

To Transfer Funds

1. Go to www.pacificservice.org and log in to your account.
2. Choose the **Transfer Funds** tab.

In the area labeled **Create / Edit a Transfer**, you will see the steps laid out. The required fields are marked with an asterisk. Question marks (?) signal available help or hints.

The screenshot shows a web browser window with the URL olb.pacificservice.org/OnlineBanking/TransferFunds/ManageTransfers.aspx. The page header includes the Pacific Service Credit Union logo and navigation links: **View Accounts**, **Transfer Funds** (selected), **eStatements**, **Payments**, **Apply for a Loan**, **MoneyManager**, and **eForms**. A secondary navigation bar contains links: **Transfer Funds**, **Manage External Accounts**, **Transfer Activity**, **Cross Account Setup**, **Cross Account Management**, and **Withdraw Funds By**. The main content area is titled **Create / Edit a Transfer** with a **Help** link. The form contains the following fields:

- * From Account:** A dropdown menu with the text "— Select a Source —" and a question mark icon.
- * To Account:** A dropdown menu with the text "— Select a Destination —" and a question mark icon.
- * Amount:** A text input field.
- * Scheduling Option:** A dropdown menu with the text "— Select an Option —" and a question mark icon.
- Description:** A text input field with a question mark icon.

At the bottom of the form are two buttons: **Cancel** and **Submit**.

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2. Choose the **Transfer Funds** tab.

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The screenshot shows the Pacific Service Credit Union online banking interface. The browser address bar displays <https://olb.pacificservice.org/OnlineBanking/TransferFunds/ManageTransfers.aspx>. The header features the Pacific Service Credit Union logo and navigation links: [Contact Us »](#), [Log Out »](#), and a welcome message "Welcome, P.". A main navigation bar includes tabs for [View Accounts](#), [Transfer Funds](#) (selected), [eStatements](#), [Payments](#), [Apply for a Loan](#), [MoneyManager](#), [eForms](#), and [Ma](#). Below this, a secondary navigation bar lists [Transfer Funds](#), [Manage External Accounts](#), [Transfer Activity](#), [Cross Account Setup](#), [Cross Account Management](#), and [Withdraw Funds By Check](#). The breadcrumb trail shows [Transfer Funds](#) » [Transfer Funds](#). The main content area is titled "Create / Edit a Transfer" with a [Help](#) link. The form contains the following fields:

- * From Account: (dropdown menu)
- * To Account: (dropdown menu)
- * Amount:
- * Scheduling Option: (dropdown menu)
- Description:

At the bottom of the form are "Cancel" and "Submit" buttons.

3. Choose a *Source*—the account you wish to transfer funds from (**From Account**).



Create / Edit a Transfer ? Help

* From Account: — Select a Source —
* To Account: — Select a Source —
* Amount: xx -S02 - RELATIONSHIP CHECKING (Available \$2,223.43)
* Scheduling Option: xx -L81 - VISA PLATINUM REWARDS (Available \$4,245.42)

Please select the account that will be used as the source of the funds for the transfer.

Description: ?

Cancel

Submit

4. Choose a *Destination*—the account you wish to transfer funds to (**To Account**).

(Notice that the money market account in the image below is grayed out as a *Destination* option (**To Account**) because you selected it as the *Source* account (**From Account**) and it cannot be both the Source and the Destination.)

The screenshot shows the Pacific Service Credit Union Online Banking interface. The browser address bar displays <https://olb.pacificservice.org/OnlineBanking/TransferFunds/ManageTransfers.aspx>. The page header includes the Pacific Service Credit Union logo and navigation links like "Contact Us" and "Log Out". The main navigation bar highlights "Transfer Funds". Below this, a sub-navigation bar lists various options, with "Transfer Funds" being the active selection. The "Create / Edit a Transfer" form is displayed, featuring a "Help" link. The form fields are as follows:

- * From Account:** A dropdown menu showing "xx -S02 - RELATIONSHIP CHECKING (Available \$2,223.43)".
- * To Account:** A dropdown menu with "— Select a Destination —" as the current selection. A tooltip is visible next to this field, stating: "Note that the accounts that are gray are not valid transfer targets for the selected source account."
- * Amount:** A dropdown menu showing "xx S00 - SAVINGS ACCOUNT (Available \$0.00)".
- * Scheduling Option:** A dropdown menu showing "xx -S02 - RELATIONSHIP CHECKING (Available \$2,223.43)".
- Description:** A text input field showing "xx -L81 - VISA PLATINUM REWARDS (Balance \$7,754.58)".

