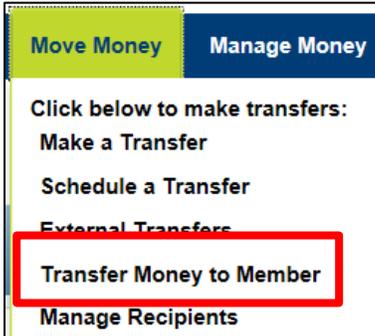


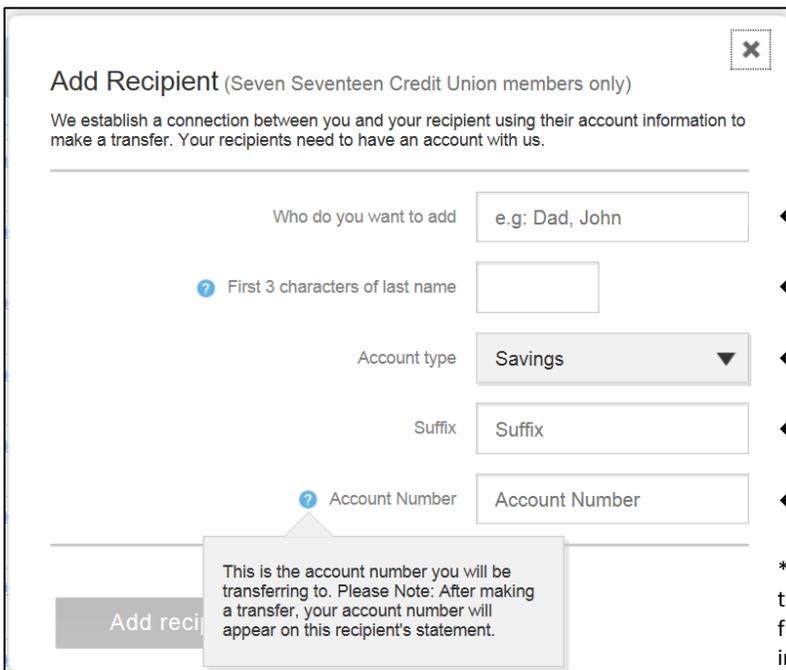
NetWorth24 - Transfer Money To Member

There is a new service in NetWorth24 called **Transfer Money To Member** that will allow you to transfer money to any SSCU member as long as you have some basic information. It is important to note that when you use this service, **your account number will appear on the recipient's statement**. This new service can be found under the Move Money tab:



The screenshot shows a navigation menu with two tabs: 'Move Money' (highlighted in green) and 'Manage Money' (highlighted in blue). Below the tabs, there is a list of options: 'Click below to make transfers:', 'Make a Transfer', 'Schedule a Transfer', 'External Transfers', 'Transfer Money to Member' (highlighted with a red box), and 'Manage Recipients'.

When you click on this for the first time, you will receive a pop-up box to add a recipient. You will need to know the following information to add a member:



The screenshot shows a pop-up window titled 'Add Recipient (Seven Seventeen Credit Union members only)'. It contains the following fields and labels:

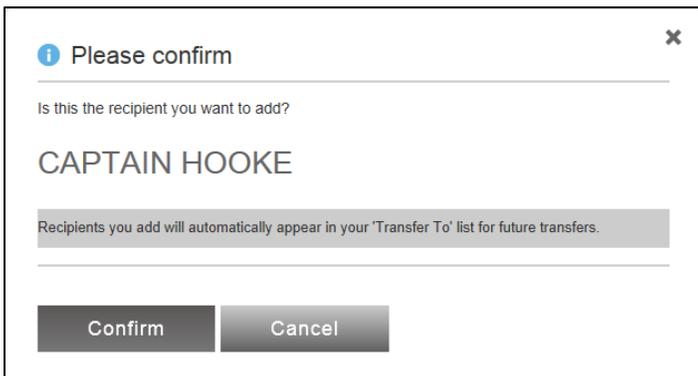
- 'Who do you want to add' with the example text 'e.g: Dad, John'
- 'First 3 characters of last name' with a question mark icon and an empty input field
- 'Account type' with a dropdown menu set to 'Savings'
- 'Suffix' with an empty input field
- 'Account Number' with a question mark icon and an empty input field

At the bottom left, there is an 'Add recipient' button. A tooltip points to the 'Account Number' field with the text: 'This is the account number you will be transferring to. Please Note: After making a transfer, your account number will appear on this recipient's statement.'

