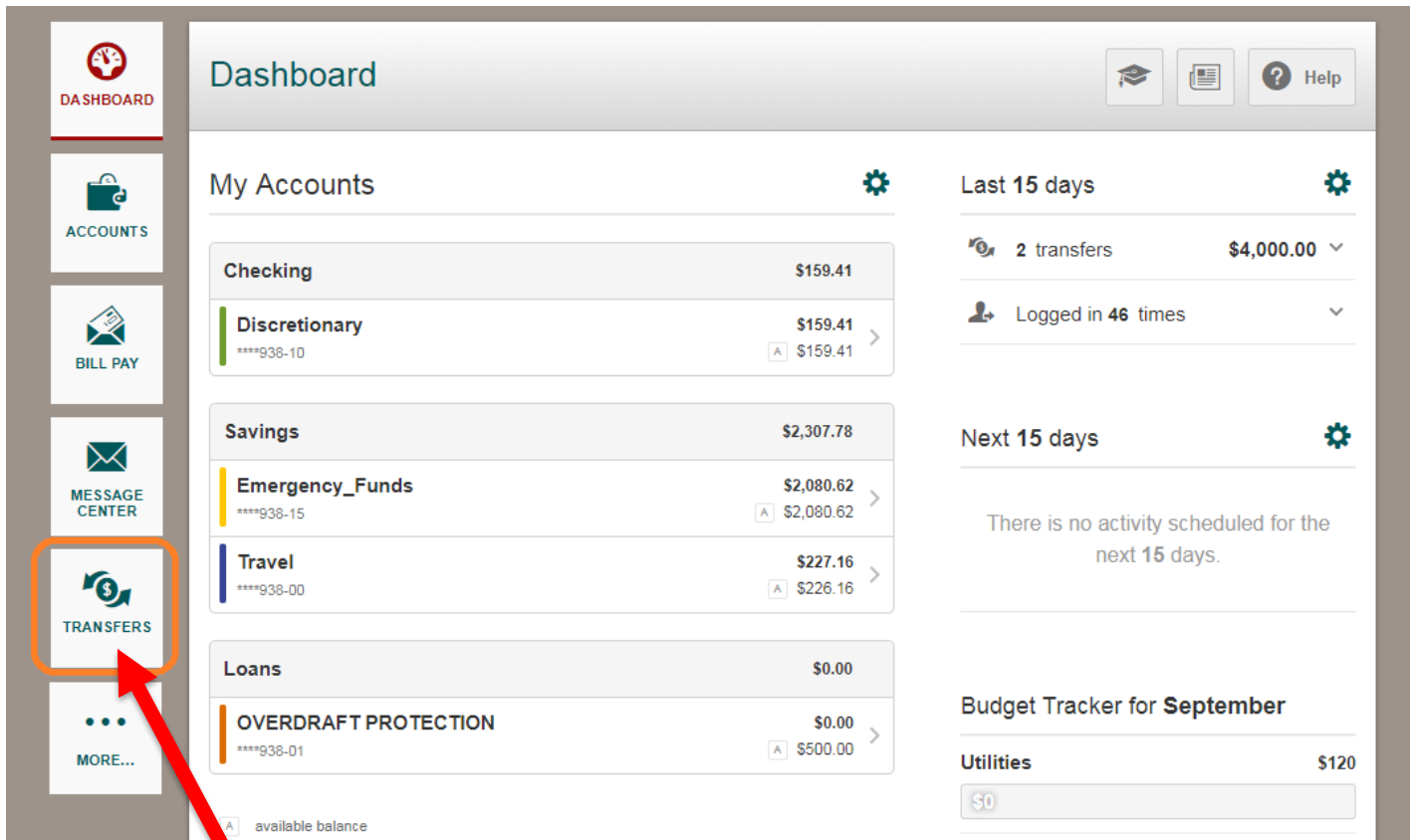


Transfer Money to Another Member

With **Patelco Online™**, it's easy to send money to another Patelco member who also has online banking

1. To schedule a new transfer to another member who has online banking, select the **TRANSFERS** widget



If you want to send money to another member who does not have online banking access, select the **POPMONEY** widget

Transfer Money to Another Member

2. Choose your From Account

Transfers

Classic | Scheduled | History

Transfer Details

From Account * Select Account

To Account * Select Account

+ Add Account

Amount *

Date 9/28/2017

Frequency One Time

Reason

Transfer Confirmation

From Account None Selected

To Account None Selected

Amount \$0.00

Occurs One Time

On Today

Reason

Confirm Transfer

Transfer Money to Another Member

- Then select your **To Account**. If you've previously sent money to this other member, their account should appear in the **To Account** drop-down menu

