



# Self-Service Walkthrough

Helpful tips for your everyday  
digital banking needs.

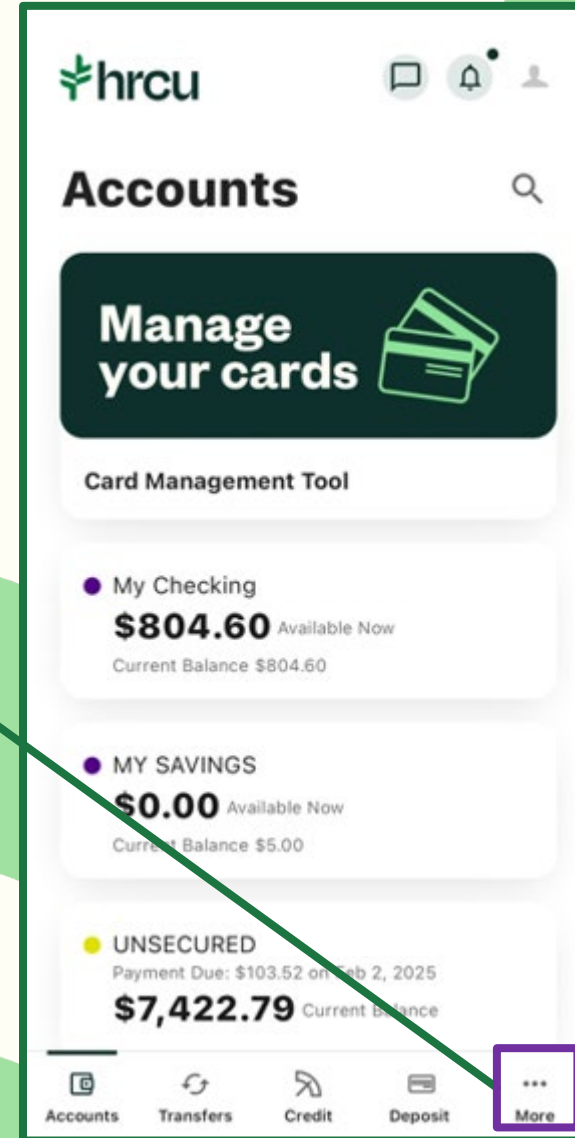




# Setting Up Transfers



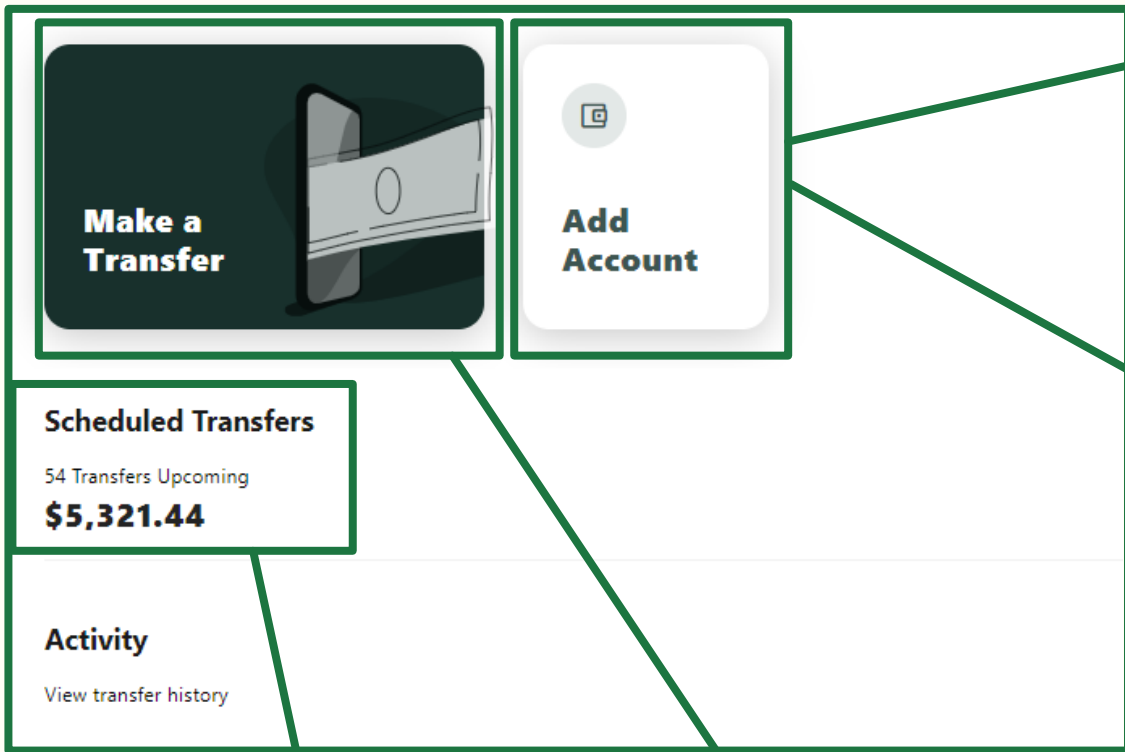
*After logging into your HRCU Mobile App, you should see a Snapshot of your account, as shown here. To Schedule a Transfer, we will need to click on the More button at the bottom right.*





