

# Creating an External Transfer

## Online Banking Guide

To Create a transfer *From* an external account

*Continue to Page 3 for instructions on creating a transfer To an external account*

1. From the Transactions menu, select Transfer Money or Pay Northwest Loans. Create your desired transaction by completing the **To**, **From**, **Amount**, **Payment Type** (Pay Northwest Loans only), **Date**, and **Memo** fields. Click **Transfer Funds** or **Continue** if you are on the Pay Northwest Loans page.

The first screenshot shows the 'Funds Transfer' screen. It includes a sidebar menu with options like Home, Messages, Transactions, External Account, Pay Northwest Loans, Deposit Only, Online Activity Center, Add External Account, Verify External Account, Pay Bill/Repayment Plan, Statements, Services, Alerts, and Log Out. The main form has fields for 'From' (Select From Account), 'To' (Select To Account), 'Amount' (with a 'Make this a recurring transaction' checkbox), 'Date' (with a calendar icon), and 'Memo' (with a note 'Enter letters and numbers only'). There are 'Clear' and 'Transfer Funds' buttons at the bottom.

The second screenshot shows the 'Loan Payments' screen. It has a similar sidebar menu. The main form has fields for 'From Account', 'To Loan Account', 'Payment Type', 'Amount' (with a 'Make this a recurring transaction' checkbox), 'Date' (with a calendar icon), and 'Memo' (with a note 'Enter letters and numbers only'). There is a 'Continue' button at the bottom.

2. Select **Authorize** from the External Account Authorization screen.

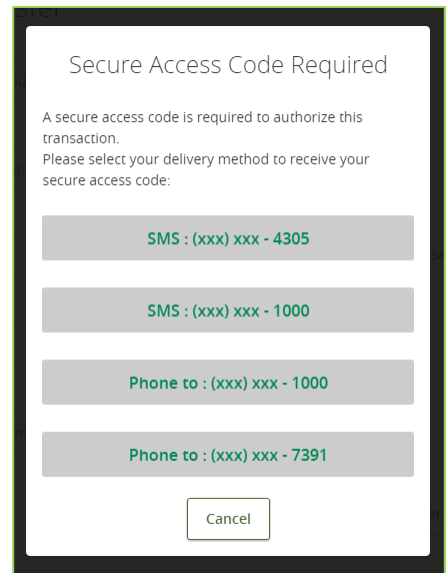
The 'External Account Authorization' screen displays the following information:

- Amount: \$1.00
- Date: 2/23/2017
- Routing Number: 022000839
- Account Number: XXXXXX1987
- Account Type: External Checking

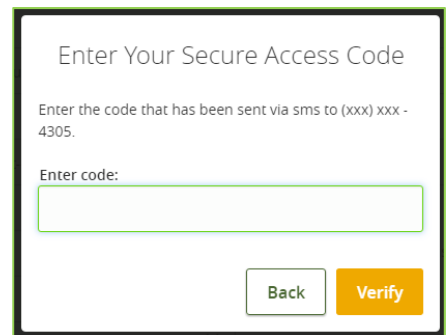
Below this information is a paragraph of text: "I understand that this authorization will remain in full force and effect until I cancel this transaction through my Northwest Online and Mobile Banking. I understand that cancellation of the transaction is only permitted prior to processing of the transfer. To complete this transaction, click the 'Authorize' button to receive your required Secure Access Code. Once authorized, there cannot be any changes or corrections. It is recommended that you monitor this transaction through the Online Activity Center."

At the bottom of the screen are two buttons: 'Print this Authorization' and 'Authorize'.

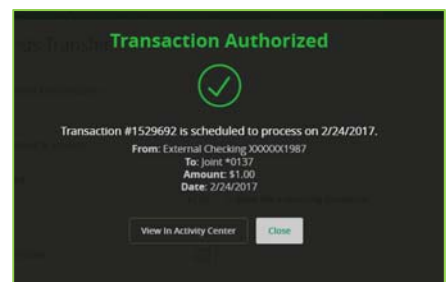
3. Select the Secure Access target were you'd like your SAC delivered.



4. Enter your Secure Access Code and select Verify.



5. A confirmation will display that the transaction is authorized.



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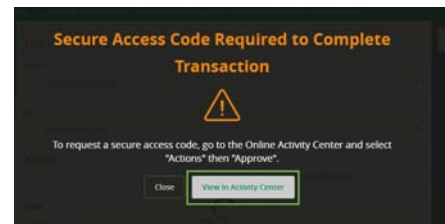
To Create a transfer To an external account

1. From the Transactions menu, select Transfer Money or Pay Northwest Loans. Create your desired transaction by completing the **To**, **From**, **Amount**, **Payment Type** (Pay Northwest Loans only), **Date**, and **Memo** fields. Click **Transfer Funds** or **Continue** if you are on the Pay Northwest Loans page.