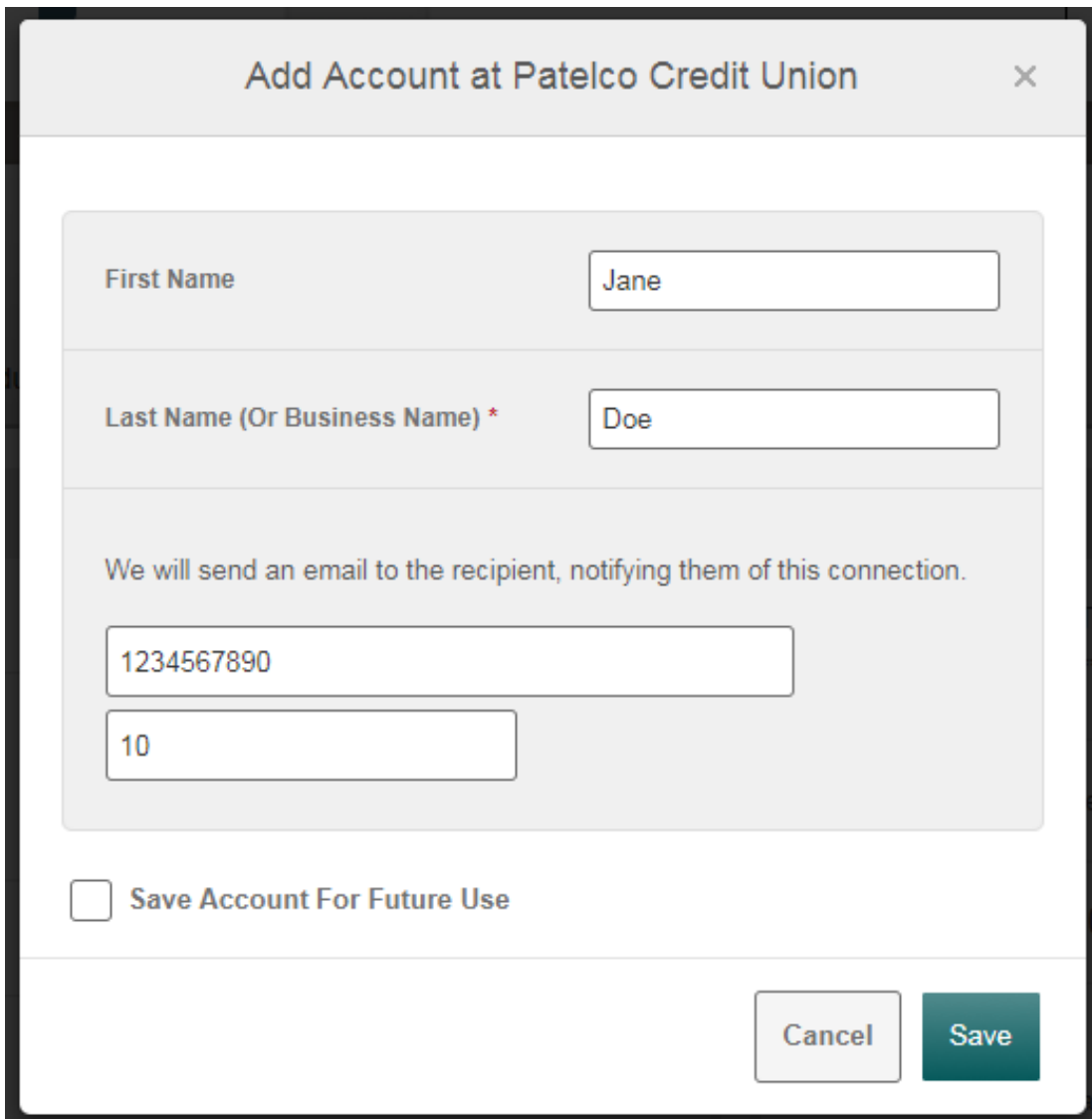
The screenshot shows the 'Transfers' page with the 'Classic' tab selected. The 'Transfer Details' section includes fields for 'From Account', 'To Account', 'Amount', 'Date', 'Frequency', and 'Reason'. The 'To Account' dropdown menu is highlighted with an orange box. The 'Transfer Confirmation' section shows 'From Account' and 'To Account' as 'None Selected', 'Amount' as '\$0.00', 'Occurs' as 'One Time', and 'On' as 'Today'. A 'Confirm Transfer' button is visible at the bottom.