A screenshot of the HRCU mobile app interface. The top header shows the HRCU logo and the text "LAST LOGIN January 1, 2025". Below this is a navigation menu with several items: "Accounts" (with a dropdown arrow), "Transfer &amp; Pay" (with an upward arrow and highlighted by a green box), "Bill Pay", "Transfers" (with a green box and an arrow pointing to it from the left), "Apply" (with a dropdown arrow), "Financial Planning" (with a dropdown arrow), and "Tools &amp; Settings" (with a dropdown arrow). Underneath is a "UTILITIES" section with "Contact Us", "Locations", "Go to HRCU.org", and "Log Out". On the right side, there is a sidebar menu with categories: "CHECKING" (containing "FREE CHECKING" and "REGULAR CHECKING"), "SAVINGS" (containing "PRIMARY SAVINGS"), "CREDIT CARDS" (containing "VISA CLASSIC"), and "LEGEND" (containing "available balance" and "external account"). At the bottom right, there is a promotional banner that says "Tap to a" and "Opening an ac".

Click on Transfer & Pay,  
followed by Transfers.

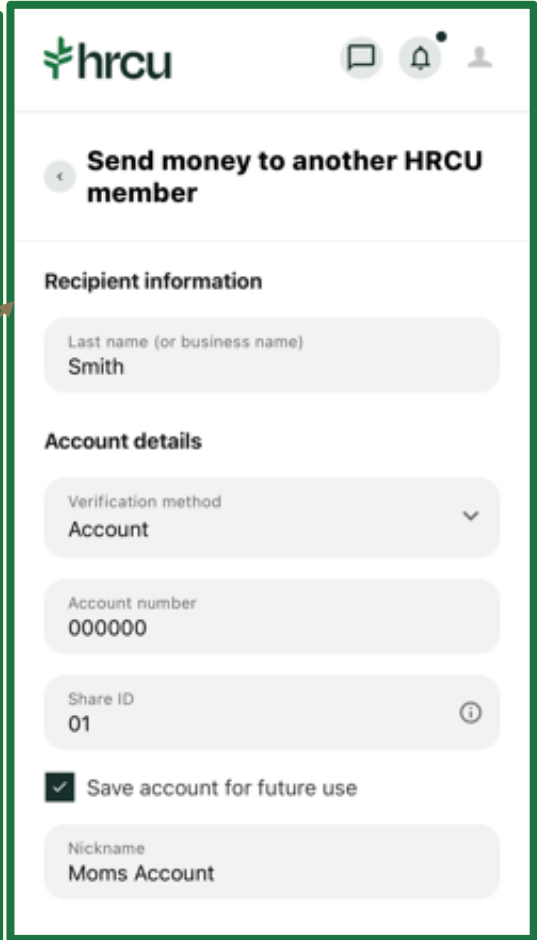


Click **Add Account** to add an external account (one you have at another financial institution).

Click **Add Account** to add another HRCU member's account to transfer to.

To add another member's account, you will need their member number, their last name (or business name), and share ID (all members have a share ID of 01 for savings or you can ask them what their share ID is for their checking).

