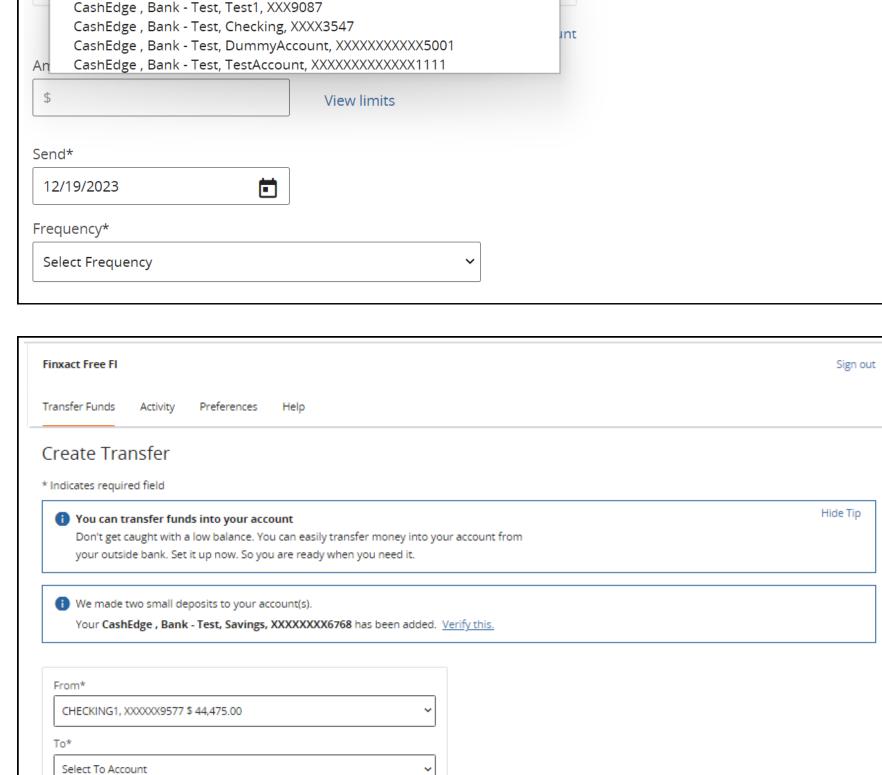
My Other Accounts

My Other Accounts

CashEdge , Bank - Test, Test1, XXX9087 CashEdge , Bank - Test, Checking, XXXX3547

