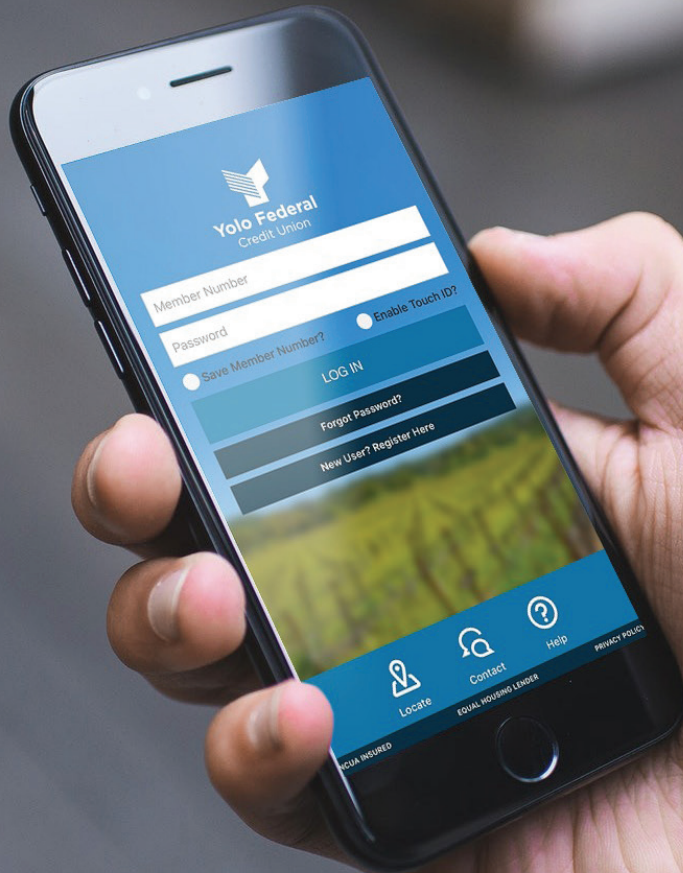




Yolo Federal
Credit Union

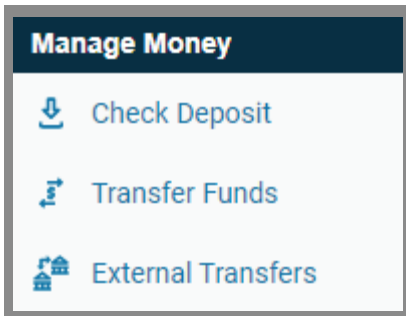


USER GUIDE

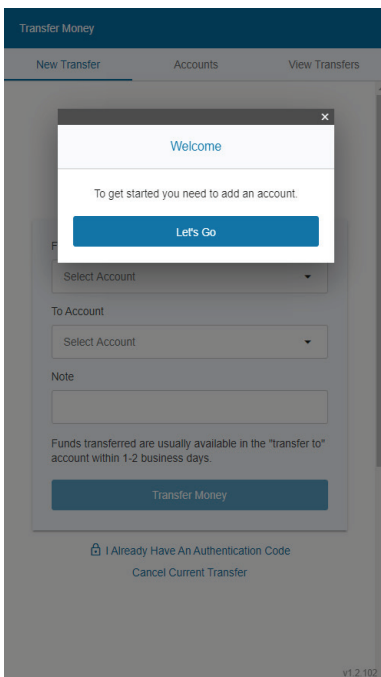
External Transfer

Manage Money

External Transfer



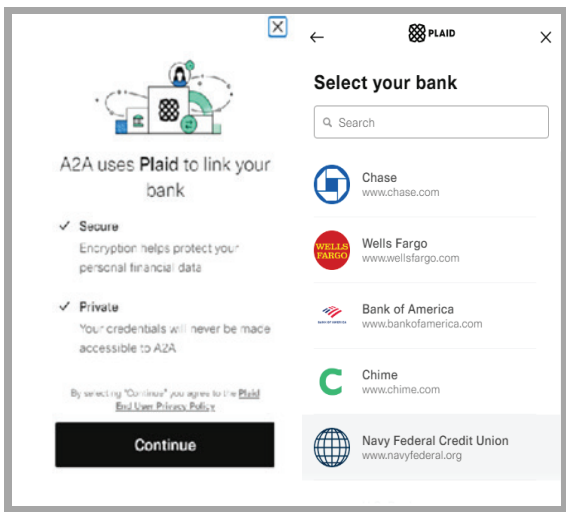
- 1 First, you will need to add your external account information.



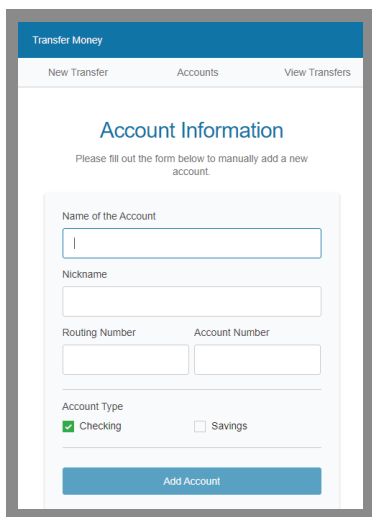
Manage Money

External Transfer

Option 1: Using **Plaid**, you'll be able to link to your account using your external financial institution's online login credentials.



Option 2: You can manually add your external account with the verification of micro-deposits. You will need the **Routing Number, Account Name, and Account Number.**

A screenshot of the "Account Information" form in a mobile application. The form is titled "Account Information" and includes the instruction "Please fill out the form below to manually add a new account." The form fields are: "Name of the Account" (text input), "Nickname" (text input), "Routing Number" (text input), "Account Number" (text input), and "Account Type" (radio buttons for "Checking" and "Savings", with "Checking" selected). At the bottom of the form is an "Add Account" button. The top of the screen shows the "Transfer Money" header and navigation options: "New Transfer", "Accounts", and "View Transfers".

Manage Money

External Transfer

- 2 After adding an external account, you can schedule a transfer. Select your **From Account**, **To Account**, and leave an optional **Note**. Click **Transfer Money**.

The screenshot shows the 'Transfer Money' interface. At the top, there are three tabs: 'New Transfer', 'Accounts', and 'View Transfers'. The 'New Transfer' tab is selected. Below the tabs, the text 'Amount to Transfer:' is followed by a large '\$ 0 00' display. Below this, it says 'Tap above to change amount'. There are two dropdown menus: 'From Account' and 'To Account', both with 'Select Account' as the placeholder text. Below these is a text input field for 'Note'. At the bottom, there is a blue button labeled 'Transfer Money'. Below the button, there is a link that says 'I Already Have An Authentication Code' and a link that says 'Cancel Current Transfer'.

Click **View Transfers** to view, edit, and cancel transfers.

This screenshot shows the 'Transfer Money' interface with the 'View Transfers' tab selected. The 'New Transfer' and 'Accounts' tabs are visible but not selected. The 'View Transfers' tab is highlighted with a blue underline.

Click **Accounts** to view, manage, or delete your External Accounts.

This screenshot shows the 'Transfer Money' interface with the 'Accounts' tab selected. The 'New Transfer' and 'View Transfers' tabs are visible but not selected. The 'Accounts' tab is highlighted with a blue underline.