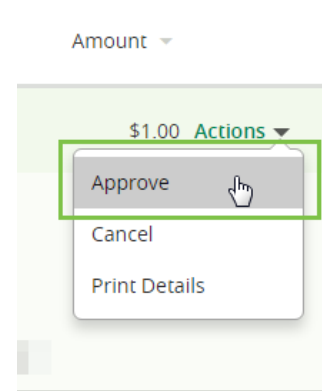
The top screenshot shows the 'Funds Transfer' form. It includes a sidebar with navigation options like Home, Messages, Transactions, Deposit Only, Online Activity Center, Add External Account, Verify External Account, Pay Bills/Repayment Plan, Statements, Services, Alerts, and Log Out. The main form has fields for 'From' (Select From Account), 'To' (Select To Account), 'Amount' (with a checkbox for 'Make this a recurring transaction'), 'Date' (with a calendar icon), and 'Memo' (with a note 'Enter letters and numbers only'). There are 'Clear' and 'Transfer Funds' buttons at the bottom.

The bottom screenshot shows the 'Loan Payments' form. It has a similar sidebar. The main form has fields for 'From' (Select From Account), 'To' (Select To Account), 'Payment Type' (with a dropdown menu), 'Amount' (with a checkbox for 'Make this a recurring transaction'), 'Date' (with a calendar icon), and 'Memo' (with a note 'Enter letters and numbers only'). There is a 'Continue' button at the bottom.

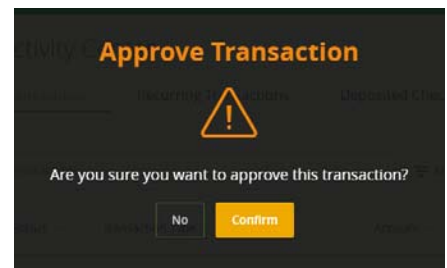
2. A warning will display advising that a Secure Access Code is required to complete the transaction. Select **View in Activity Center**



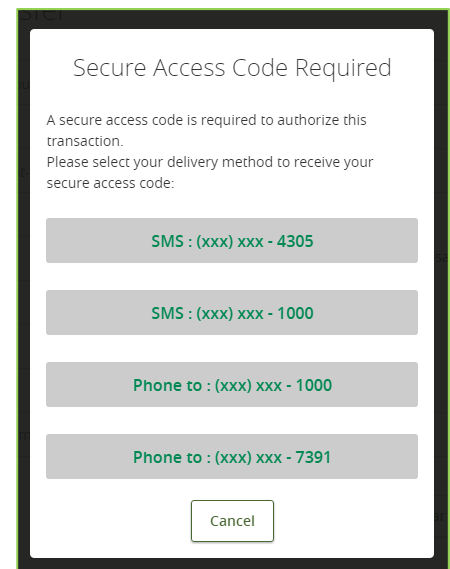
- From the **Online Activity Center**, select **Actions** and then **Approve**.



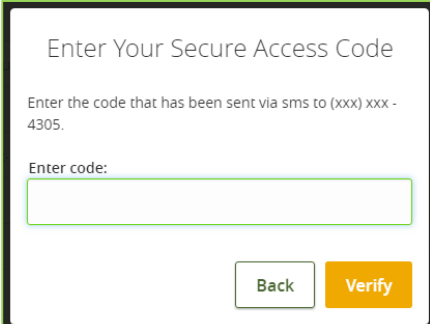
- Confirm that you'd like to approve the transaction by selecting **Approve**



- Select the Secure Access target were you'd like your SAC delivered.



6. Enter your Secure Access Code and select Verify.



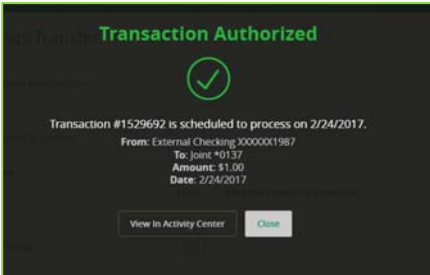
Enter Your Secure Access Code

Enter the code that has been sent via sms to (xxx) xxx-4305.

Enter code:

Back Verify

7. A confirmation will display that the transaction is authorized.



Transaction Authorized

Transaction #1529692 is scheduled to process on 2/24/2017.

From: External Checking XXXXXX1987  
To: Joint \*0137  
Amount: \$1.00  
Date: 2/24/2017

View In Activity Center Close