

Mobiloil Credit Union External Transfer Guide

Mobiloil
CREDIT UNION

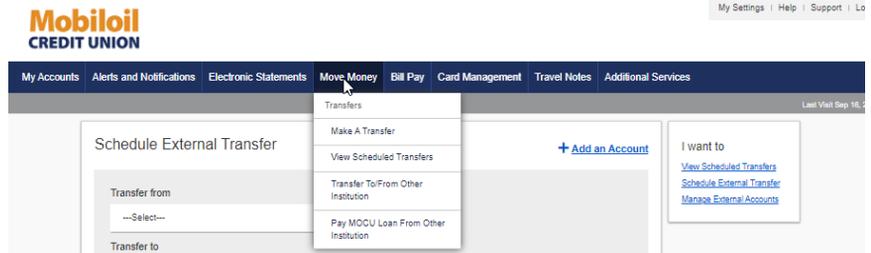
****Please read before setting up a new external transfer****

Checking or savings transfers to other financial institution accounts OUTSIDE the credit union that were set up on the previous online banking platform (before September 2021) WILL NOT transfer over to the new system. You will need to reestablish those transfers on the new system.

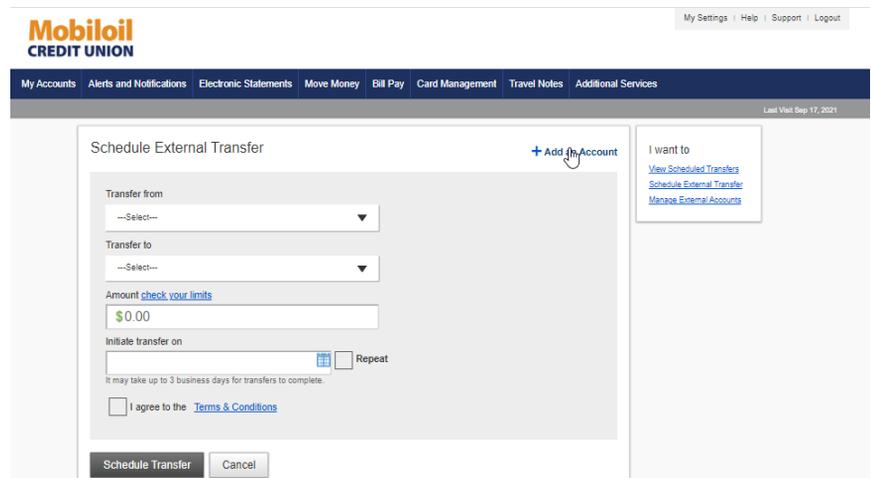
To set up a new external transfer on the new system, follow the steps below:

Step 1: Select "Transfer To/From Other Institutions" from the dropdown under "Move Money."

Once there, select "Schedule External Transfer" from the right-hand side under "I want to."



Step 2: Select "Add an Account" in the upper right-hand corner.



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.

External Transfer - Add Account

Please provide your other Financial Institution information below

Account type
---Select---

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

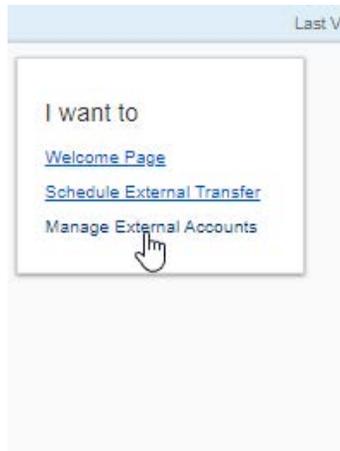
9 Digit Routing Number Account Number

Continue Cancel

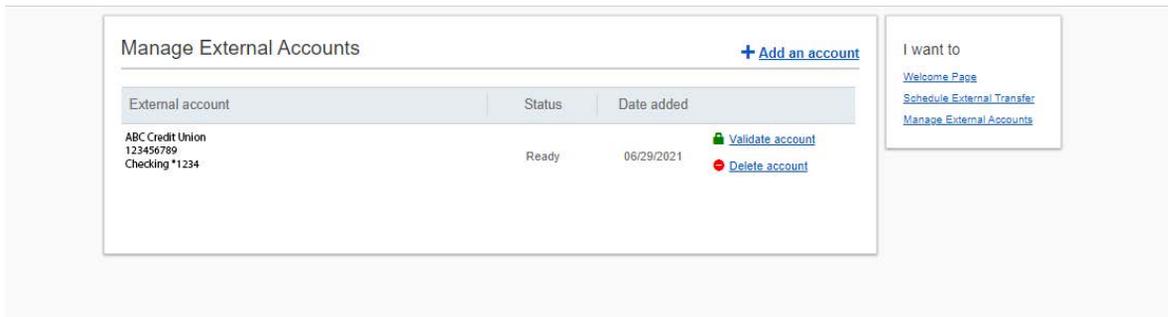
Step 4: Once the external account is added, you will need to check that account activity for two micro transaction amounts placed by Mobiloil Credit Union. Select "Manage External Accounts." The account will show "Pending" until the micro deposits have been made.

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

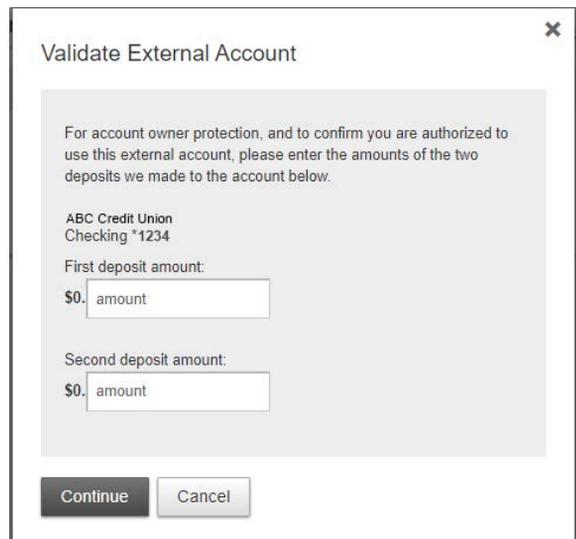
Step 5: You may either validate the amounts by choosing "Click here" in the previous example, or you may navigate to the main "Move Money" tab and select "Transfer To/From Other Institutions" to manage your accounts.



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



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



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

External account

ABC Credit Union
123456789
Checking *1234
[click here to transfer from this account](#)

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](#)

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

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

You will now see your Scheduled External Transfer displayed.

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.