

# How To Set Up Contacts and External Accounts

SafeAmerica Credit Union

A simple way to your daily banking



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# Setting Up Contacts

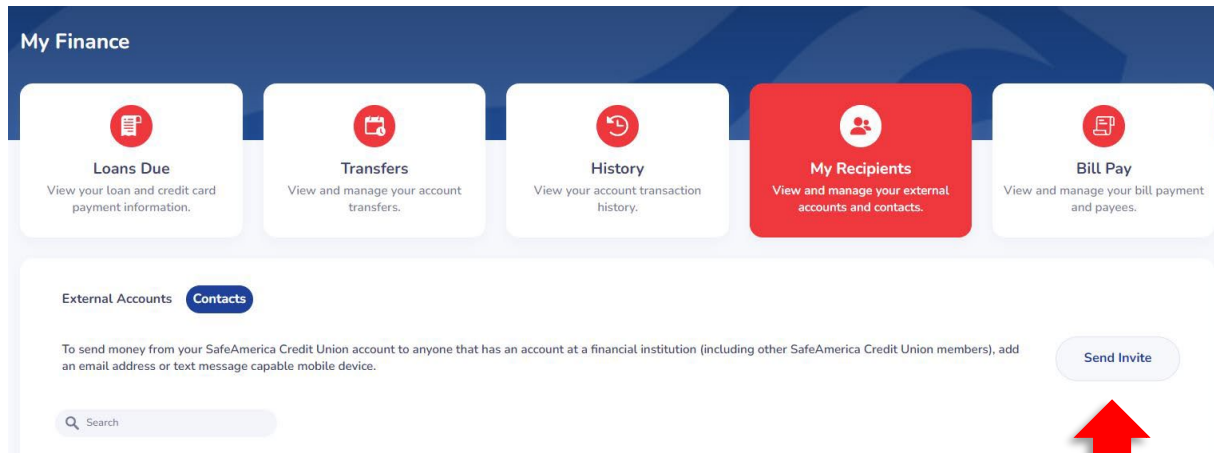
So you can send money to friends/family and other  
SafeAmerica members.



# Step 1 – Setting Up Contacts:

Before sending funds from your SafeAmerica Credit Union Account to anyone that has an account with a financial institution (including other SafeAmerica Credit Union members), you must first invite and verify their account.

- Click “**My Finance**” then “**My Recipients**”. Located on the left of the screen, click “**Contacts**” then click “**Send Invite**”.



## Step 2 – Setting Up Contacts:

- Enter the name and email or phone number of the person you want to send money to. Then select “**Send Invite**”.

**Send Invite** ×

We will send a secure invitation to your recipient requesting their routing and account number.

Name\*

Email or Phone Number\*

Cancel Send Invite

# Step 3 – Setting Up Contacts:

- Your contact will receive an email or text message invitation. To accept, your recipient must click the link and provide the following information:
  - Their name
  - Their bank's name
  - That bank's routing number
  - The account type
  - Their account number
  - Then select “Accept Invite”

The image displays two side-by-side screenshots of a mobile application interface for SafeAmerica Credit Union. Both screens feature the SafeAmerica logo at the top. The left screen is titled 'Accept invite' and contains five text input fields: 'First Name\*', 'Last Name\*', 'Bank Name\*', 'Bank Routing Number\*', and 'Bank Account Number\*'. The right screen is also titled 'Accept invite' and contains a 'Type\*' dropdown menu with 'Checking' selected, a 'Bank Account Number\*' text input field, and a 'Confirm Bank Account Number\*' text input field. At the bottom of both screens are navigation icons: a back arrow, a forward arrow, a plus sign, a square with a minus sign, and a three-dot menu. The right screen has two buttons at the bottom: 'Go Back' and 'Accept Invite'.

# Step 4 – Setting Up Contacts:

- Once accepted, your recipient will be listed under “My Recipients” and you can now begin to send funds to your newly added contact!

The screenshot shows the 'My Finance' dashboard with five main navigation tiles: 'Loans Due', 'Transfers', 'History', 'My Recipients' (highlighted in red), and 'Bill Pay'. Below these is a section for 'External Accounts' with a 'Contacts' sub-tab. A text instruction explains how to add contacts. A search bar is present, and a table lists a contact named 'My Friend' with the email 'myfriend@email.com' and a three-dot menu icon.

