



## Desktop Member to Member Transfers - Account Number

Member to Member transfers allow Members to securely move money between their Credit Union account and another Member's account.

### Member to Member Transfers Step-by-Step

Use the following steps to set up Member to Member transfers.

Step	Action
1	Click the <b>Make a Transfer</b> menu at the top of the screen.
2	Click the <b>Member to Member Accounts</b> hyperlink at the left of the screen.
3	Click the <b>Add Account</b> hyperlink at the top of the screen.
4	Click to select the <b>Account Number</b> radio button (circle icon).
5	Click and enter the following information in the corresponding fields: <ul style="list-style-type: none"><li>• Member's Last Name</li><li>• Account Number</li><li>• Suffix - The 4-digits (after the dash) at the end of your account number.</li><li>• Account Nickname</li></ul>
6	Scroll down and click to select the <b>Checking</b> or <b>Savings</b> radio button (circle icon).
7	Click the <b>Add Account</b> button.
8	Click to select the <b>Verification Method</b> (Text, Voice, Email) using the drop-down arrow.
9	Click and select either a <b>10-digit Phone Number</b> or an <b>Email Address</b> using the drop-down arrow to receive a verification code.
10	Optional: Click the <b>Cancel</b> button to cancel the verification request.
11	Click the <b>Next</b> button.
12	Check your email or phone for the <b>verification code</b> .
13	If prompted to review a disclosure, click <b>I Agree</b> to continue. If not, simply continue.
14	Click and enter the <b>Verification Code</b> in the Verification Code field.
15	Optional: Click the <b>Request New Code</b> hyperlink to receive a new code.
16	Optional: Click the <b>Cancel</b> button to stop the transfer by account request.



## Member to Member Transfers Step-by-Step, continued

Use the following steps to set up Member to Member transfers.

Step	Action
17	Click the <b>Next</b> button.
18	A <b>confirmation</b> appears once the account is successfully added.
19	Optional: Click the <b>Make a Transfer to This Account</b> button to transfer funds.
20	Optional: Click the <b>Add Another Account</b> button to add another Member to Member Account.
21	Click the <b>Manage</b> hyperlink at the top of the screen.
22	Click the <b>Account record</b> drop-down arrow to expand Member to Member Accounts details.
23	Click the <b>Edit</b> (  ) icon to edit the Member to Member Account.
24	Click the <b>Delete</b> hyperlink to delete the Member to Member Account.
25	Click the <b>Transfer To</b> button to transfer funds.