



Transfers ↻

The Transfer option is used to transfer funds between shares and loans on your account and accounts you have requested to have crosslinked.

Where to Access Transfers in *Online Banking* Page 2

Transfer Dashboard Button / Creating a New Transfer Page 3

Transfer Dashboard Panel: View, Edit, or Delete Scheduled Transfers, Create New Transfers, Access Member Transfers Page 4

Transfer Menu Tab: View, Edit, or Delete Scheduled Transfers, Create New Transfers, Access Member Transfers Page 5

Edit or Delete a Scheduled Transfer: Page 5

Where to Access Transfers in *Mobile Banking* Page 6

Transfer Dashboard Button / Creating a New Transfer Page 7

Transfer Dashboard Panel: View, Edit, or Delete Scheduled Transfers and Create New Transfers Page 8

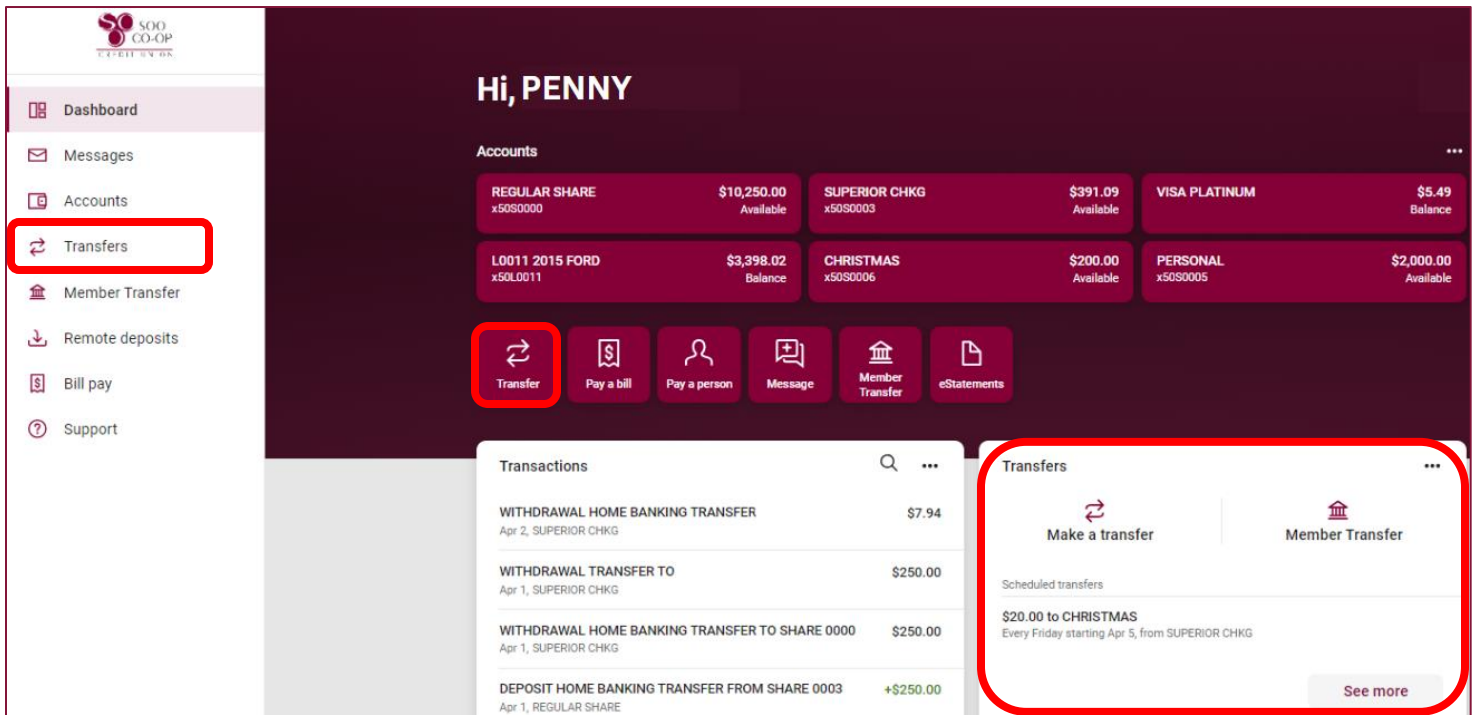
Transfer Menu Tab: View, Edit, or Delete Scheduled Transfers and Create New Transfers Page 8

Edit or Delete a Scheduled Transfer: Page 9

Transfers in Online Banking

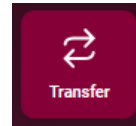
From the Dashboard, you have three options to access your transfers.

