

WECU SYSTEM UPGRADE: How To...

Create & Edit Scheduled Transfers

Making a Transfer Within the Same Account:

- 1 From Quick Links, click **Make a Transfer**.
- 2 Select **To My Accounts** and fill out the From/To account information and the transfer amount.
- 3 Change the Scheduling Option if the transfer needs to be recurring or future dated.
- 4 Add a Description to the transfer if necessary.
- 5 Click **Submit**.
- 6 Review the transfer and click **Confirm**.

Editing a Scheduled Transfer:

- 1 Click the **Make a Transfer** quick link, or under the Transfers button, click **Make a Transfer**.
- 2 In Scheduled Transfers, click on the **pencil icon** next to the transfer needing to be edited.
- 3 Make the necessary changes, adding a description if needed, and click **Submit**.
- 4 Review the transfer and click **Confirm**.

Deleting a Scheduled Transfer:

- 1 Click the **Make a Transfer** quick link, or under the Transfers button, click **Make a Transfer**.
- 2 In Scheduled Transfers, click on the **trashcan icon** next to the transfer needing to be deleted.