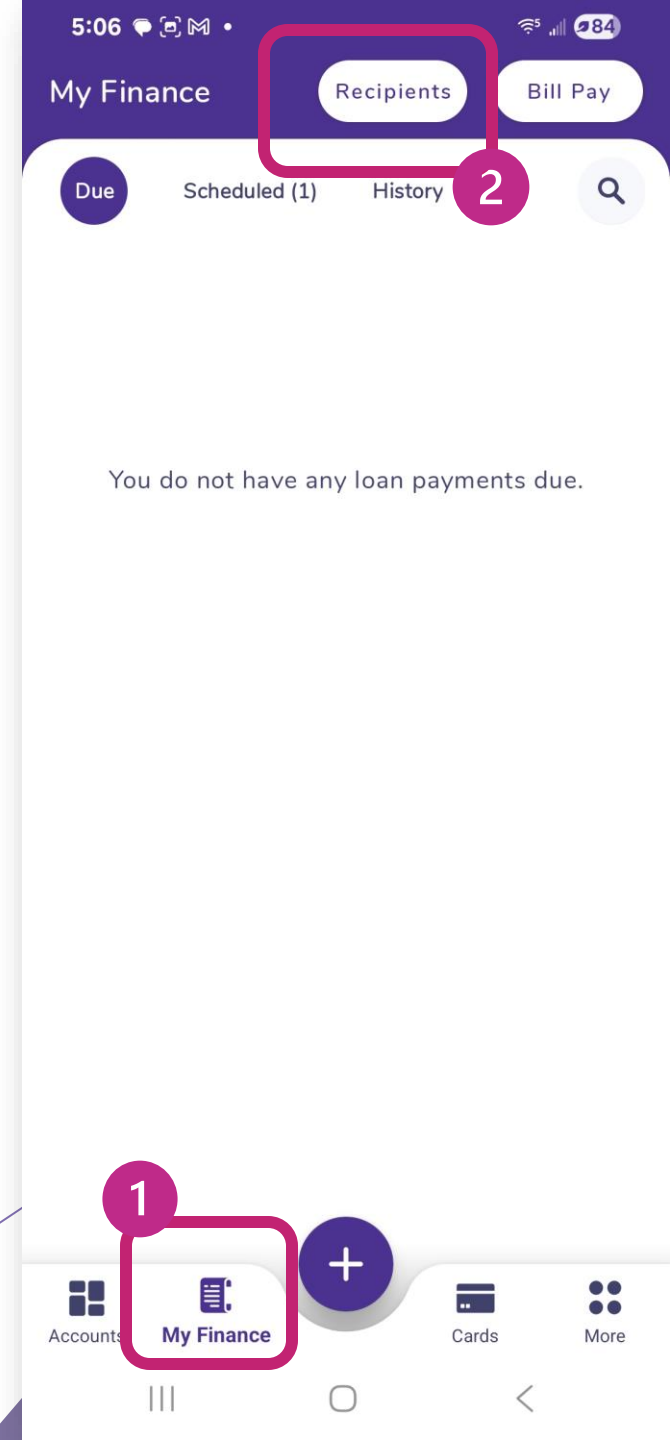


Member to Member Transfers: Adding Contacts & Accepting Invites

SENDING MEMBER:

