

Transferring to Another Member

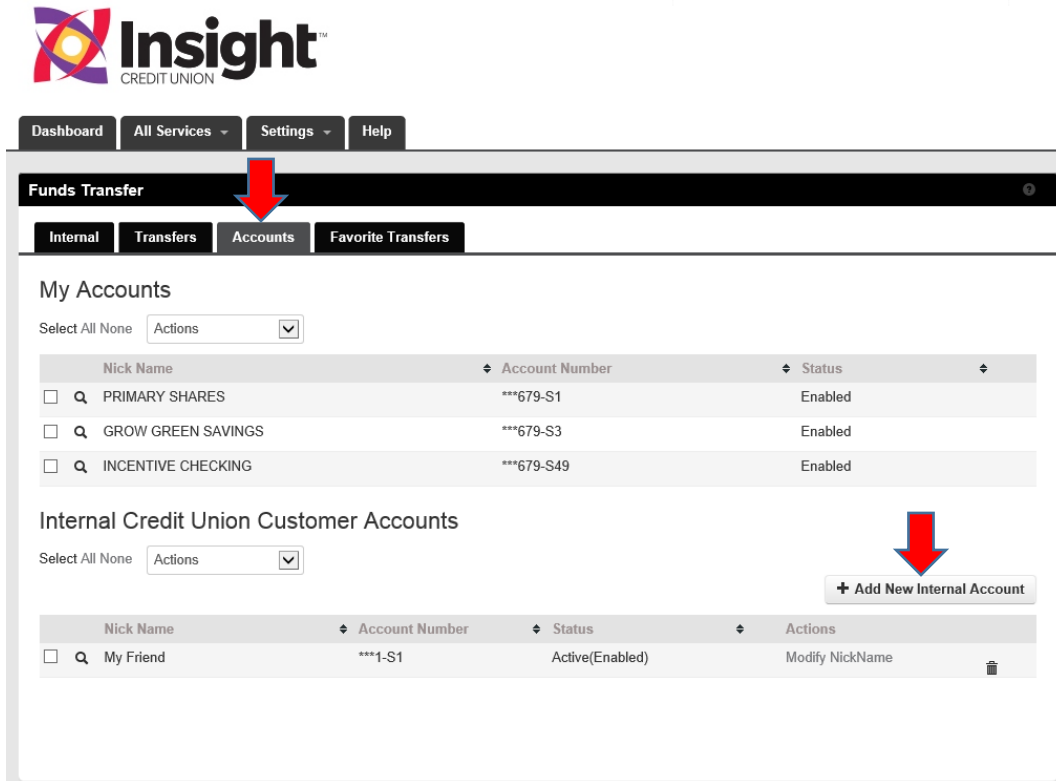
There may be times you want to transfer funds from one of your accounts to another member. That is certainly possible; just follow these steps:

1. Choose "Funds Transfer" from the "All Services" Menu. Depending on which view you prefer, you will either choose the link or the button as shown below.

