



Recurring Transfer Guide




Internal Account Transfer

To set up an automatically recurring payment from a United Heritage Credit Union account:

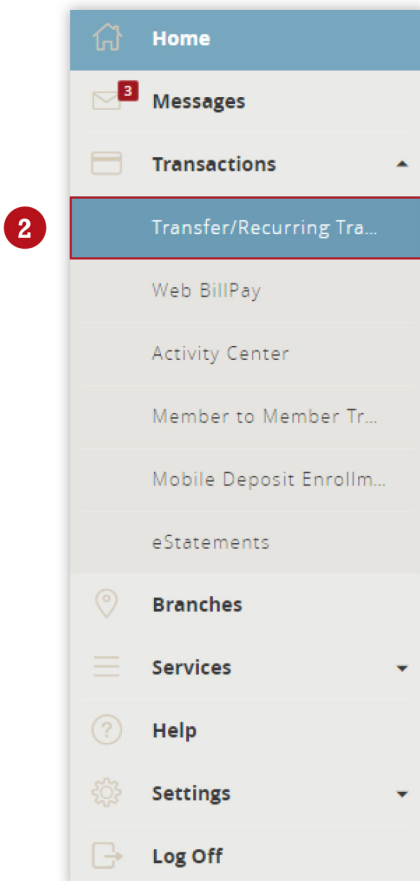
1. Sign in to your United Heritage Online Banking account via uhcu.org.
2. Select “Transfer/Recurring Transfer” under “Transactions” in the Online Banking navigation menu.

Welcome Back

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Account Sign In | 

[Forgot password?](#)





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3. Select the dropdown arrow located under the “FROM” field and choose the United Heritage account from which you wish to transfer the funds.
4. Select the dropdown arrow located under the “TO” field and choose the United Heritage share or loan to which you wish to transfer the funds.
5. Enter the amount you wish to transfer in the “AMOUNT” field.
6. Select the Frequency dropdown and choose to make this a recurring transfer.

Transfer/Recurring Transfer

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4

5

6

Transfer Date:

Memo (optional):

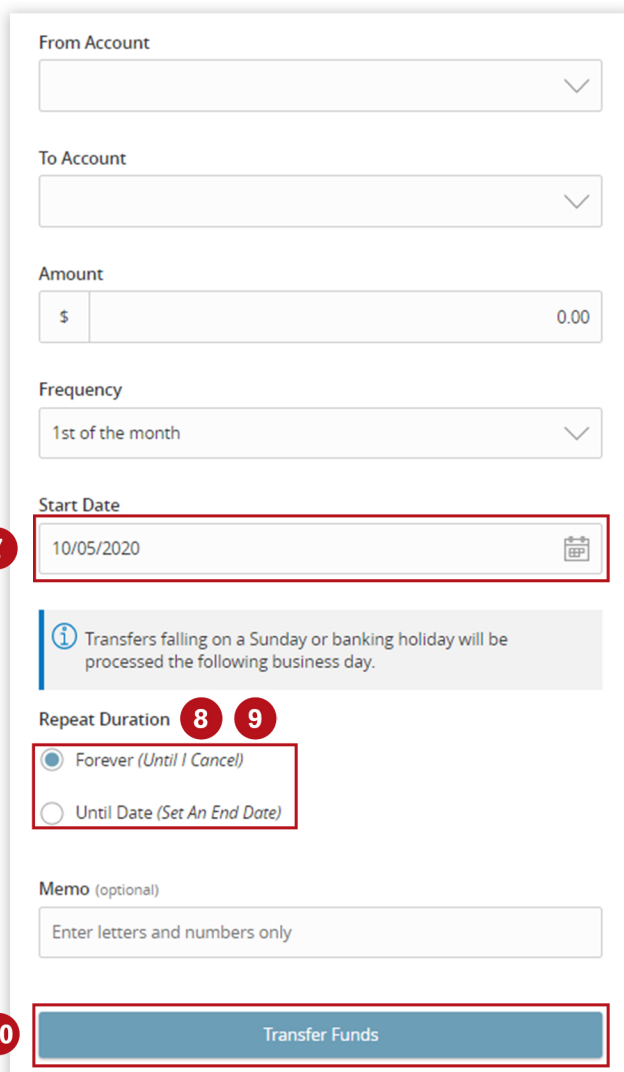


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7. Enter the date on which you wish the recurring transfer to start in the “TRANSFER DATE” field.