You can even click **Save account for future use** so that you can easily transfer to them in the future.



**Scheduled Transfers**  
54 Transfers Upcoming  
**\$5,321.44**

**Activity**  
View transfer history

This is showing how many transfers are already scheduled to be completed. Simply click here to view them.

Click **Make a Transfer** to schedule a new transfer.

The other HRCU member does not have access to and cannot see your account.



Click **From Account** and choose the account you want the transfer from.

**Make a Transfer**

**Accounts**

From Account  To Account

**How Much**

Amount

**When**

Frequency  Date

**Memo**

Description (Optional)

[Learn more about our Transfer Policy and Limits](#)



Click **To Account** to choose which account you would like to transfer to. You can transfer to a checking/savings account or a loan or credit card to make a payment.

**Make a Transfer**

**Accounts**

From Account  
● FREE CHECKING  
Ⓜ \$548.34

**How Much**

Amount

**When**

Frequency  
One Time

**Memo**

Description (Optional)

Learn more about our [Transfer Policy](#) and [Limits](#)

Review Transfer

Let's chat!

**To Account**

- PRIMARY SAVINGS \$5.00
- VISA REWARDS \$231.31
- UNSECURED \$165.64
- 2016 BUICK ENCORE \$5,759.61

+ Add an Account

Other – This is to schedule a specific amount. Example

Choose what type of payment you would like to make.

**Regular Payment** – This will process the normal, monthly payment.

**Amount Due** – This will process the amount due. If you are late, this may be a higher-than-normal payment.

**Pay Off** – This is the amount that is left to Pay Off the loan.

**Other** – This is to schedule a specific amount. Example: you owe \$400 per month; you would like to make \$100 weekly payments. You would choose Other and put in \$100 for the amount.

**Principal Only** – This is for Principal Only payments.

**Make a Transfer**

**Accounts**

From Account  
● FREE CHECKING  
\$548.34

To Account  
● 2016 BUICK ENCORE  
\$5,759.61

**How Much**

Learn more about [Loan Payment Options](#)

Payment Type

- Regular Payment \$385.39
- Amount Due \$656.17
- Past Due Amount \$270.78
- Pay Off \$5,763.39
- Other
- Principal Only  
This option is inactive because the loan due date must be in the future.

Date  
01-01-2025

0 / 20

Let's chat!





**Make a Transfer**

From Account  
● FREE CHECKING  
Ⓜ \$548.34

To Account  
● 2016 BUICK ENCORE  
\$5,759.61

**How Much**  
Learn more about [Loan Payment Options](#)

Payment Type  
Regular Payment \$385.39

**When**

Frequency  
One Time

One Time ✓

Daily

Weekly

Biweekly

Monthly

Date  
01-09-2025

0 / 20

Transfer

Let's chat!

The screenshot shows a mobile app interface for making a transfer. It includes sections for 'From Account' (FREE CHECKING, \$548.34), 'To Account' (2016 BUICK ENCORE, \$5,759.61), 'How Much' (Payment Type: Regular Payment \$385.39), and 'When' (Frequency: One Time). A date field shows 01-09-2025. A 'Transfer' button is at the bottom, and a chat bubble says 'Let's chat!'.

Choose the frequency of the payment.

You may choose to make a *One Time Payment*, or you can make *Daily, Weekly, Biweekly, Monthly, End of Month, Semi Monthly, Every Other Month, Every Four Weeks, Quarterly, Every Six Months, or Yearly.*



Choose the date for the transfer (or the first date to start an automatic payment)

Optional: Write a description of the name of this Series. We recommend something simple like Car Payment or Mortgage.

After clicking **Review Transfer**, if all looks good, click **Submit**.

**Make a Transfer**

From Account  
● FREE CHECKING  
Ⓐ \$548.34

To Account  
● 2016 BUICK ENCORE  
\$5,759.61

**How Much**  
Learn more about [Loan Payment Options](#)

Payment Type  
Regular Payment \$385.39

**When**

Frequency  
One Time

Date  
01-09-2025

**Memo**  
Description (Optional)  
0 / 20

Learn more about our [Transfer Policy and Limits](#)

**Review Transfer**

Let's chat!