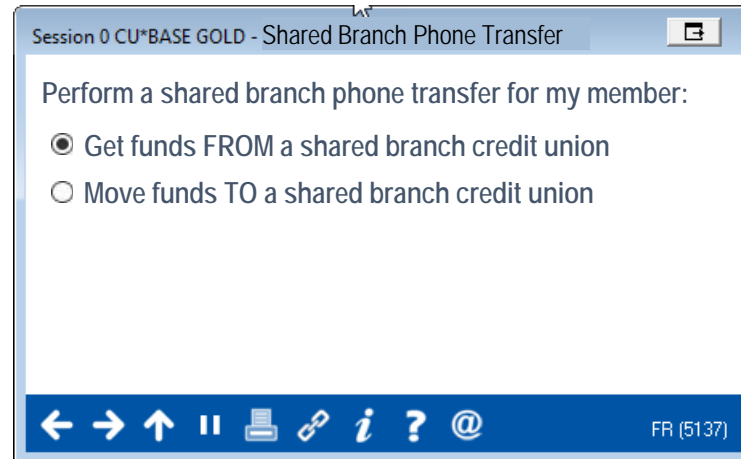


Window appears after clicking “Shared Branch Transfer” on Main Phone Op screen

Example 1 (FROM a shared branch)



PROJ #51570  
Rev: 7/1/2019

# Initial Shared Branch Phone Transfer Screen (from a SB CU)

Session 0 CU\*BASE GOLD - CREDIT UNION

File Edit Tools Help

## Shared Branch Phone Transfer

Getting Funds FROM a SB Credit Union

Select Account to Transfer FROM		Select Account to Transfer TO	
Credit union ID <input type="text"/>	<input type="text"/>	Account # <input type="text"/>	<input type="text"/>
Account # <input type="text"/>	First 3 characters of last name <input type="text"/>	Account # <input type="text"/>	<input type="text"/>

### Transaction Information

Transfer amount

Primary description **SB PHONE TRANSFER**

Navigation icons: back, forward, up, pause, print, link, info, help, search

8/30/18

# Final Shared Branch Phone Transfer Screen (from a SB CU)

Session 0 CU\*BASE GOLD - CREDIT UNION
File Edit Tools Help

Shared Branch Phone Transfer
Getting Funds FROM a SB Credit Union

Select Account to Transfer FROM

Select Account to Transfer TO

Credit union ID  WESTERN DISTRICTS CREDIT UNION

Account #   First 3 characters of last name  Account #

Transaction Information

Transfer amount

Primary description **SB PHONE TRANSFER**

Secondary description

From Account at Shared Branch Credit Union

To Account at My Credit Union

Name **JOHN A MEMBER**

DBA **IF THERE IS ONE**

IRA/HSA code

Name **SUZIE Q MEMBER**

DBA **TRUSTEE**

Membership designation **Individual**

Secondary Names

Beginning available balance	842.95
Transfer amount	10.00-
Ending available balance	832.95

Beginning balance	1,000.00
Transfer amount	10.00
Ending balance	1,010.00

Post
Post/Return

← → ↑ || 🖨️ 🔗 ⓘ ? @
8/30/18

## Example 2 (TO a shared branch)

Session 0 CU\*BASE GOLD - Shared Branch Phone Transfer

Perform a shared branch phone transfer for my member:

Get funds FROM a shared branch credit union

Move funds TO a shared branch credit union

← → ↑ || 🖨️ 🔗 ⓘ ? @ FR (5137)

# Initial Shared Branch Phone Transfer Screen (to a SB CU)

Session 0 CU\*BASE GOLD - CREDIT UNION

File Edit Tools Help

## Shared Branch Phone Transfer Moving Funds TO a SB Credit Union

Select Account to Transfer FROM	Select Account to Transfer TO
Account # <input type="text"/>	Credit union ID <input type="text"/>
<input type="text"/>	Account # <input type="text"/> First 3 characters of last name <input type="text"/>

### Transaction Information

Transfer amount

Primary description **SB PHONE TRANSFER**

Navigation icons: back, forward, up, pause, print, link, info, help, search

8/30/18

Mockups only; subject to change.

# Final Shared Branch Phone Transfer Screen (to a SB CU)

Session 0 CU\*BASE GOLD - CREDIT UNION
File Edit Tools Help

## Shared Branch Phone Transfer

Moving Funds TO a SB Credit Union

Select Account to Transfer FROM

Select Account to Transfer TO

Account #

Credit union ID  WESTERN DISTRICTS CREDIT UNION

Account #   First 3 characters of last name

Transaction Information

Transfer amount

Primary description **SB PHONE TRANSFER**

Secondary description

From Account at My Credit Union

To Account at Shared Branch Credit Union

IRA/HSA code

Name **SUZIE Q MEMBER**

DBA **TRUSTEE Individual**

Secondary Names

Name **JOHN A MEMBER**

DBA **IF THERE IS ONE**

Beginning available balance	1,000.00
Transfer amount	10.00
Ending available balance	1,010.00

Beginning balance	842.95
Transfer amount	10.00-
Ending balance	832.95

Post Post/Return

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8/30/18