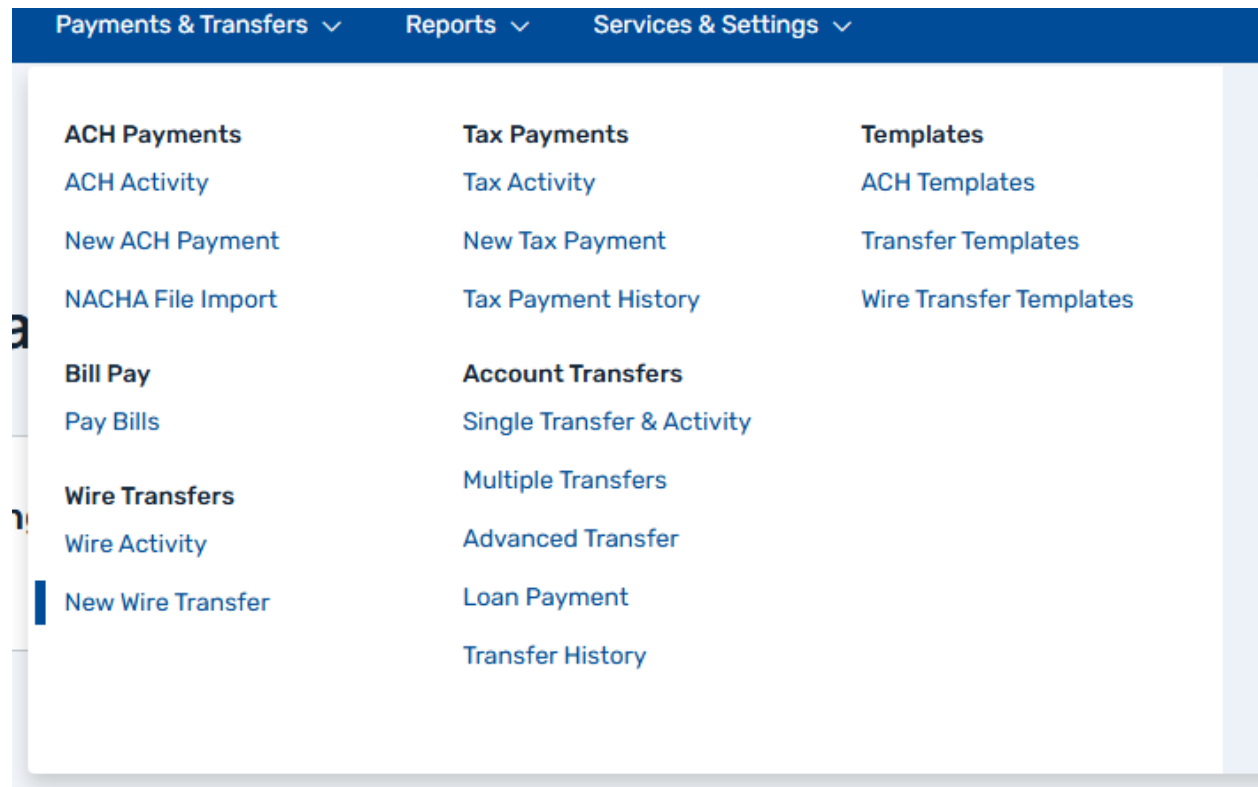


How to Create a Wire Template

To Create a template, go to Payments & Transfers New Wire Transfer



Pick add a new Recipient.

New Wire Transfer

Who Are You Paying?

⊕ Add a New Recipient

or

Choose From Template
Start typing to filter list

Fill in the recipient information and click next.

New Domestic Recipient

Recipient Information

Clear Form

Name

Bella Hall

Address

714 Sun St

Must be physical address

City

Houghton

State

MI

▼

Zip

49931

Must be 5 or 9 digits

Next

Cancel

Fill in the account number, routing number and click verify. If it is a correct routing number, it will fill in the bank name and address. Hit save and continue.

New Domestic Recipient

Recipient Account

Clear Form

Account Number and Routing Number are required; all other information is optional

Account Number

12356952

Routing Number

026009593

✓ Verified

Recipient Institution

Institution Name is required; all other information is optional

Institution Name

Bank of America, National Association

Save & Continue

Back

Cancel

Type in the wire details. Amount, date and pick the account it is being sent from. Hit Review and Submit.

Wire Details

\$ Amount 1.18

Send On 8/18/2025

Clear Form

Funding Account Checking *00017

Available Balance: \$93.19

Wire Description (optional)

Add internal memo. Recipient will not see this.

Send From

Name Kitty Duck

Tax ID 38522111

Country UNITED STATES

Address 235 Quincy St
Hancock, MI 49930

Phone 9066962373

Next: Review & Submit

Cancel

This is where you will click on save as a Wire Template

Does everything look good?