- **Dashboard Button:** Create a new transfer.
- **Dashboard Panel:** Create a new transfer, access member transfers, and view, edit, and delete scheduled transfers.
- **Menu Tab:** View, edit, and delete scheduled transfers, create a new transfer, and access member transfers.



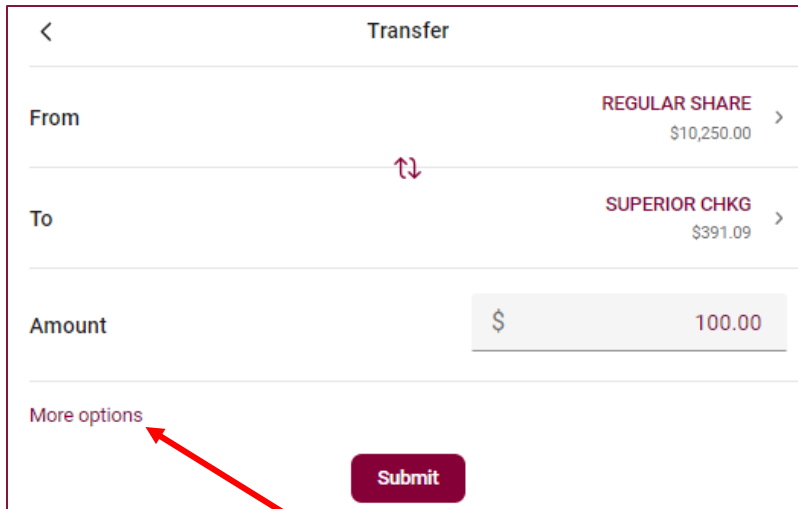
The screenshot shows the online banking dashboard for Penny. The left sidebar contains navigation options: Dashboard, Messages, Accounts, Transfers (highlighted with a red box), Member Transfer, Remote deposits, Bill pay, and Support. The main content area displays the user's name 'Hi, PENNY' and a grid of accounts with their balances. Below the accounts is a row of action buttons: Transfer (highlighted with a red box), Pay a bill, Pay a person, Message, Member Transfer, and eStatements. At the bottom, there are two panels: 'Transactions' showing recent activity and 'Transfers' showing options to 'Make a transfer' or 'Member Transfer', along with a section for 'Scheduled transfers' listing a recurring transfer of \$20.00 to CHRISTMAS.

Dashboard Button: Online



To quickly create a new transfer, select the Transfer Dashboard Button.

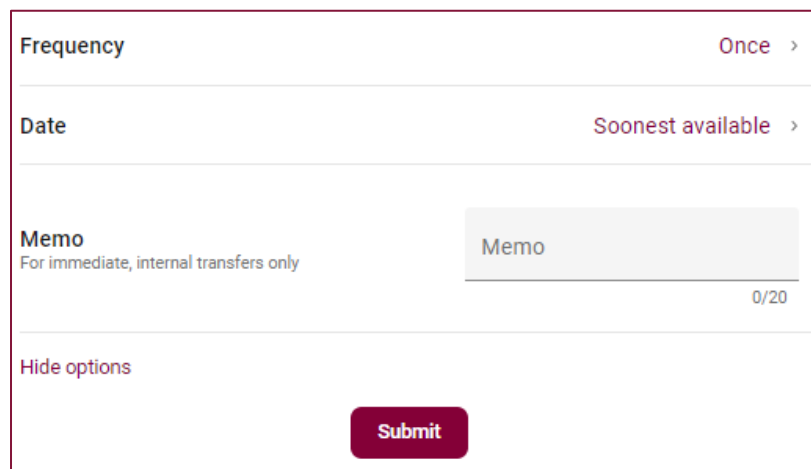
Choose which share (or loan) you would like the funds to come **from**, which share (or loan) you would like the funds to go **to**, and how much you would like to transfer. Select submit.