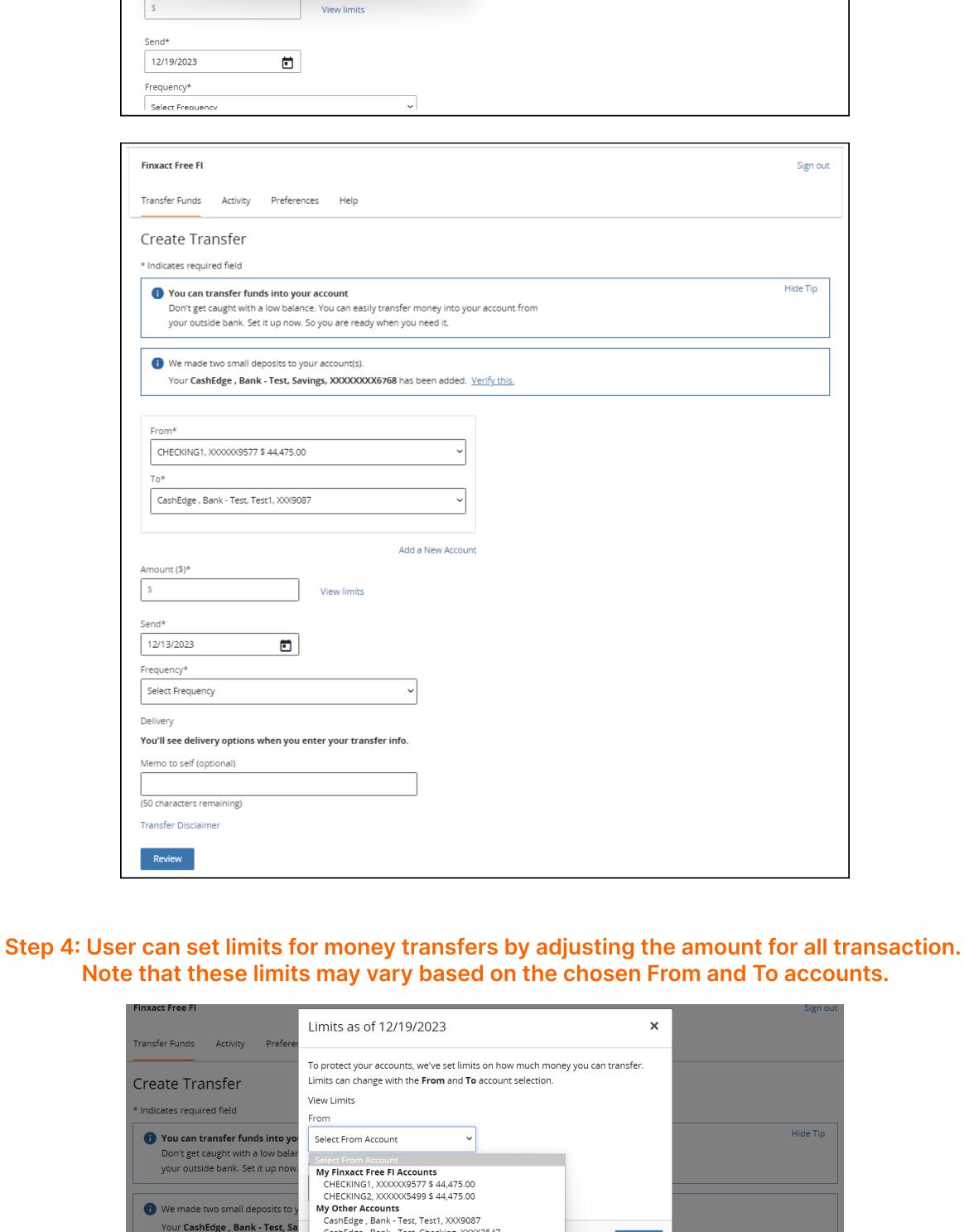
CashEdge , Bank - Test, DummyAccount, XXXXXXXXXXX5001 CashEdge , Bank - Test, TestAccount, XXXXXXXXXXXXXX1111 Amount  $\mathfrak{p}^{(n)}$ 

want to withdraw funds.



Add a New Account Amount (\$)\* View limits 12/13/2023 Frequency\* Select Frequency You'll see delivery options when you enter your transfer info. Memo to self (optional) (50 characters remaining) Transfer Disclaimer Step 3: Choose the "To account" (non-host) to which you intend to transfer the funds. From\* CHECKING1, XXXXXX9577 \$ 44,475.00 Select To Account

Send\*



To protect your accounts, we've set limits on how much money you can transfer. er Funds Activity Prefere Limits can change with the **From** and **To** account selection. View Limits ate Transfer From

Close

CashEdge , Bank - Test, Checking, XXXX3547

CHECKING1, XXXXXX9577 \$ 44,475.00

Memo to self (optional)

(50 characters remaining)

Create Transfer

\* Indicates required field

1 You can transfer funds into your account

We made two small deposits to your account(s).

CHECKING1, XXXXXX9577 \$ 44,475.00

CashEdge , Bank - Test, Test1, XXX9087

Amount (\$)\*

ONE TIME

RECURRING

One-time transfer

Once every month Every 15 days Every week

Confirm

Transfer Funds Activity Preferences Help

✓ You're transferring \$110.00 on 12/21/2023

From CHECKING1, XXXXXX9577 \$ 44,475.00 To CashEdge , Bank - Test, Checking, XXXX3547

Cancel

Finxact Free FI

Transfer Confirmed

**Reference #** 149124735

Every 2 weeks Every 3 weeks

Don't get caught with a low balance. You can easily transfer money into your account from

Your CashEdge , Bank - Test, Savings, XXXXXXXXX6768 has been added. Verify this.