If their account doesn't appear, or if you haven't sent money to them before, select the **Add Account** button

The screenshot shows the 'Transfers' page with the 'Classic' tab selected. The 'Transfer Details' section includes fields for 'From Account', 'To Account', 'Amount', 'Date', 'Frequency', and 'Reason'. The 'Add Account' button is highlighted with an orange box. The 'Transfer Confirmation' section shows 'From Account' and 'To Account' as 'None Selected', 'Amount' as '\$0.00', 'Occurs' as 'One Time', and 'On' as 'Today'. A 'Confirm Transfer' button is visible at the bottom.

Transfer Money to Another Member

4. In the **Add Account** box, enter the other member's:
- **First Name**
 - **Last Name**
 - **Member Number**
 - **Share ID** (such as 10 or 15)



Add Account at Patelco Credit Union

First Name

Last Name (Or Business Name) *

We will send an email to the recipient, notifying them of this connection.

Save Account For Future Use

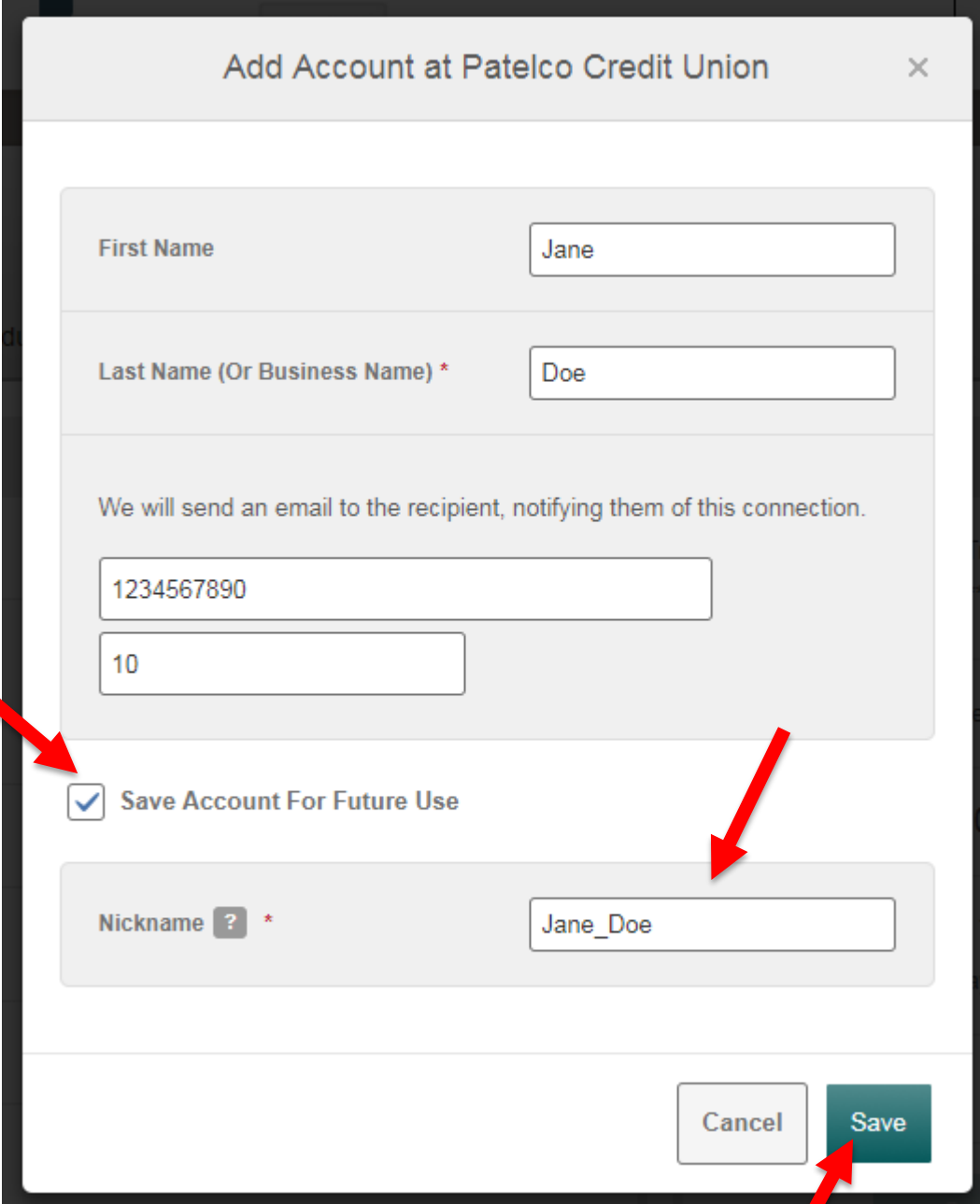
Cancel Save

Transfer Money to Another Member

If you want to be able to send transfers again to this person in the future, select the box next to **Save Account For Future Use**

If you're saving the account for future use, give it a nickname

5. Then select **Save**



The screenshot shows a form titled "Add Account at Patelco Credit Union" with a close button (X) in the top right corner. The form contains the following fields and options:

- First Name:** Text input field containing "Jane".
- Last Name (Or Business Name) *:** Text input field containing "Doe".
- Phone Number:** A section with the text "We will send an email to the recipient, notifying them of this connection." followed by two text input fields. The first contains "1234567890" and the second contains "10".
- Save Account For Future Use:** A checked checkbox with a blue checkmark.
- Nickname ? *:** Text input field containing "Jane_Doe".
- Buttons:** "Cancel" and "Save" buttons at the bottom right.