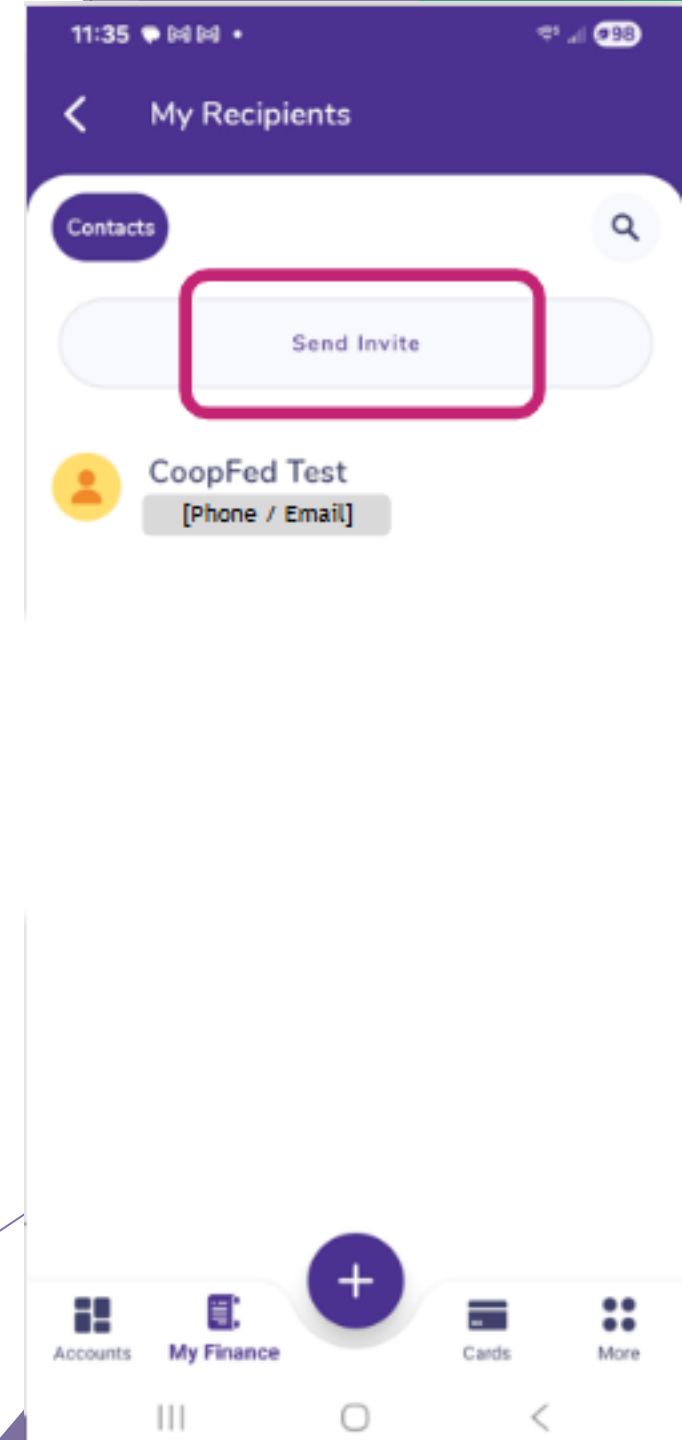
- The first time you send money to another member, you must add them as a Contact by going to **My Finance** > **Recipients**



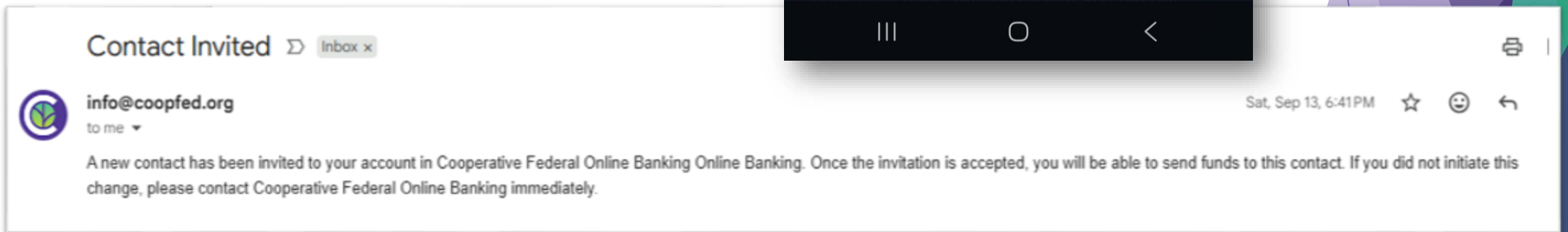
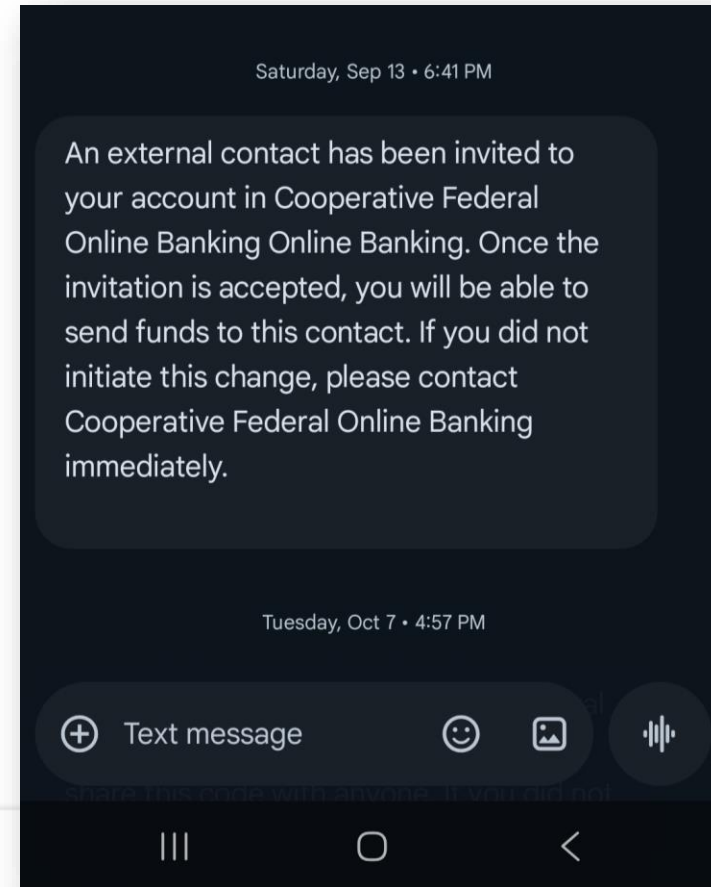
Member to Member Transfers: Adding Contacts & Accepting Invites

