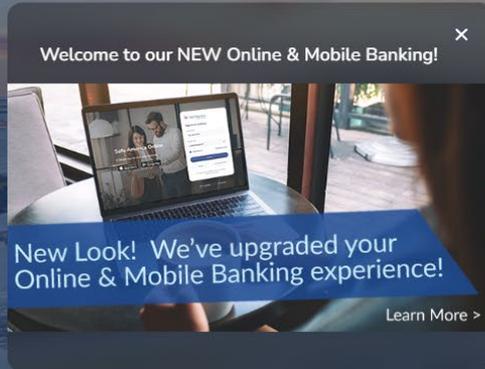


# How To Set Up Transfers



**SafeAmerica Credit Union**

A simple way to your daily banking



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Username

Password

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# This Guide Will Show You How to Transfer Funds:

- To/from your SafeAmerica accounts (Internal Transfers)
- To other SafeAmerica accounts and other people (Friends & Family)
- To/from your accounts you have elsewhere (External Accounts)



# Internal Transfers

Transfer Money Between Your SafeAmerica Accounts



# Step 1 - Internal Transfers

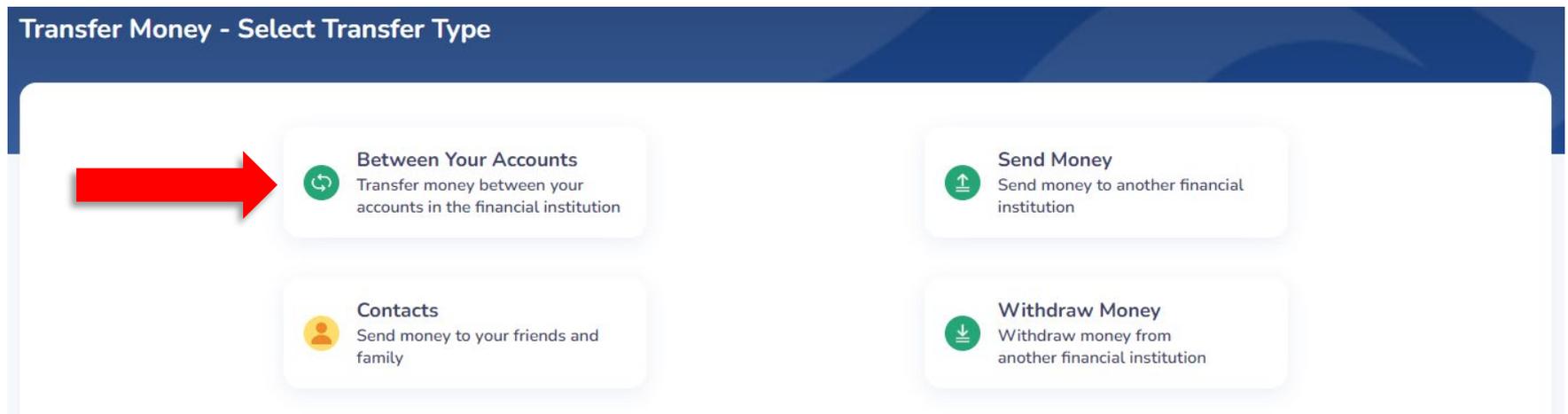
- Log into online banking at safeamerica.com
- Locate and Click “**Transfer Money**” at the top of your dashboard.



## Step 2 - Internal Transfers:

- Select “Between Your Accounts”.

Transfer Money - Select Transfer Type



The screenshot shows a selection screen with four options, each in a white rounded rectangle with a green icon:

- Between Your Accounts** (Circular arrow icon): Transfer money between your accounts in the financial institution. A red arrow points to this option.
- Send Money** (Upward arrow icon): Send money to another financial institution.
- Contacts** (Person icon): Send money to your friends and family.
- Withdraw Money** (Downward arrow icon): Withdraw money from another financial institution.

# Step 3 - Internal Transfers:

- Select an account you want to send your funds from.

① Select an account you want to send from > ② > ③

<b>Regular Share</b>	
Available	Current Balance
<b>\$0.01</b>	<b>\$25.01</b>
<b>Free Checking</b>	
Available	Current Balance
<b>\$10.00</b>	<b>\$10.00</b>
<b>Blended Money Market</b>	
Available	Current Balance
<b>\$2,054.72</b>	<b>\$2,054.72</b>

# Step 4 - Internal Transfers:

- Select the account you wish to transfer funds to. Then click “Continue” on the bottom right of the screen.