At the bottom of the form, there are "Cancel" and "Submit" buttons.

5. Fill in the dollar amount you wish to transfer (**Amount**).

The screenshot shows the Pacific Service Credit Union online banking interface. The browser address bar displays <https://olb.pacificservice.org/OnlineBanking/TransferFunds/ManageTransfers.aspx>. The header features the Pacific Service Credit Union logo and navigation links: [Contact Us >>](#) and [Log Out >>](#). Below the header is a navigation bar with tabs: [View Accounts](#), [Transfer Funds](#) (selected), [eStatements](#), [Payments](#), [Apply for a Loan](#), [MoneyManager](#), [eForms](#), and [Manage](#). A secondary navigation bar includes links: [Transfer Funds](#), [Manage External Accounts](#), [Transfer Activity](#), [Cross Account Setup](#), [Cross Account Management](#), and [Withdraw Funds By Check](#). The main content area is titled [Transfer Funds](#) > Transfer Funds. Below this is a section titled **Create / Edit a Transfer** with a [Help](#) link. The form contains the following fields:

- * From Account: ?
- * To Account: ?
- * Amount:
- * Scheduling Option:
- Description:

At the bottom of the form are [Cancel](#) and [Submit](#) buttons. A tooltip on the right states: "You may enter any description that will help you remember the purpose of this transfer here."

6. Select a Scheduling Option: **Immediate**, **Future-Dated (One-Time)**, or **Recurring**.
7. The optional **Description** field allows you to add a note to help you remember this transaction.
8. Click **Submit**.

You should see a confirmation message asking you to confirm your transaction.


The screenshot shows a web browser window with the URL <https://olb.pacificservice.org/OnlineBanking/TransferFunds/ManageTransfers.aspx>. The page header features the Pacific Service Credit Union logo and navigation links: "Contact Us >>" and "Log Out >>". Below the header is a main navigation bar with tabs: "View Accounts", "Transfer Funds" (selected), "eStatements", "Payments", "Apply for a Loan", "MoneyManager", "eForms", and "Manage". A secondary navigation bar includes links: "Transfer Funds", "Manage External Accounts", "Transfer Activity", "Cross Account Setup", "Cross Account Management", and "Withdraw Funds By Check". The main content area is titled "Transfer Funds" and contains a sub-header "Create / Edit a Transfer" with a help icon. Below this is a section titled "Please Verify Your Transfer Information" with the following details: "From Account: xx -S02 - RELATIONSHIP CHECKING (Available \$2,223.43)", "To Account: xx -S00 - SAVINGS ACCOUNT (Available \$0.00)", "Amount: \$5.00", "Scheduling Option: Immediate", and "Description: R fund". At the bottom of this section are three buttons: "Cancel", "Edit", and "Confirm".

On this screen you can verify the details of your transfer. You can edit the info (**Edit**), or cancel and start over (**Cancel**).

9. Click **Confirm** if you want to complete the transaction.

Once you have completed the transaction, you should see the message indicating success, with your confirmation number.

https://olb.pacificservice.org/OnlineBanking/TransferFunds/ManageTransfers.aspx


 **PACIFIC SERVICE CREDIT UNION**


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Welcome, P


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[Transfer Funds](#) » Transfer Funds

 Your transfer has been successfully submitted. Confirmation number: C23NC5


Create / Edit a Transfer  [Help](#)

* From Account: 

* To Account: 

* Amount:

* Scheduling Option:

Description: 

The next time you log in, you can see the new balances displayed in your accounts.



PACIFIC SERVICE
CREDIT UNION

Contact Us »

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Welcome, P

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Welcome P

Last Login 07/30/2020 10:01:13 PM



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Money Manager

Jul 2 – Jul 3

[Accounts](#) [Help](#) | [Show Account Number](#)

Account Name	Account	Balance	Available Balance	
SAVINGS ACCOUNT	xx -S00	\$10.00	\$5.00	
RELATIONSHIP CHECKING	xx -S02	\$2,218.43	\$2,218.43	Order Checks
	Total	\$2,228.43	\$2,223.43	