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)

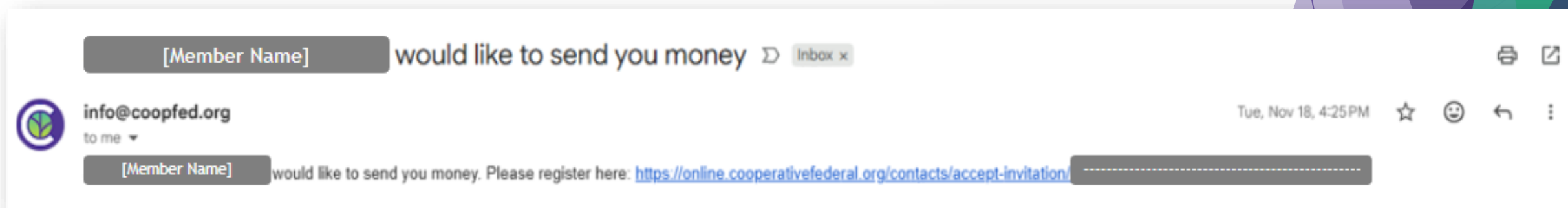
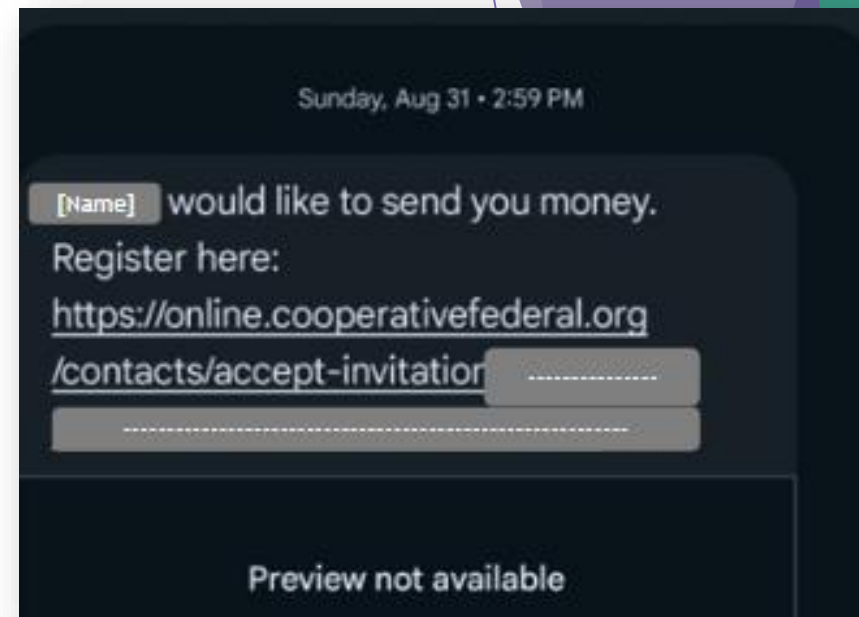


SENDING MEMBER receives a confirmation message of the outgoing notification:



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](https://online.cooperativefederal.org).



