



Mobiloil Credit Union External Transfer Guide

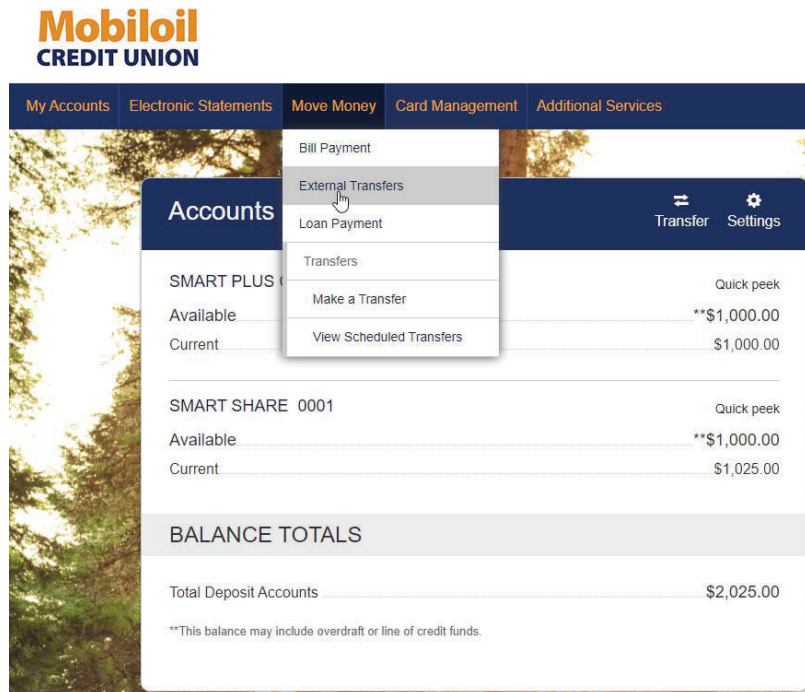
Mobiloil
CREDIT UNION

****Please read before setting up a new external transfer****

Checking or savings transfers to other financial institution accounts OUTSIDE the credit union WILL NOT transfer over to the new system. You will need to reestablish those transfers on the new system.

To set up a new external transfer on the new system, follow the steps below:

Step 1: Select External Transfers from the dropdown under "Move Money."



Step 2: Add external account information, including the routing number and account number. Click "Continue" when done.

External Transfer--Add Account Information

To make a transfer, we will need some information about your other account.

Please have your routing number and account number available.

Here is where you can find these on a check or deposit slip:

123456780

1100012345678

1234

9 Digit Routing Number

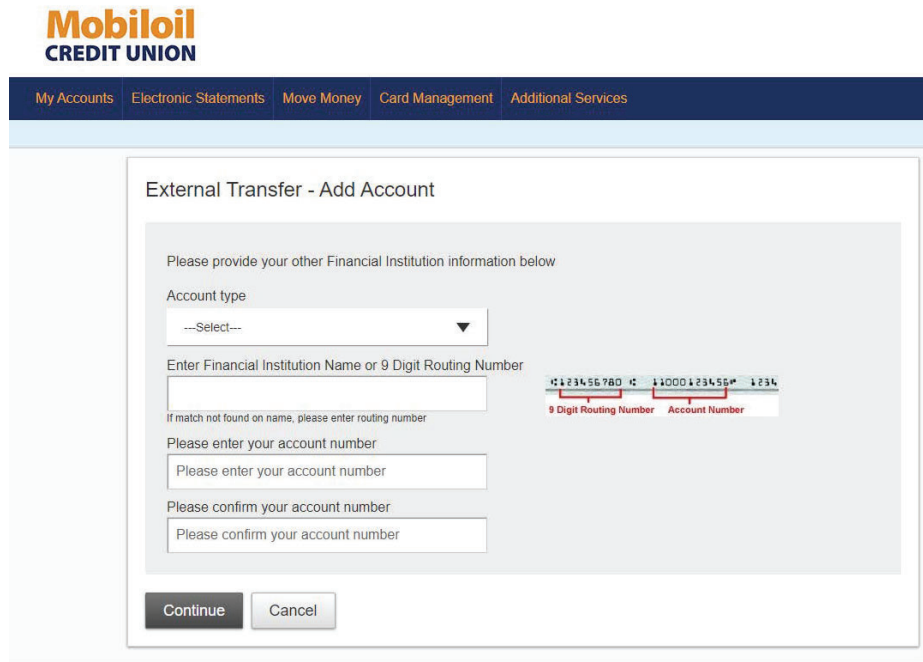
Account Number

Continue

Cancel

Checking, savings, and money market accounts* are available account types for external transfers.

Step 3: You will be prompted to provide the Financial Institution information. Click "Continue" when done.