① Select an account you want to send from >      ② Select an account you want to send to >      ③

Account Name	Available	Current Balance
Regular Share	\$0.01	\$25.01
Free Checking	\$10.00	\$10.00
Blended Money Market	\$2,054.72	\$2,054.72

Account Name	Available	Current Balance
Regular Share	\$0.01	\$25.01
Free Checking	\$10.00	\$10.00

Cancel      Continue

## Step 5 - Internal Transfers:

- Select the amount, date, frequency, and end date. You can select to add a memo. When finished, click “Continue”.

Please review below transfer information

From Free Checking		To Regular Share
Starting Wednesday, April 19, 2023		
No Repeat		
<a href="#">Go Back</a>		<a href="#">Continue</a>

## Step 6 - Internal Transfers:

That's it! Your transfer is complete. You will be redirected to your dashboard.



Success!

You've submitted \$6.00 to Regular Share .

This transfer has been scheduled.

You will be redirected soon...



# Send Money to People

This includes other SafeAmerica Credit Union members.

# Before Getting Started:

- Before you are able to send funds to a person (a Contact) you will need to add a contact and go through the verification process. Once your contact is verified, you can come back and send funds.
- Please refer to our **“How To Set Up Contacts and External Accounts”** step-by-step guide.

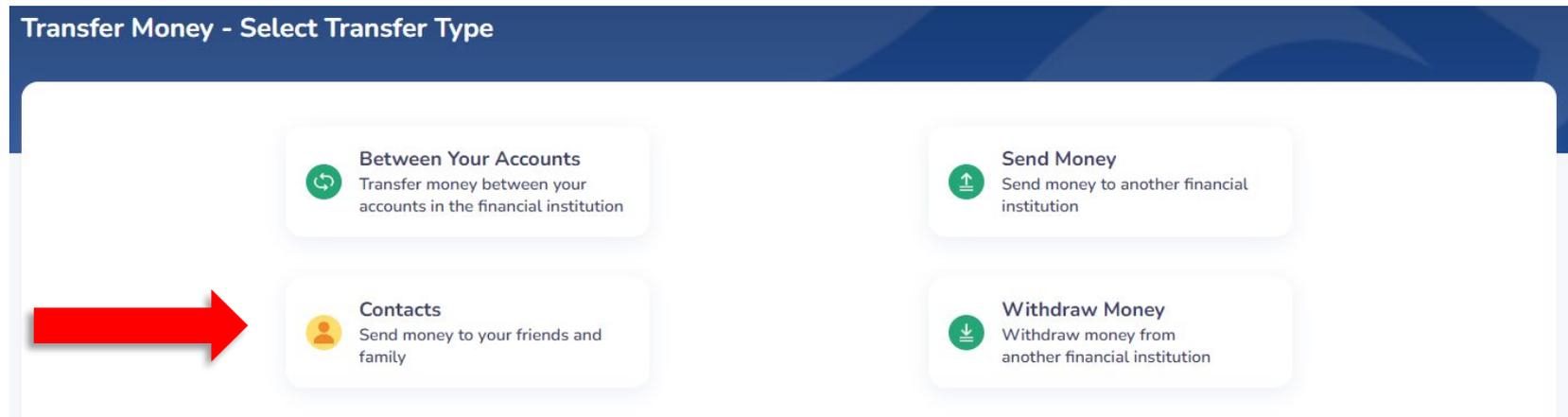
# Step 1 - Sending Money to Friends/Family:

- Log into online banking at safeamerica.com
- Locate and Click **“Transfer Money”** at the top of your dashboard.



# Step 2 - Sending Money to Friends/Family:

- Select “Contacts”.



# Step 3 - Sending Money to Friends/Family:

- Select an account you want to send funds from.