- ← Nickname of member you are adding*
- ← First three characters of members last name
- ← The account type (savings or checking)
- ← The suffix of that account type
- ← The member's account number

*When adding a nickname – you may also want to include the account and suffix that you will be transferring to for future reference. If you don't include it here, the account information is not displayed after the recipient is set up.

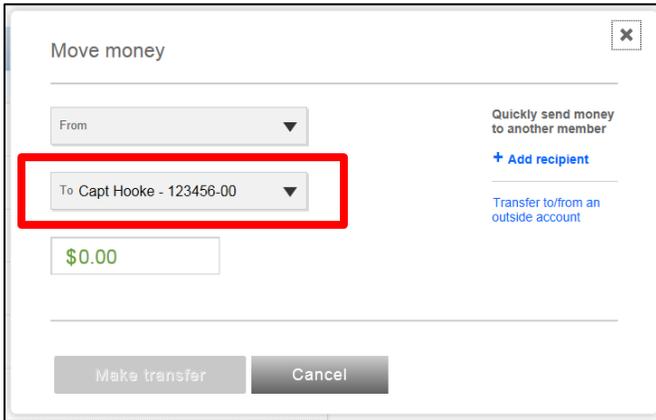
When you click on "Add recipient" button at the bottom, you will get a confirmation screen:



The screenshot shows a confirmation dialog box titled 'Please confirm'. It asks 'Is this the recipient you want to add?' and displays the name 'CAPTAIN HOOKE'. Below the name, there is a grey bar with the text: 'Recipients you add will automatically appear in your 'Transfer To' list for future transfers.' At the bottom, there are two buttons: 'Confirm' and 'Cancel'.

Be sure this is the member you are trying to add and then click "Confirm" to add the member to your transfer list.

After clicking confirm – you will be taken to the “Move Money” window – and the member you just added will be pre-filled in the “transfer to” drop-down box:



Move money

From

To Capt Hooke - 123456-00

\$0.00

Make transfer Cancel

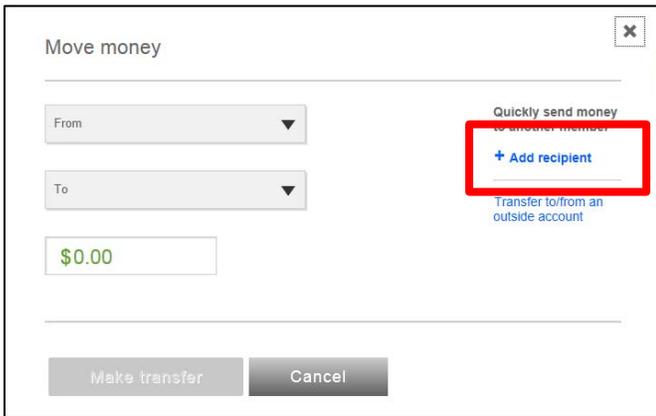
Quickly send money to another member

+ Add recipient

Transfer to/from an outside account

Just choose the account you want to transfer from in the drop-down, enter your dollar amount and click “Make Transfer” to move money to this member’s account.