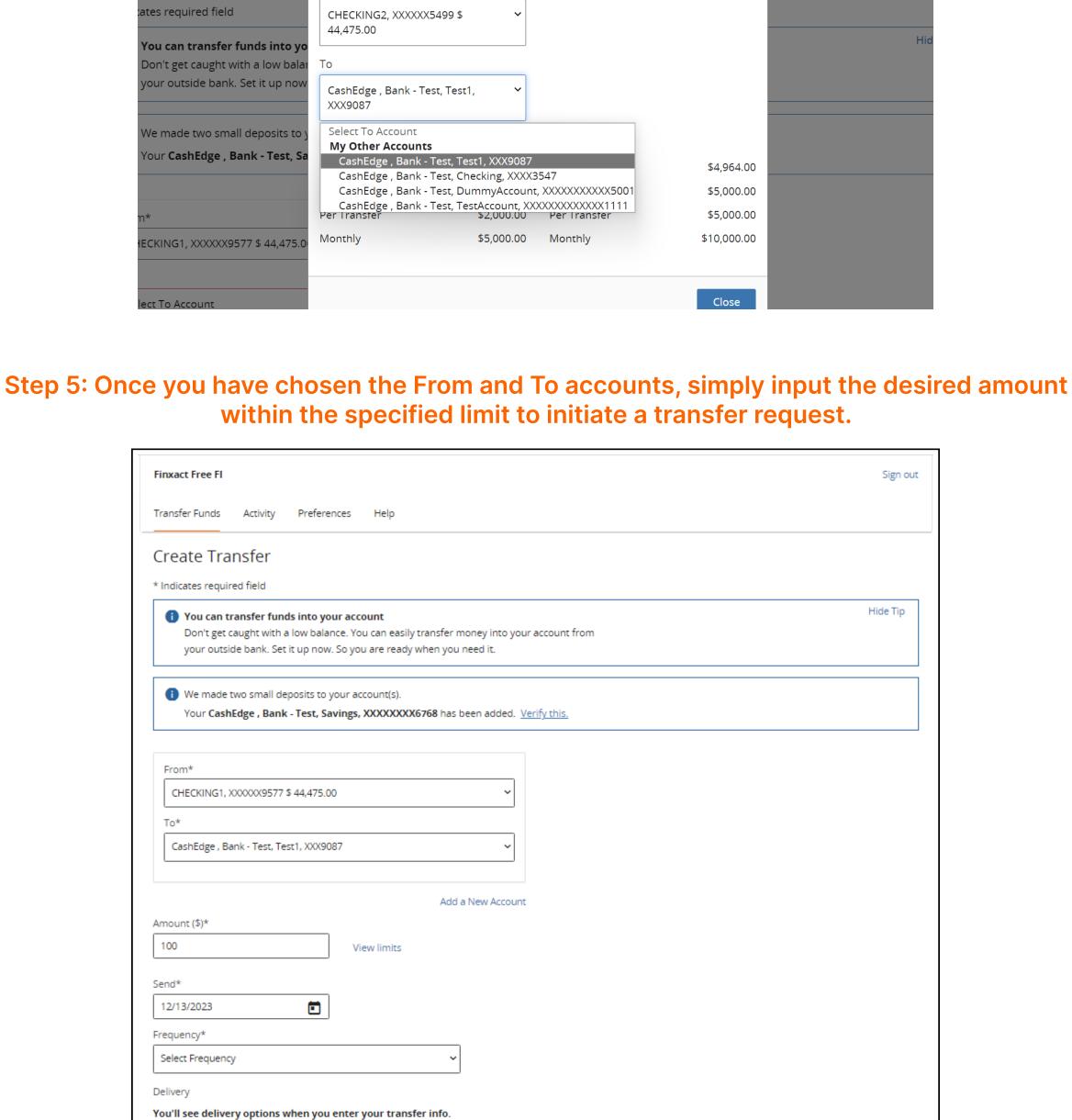
View limits

your outside bank. Set it up now. So you are ready when you need it.

