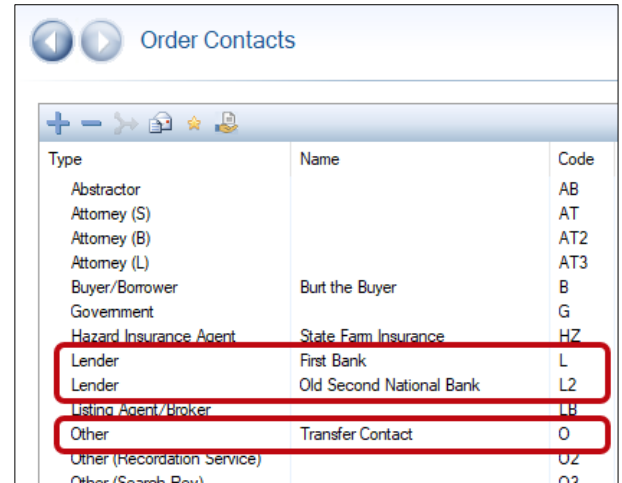## CDF to CDF using CDF Transfer Option (within same order)

Follow these steps to transfer funds from one CDF to another CDF (within the same order) using the **CDF Transfer Option** fields.
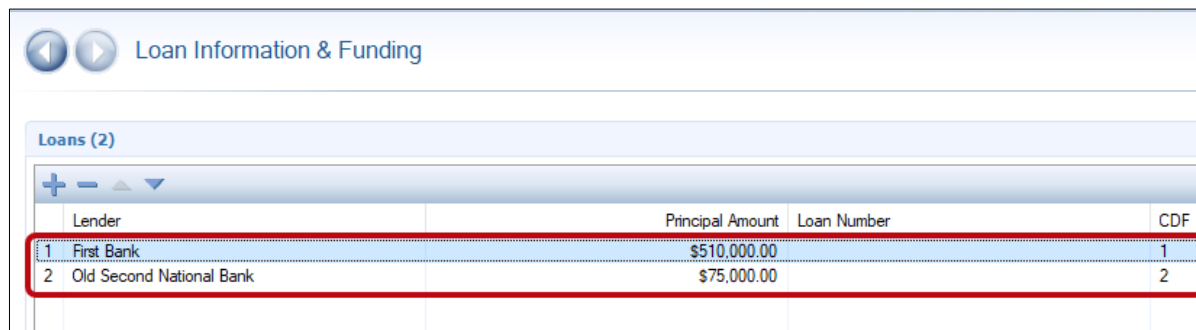
In our example we are transferring funds from a 2nd loan to a 1st loan.

1. Navigate to the **Order Contacts** screen

2. Enter/verify the loan Contacts,

    a. **L-Lender** Contact for the first loan

    b. **L2-Lender** Contact for the second loan
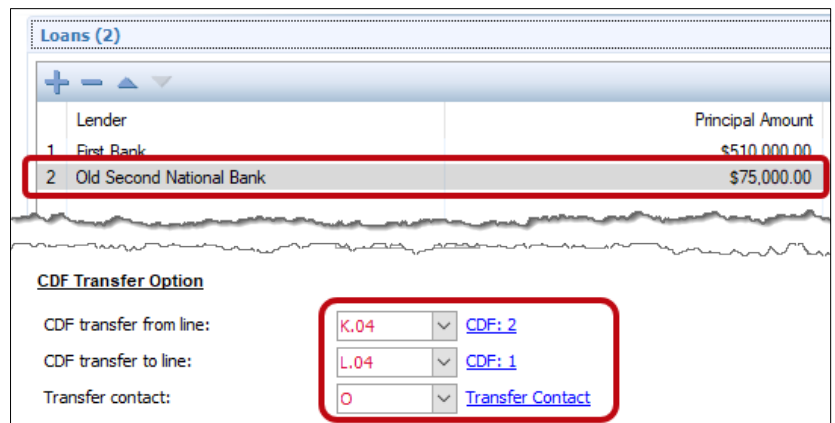
    c. **O-Contact** for the funds transfer

3. Navigate to the **Loan Information & Funding** screen

4. Verify **Principal amount of loan** is entered for the first and second loans

5. Highlight **Loan 2** in the grid

6. Scroll down to the **CDF Transfer Option** section

7. Select the,

    a. **CDF transfer from line** – depending on which section you need the transfer to show on the CDF

    b. **CDF transfer to line**

    c. **Transfer contact** set up for the funds transfer (**step 2**)

Selecting the **transfer from/to** lines allows the net amount of the loan to be populated to the section/line selected in **step 7**. As fees are entered against the loan (where the To-code reflects the Lender for the 2nd loan), the amount automatically adjusts.

From CDF 2

To CDF 1

8. Enter charges for the second loan as you normally would

CDF to CDF using CDF Transfer Option (within same order)

As charges are entered for the second loan, the amount automatically adjusts on the **CDF 2** and **CDF 1**.

The **Register** shows the **Pending Receipt** to **CDF 1** and the corresponding **Pending CDF Transfer(-)** from **CDF 2**.