Note: If the recurring transfer involves an external account (a non-UHCU account), the transfer will happen on the closest business day, Mon-Fri, to the recurring schedule and will need an SAC (Secure Access Code) to be authorized. All UHCU to UHCU transfers will process on the date requested.

8. If you would like the recurring transfer to end on a specific date, select the “UNTIL DATE” option and enter an end date.
9. If you do not want the transfer to stop, choose the “FOREVER (UNTIL I CANCEL)” option Note: If you select “Forever (Until I Cancel)” option, you will be required to manually cancel the automatic transfer in order to stop it.
10. Select “Transfer Funds.”
11. Once you successfully complete the recurring transfer setup, a “Transaction Authorized” confirmation message will appear.



From Account

To Account

Amount
\$

Frequency
1st of the month

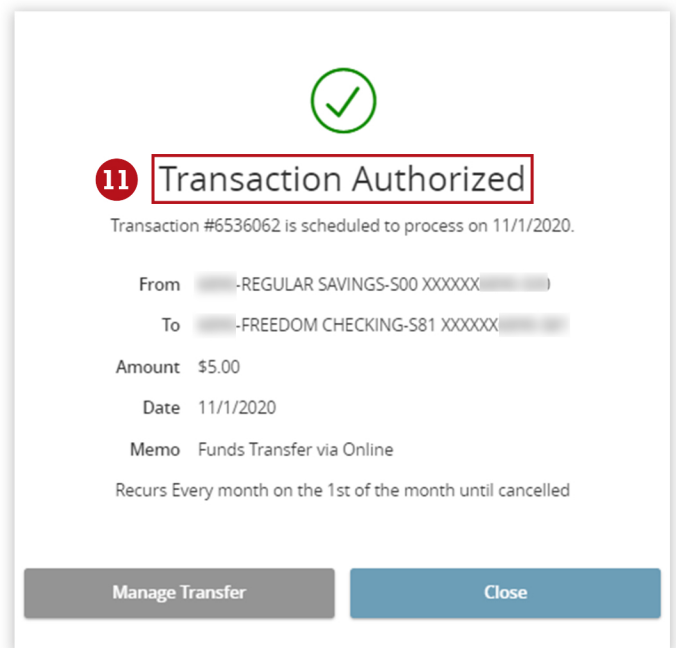
Start Date
10/05/2020

Repeat Duration

- Forever (Until I Cancel)
- Until Date (Set An End Date)

Memo (optional)

Transfer Funds



Transaction Authorized

Transaction #6536062 is scheduled to process on 11/1/2020.

From -REGULAR SAVINGS-S00 XXXXXX

To -FREEDOM CHECKING-S81 XXXXXX

Amount \$5.00

Date 11/1/2020

Memo Funds Transfer via Online

Rekurs Every month on the 1st of the month until cancelled

Manage Transfer **Close**



Recurring Transfer Guide

- Once the recurring transfer has been created, you can view, edit, or cancel the transfer from your Activity Center.
- Go to the Activity Center by selecting "TRANSACTIONS" then "ACTIVITY CENTER" from the main menu.
- Select "RECURRING TRANSACTIONS"
- Select the transfer to see the details. To view, edit, or cancel this series select the three dot menu to the right of the transfer. To cancel a single transfer in a recurring series, you would do so from the "SINGLE TRANSACTION" tab. To cancel the entire recurring transfer series, you would do so in the "RECURRING TRANSFER" tab at the top of the Activity Center.

The screenshot displays the 'Activity Center' interface. On the left is a navigation menu with 'Activity Center' highlighted (marked with a red circle 13). The main content area is titled 'Activity Center' (marked with a red circle 14) and has three tabs: 'Single Transactions', 'Recurring Transactions' (which is selected and highlighted with a red box), and 'Deposited Checks'. Below the tabs is a table of transactions with columns for 'Created date', 'Status', 'Transaction Type', 'Account', and 'Amount'. A red circle 15 points to an 'Actions' menu icon (three dots) next to a transaction. This menu is open, showing options: 'Toggle Details', 'Cancel series', 'Edit Series', 'View transactions in series', and 'Print Details'. The transaction details shown are: Tracking ID: 6536130, Amount: \$5.00, Description: Funds Transfer via Online, Recurring ID: 30742, From Account: External Checking XXXX, To Account: XXXX-REGULAR SAVING, Created: 10/05/2020 12:09 PM, Authorized: 10/05/2020 12:10 PM, Frequency: Every month on the 1st, Start Date: 11/01/2020, No End Date: No End Date, Is Recurring: Yes, Transactions to Date: 1, and Next Transaction: 11/01/2020.