Transfer Disclaimer

Review

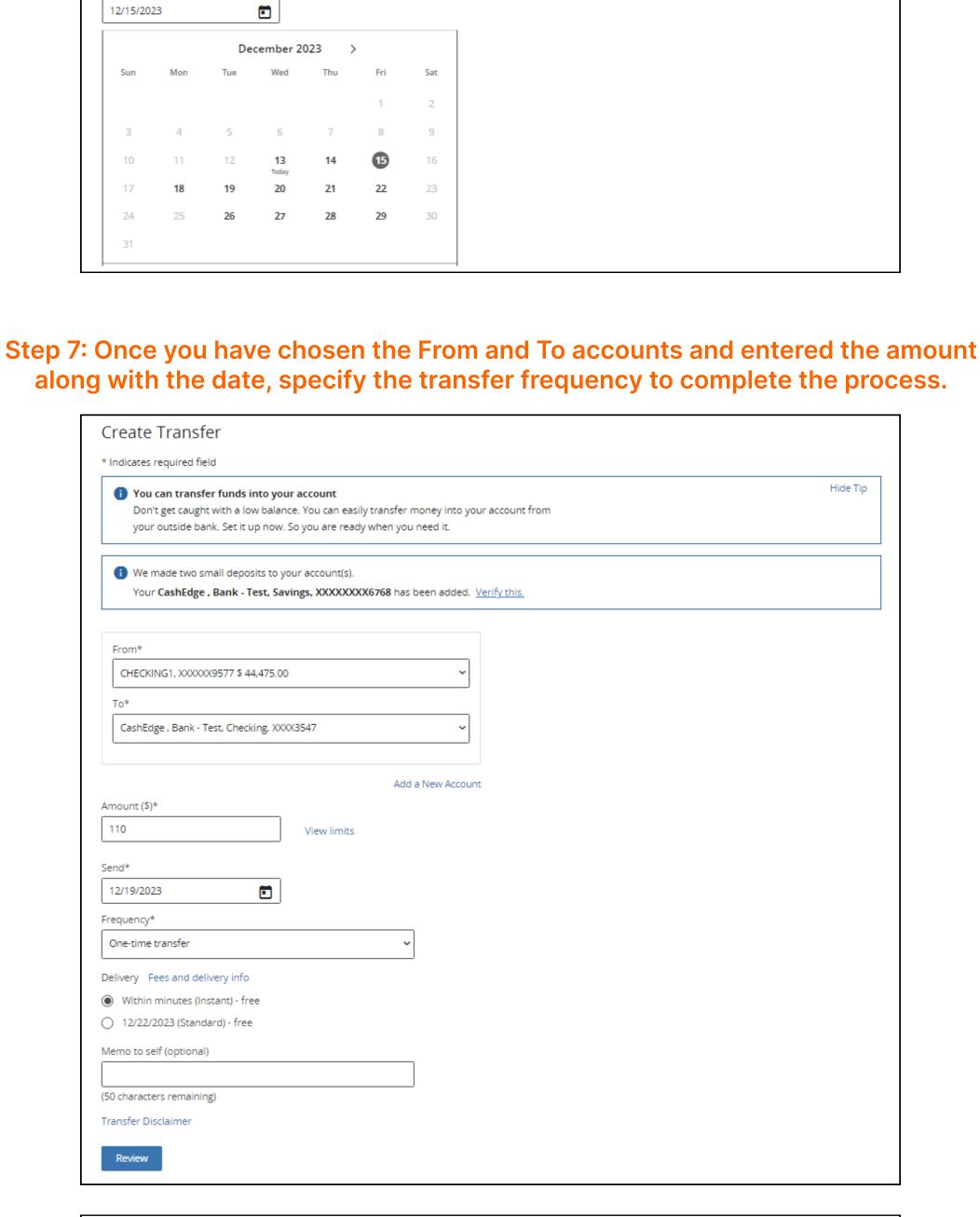
CashEdge , Bank - Test, DummyAccount, XXXXXXXXXXX5001 CashEdge , Bank - Test, TestAccount, XXXXXXXXXXXXX1111



proceed to select the desired date. Finxact Free FI Sign out Transfer Funds Activity Preferences Help

