

INTERNAL TRANSFERS QUICK START GUIDE

Easily transfer money to and from
another Northeast CU account.

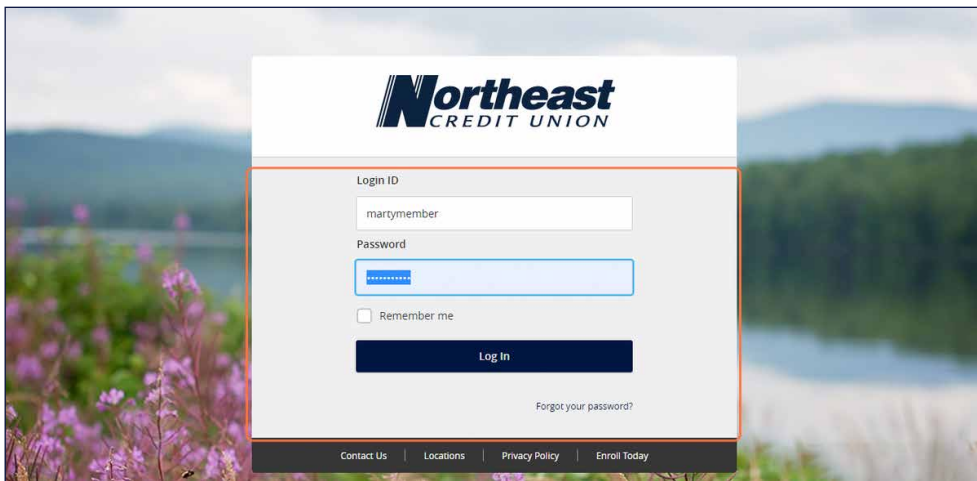
Northeast
CREDIT UNION



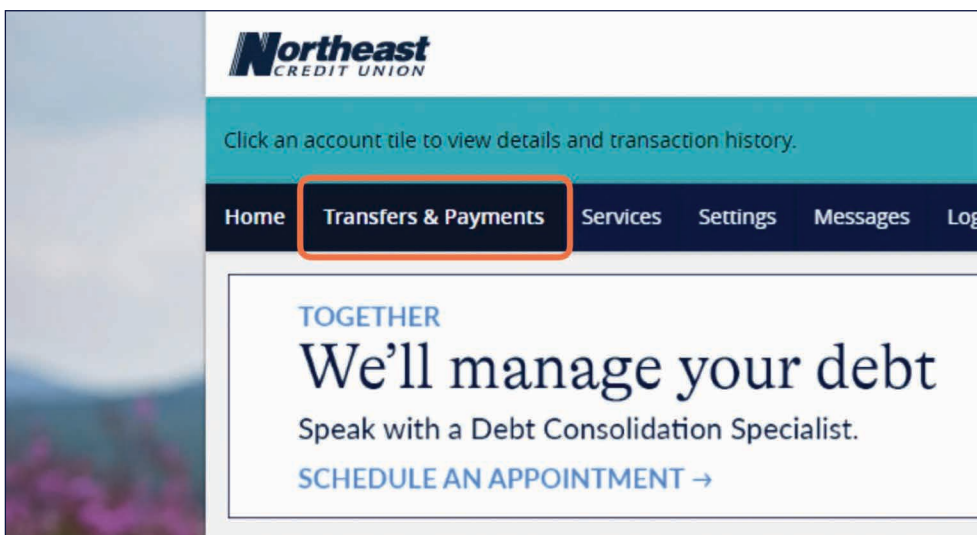
INTERNAL TRANSFERS

Transferring money from one Northeast Credit Union account to another is easy. Just follow these simple steps:

1. Go to necu.org to log in, or open your Northeast Mobile App.
(Note: all photos used in this guide show the desktop view only.)



2. Select “Transfers & Payments” from the main menu.





INTERNAL TRANSFERS

3. Select “**Make a Transfer**” from the Transfers section.

Transfers & Payments

Search page

TRANSFERS

- Make a Transfer**
Transfer money from one account to another.
- Member to Member Transfer**
Send money to another member
- Manage Transactions**
Manage single/recurring transfers. View deposited checks.
- Manage External Accounts**
Connect accounts from other institutions to make transfers or payments

4. Choose the account you'd like to transfer from.

Make a Transfer

Search tran

All Pending P

No history

From Account

- SPECIAL PURPOSE ACCOUNT \$3.00
- MEMBER CHOICE \$8.00
- Paying the Bills \$8.00
- Jon's Savings \$7.00
- REGULAR SAVINGS \$6.00



INTERNAL TRANSFERS

5. Choose the account you'd like to transfer to.

Make a Transfer

From Account
SPECIAL PURPOSE ACCOUNT ██████████ \$3.00

To Account

MEMBER CHOICE ██████████ \$8.00
Paying the Bills ██████████ \$8.00
Jon's Savings ██████████ \$7.00

Search transe

All Pending Proc

No history a

6. Enter the amount you'd like to transfer.

From Account
SPECIAL PURPOSE ACCOUNT ██████████ \$3.00

To Account
MEMBER CHOICE ██████████ \$8.00

Amount
\$ 2.00

- Must be greater than \$0.00

One time transfer

All Pending Proc

No history a



INTERNAL TRANSFERS

7. Choose the frequency you'd like the transfer to occur.

The screenshot shows a form for setting up an internal transfer. The fields are as follows:

- To Account:** A dropdown menu showing "MEMBER CHOICE" with a blurred account name and a balance of "\$8.00".
- Amount:** A text input field with a dollar sign on the left and "2.00" on the right.
- Frequency:** A dropdown menu with "One time transfer" selected. This field is highlighted with a red rectangular border.
- Transfer Date:** A date picker showing "07/11/2022" with a calendar icon to its right.

8. If you'd like there to be an end date to the transfer occurrence, you can choose the date or leave "**Forever**" checked and you can cancel at anytime.

The screenshot shows the "Repeat Duration" section of the form. It includes the following elements:

- A grey bar at the top with the text "processed the following business day."
- The heading "Repeat Duration".
- Two radio button options:
 - The first option is "Forever (Until I Cancel)", which is currently selected (indicated by a red dot).
 - The second option is "Until Date (Set An End Date)", which is currently unselected (indicated by a red square border around the radio button).
- The heading "Memo (optional)" followed by a text input field.



INTERNAL TRANSFERS

9. Select the “Transfer Funds” button.

Repeat Duration

Forever (Until I Cancel)

Until Date (Set An End Date)

End Date

07/15/2022

Memo (optional)

Transfer Funds

10. A confirmation number will pop up. You can either close or select “Manage Transfers” to be directed to the “Activity Center”.

Amount \$2.00

Date 7/11/2022

Memo Funds Transfer via Online

Recurs Every month on the 11th of the month until 7/15/2022

Manage Transfer

Close

Transfer Date

07/11/2022



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