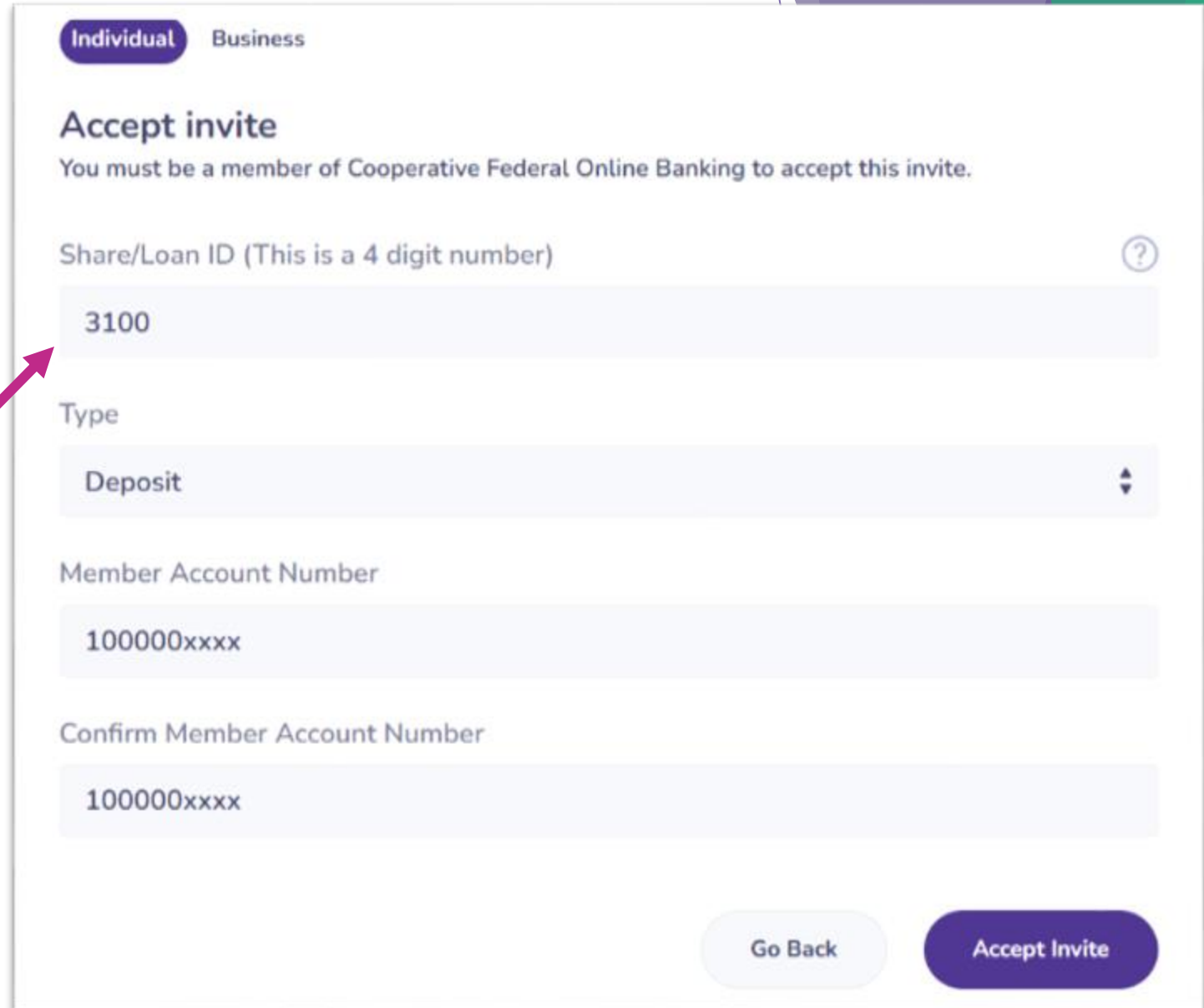
INVITED MEMBER clicks the link and inputs their info:

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).



Individual Business

Accept invite

You must be a member of Cooperative Federal Online Banking to accept this invite.

Share/Loan ID (This is a 4 digit number) ?

3100

Type

Deposit

Member Account Number

100000xxxx

Confirm Member Account Number

100000xxxx

Go Back Accept Invite

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.

Individual Business

Accept invite

You must be a member of Cooperative Federal Online Banking to accept this invite.

Share/Loan ID (This is a 4 digit number) ?

3100

Type

Deposit

Member Account Number

100000xxxx

Confirm Member Account Number

100000xxxx

Go Back Accept Invite

INVITED MEMBER clicks the link and inputs their info:

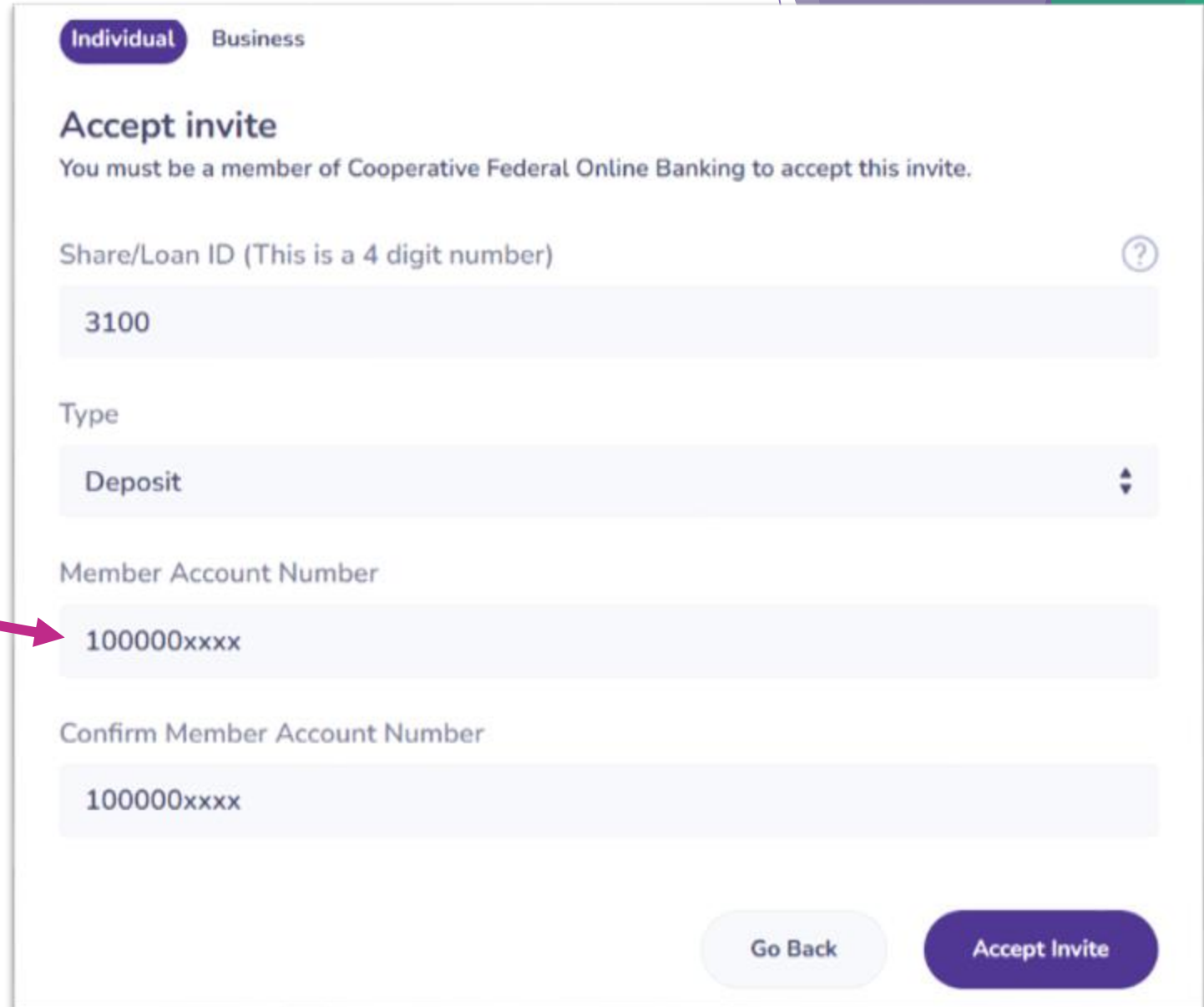
On the first screen, they just need to type their **name**. The bank name and routing number are pre-filled. Advance to the next screen.

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**.



The screenshot shows a web interface for accepting an invite. At the top, there are two tabs: 'Individual' (selected) and 'Business'. Below the tabs is the heading 'Accept invite' and a subtext: 'You must be a member of Cooperative Federal Online Banking to accept this invite.' The form contains four input fields: 'Share/Loan ID (This is a 4 digit number)' with a value of '3100', 'Type' with a dropdown menu showing 'Deposit', 'Member Account Number' with a value of '100000xxxx', and 'Confirm Member Account Number' with a value of '100000xxxx'. A pink arrow points to the 'Member Account Number' field. At the bottom right, there are two buttons: 'Go Back' and 'Accept Invite'.

Individual Business

Accept invite

You must be a member of Cooperative Federal Online Banking to accept this invite.

Share/Loan ID (This is a 4 digit number) ?