The screenshot shows a mobile app interface for creating a transfer. At the top, there is a back arrow and the title "Transfer". Below this, there are three main sections: "From", "To", and "Amount". The "From" section is set to "REGULAR SHARE" with a balance of "\$10,250.00". The "To" section is set to "SUPERIOR CHKG" with a balance of "\$391.09". A double-headed arrow between these sections indicates they can be swapped. The "Amount" section has a text input field containing "\$ 100.00". At the bottom left, there is a link for "More options" with a red arrow pointing to it. At the bottom center, there is a "Submit" button.

To create a recurring transfer or add a memo, select **more options**.

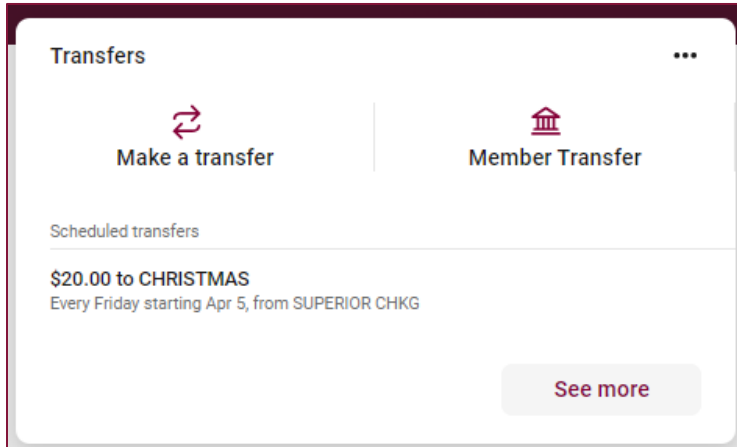
You can adjust the frequency and choose a transfer start date or add a memo to your immediate transfer. Select submit.



The screenshot shows the "More options" screen in the app. It has a title "More options" and a back arrow. Below the title, there are three sections: "Frequency", "Date", and "Memo". The "Frequency" section is set to "Once". The "Date" section is set to "Soonest available". The "Memo" section has a text input field containing "Memo" and a character count of "0/20". At the bottom left, there is a link for "Hide options". At the bottom center, there is a "Submit" button.

Dashboard Panel: Online

Scroll on your dashboard until you find the “Transfers” panel.



Here you can create a new transfer.

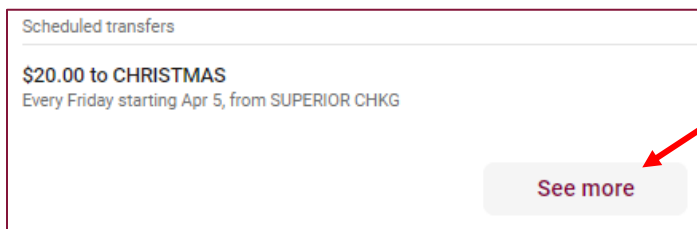


This will prompt you through the same steps as the dashboard button.

Access Member Transfer. (Transfer to another SCCU account.)