Recipient Name	Contact Details
My Friend	myfriend@email.com <span>...</span>



# External Accounts

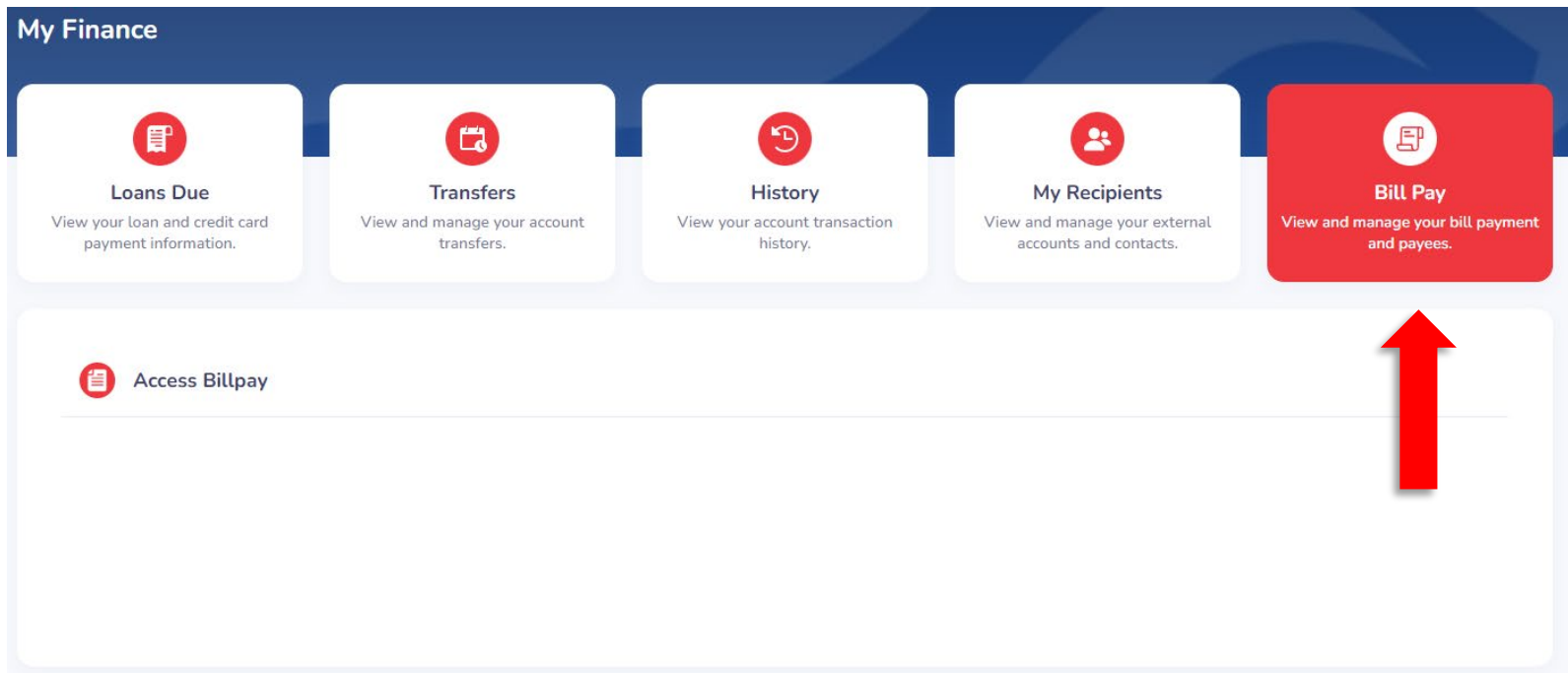
So you can transfer money to/from  
accounts you have elsewhere.



# Step 1 – Setting Up External Accounts:

Before transferring money to/from an external account, you must first set up and verify your account.

- Click “**My Finance**” then “**Bill Pay**”.





# Step 2 – Setting Up External Accounts:

- Click the “**Transfer/Send Money Tab.**” In the External Accounts box, select the “Add” button.