Three red arrows point to the "Save Account For Future Use" checkbox, the "Nickname" field, and the "Save" button.

Transfer Money to Another Member

6. Verify the **From Account** and **To Account**, and then enter the **Amount**, the **Date**, and the **Frequency**

If you want, add a **Reason**

Transfers

Classic | Scheduled | History

Help

Transfer Details

From Account * Travel

To Account * Jane Doe [+ Add Account](#)

Amount * 10.00

Date 9/28/2017

Frequency One Time

Reason

Transfer Confirmation

From Account Travel ****938-00 A \$226.16

To Account Jane Doe

Amount \$10.00

Occurs One Time

On Today

Reason

[Confirm Transfer](#)

Transfer Money to Another Member

- 7. Review the **Transfer Confirmation** information and then select **Confirm Transfer**

Transfer Confirmation ?

From Account Travel
****938-00 A **\$226.16**

To Account Jane Doe

Amount \$10.00

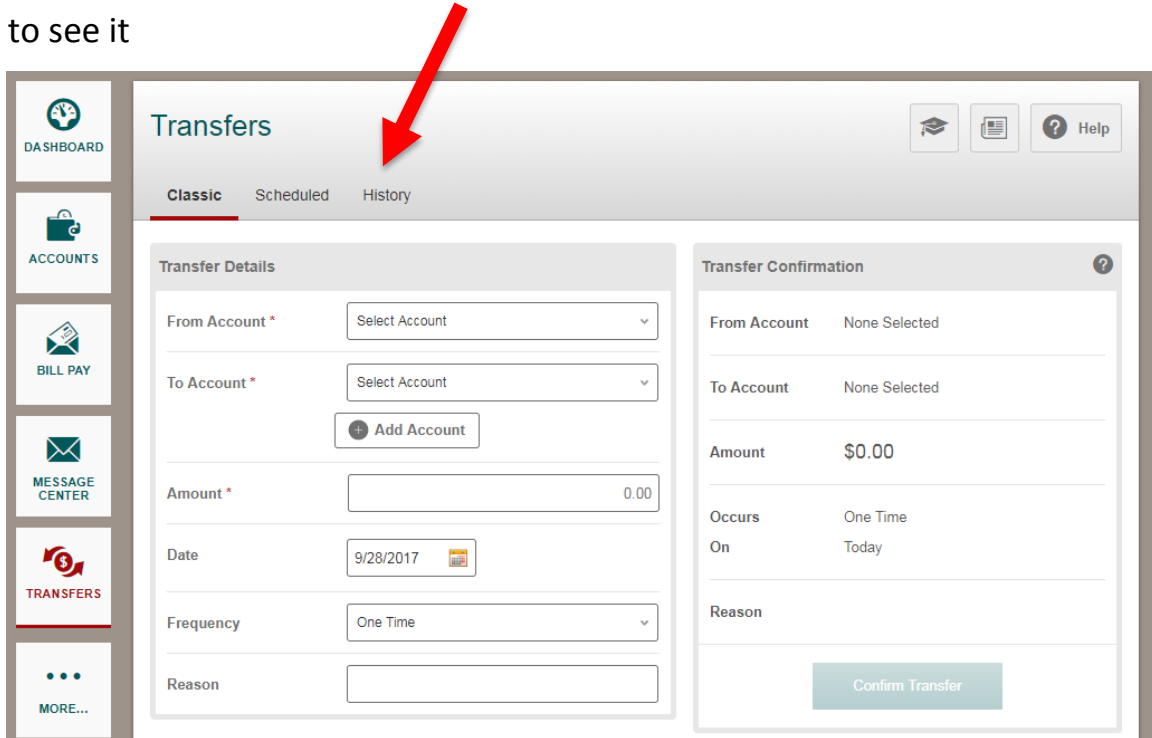
Occurs One Time
On Today

Reason

Confirm Transfer

Transfer Money to Another Member

- 8. If your transfer was an immediate one-time transfer, select the **History** tab to see it



If your transfer to another member was scheduled for a future date, select the **Scheduled** tab, where you can edit or cancel any future or recurring transfer

