

# Classic Transfers

To send money between members or move it between your accounts, follow these steps.

- 1 Click on **Transfers**.
- 2 Click **Classic**.
- 3 Select the account where the transfer should originate from the dropdown.
- 4 Select the account where the transfer should be deposited from the dropdown. (If you don't see the right account, see **Adding Accounts**.)
- 5 Fill in the amount of the transfer.

## For a one-time transfer:

- 6 Choose the date of the transfer.
- 7 Ensure the dropdown says **One Time**.

## For a recurring transfer:

- 6 Choose the date of the first occurrence.
- 7 Choose the frequency of the transfer:
  - A Click here to continue the recurring transfer forever.
  - B Click here to pick an end date for the recurring transfer and then select the date.
  - C Click here to stop the transfer after a set number of occurrences; put the number of times you want the transfer to happen in the box.
- 8 Click **+ Add Memo** to make notes here about the transfer for your records.
- 9 Verify the information shown here is accurate and click **Submit Transfer** to make your transfer.

The screenshot shows the Veridian credit union website's 'Transfers' page. The page is titled 'Transfers' and has a sidebar with navigation options: DASHBOARD, EDOCS, ACCOUNTS, TRANSFERS (highlighted), and BILL PAY. The main content area is titled 'Transfers' and has tabs for 'Classic', 'Scheduled', and 'History'. The 'Classic' tab is active, showing a 'Make a Transfer' form. The form includes fields for 'From Account', 'To Account', 'Amount', and 'Date'. There are also options for 'Frequency' (One Time, Daily, Weekly, etc.) and a 'Submit Transfer' button. A 'Next 30 Days Scheduled' section shows no transfers scheduled. A dropdown menu for frequency is open, showing options like 'One Time = por única vez', 'Daily = diaria', 'Weekly = semanal', etc. A second dropdown for 'Ending' is also open, showing options like 'Never', 'On', and 'After'.

# Adding Accounts

To add an account for transfers, follow the steps below.

To add another Veridian member's account:

- 1 Click on **Transfers**.
- 2 Click **Classic**.
- 3 Click **+ Transfer to another Veridian Credit Union member**.
- 4 Fill in the recipient's last name or the business's name.
- 5 Choose **Share account** if the transfer is going to checking or savings and **Loan account** if it is going to pay a loan.
- 6 Enter the member number of the recipient.
- 7 Enter the two- or three-digit number account number (01 for savings #1, for example).
- 8 Click **Cancel** to cancel or **Save** to add the account.

The screenshot displays the Veridian Credit Union website interface. At the top, there is a navigation bar with links for 'Contact', 'Locations', and 'Rates', along with 'Chat Now' and 'Log Out' options. The Veridian logo is prominently displayed. Below the navigation bar, the user's name 'John Doe' is visible. The main content area is titled 'Transfers' and includes tabs for 'Classic', 'Scheduled', and 'History'. The 'Classic' tab is selected, and the 'Make a Transfer' section is active. This section contains several input fields: 'From Account' (with a dropdown menu), 'To Account' (with a dropdown menu and a date indicator 'Today 30 NOV 2018'), 'Amount' (with a '\$' symbol and 'Enter Amount' placeholder), 'Date' (with a calendar icon), and 'Frequency' (with a dropdown menu set to 'One Time'). There are also buttons for 'Add Memo', 'Submit Transfer', and a link to 'Transfer Policy'. A modal window titled 'Add Account at Veridian Credit Union' is overlaid on the page. This modal contains a form with the following fields: 'Last Name (Or Business Name)' (with a red circle 4), 'Share account' (with a dropdown menu and a red circle 5), 'Recipient's number' (with a red circle 6), and 'Share ID' (with a red circle 7). At the bottom of the modal, there are 'Cancel' and 'Save' buttons, with a red circle 8 next to the 'Save' button.

# Adding Accounts

To add an account for transfers, follow the steps below.

To add an external account:

When you link an external account for the first time, Veridian will make two deposits less than \$1 in the external account. You will need to verify those deposit amounts with Veridian before you can transfer money between the external account and your Veridian accounts. Please allow enough time for this process to occur before you need to make your first transfer.

- 1 Click on **Transfers**.
- 2 Click **Classic**.
- 3 Click **+ Add an external account**.
- 4 Choose **Checking** for a checking account and **Savings** for a savings account.
- 5 Fill in the routing number for the external account. (You may need to ask the other financial institution for this number.)
- 6 Fill in the account number.
- 7 Type the account number again to confirm.
- 8 Give the account a nickname.
- 9 Click **Cancel** to cancel or **Save** to continue.
- 10 Once the deposits have been made in the external account, click on **Dashboard**.
- 11 Click **Confirm**.
- 12 Enter the amount of the first deposit.
- 13 Enter the amount of the second deposit.
- 14 Click **Cancel** to cancel or **Confirm** to link the account.