① Select an account you want to send from > ② > ③

<b>Regular Share</b>	
Available	Current Balance
<b>\$0.01</b>	<b>\$25.01</b>

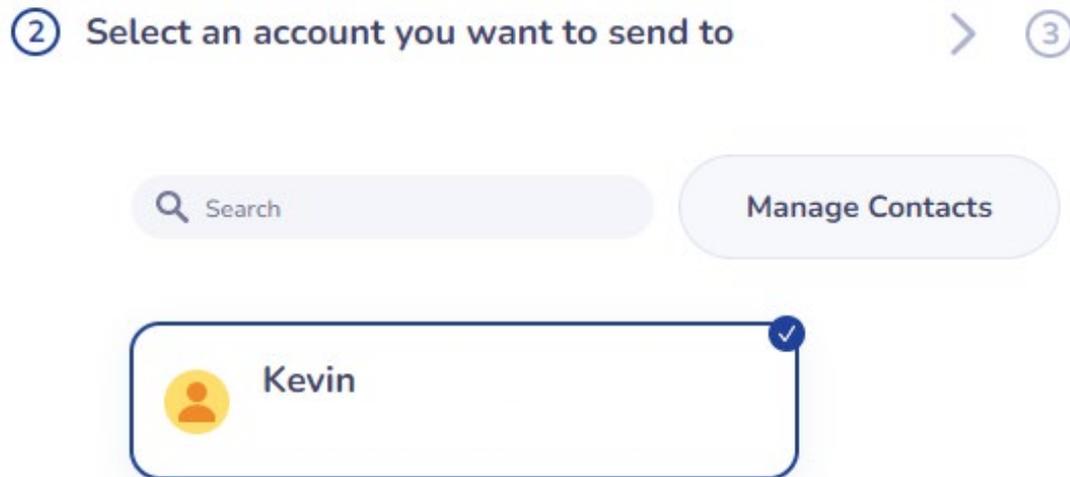
<b>Free Checking</b>	
Available	Current Balance
<b>\$10.00</b>	<b>\$10.00</b>

<b>Blended Money Market</b>	
Available	Current Balance
<b>\$2,054.72</b>	<b>\$2,054.72</b>

## Step 4 - Sending Money to Friends/Family:

- Select a contact you want to send to. Contacts must be set up prior to this step. Click Manage Contacts to add a Contact now.
- Select “Continue” on the bottom right.



# Step 5 - Sending Money to Friends/Family:

- Select the amount, date, frequency, and end date. When finished, click “Continue”.

① > ② > ③ Amount

Send money from Blended Money Market account to Kevin

Amount (Amt. Available \$2,054.72)

\$ 6.00

Date

04/19/2023 

Frequency      End Date

No Repeat       None

Before continuing, please agree to the [Terms and Conditions](#) for external transfer.

Go Back

Continue

## Step 6 - Sending Money to Friends/Family:

- Review the transfer information. When finished, click “**Continue**” on the bottom right.

Please review below transfer information



Starting Wednesday, April 19, 2023

No Repeat

Go Back

Continue

## Step 7 - Sending Money to Friends/Family:

- That's it. Your transfer is complete! You will be redirected to your dashboard.



**Success!**

You've submitted \$6.00 to Kevin .

**This transfer has been scheduled.**

You will be redirected soon...



# External Transfers

Transfer money to/from accounts you have at other financial institutions.

# Before Getting Started:

- Before you are able to send funds to an external account, you must add your external account in the “**Bill Pay**” section of Online & Mobile Banking.
- Please refer to our “**How To Set Up Contacts and External Accounts**” step-by-step guide.