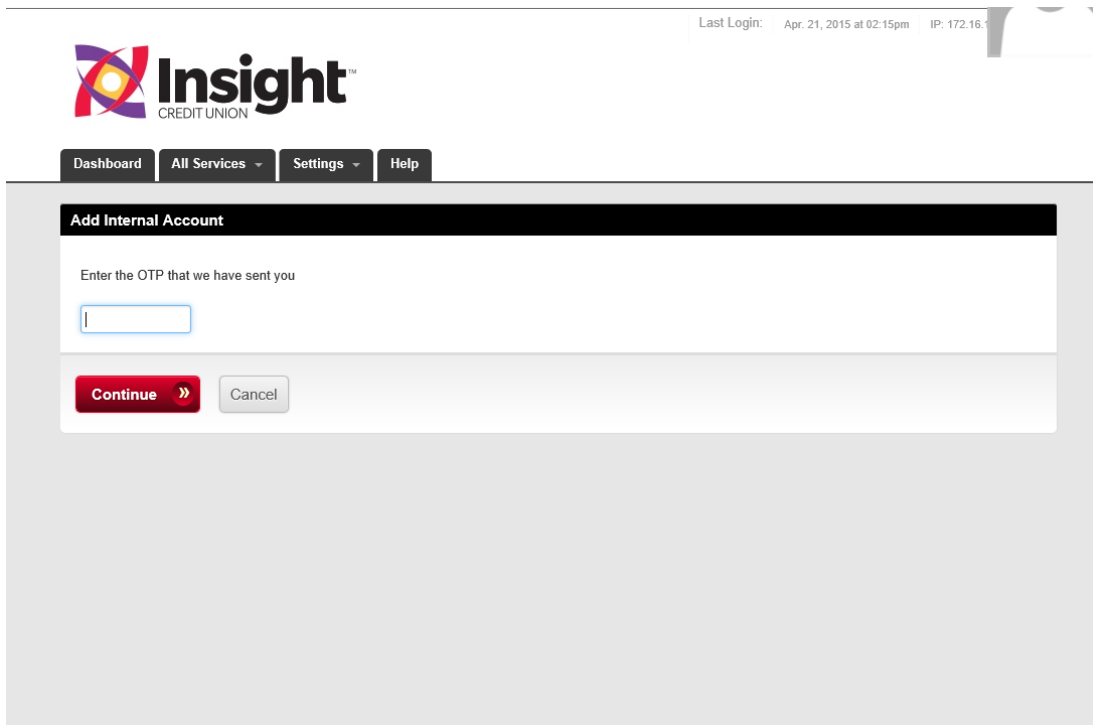
The screenshot shows the Insight Credit Union dashboard. At the top left is the Insight Credit Union logo. Below it is a navigation bar with 'Dashboard', 'All Services', 'Settings', and 'Help'. The 'All Services' menu is open, and 'Funds Transfer' is circled in red. Other menu items include Message Center, Account Summary, Check to Sell, Stop Payment, Statements, SkipAPay, Direct Deposits, Mortgage Inquiries, Tax Information, Credit Card, and Bill Pay. Below the navigation bar, there are two main sections: 'Account Summary' and 'Funds Transfer'. The 'Account Summary' section shows a table with columns for 'test for today', 'Last Transaction', 'Current Balance', and 'Available Balance'. The 'Funds Transfer' section has tabs for 'Status' and 'Internal', and a form with fields for 'From Account', 'To Account', 'To Member' (Member #, Acct., Last Name), 'Amount', and 'On Date'. There are also 'Public Notes' and 'Private Notes' fields.

This screenshot is similar to the first one, but the 'Funds Transfer' option in the 'All Services' menu is represented by a button with a dollar sign and arrows, which is circled in red. The 'Funds Transfer' form is also visible, but the 'On Date' field is now set to '04/23/2015'. At the bottom of the form, there is a red 'Transfer' button. The 'Account Summary' table and 'Events Calendar' are also visible.

2. Under the “Accounts” tab, select “Add New Internal Account”.



3. The system will automatically generate a one-time password and send it to the device you chose during the registration process. Access that one-time password, enter it into the screen and click continue.



4. Enter the information for the account you want to transfer to. Enter the member number, the account type, the first three letters of the last name and a nickname for this member. In the example below, the nickname we use is “For testing”.



Add Internal Account - Account Details

| | | |
|---------------|--|------------------------|
| Member Number | <input type="text" value="12345"/> | (e.g. 12345) |
| Account type | <input type="text" value="S1"/> | (e.g. S1, L2, L3, etc) |
| Last Name | <input type="text" value="JON"/> | First 3 letters only |
| Nick Name | <input type="text" value="For testing"/> | (e.g. John Doe) |

Continue » Cancel

5. The system will indicate the account has been added. Click finish.



Add Internal Account - Completed

You have added account My Friend successfully. You will be able to transfer funds to this account.

Finish

6. Now you can select this member in the drop-down menu as a "Transfer To" account.

Keep in mind--You will only need to create this member ONCE. Each time you go in to make a transfer after that, the member will be available as an option from the "To Account" drop-down menu .

Last Login: Apr.



Dashboard All Services Settings Help

Funds Transfer

Internal Transfers Accounts Favorite Transfers

From Account

NON INTEREST CHECKING (**359-S29) [Available Balance: \$11,580.30]

To Account Add New

Select PRIMARY SHARES (**359-S1) [Available Balance: \$0.00]
For testing(**1-S1)

To Member Number Account Last Name 3 Letters

Amount

\$ Advanced Options

Public Notes

Private Notes

Transfer Now

Schedule One-Time for Later Date

Schedule Recurring Transfer

Submit Transfer

Cancel

Your Transfer

From

To

Amount

Public Notes

Private Notes

Frequency

Transfer Date

Applied User