Mobiloil CREDIT UNION

My Accounts | Electronic Statements | Move Money | Card Management | Additional Services

External Transfer - Add Account

Please provide your other Financial Institution information below

Account type

Enter Financial Institution Name or 9 Digit Routing Number

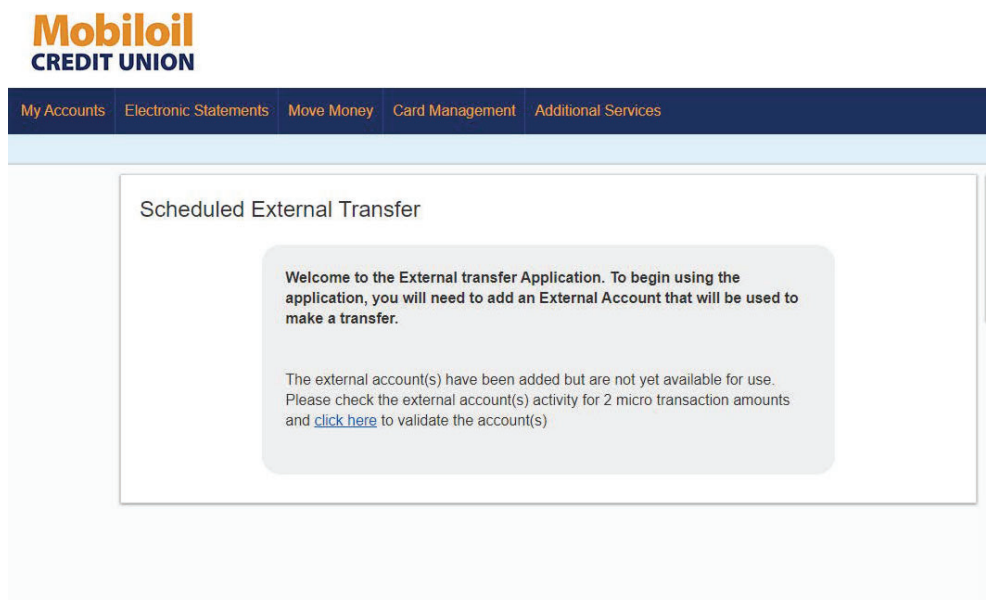
If match not found on name, please enter routing number

Please enter your account number

Please confirm your account number

9 Digit Routing Number Account Number

Step 4: Once the external account is added, you will need to check that account activity for 2 micro transaction amounts placed by Mobiloil Credit Union. Choose the "Click here" link to validate those amounts.



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Scheduled External Transfer

Welcome to the External transfer Application. To begin using the application, you will need to add an External Account that will be used to make a transfer.

The external account(s) have been added but are not yet available for use. Please check the external account(s) activity for 2 micro transaction amounts and [click here](#) to validate the account(s)

***Please note: Micro deposits take 1 - 2 business days to process & appear in your account.**

Step 5: You may either validate the amounts by choosing "Click here" in the previous example, or you may navigate to the main External Transfer tab and select "Manage External Transfers."

Figure 1

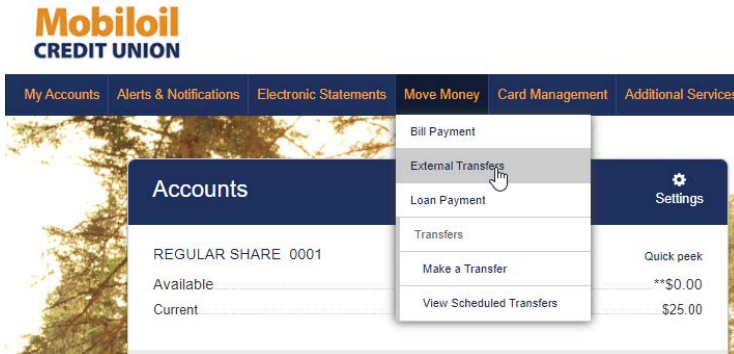
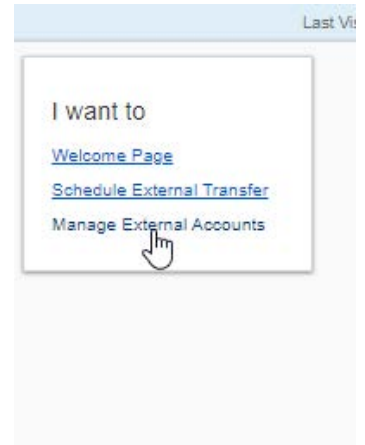
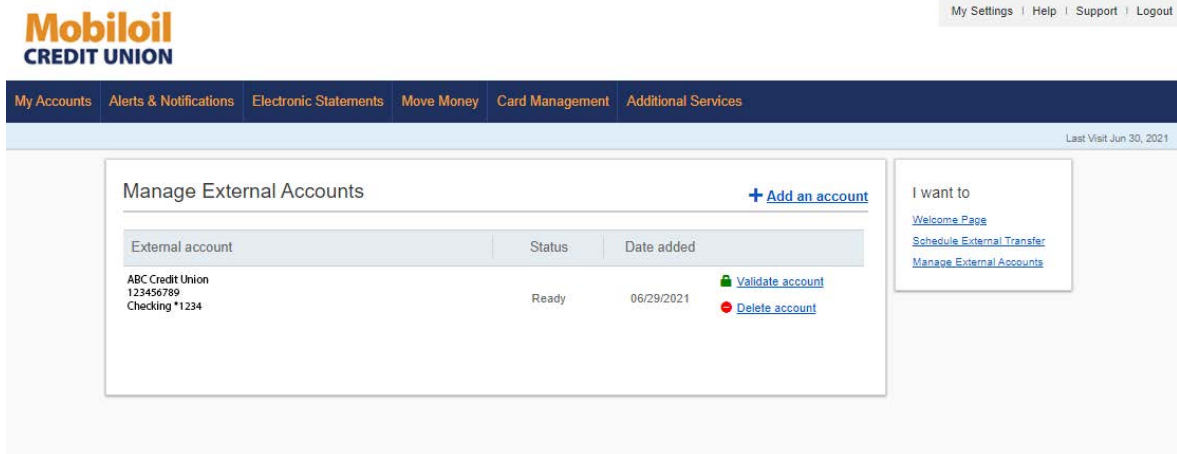


