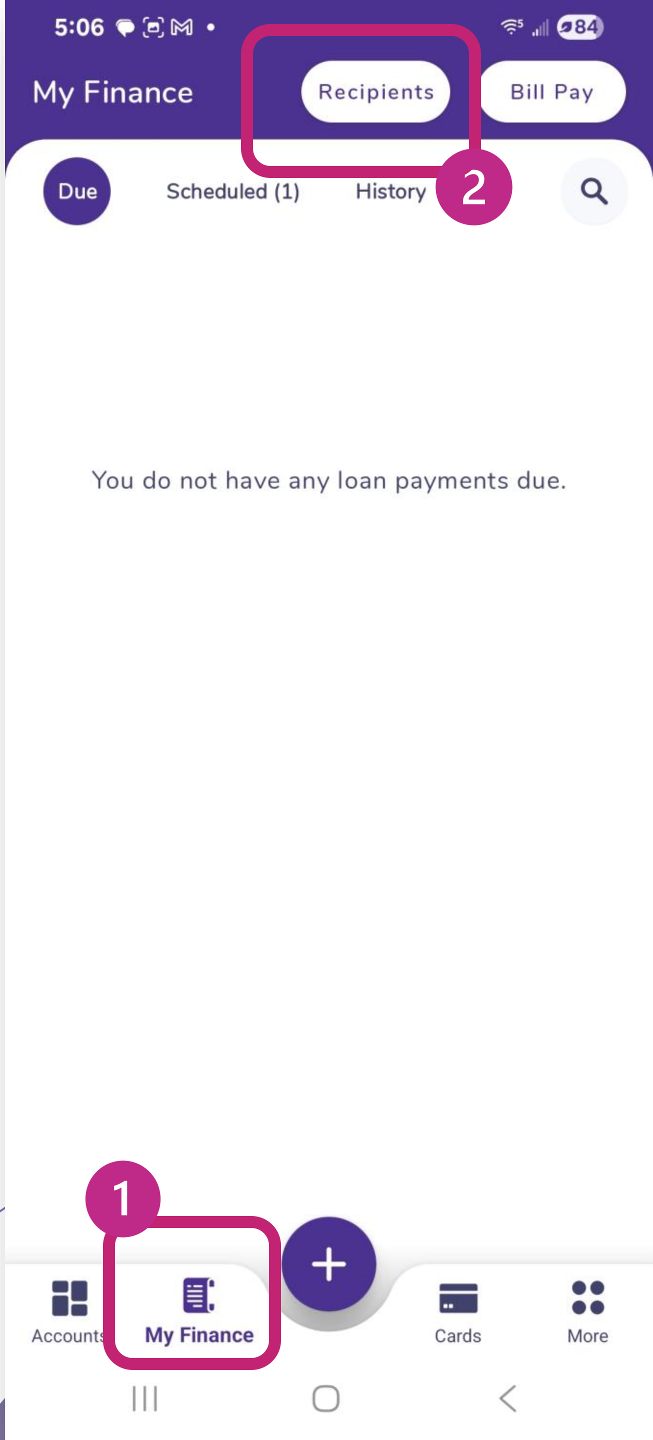
Member to Member Transfers: Adding Contacts & Accepting Invites

SENDING MEMBER:

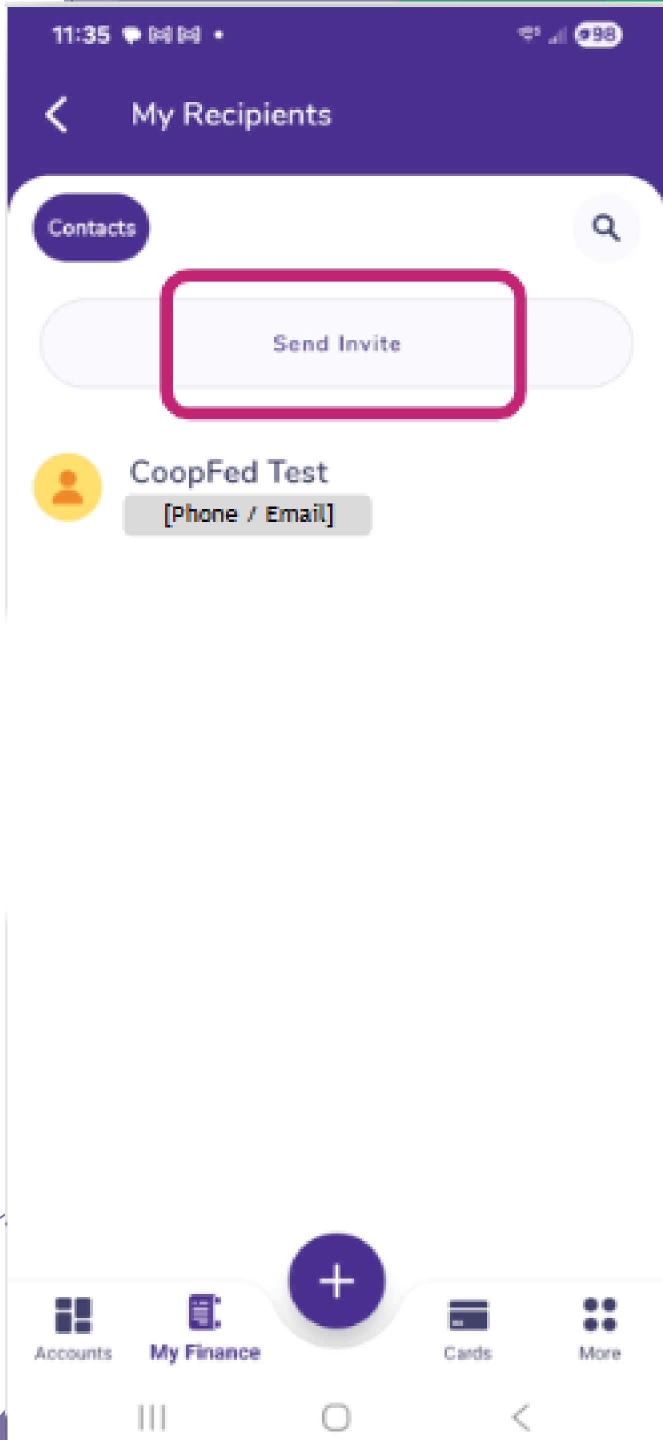
- The first time you send money to another member, you must add them as a Contact by going to **My Finance** > **Recipients**