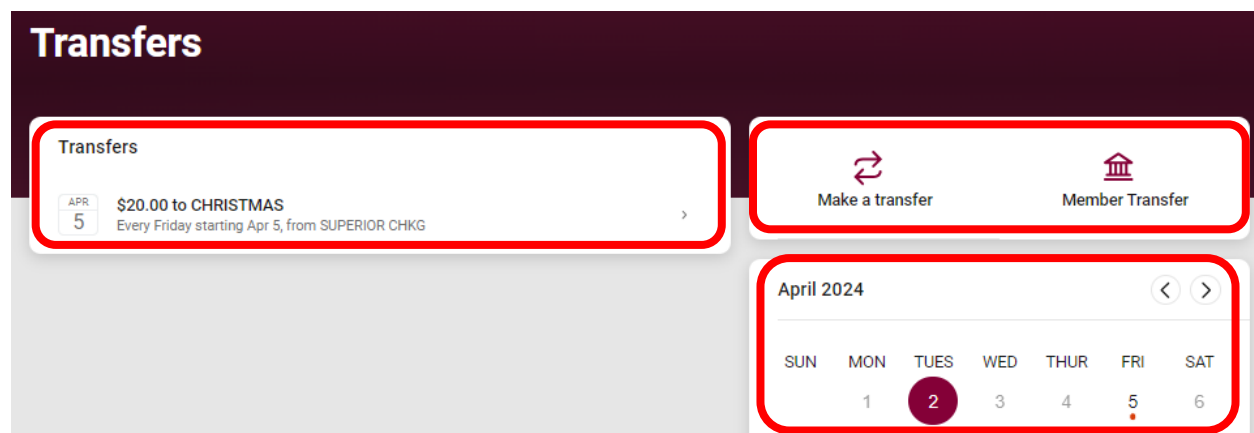
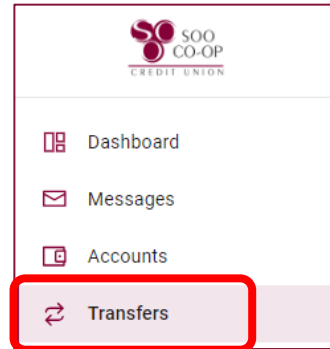


View a brief list of scheduled transfers, as well as edit or delete the existing scheduled transfers by clicking them. If the transfer you are looking for is not available in the list, select **See more**.



Menu Transfers Tab: Online

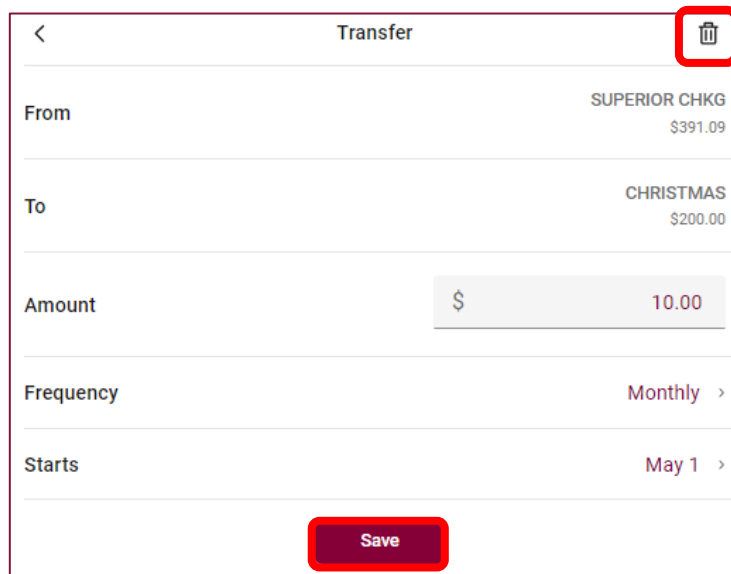
Select the Transfers tab in the menu to see your complete list of scheduled transfers you have created in Digital Banking, as well as a calendar, create a new transfer, and access member transfers.



Editing and Deleting Scheduled Transfers: Online

To edit or delete an existing scheduled transfer, click on the transfer in your list.

