

## PhoneBanking Tip Sheet

408.524.4500 • 855.500.P1CU (7128)  
Option 1

### TIPS

- Press \* at any time to return to the Previous Menu.
- Press # at the end of your selection to complete the transaction.
- Press 5 to end the call.
- When prompted for an account # enter the 2 to 3 digit # associated with the account type, for example, a share account is 01.

For the Account menu, press #1

To block a lost or stolen credit or debit card, press #2

For Accounts and Loan Inquiries, press #1, #1

For Payments, Transfers & Withdrawals, press #1, #2

To stop a payment, press #1, #3

When prompted, provide your member # and access code.

## SAMPLE TRANSACTIONS

### MAKE A LOAN PAYMENT

- Press #1 for Account Menu
- Press #2 for Payments/Transfers/Withdrawals
- Press #1 for Loan Payment
- Select the account from which to make payment
  - #1 From share account
  - #2 From share draft account
  - #3 From another account
  - #4 From a loan advance

### ACCOUNT TRANSFERS

- Press #1 for Account Menu
- Press #2 for Payments/Transfers/Withdrawals
- Press #2 for Transfer
- Select from the following options:
  - #1 Share to share draft transfer
  - #2 Share draft to share transfer
  - #3 Loan to share draft transfer
  - #4 Loan to share transfer
  - #5 Select accounts for transfer
  - #6 Select a loan and account transfer

### WITHDRAWALS

- Press #1 for Account Menu
- Press #2 for Payments/transfers/withdrawals
- Press #4 for Withdraw check
- Select from the following options:
  - #1 From Share account to be mailed
  - #2 From specific account to be mailed

### BALANCE INQUIRIES

- Press #1 for Account Menu
- Press #1 for Account/loan Inquiries
- Press #1 for Account Balance
- Select the account from which to make payment
  - #1 From share account
  - #2 From share draft account
  - #3 From another account

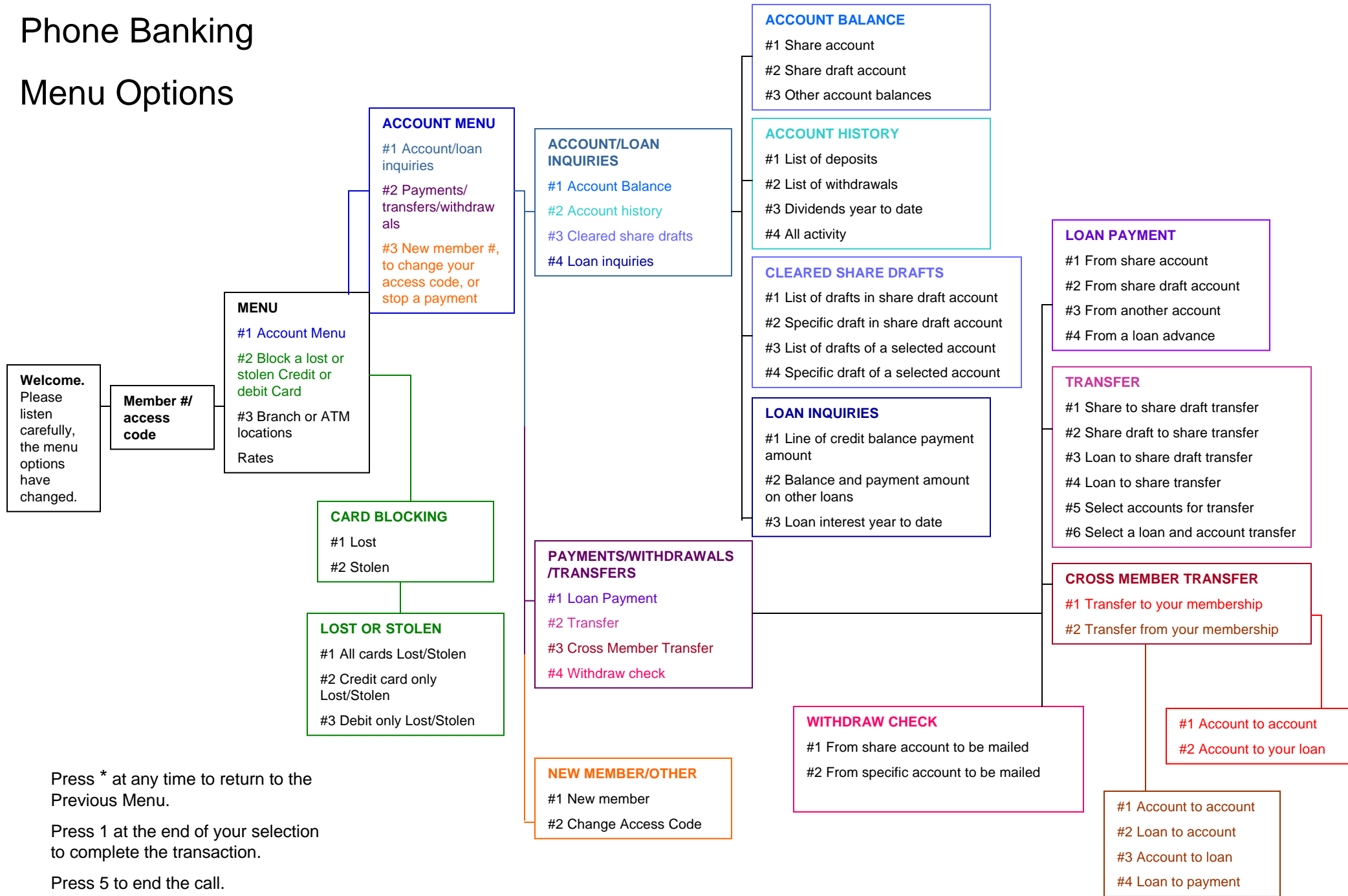
### ACCOUNT ACTIVITY

- Press #1 for Account Menu
- Press #1 for Account/loan Inquiries
- Press #2 for Account History
- Select the history to review
  - #1 List of deposits
  - #2 List of withdrawals
  - #3 Dividends year to date
  - #4 All activity

### SHARE DRAFT/CHECKING INQUIRIES

- Press #1 for Account Menu
- Press #1 for Account/loan Inquiries
- Press #3 for Cleared Share Drafts
- Select from the following options:
  - #1 List of drafts in Share draft account
  - #2 Specific draft in share draft account
  - #3 List of drafts of a selected account
  - #4 Specific draft of a selected account

# Phone Banking Menu Options



Press \* at any time to return to the Previous Menu.

Press 1 at the end of your selection to complete the transaction.

Press 5 to end the call.

When prompted for an account # enter the 2 to 3 digit # associated with the account type, for example, a share account is 01.