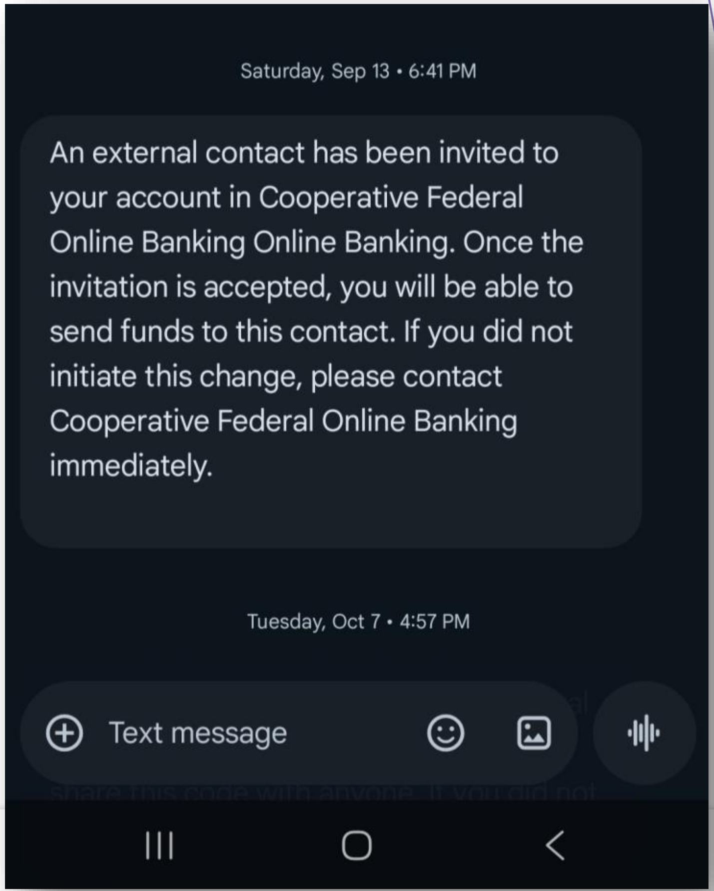
Member to Member Transfers: Adding Contacts & Accepting Invites

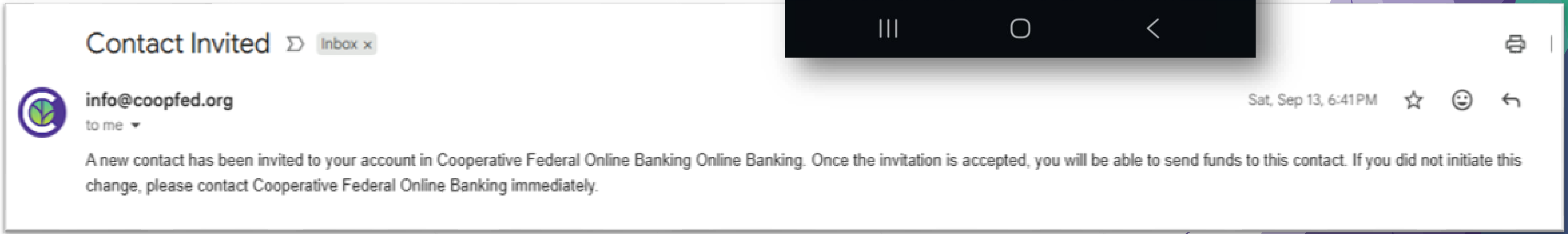
SENDING MEMBER:

- Choose **Send Invite**
  - Enter the person's name and their cell # **or** email
  - They will receive an invitation via the contact information provided (text **or** email)
  - The person will enter their own account info! (Private)



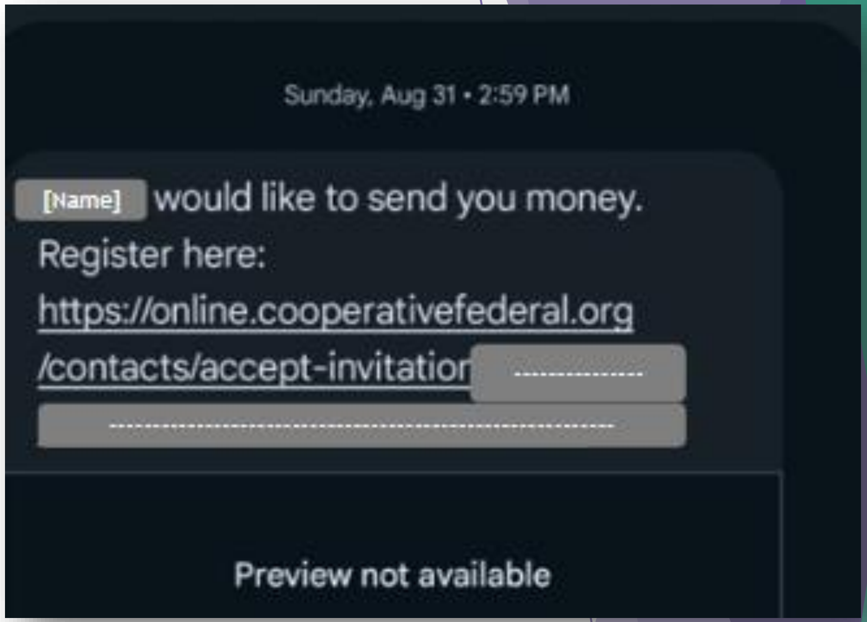
SENDING MEMBER receives a confirmation message of the outgoing notification:

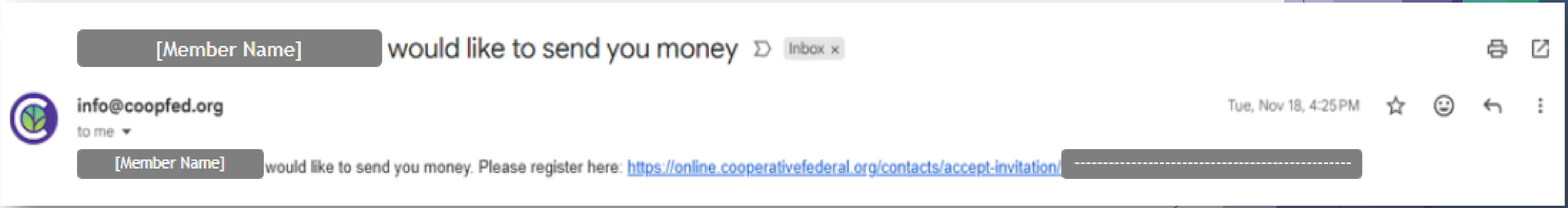




INVITED MEMBER receives a request:

*This message may be filtered into Spam, so if they don't see it, they should do a search for **info@coopfed.org** or **Cooperative Federal.***