3100

Type

Deposit

Member Account Number

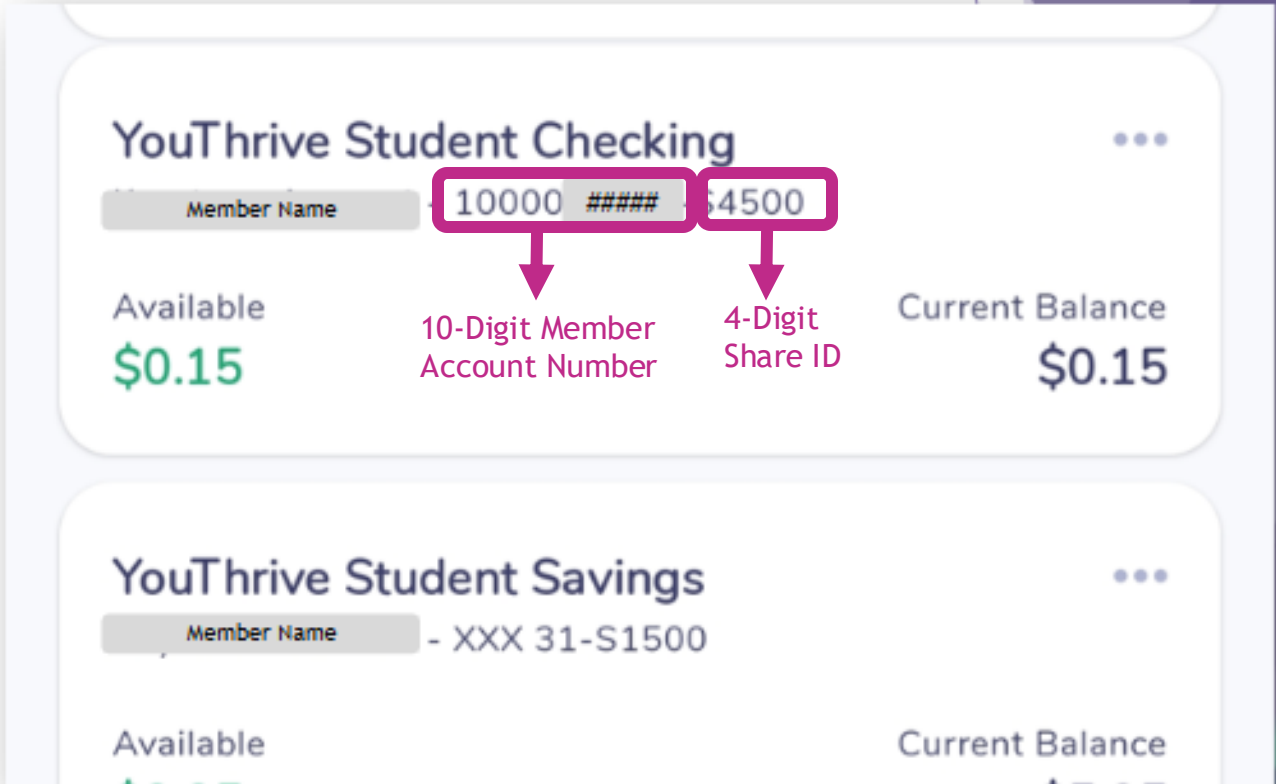
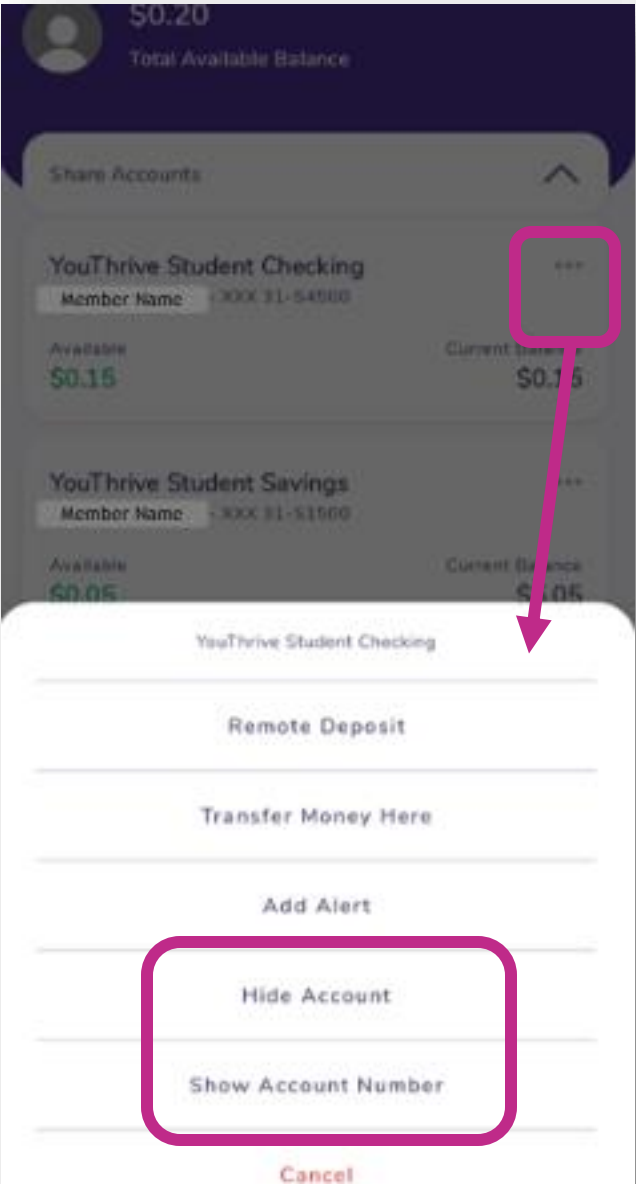
100000xxxx