Figure 2



Here, you will see the option to click "Validate Account."



Step 6: Enter the two micro deposit amounts and click "Continue."

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Validate External Account

For account owner protection, and to confirm you are authorized to use this external account, please enter the amounts of the two deposits we made to the account below.

ABC Credit Union
Checking *1234

First deposit amount:

\$0.

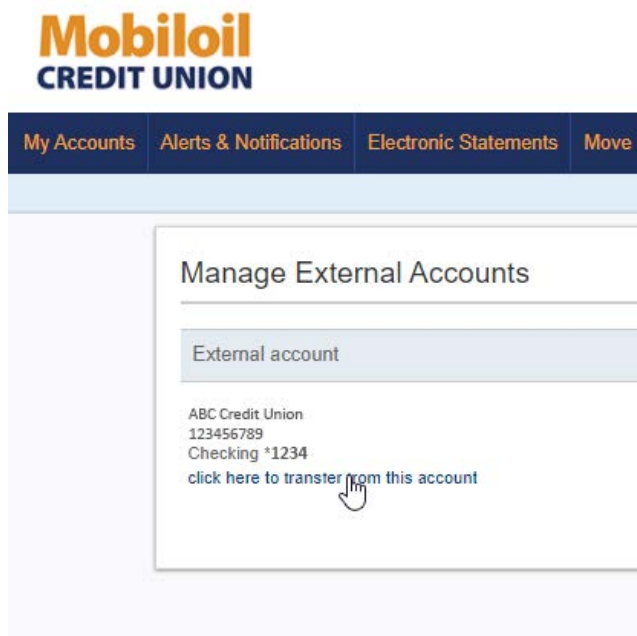
Second deposit amount:

\$0.

Continue

Cancel

Step 7: Your account is now verified! To schedule a transfer with this account, select "Click here to schedule a transfer."



Select the account you would like to transfer from, as well as the account you would like to transfer to. Enter the amount and the desired date for the transfer. You must agree to the Terms & Conditions, and you may click the blue link if you'd like to read them.

Once you are ready, select "Schedule Transfer."

Schedule External Transfer

[+ Add an Account](#)

Transfer from
ABC Credit Union Checking *1234 ▼

Transfer to
--Select-- ▼

Amount [check your limits](#)
\$0.00

Initiate transfer on
 ☐ Repeat

It may take up to 3 business days for transfers to complete.

☐ I agree to the [Terms & Conditions](#)

Schedule TransferCancel

Step 8: You will be shown a final review popup. If you are ready, select "Schedule Transfer."

Schedule External Transfer Review

Transfer from	ABC Credit Union Checking *1234
Transfer to	Regular Share*0001
Transfer amount	\$20.00
Transfer initiation date	07/01/2021

Schedule Transfer

Edit Transfer

Cancel

You will now see a confirmation number. Click "Continue."


Schedule External Transfer Confirmation

Transfer from	ABC Credit Union Checking *1234
Transfer to	Regular Share*0001
Transfer amount	\$20.00
Transfer initiation date	07/01/2021
Confirmation	038848457

Continue

Print

You will now see your Scheduled External Transfer displayed.



My Accounts

Alerts & Notifications


Electronic Statements

Move Money

Card Management

Additional Services

Scheduled External Transfers

From	To	Amount	Transfer On	Repeat	Status
ABC Credit Union Checking *1234	Regular Share*0001	\$20.00	07/01/2021		 Cancel

To cancel a transfer, just click "Cancel", and you will receive a confirmation screen verifying you would like to cancel the selected transfer. Click "Yes" and the transfer will now be cancelled.