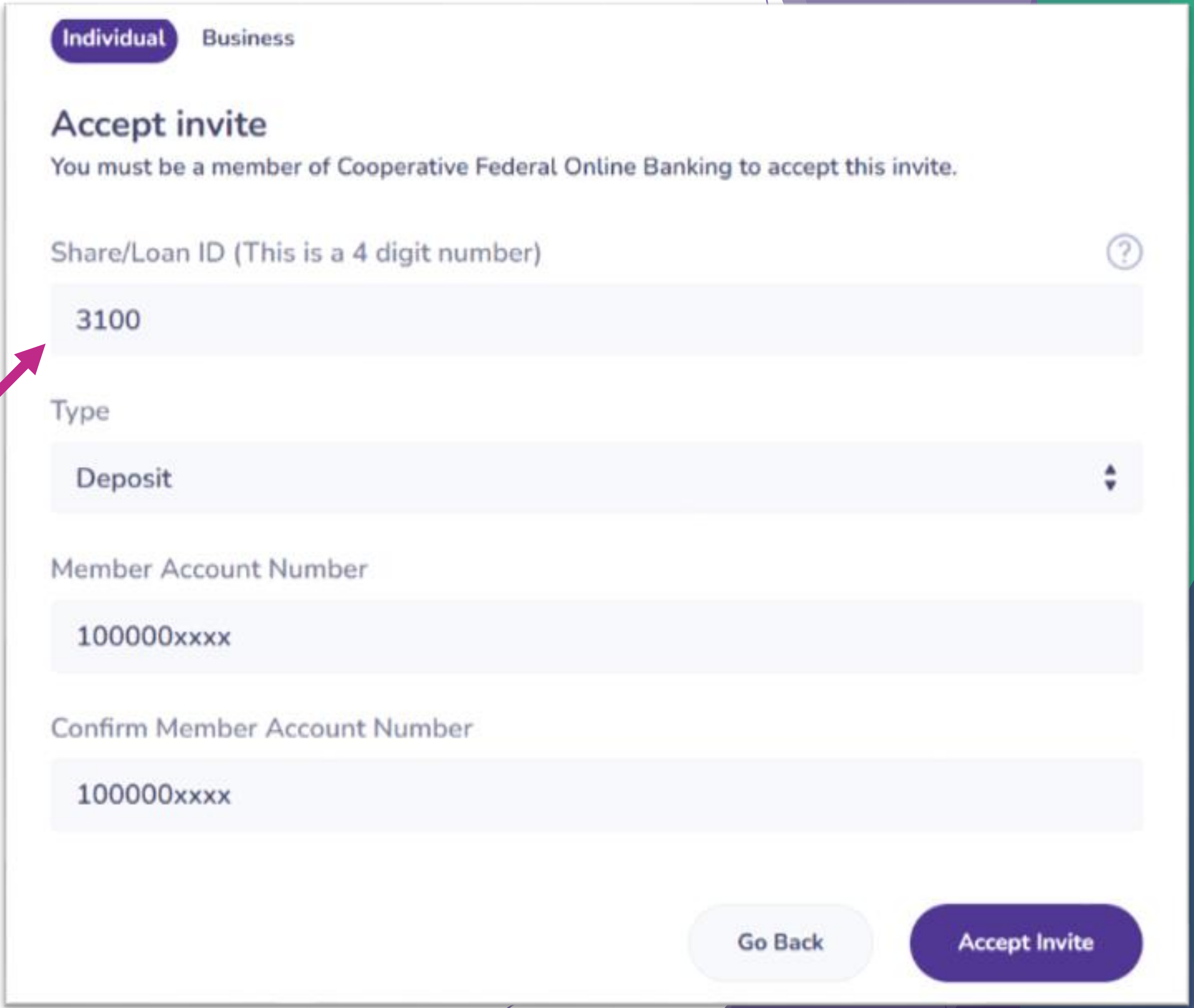


INVITED MEMBER clicks the link and inputs their info:

On the first screen, they just need to type their **name**. The bank name and routing number are pre-filled. Advance to the next screen.

On the next screen, they will need to enter a few bits of information:

(1) Share/Loan ID
This identifies which account or loan, using a ***4-digit*** code. For example, a personal checking account is typically type 3100 (note - this may vary).