Confirm Member Account Number

100000xxxx

Go Back Accept Invite

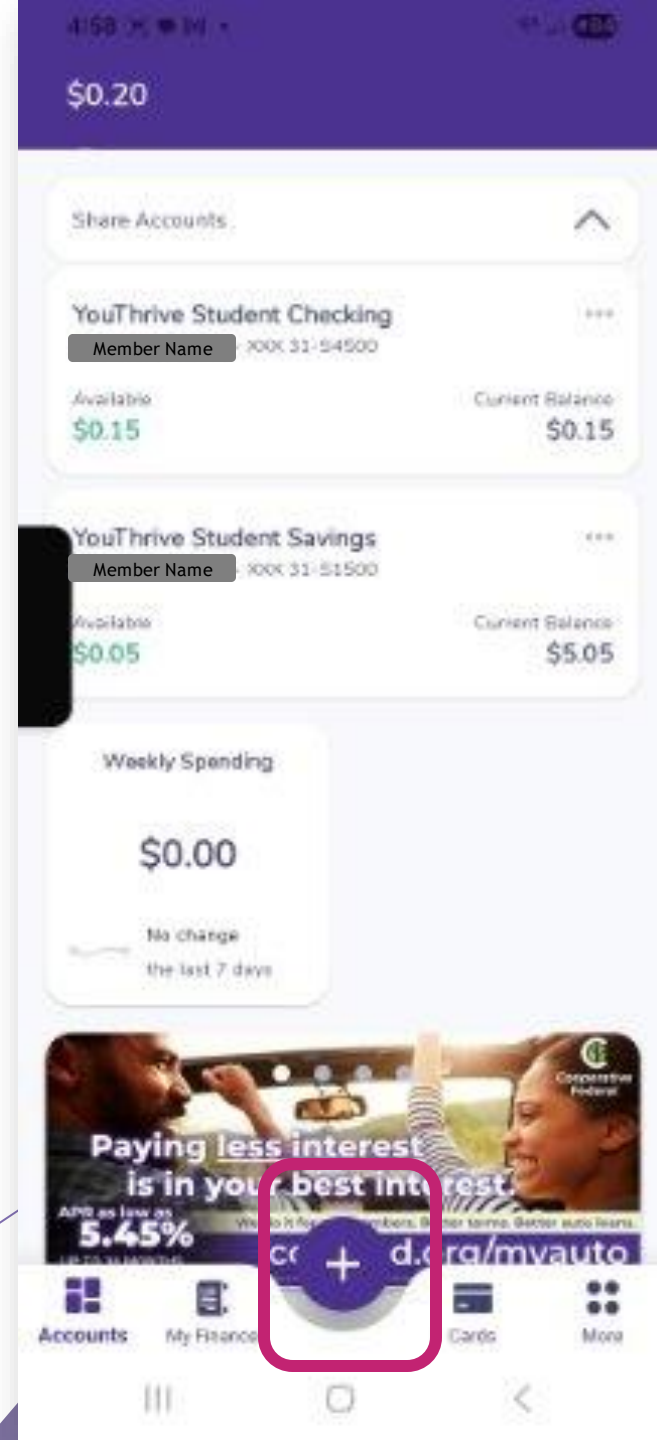
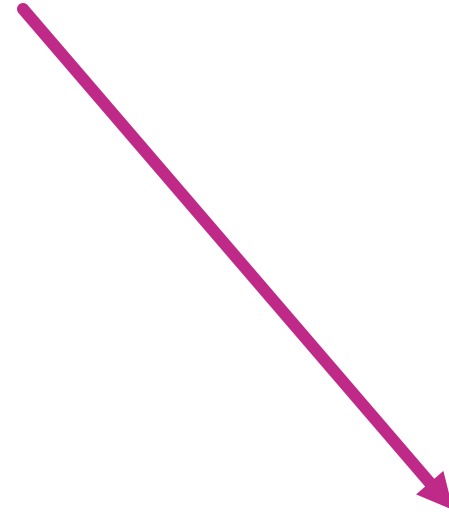
Members can **show or hide** their SHARE ID / LOAN ID and their MEMBER ACCOUNT NUMBER in Mobile & Online Banking:



Member to Member Transfers


SENDING MEMBER:

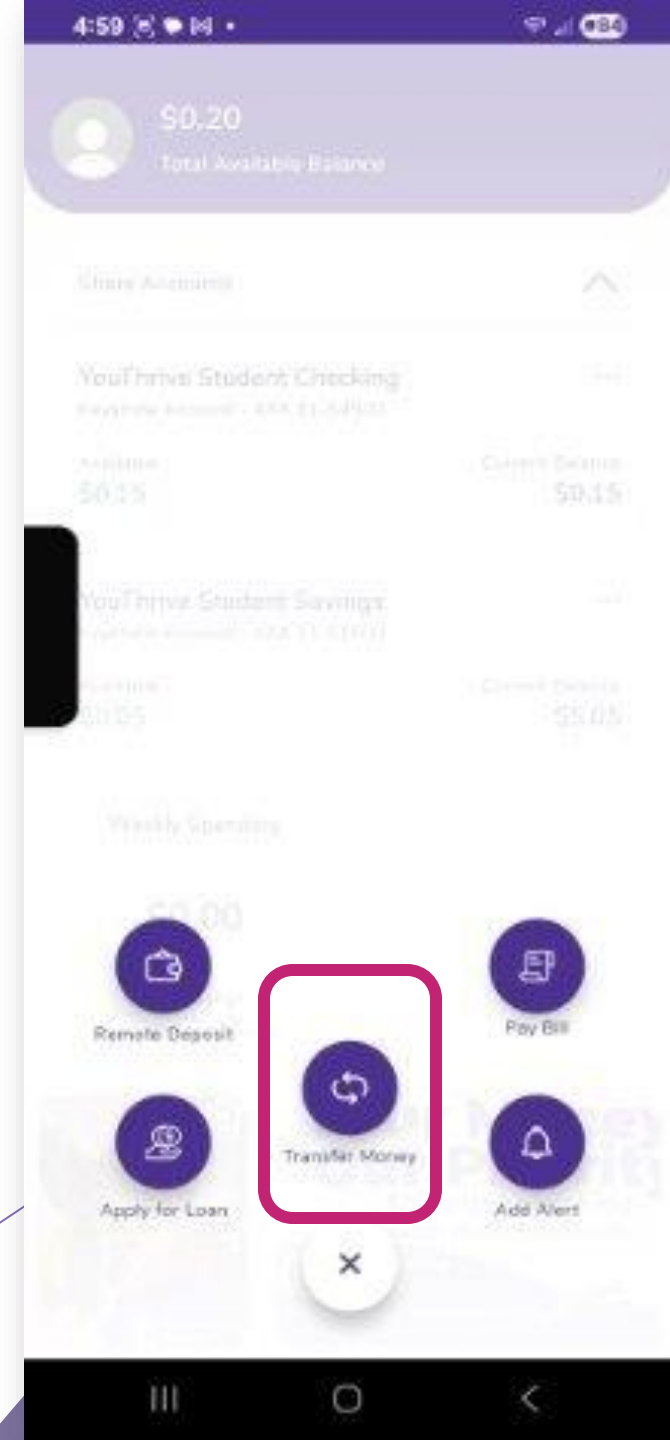
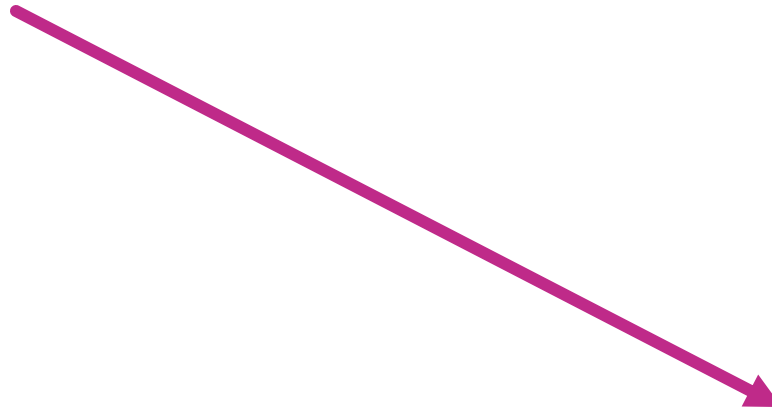
- Once the contact is created, go to the  menu



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.*