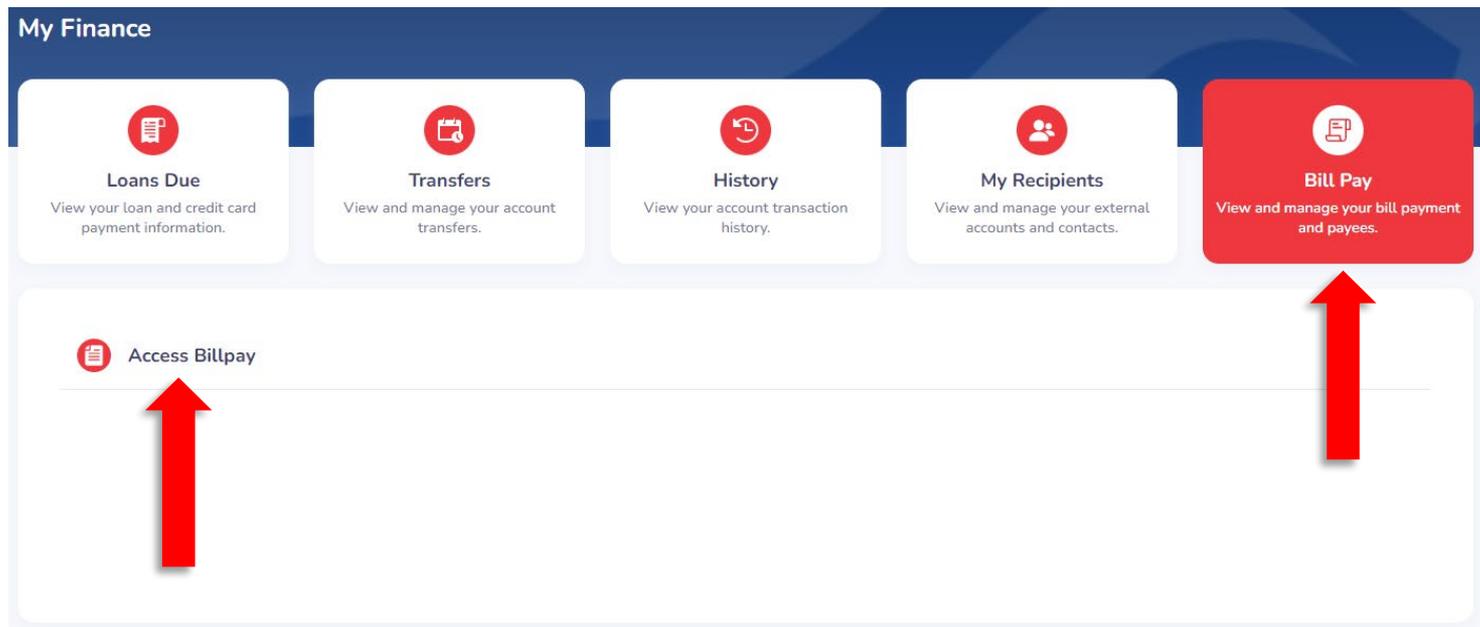
# Step 1 – External Transfers:

- Log into online banking at safeamerica.com
- Locate and Click “**My Finance**” at the top of your dashboard.



## Step 2 – External Transfers:

- Locate and select “**Bill Pay**” from the right of your screen.
- Select “**Access Bill Pay**”.



# Step 3 - External Transfers:

- Select the Transfer/Send money tab



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

Transfer or Send Money

ADD ▾

Add Person

Add Ext. Account

To

Select Person or Account

↔ External Accounts ADD

👤 People ADD

📅 < MAY 2023 > Send Date

No information to display

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# Step 4 - External Transfers:

- Select your “**To**” and “**From**” accounts.
- Select the date you want to send it, the amount, and choose the frequency. Then Select the transfer button.

The screenshot shows the 'Transfer or Send Money' interface. The top navigation bar includes 'Bill Pay Dashboard', 'Pay Bills', 'Payment Activity', and 'Transfer/Send Money'. The main form has the following fields and options:

- To:** Credit Union (Checking) (indicated by a red arrow)
- From:** Free Checking
- Send Date:** 05/11/2023 (indicated by a red arrow)
- Est. Delivery Date:** 05/12/2023
- Amount:** \$ Amount
- Buttons:** CANCEL, TRANSFER

On the right side, there are two panels:

- External Accounts:** Credit Union (Checking) checking x1234
- People:** Mary Smith

At the bottom, there is a calendar navigation for 'MAY 2023' and a 'Send Date' toggle switch. A footer contains the text: '© 2023 SafeAmerica Credit Union All Rights Reserved. SafeAmerica Credit Union 6001 Gibraltar Dr. Pleasanton, CA 94588 Phone: 800-972-0999'.

# Step 5 - External Transfers:

- That's all! You'll see a success message and the scheduled transfer located in the bottom box.

The screenshot displays the 'Transfer/Send Money' interface. At the top, there are navigation tabs: 'Bill Pay Dashboard', 'Pay Bills', 'Payment Activity', and 'Transfer/Send Money'. The main content area is divided into several sections:

- Transfer or Send Money:** A section with an 'ADD' button and a 'To' dropdown menu labeled 'Select Person or Account'.
- External Accounts:** A section with an 'ADD' button and a dropdown menu showing 'Credit Union (Checking) checking x1234'.
- People:** A section with an 'ADD' button and a dropdown menu.
- Scheduled:** A section showing a calendar for 'MAY 2023' with a 'Send Date' toggle. Below the calendar, a transfer is listed: '11 MAY' (with a red arrow pointing to it), 'To: Credit Union (Checking) \$1.00', and 'From: Free Checking Pending'. Below this, it says 'Incoming Total \$1.00'.

At the bottom, there is a footer with the text: '© 2023 SafeAmerica Credit Union All Rights Reserved. SafeAmerica Credit Union · 6001 Gibraltar Dr., Pleasanton, CA 94588 · Phone: 800-972-0999'.