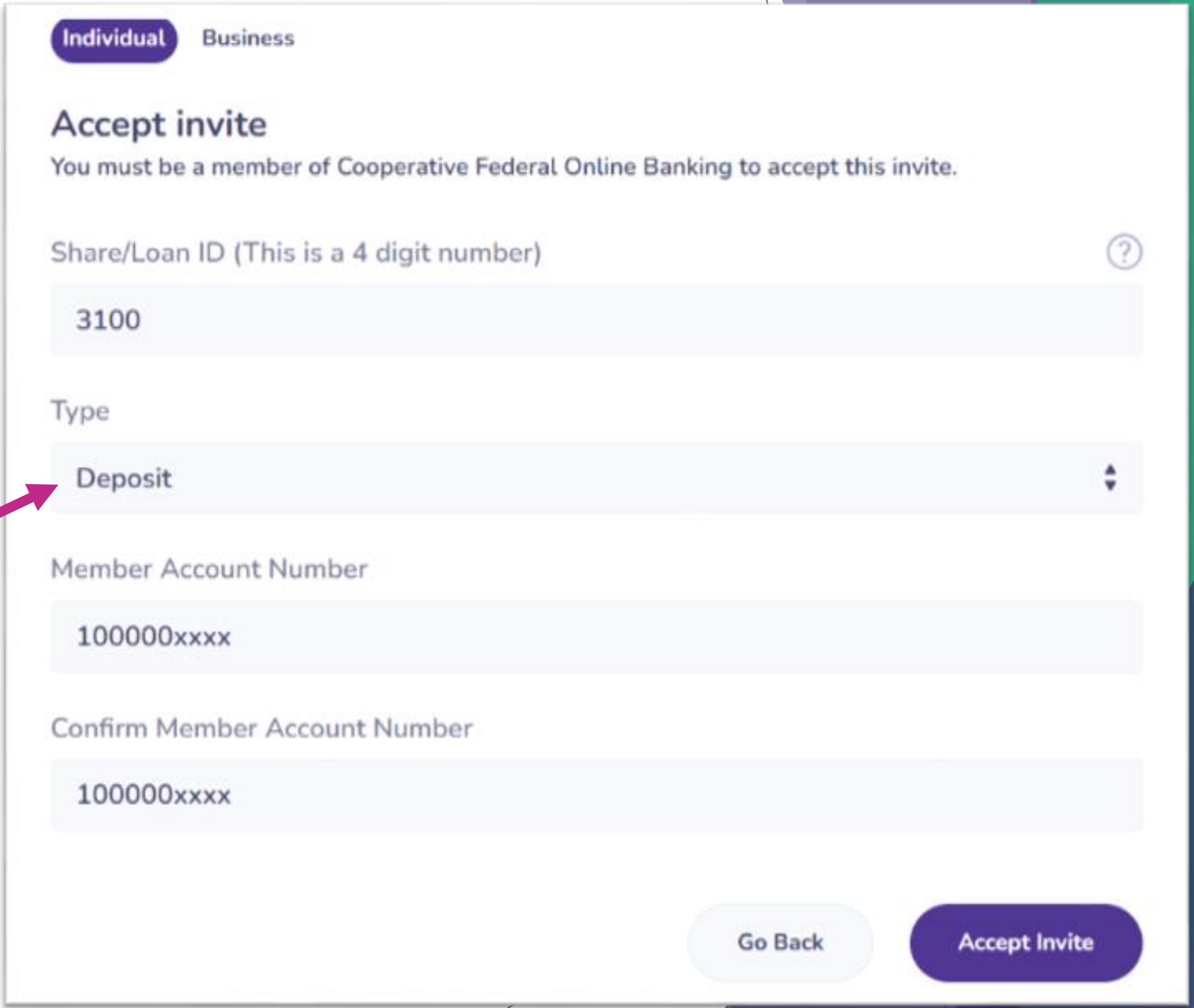


INVITED MEMBER clicks the link and inputs their info:

On the first screen, they just need to type their **name**. The bank name and routing number are pre-filled. Advance to the next screen.

On the next screen, they will need to enter a few bits of information:

(2) Type
Choose Deposit or Loan from the drop down options.



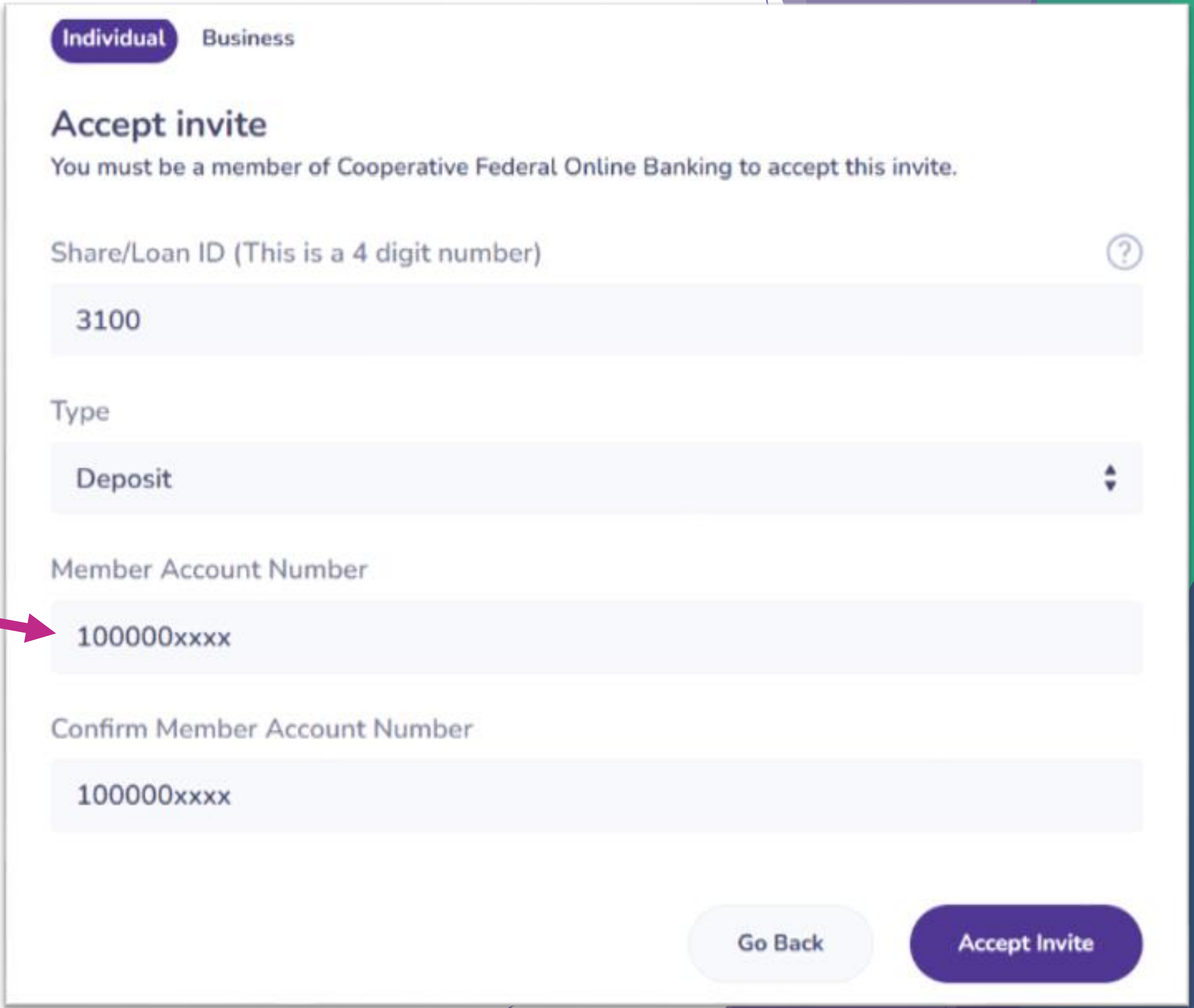
INVITED MEMBER clicks the link and inputs their info:

On the first screen, they just need to type their **name**. The bank name and routing number are pre-filled. Advance to the next screen.

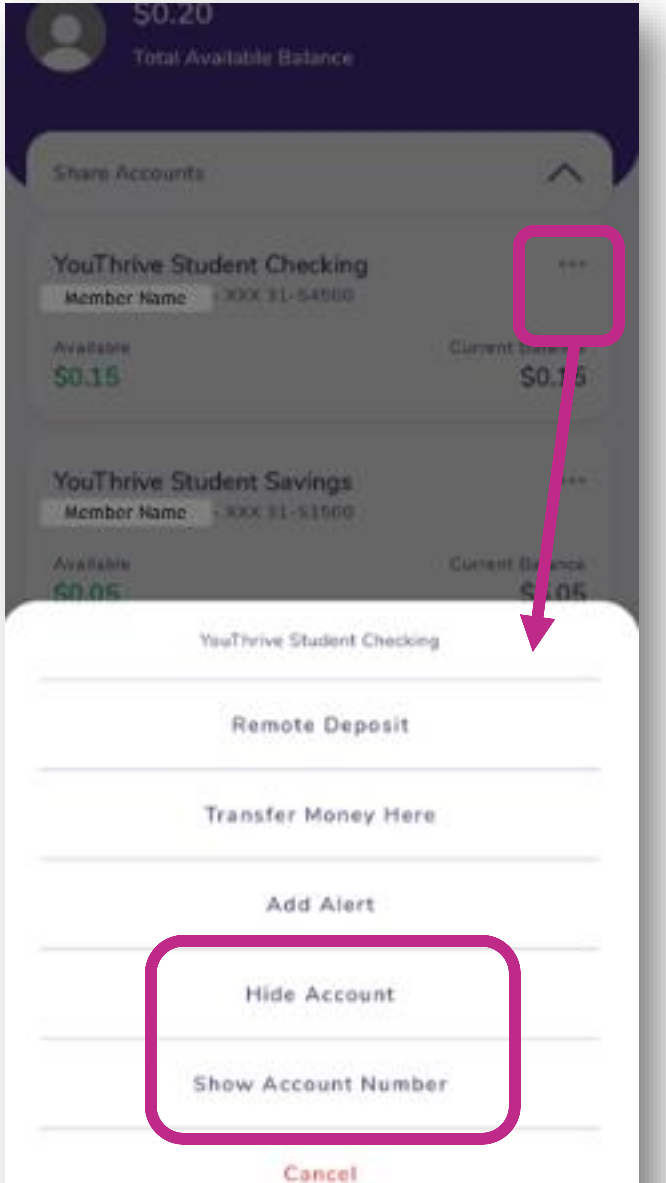
On the next screen, they will need to enter a few bits of information:

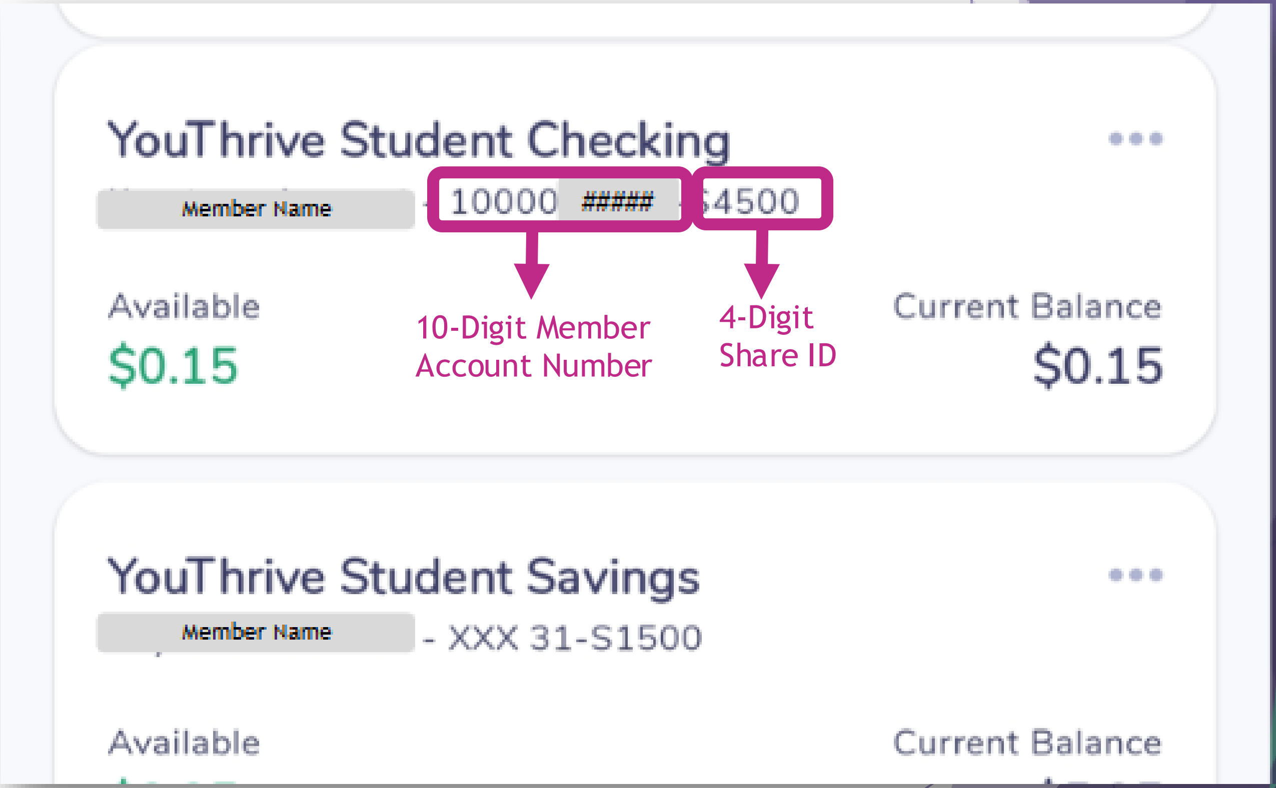
(3) Member Account Number
Enter and confirm the ***10-digit*** Member Account Number.

To submit your information, choose **Accept Invite**.



Members can show or hide their SHARE ID / LOAN ID and their MEMBER ACCOUNT NUMBER in Mobile & Online Banking:

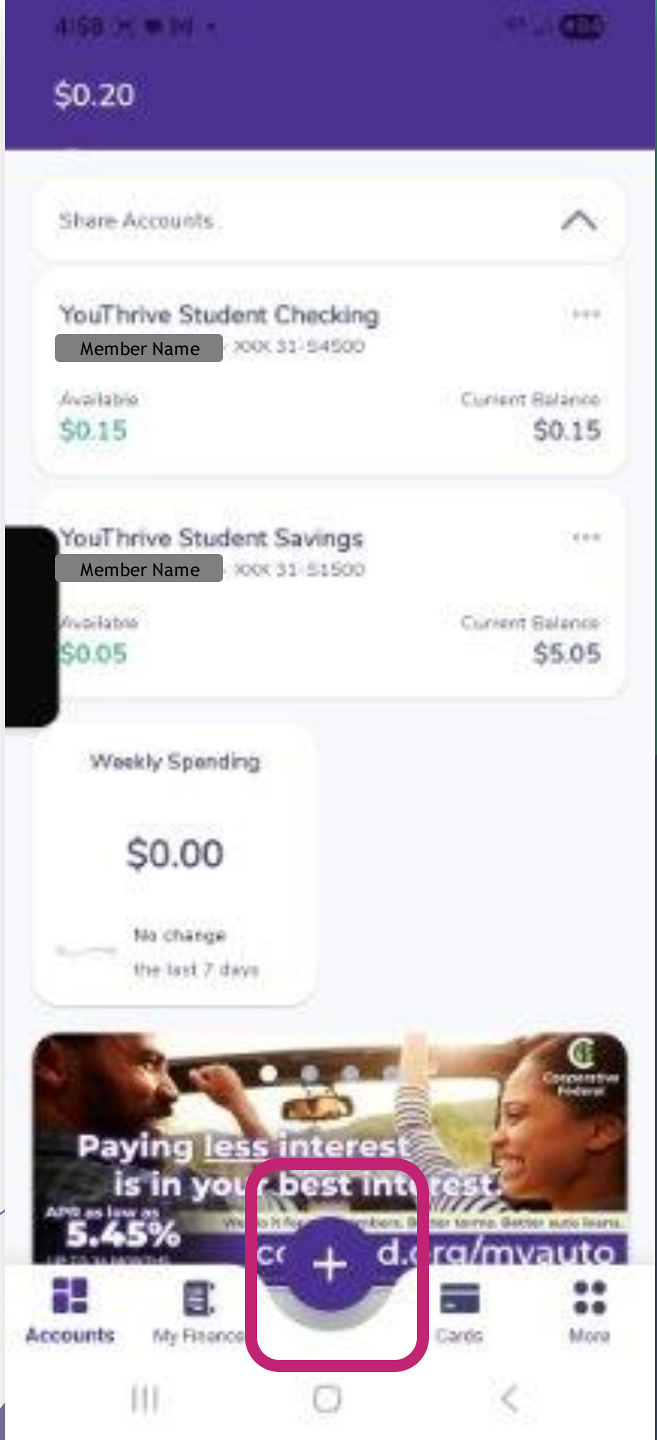




Member to Member Transfers

SENDING MEMBER:

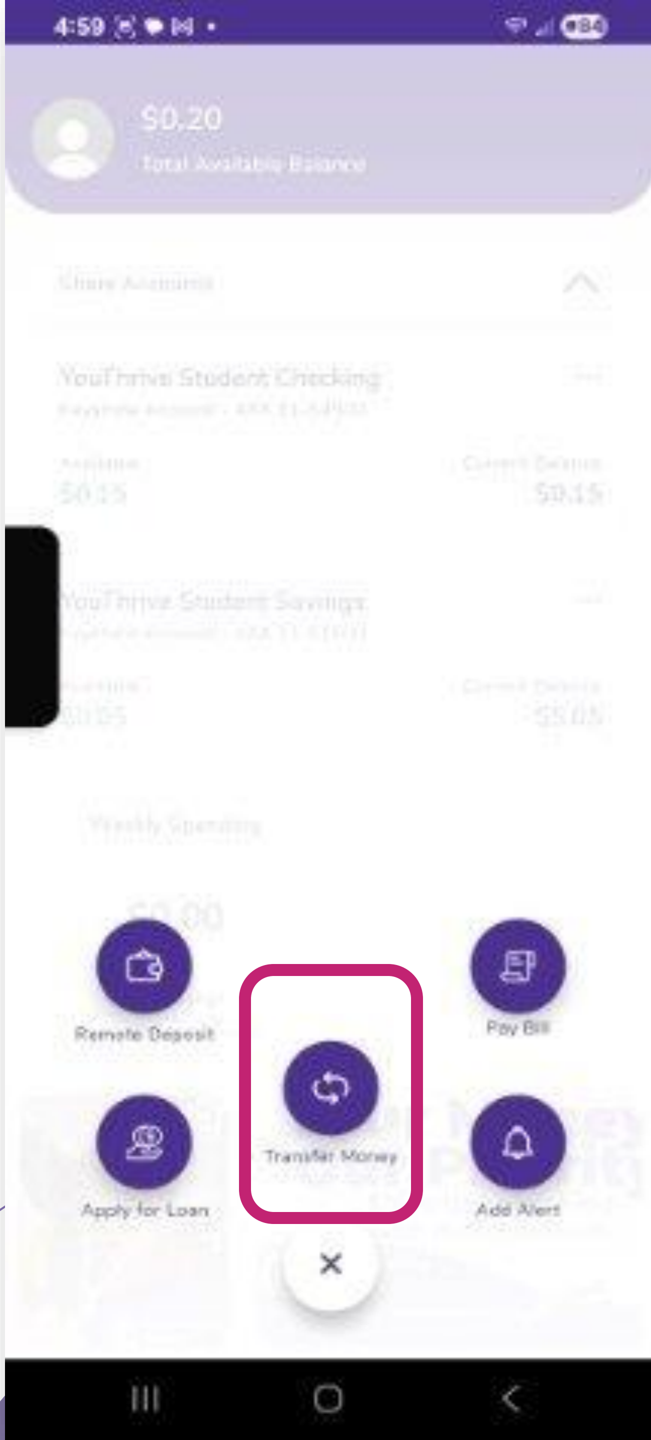
- Once the contact is created, go to the + menu



Member to Member Transfers

SENDING MEMBER:

- Once the contact is created, go to the menu
- and choose "**Transfer Money**"
  - *Or, in web browser: Go to the main menu and choose "Transfer Money"*



Member to Member Transfers

SENDING MEMBER:

- Choose "**Contacts**" ... and the rest of the steps are the same as for transferring between your own accounts!
  - Select "From" Account
  - Select "To" Account (from list of Contact Names)
  - Enter Amount, Memo, etc.
- *Note: There is no automatic notification confirming that the recipient accepted the invitation – the sender needs to log in to check, or else contact the recipient directly.*