Transfer Instructions

Creating transfers

Banno Mobile can create one-time transfers, future-dated transfers, and recurring transfers.
Two accounts need to be associated with the app to complete a transfer. Future-dated transfers and recurring transfers are available only for JHA core institutions.

1- Open the app menu and select **Transfer**.
2- Select **Make a transfer**.
3- If prompted, answer the security question and select **Submit**. If not, continue to the next step.
4- Select the account you want to transfer funds from, and then select an account for the destination.
5- Enter the transfer amount.
6- Choose a situation and follow the corresponding steps:

Situation	Steps
Creating a one-time transfer	Select **Submit**.
Creating a one-time scheduled transfer	This option is only available for financial institutions using a JHA core. a. Select **More options**. b. Select the **Date** field. c. Select a date for the transfer if you want something other than the *Soonest available* default. d. Select **Submit**.
Creating a recurring transfer	This option is only available for financial institutions using a JHA core. a. Select **More options**. b. Select the **Date** field. c. Select a date for the repeating transfer to start. d. Change the **Frequency** field. e. Select **Submit**.

TIP: If your transfer is an immediate, internal transfer, you can add a memo note by selecting More options and completing the Memo field.

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Modifying scheduled transfers

After a person creates a scheduled transfer, they can still modify or delete it.

Note the following restrictions:

- *Only transfers created in Banno Mobile can be edited using this method.*

1- Select the main menu and then select **Transfer**.
2- Select a transfer in the *Scheduled transfers* list.
3- Choose a situation and follow the corresponding steps.

Situation	Steps
Edit transfer	a. Modify the desired fields. b. Select Save.
Delete transfer	If iOS, select Delete. If Android, select 🗑

Transferring funds from one member to another

Use these instructions to understand how a member of a credit union can use Banno Mobile to transfer funds to another member of the same credit union.

1- Select the main menu, and then select **Member transfer**.
2- Complete the fields in the form.
   From:
   Selecting this field makes a screen appear where the end users can select from accounts to transfer funds from. The accounts available to choose from are limited to those belonging to the end user's primary financial institution.
   Member name:
   In this field, the end user inputs the first three letters of the receiving member's name. Only three characters are allowed in this field.
   Member #:
   The end user enters the member number of the member they want to transfer funds to in this field.
   Type:
   The end user selects between *Share (S)* and *Loan(L)* to indicate the type.
   Share/Loan #:
   The end user inputs the share or loan number for the receiving member's account, up to four characters.
   Amount:
   The end user inputs the transfer amount in this field. There is no character limit.
3- Select **Submit**.
   A confirmation message appears.
4- Select **OK**.

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