After you have added a recipient and you click on the **Transfer Money To Member** link, your window will look like this:



Move money

From

To

\$0.00

Make transfer Cancel

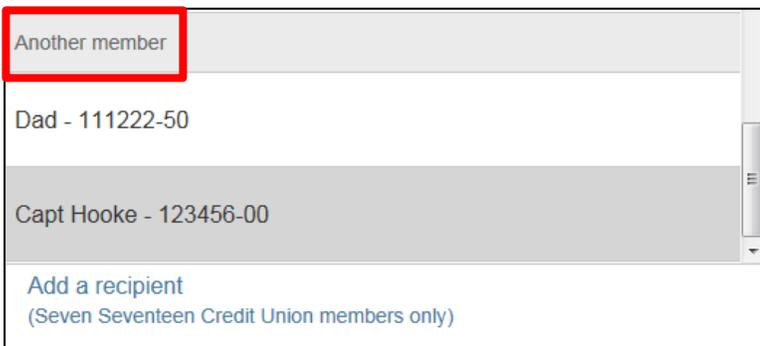
Quickly send money to another member

+ Add recipient

Transfer to/from an outside account

To add another member, click on “Add recipient” (above). This will take you back through the flow of adding a member.

To make a transfer TO the member in the future, choose the TO drop-down box and scroll to the bottom of your own account list to find the section labeled “Another member”:



Another member

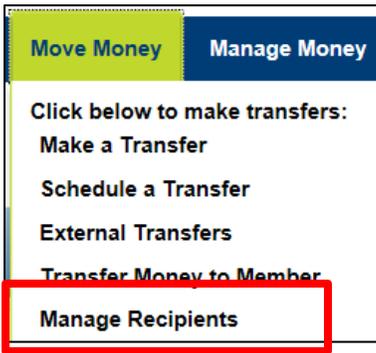
Dad - 111222-50

Capt Hooke - 123456-00

Add a recipient
(Seven Seventeen Credit Union members only)

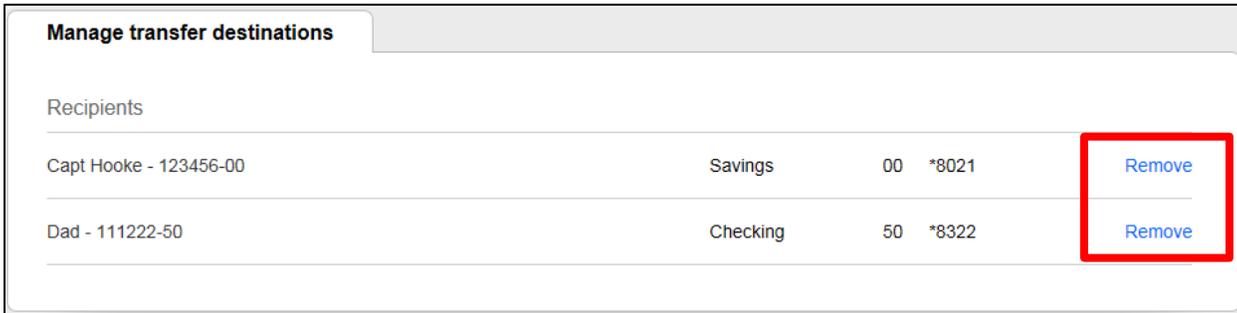
Here you can choose any of the members you have added – or you can click here to Add a recipient (member) as well.

If you no longer wish to have a member appear in this list, click on **Manage Recipients** under the Move Money tab:



The screenshot shows a menu with two tabs: 'Move Money' (highlighted in green) and 'Manage Money' (highlighted in blue). Below the tabs, the text 'Click below to make transfers:' is followed by a list of options: 'Make a Transfer', 'Schedule a Transfer', 'External Transfers', 'Transfer Money to Member', and 'Manage Recipients'. The 'Manage Recipients' option is highlighted with a red rectangular box.

This will allow you to remove members from your list.



The screenshot shows a page titled 'Manage transfer destinations'. Under the heading 'Recipients', there is a table with two rows of recipient information. Each row has a 'Remove' button to its right, which is highlighted with a red rectangular box.

Manage transfer destinations				
Recipients				
Capt Hooke - 123456-00	Savings	00	*8021	Remove
Dad - 111222-50	Checking	50	*8322	Remove

At this time, you cannot edit the existing recipients – so if you want to change the nickname or the account/suffix you are transferring to, you will need to delete the recipient and add them back through the “Add Recipient” link.