MainStreetBank

Digital Banking Wire Templates

The use of wire templates are a great way to streamline the process of sending wires. If you have a creditor (recipient) that you plan to wire funds to more than once, you can create a wire template for future use.

01 Create a Wire Template

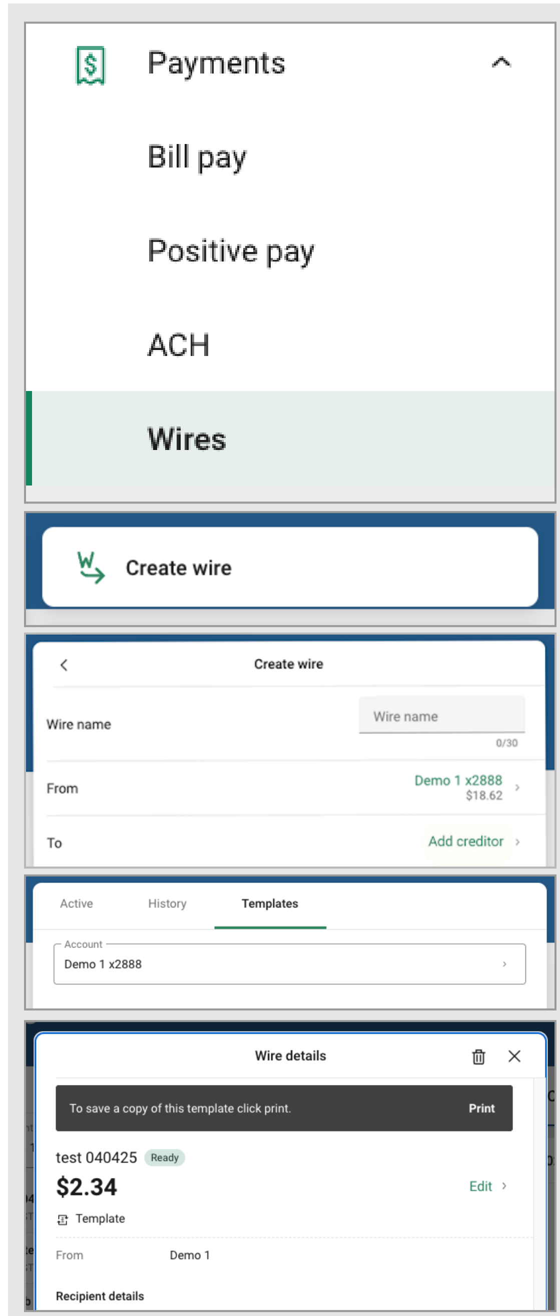
- From the left navigation menu, click the **Payments** dropdown and then **Wires**
- From the right side of the Wires dashboard, click **Create Wire**
- Complete all of the required fields for the wire template
  - **Wire name** - A name to uniquely identify this wire
  - **From** - The account you want to send the wire from
  - **To** - Click **Add Creditor** to add the creditor account and creditor agent details
  - **Amount** - The amount you will typically send
  - **Notes** - Click Add notes to add any additional information
- Check the **Save as template** box
- Click **Create wire**
- Click **Done** in the wire created confirmation pop-up

03 Initiate a Wire from a Template

- From the center of the Wires dashboard, under Templates, select the wire you want to initiate by clicking on the wire name
- Confirm the wire information within the Wire details pop-up
  - If you need to change the amount of wire, click **Edit**
  - Update the amount and click **Save**
  - Click the back arrow to return to the Wire details pop-up
- From the Wire details pop-up, click **Review and initiate**
- To initiate and send the wire, click **Initiate**

02 Delete a Wire Template

- From the center of the Wires dashboard, under Templates, select the wire you want to delete by clicking on the wire name
- Within the Wire details pop-up, click the trash icon in the upper right corner
- Click **Delete** in the Delete wire pop-up



mstreetbank.com | 703-481-4589

Member FDIC

EQUAL HOUSING LENDER