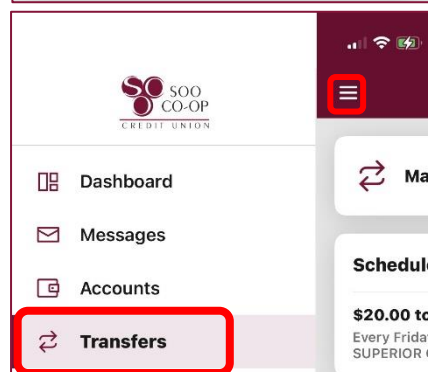
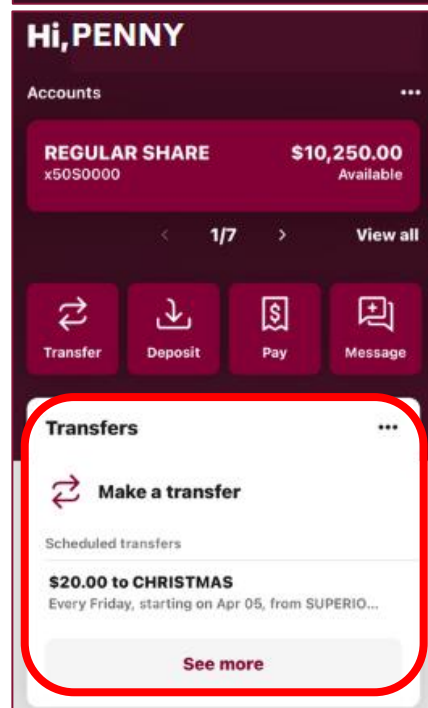
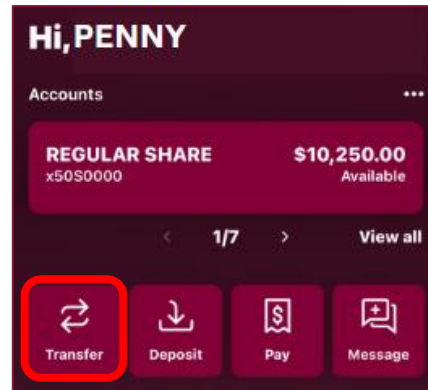
You will be prompted to update the information and select Save or to delete the scheduled transfer, select the Trash Can icon in the top right corner.



Transfers in Mobile Banking

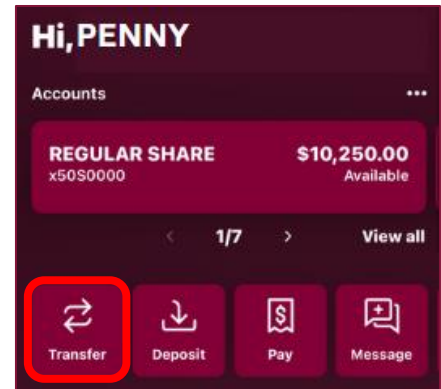
There are three options to access your transfers.

- **Dashboard Button:** Create a new transfer.
- **Dashboard Panel:** Create a new transfer, access member transfers, and view, edit, and delete scheduled transfers.
- Scroll on your dashboard to find the Transfers panel.
- **Menu Tab:** View, edit, and delete scheduled transfers, create a new transfer, and access member transfers.
- Open the menu and select Transfers.

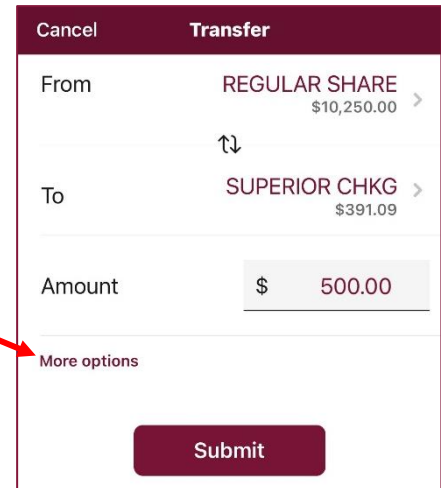


Dashboard Button: Mobile

To quickly create a new transfer, select the Transfer Dashboard Button.

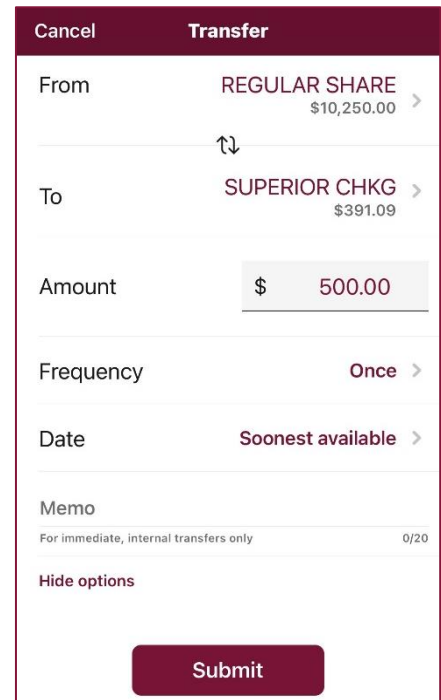


Choose which share (or loan) you would like the funds to come **from**, which share (or loan) you would like the funds to go **to**, and how much you would like to transfer. Select submit.