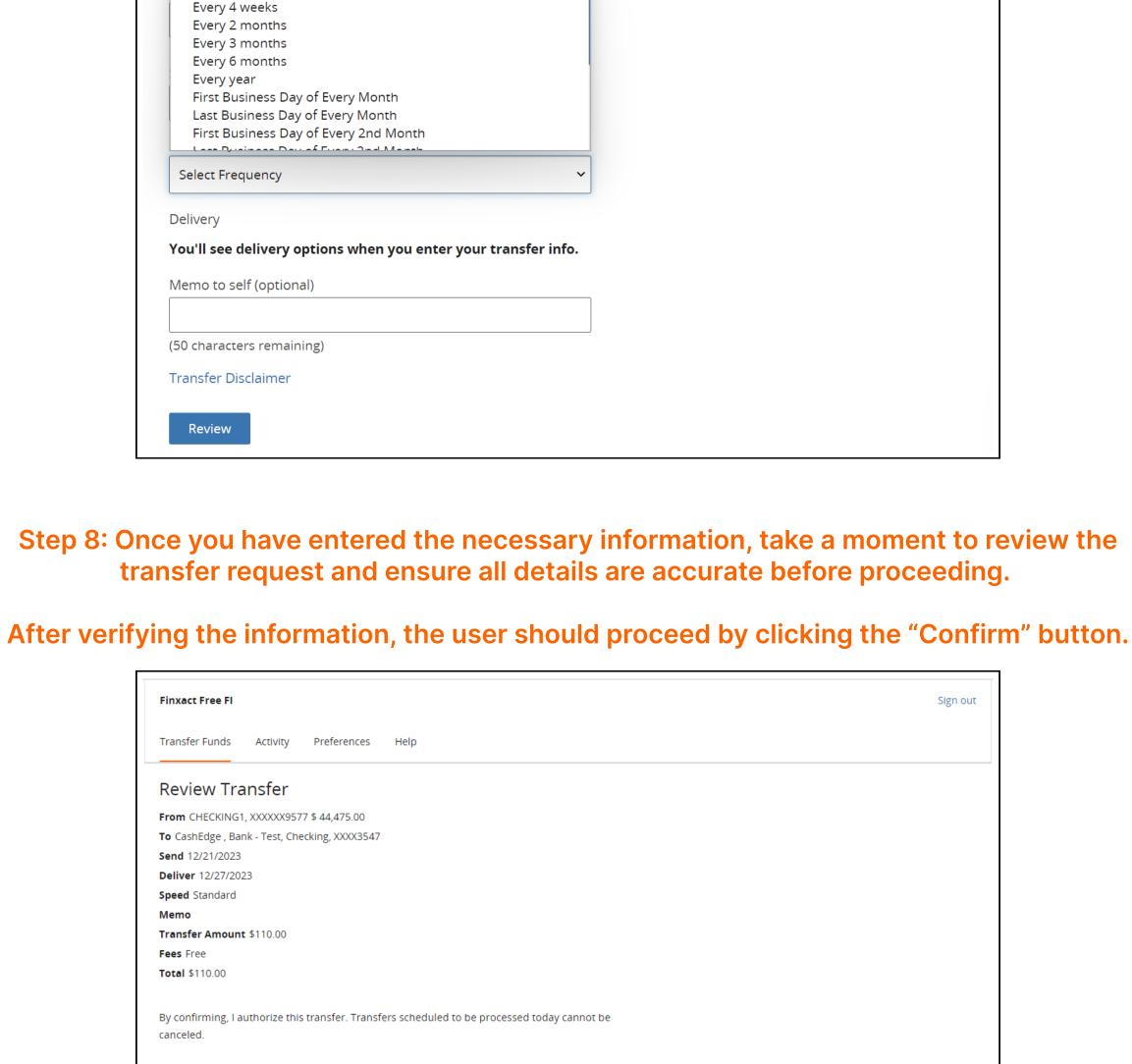
Add a New Account

Step 6: Once you have chosen the From and To accounts and entered the amount



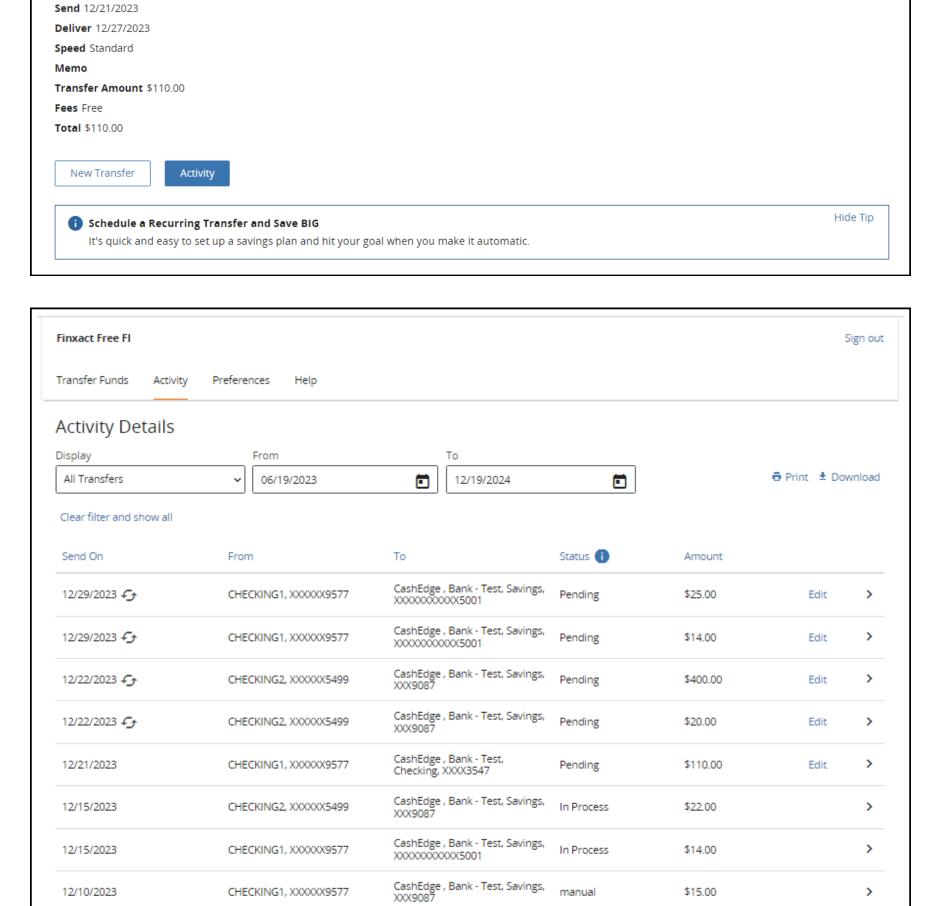
-600] Fiserv X | 🦸 [FTV-600] Fiserv X | 📕 Financial Services X

a New Account



Step 9: Once the user initiates the transfer, they will be directed to the transfer confirmation screen. From here, they have the option to review their past activities by accessing the activity screen or proceed to initiate a new transfer request.

Print



CashEdge , Bank - Test, Savings, XXX9087 manual \$100.00 12/08/2023 CHECKING1, XXXXXX9577 CashEdge , Bank - Test, Savings, Completed CHECKING2, XXXXXX5499 You can view 6 months of past transactions and all your future-dated scheduled transactions Showing 39 records for All Transfers from 06/19/2023 to 12/19/2024