Wire Details	Amount	\$1.18	Funding Account	Checking *00017
	Type	Domestic	Wire Description	-
	Submit On	08/18/2025		
To	Name	Bella Hall	Routing #	026009593
	Address	714 Sun St Houghton , MI 49931 US	Institution Name	Bank of America, National Association
	Account #	12356952	Address	222 Broadway Ave New York, NY 10038 US
From	Name	Kitty Duck	Address	235 Quincy St Hancock, MI 49930
	Tax ID	38522111	Phone	9066962373
	Country	US		

Save as Wire Template

Then you will create a template name and pick which fields you want locked.

☒ Save as Wire Template

Name Your Template

Enter a Name

Lock Fields

Select the fields that template users should not be able to edit.

☐ Lock All

☐ Amount

☐ Sender Name

☐ Sender Country

☐ Sender Phone

☐ Funding Account

☐ Sender Tax ID

☐ Sender Address

Then submit the wire.

How to Use a Wire Template

Payments & Transfers ▾	Reports ▾	Services & Settings ▾
ACH Payments	Tax Payments	Templates
ACH Activity	Tax Activity	ACH Templates
New ACH Payment	New Tax Payment	Transfer Templates
NACHA File Import	Tax Payment History	Wire Transfer Templates
Bill Pay	Account Transfers	
Pay Bills	Single Transfer & Activity	
	Multiple Transfers	
Wire Transfers	Advanced Transfer	
Wire Activity	Loan Payment	
New Wire Transfer	Transfer History	

Pick choose from template

New Wire Transfer

Who Are You Paying?

+ Add a New Recipient

or

Choose From Template
Start typing to filter list

Type in the amount unless you have it set, and it is the same amount every time.

New Wire Transfer

Daily Cutoffs: 3pm EDT

Template Edward [Edit Template](#)

You will lose progress on this transfer

Type Domestic

Who Are You Paying?

Recipient info cannot be edited

Recipient Name Edward Hall
Address 707 W Fun St
Houghton, MI 49931
US
Account # 12356952

Routing # 026009593
Institution Name Bank of America, National
Association
Address 222 Broadway Ave
New York, NY 10038
US

Wire Details

\$ Amount
2.00

Payment Frequency
Single

[Clear Form](#)

Pick today's date. Then hit review and submit.

Wire Details

\$ Amount
1.00

Payment Frequency
Single

Send On
MM/DD/YYYY

Funding Account
Checking *00017

Available Balance: \$93.19

Wire Description (optional)

Add internal memo. Recipient will not see this.

Clear Form

Send From

Name	<div>Kitty Duck</div>	Address	<div>235 Quincy St Hancock, MI 49930</div>
Tax ID	<div>38522111</div>	Phone	<div>9066962373</div>
Country	<div>UNITED STATES</div>		

Next: Review & Submit

Cancel

Then again hit submit wire transfer.

Submit Wire Transfer

Go Back

Cancel

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And you will go through the approval process.

You can also go to Payments and Transfers, and Wire Transfer Templates.

Payments & Transfers ▾			Reports ▾			Services & Settings ▾		
ACH Payments			Tax Payments			Templates		
ACH Activity			Tax Activity			ACH Templates		
New ACH Payment			New Tax Payment			Transfer Templates		
NACHA File Import			Tax Payment History			Wire Transfer Templates		
Bill Pay			Account Transfers					
Pay Bills			Single Transfer & Activity					
			Multiple Transfers					
Wire Transfers			Advanced Transfer					
Wire Activity			Loan Payment					
New Wire Transfer			Transfer History					

You will then click on the name of the template you would like to use.


Activity		Templates	
<input type="text" value="Search template name"/>		Daily Cutoffs: 3pm EDT	
Filter Modified Date ▾ Recipient ▾ Funding Account ▾ Amount ▾			
<input type="checkbox"/>	Last Modified ▾	Template Name ▾	Amount ▾
> <input type="checkbox"/>	08/18/2025	Edward	\$2.00
Showing 1 results			






Click on New Wire From Template.

Edward

New Wire From Template

More Actions

Fields with a  can be edited by users of this template

Template Details	Amount	 \$2.00	Funding Account	Checking *00017
	Type	Domestic	Wire Description	 -
To	Name	Edward Hall	Routing #	026009593
	Address	707 W Fun St Houghton, MI 49931 US	Institution Name	Bank of America, National Association
	Account #	12356952	Address	222 Broadway Ave New York, NY 10038 US
From	Name	Kitty Duck	Address	235 Quincy St Hancock, MI 49930
	Tax ID	 385221111	Phone	 9066962373
	Country	 US		

And then put in the amount and date and Review and Submit