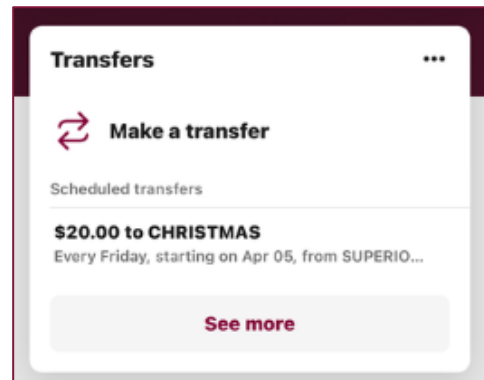
To create a recurring transfer or add a memo, select **more options**.

You can adjust the frequency and choose a transfer start date or add a memo to your immediate transfer. Select submit.



Dashboard Panel: Mobile

Scroll on your dashboard until you find the “Transfers” panel.

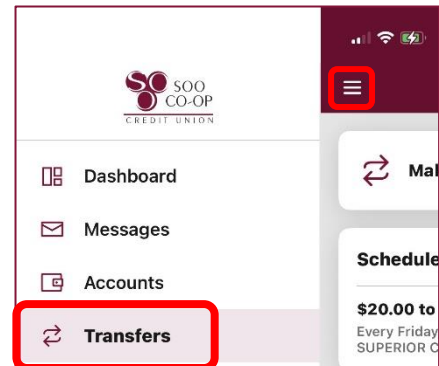


Here you can create a new transfer and view a brief list of scheduled transfers, as well as edit or delete the existing scheduled transfers by clicking them.

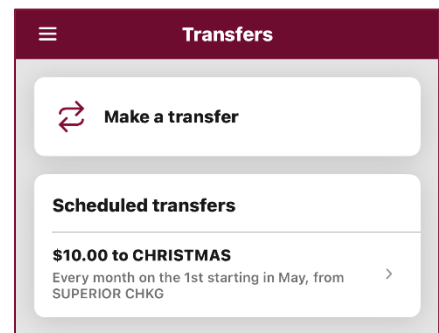
If the transfer you are looking for is not available in the list, select **See more** to be brought to the Transfer menu tab.

Menu Transfers Tab: Mobile

Select the Transfers tab in the menu.



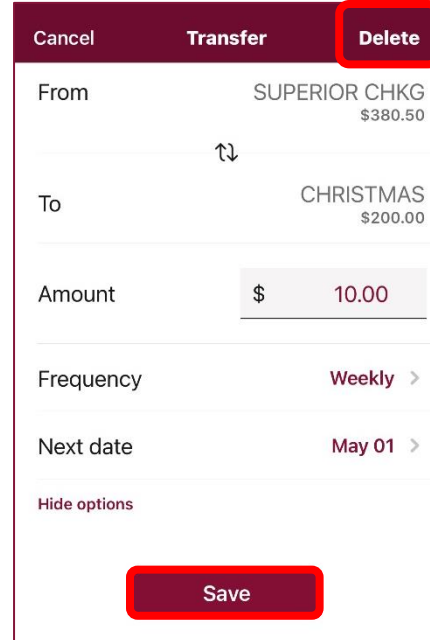
Here you will see your complete list of scheduled transfers you have created in Digital Banking, as well as the option to create a new transfer.



Editing and Deleting Scheduled Transfers: Mobile

To edit or delete an existing scheduled transfer, click on the transfer in your list.

You will be prompted to update the information and select Save or to delete the scheduled transfer, select “Delete” in the top right corner.



The screenshot shows a mobile app interface for editing a scheduled transfer. At the top, there are three buttons: 'Cancel', 'Transfer', and 'Delete'. The 'Delete' button is highlighted with a red border. Below the buttons, the form displays the following information:

- From:** SUPERIOR CHKG \$380.50
- To:** CHRISTMAS \$200.00
- Amount:** \$ 10.00
- Frequency:** Weekly >
- Next date:** May 01 >
- Hide options**
- Save** button at the bottom.