A screenshot of a web application interface. At the top, there is a navigation bar with four tabs: 'Bill Pay Dashboard', 'Pay Bills', 'Payment Activity', and 'Transfer/Send Money'. The 'Transfer/Send Money' tab is highlighted in yellow. Below the navigation bar, the main content area is divided into several sections. On the left, there is a 'Transfer or Send Money' section with a form. The form has a label 'To' and a placeholder 'Select Person or Account'. To the right of the form is a dropdown menu with an 'ADD' button. The dropdown menu is open, showing two options: 'Add Person' and 'Add Ext. Account'. To the right of the form, there are two more sections: 'External Accounts' with an 'ADD' button and 'People' with an 'ADD' button. Below these sections, there is a date selector showing '&lt; MAY 2023 &gt;' and a 'Send Date' toggle switch. At the bottom of the main content area, there is a message 'No information to display'. At the very bottom of the page, there is a footer with copyright information: '© 2023 SafeAmerica Credit Union All Rights Reserved. SafeAmerica Credit Union 6001 Gibraltar Dr., Pleasanton, CA 94588 Phone: 800-972-0999'.

# Step 3 – Setting Up External Accounts:

- Add your External Account information, agree to the terms and click **“Save.”**

Bill Pay Dashboard Pay Bills Payment Activity **Transfer/Send Money**

### Add External Account

Routing Transit Number  
321076470

Account Number  
123456789

Confirm Account Number  
123456789

Account Type  
Checking

Account Nickname (optional)  
Mortgage

Please review the terms and conditions [External Transfer Agreement for Consumer Accounts](#)

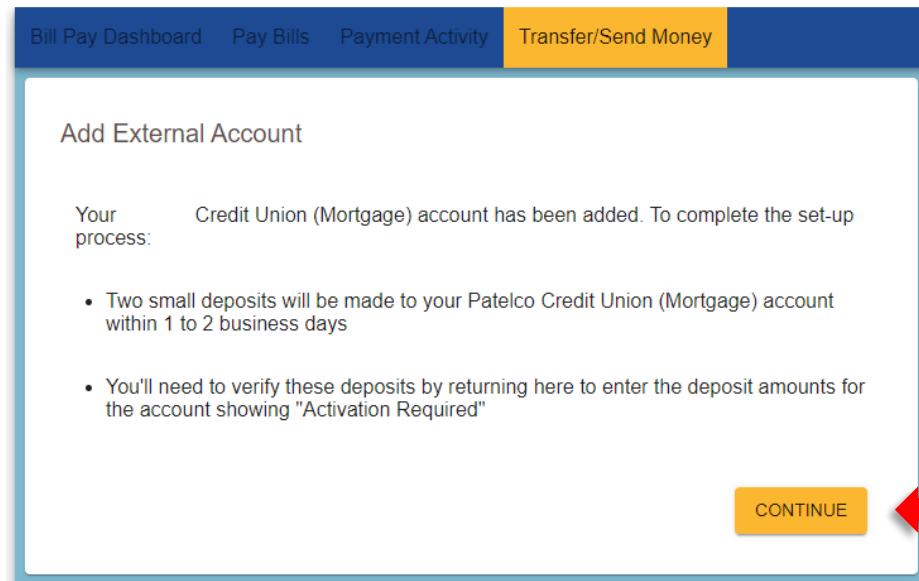
I have reviewed and accept the terms & conditions stated above.

CANCEL SAVE

< MAY 2023 > Send Date

## Step 4 – Setting Up External Accounts:

- You will now see instructions for verifying this new external account. This is a one time verification.
- Two small deposits will be made into your external account within 3 business days.
- Once you have the two micro deposits, revisit **“Transfer/Send Money Tab”** to enter the deposit amounts.



# Step 5 – Setting Up External Accounts

- That's it! You have successfully added an External Account and can now begin to send funds by selecting the “**To**” and “**From**” drop downs.

Bill Pay Dashboard Pay Bills Payment Activity **Transfer/Send Money**

Transfer or Send Money ADD

To  
Credit Union (Checking)

From  
Free Checking

Send Date 05/11/2023 Est. Delivery Date 05/12/2023 Amount \$ Amount

CANCEL TRANSFER

External Accounts ADD

Credit Union (Checking)  
checking x1234

People ADD

Mary Smith

< MAY 2023 > Send Date

No information to display

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