TEMPLATE MANAGEMENT

HELM IN ONE

PERSONAL & BUSINESS ONLINE BANKING
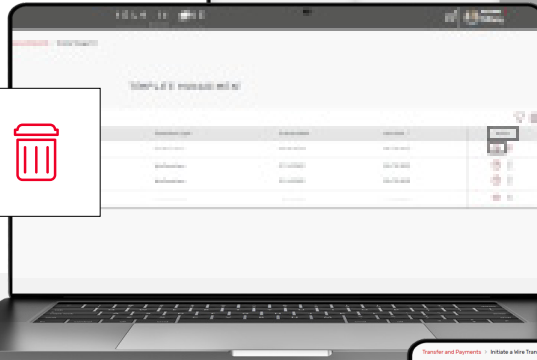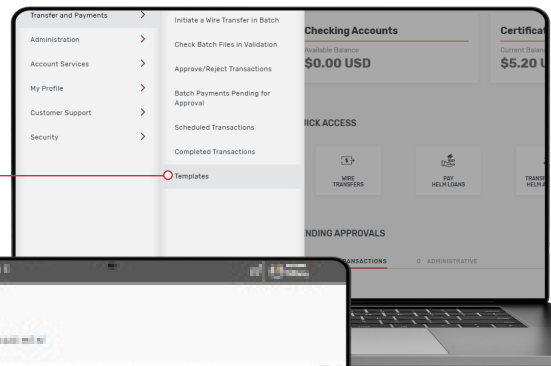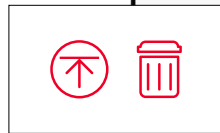
HOW TO EDIT A TEMPLATE?

1

Access Templates
Navigate to *Menu > Transfers & Payments >* `Templates`
A list of saved templates will appear.

Understanding Template Icons
Each template has two icons:

- **Arrow:** Use this to initiate a wire transfer using the selected template.
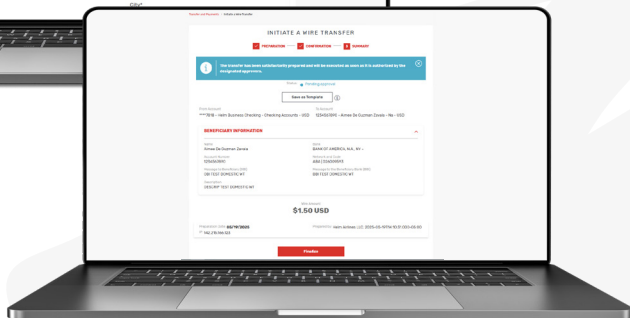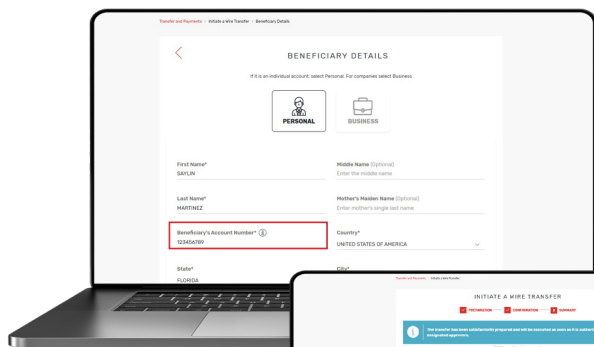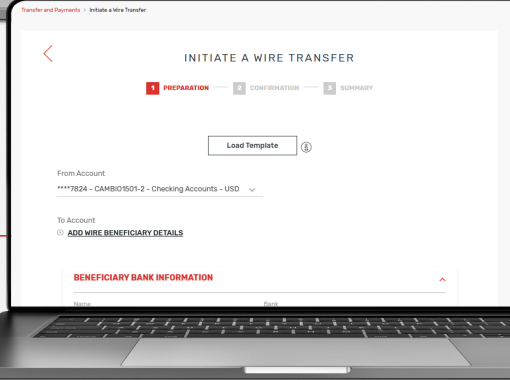
- **Trash Bin:** Use to delete the template.

