

How to Set up an Automatic Payment or Transfer in Online Banking

Log in to your Online Banking and click on Account Access, then Transfer Funds. You can choose to make a one time transfer or schedule transfers. Use the drop down boxes to set the from, to, and amount. For Scheduled Transfers, you will also need to select the date, frequency and number of transfers.

Loan Payments (except mortgage payments) can be scheduled using Online Banking.

The screenshot shows the online banking interface with four main tabs: Overview, Account Access, Bill Payer, and Self Service. Below these tabs is a navigation bar with links for Account Summary, Transfer Funds, Scheduled Transfers, and Transfer History. The 'Transfer Funds' section is active, showing two panels: 'Immediate' and 'Scheduled'.

Immediate Transfer Panel:

- FROM: Not Set (dropdown)
- TO: Not Set (dropdown)
- Amount: [text input]
- OK button

Scheduled Transfer Panel:

- FROM: CHECKING -- Checking (dropdown)
- TO: LINE OF CRED -- Loan (dropdown)
- Amount: [text input]
- Next Date: [date input] / [date input] / [date input] (with calendar icon)
- Frequency: Monthly (dropdown)
- Number of: [text input]
- Next Transfer Date Year: [text input]
- OK button

If you need to make a payment or transfer outside of the Credit Union, check out our Bill Payer service. You can pay bills and also make person to person payments with Popmoney!