2

Initiate A Wire Transfer

- Click the **arrow icon** to begin a wire transfer:

- This loads the beneficiary details from the selected template.

3

Add Wire Beneficiary Details

- Click `Add Wire Beneficiary Details` to proceed.

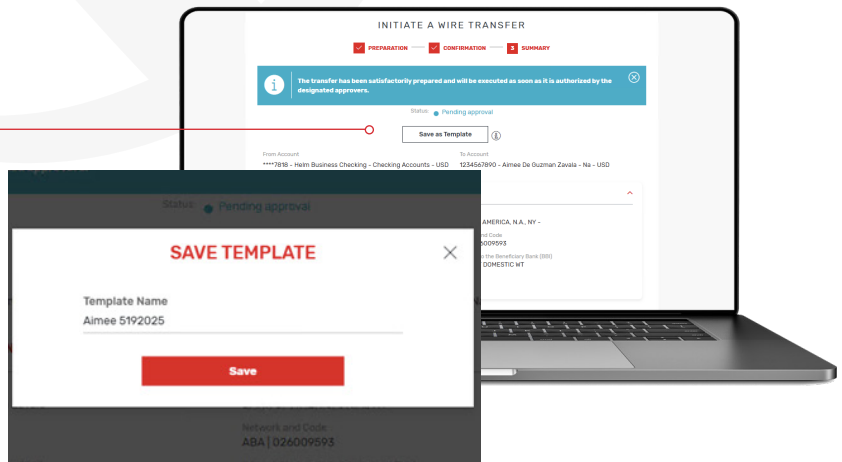- You'll be redirected to the *Beneficiary Details* screen.

4

Edit Beneficiary Details

- Update any necessary fields such as:
  - Account Number.
  - SWIFT/ BIC or Routing/ ABA number.
  - **Domestic wires** (beneficiary or intermediary banks in the U.S.) must use **ABA routing numbers** and be linked to **United States.**
  - **International wires** (beneficiary or intermediary banks outside the U.S.) must use **SWIFT codes** and be linked to the **correct country**.

- Make sure all changes are accurate before proceeding.
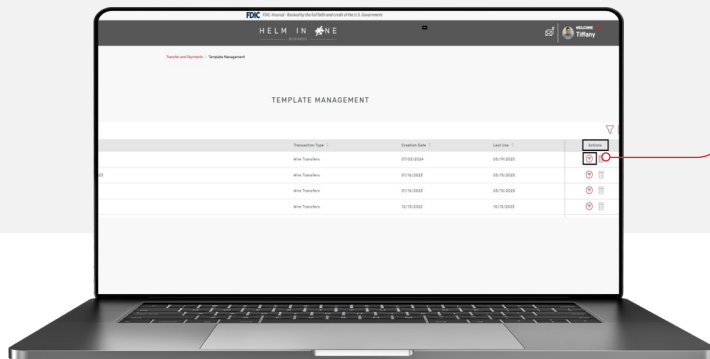
5

Execute Wire & Save As Template

- After executing the wire, you'll be prompted to `Save as Template.`

- **Recommendation:** Saving it with the same name plus today's date (e.g., Aimee 05222025) to track updates.

HOW TO DELETE A TEMPLATE?

Locate Icon

- In the *Templates List*, locate the **trash bin icon** next to the template you want to delete.

- Click the icon to initiate deletion.

1

2

Deletion Permissions

- Only the **template creator or a Super User** can delete a template.

- The system will prompt you to confirm the deletion before proceeding.

For Assistance

- Check the **Frequently Asked Questions** about HelmInOne.
- Visit our **Resource Center** for more support information.
- Send an email to **support@helmbank.com**
- Call **+1(305) 329-7330**, Monday – Friday, 8:30a.m. – 6:00 p.m. (EST).