



Digital Banking Guide

We're here to help you do banking your way.

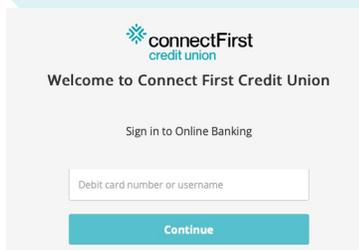


getting started.

First time logging in? Great!

To get started, get the app or visit <https://banking.connectfirstcu.com> and enter your 19-digit Member Card number.

Press Continue.



PAN
6294514311090011597

Date of Birth
Sep 28, 1972

Mobile phone number

+1 Mobile phone number

Confirm

E-mail

E-mail

Confirm

If at any point you're asked for a **PAC (Personal Access Code)**, please contact us at 1 (866) 923- 4778. We will help get you set up.

Please enter your date of birth and either your mobile phone number or your email address. You will receive an email or text with a code to make sure it's you!

Press Continue.

Next, choose a username and password. Your username is permanent so make sure you're happy with it. If you forget your username, we can remind you at any time.

Tick the Direct Service Agreement > Select Continue > Proceed to sign in.

You are all set up! You can log in for the first time with your new username and password.

That's it!

Make sure you choose a username that you will use - I want happy with it because you will not be able to change this later on!

Username

Enter username

Password

Password strength: Weak

- Minimum 10 characters
- Minimum 1 uppercase letter
- Minimum 1 lowercase letter
- Minimum 1 number

Re-enter password

Re-enter new password

I have read and accept the Direct Service Agreement

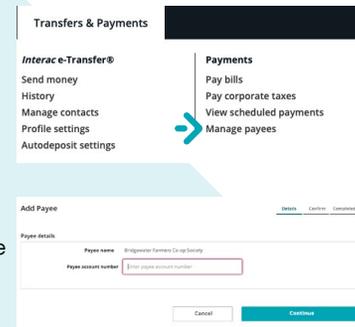
Continue

bill payments.

To add and manage your saved bill payees, go to **Transfers and payments > Manage Payees**.

Add your payee name and account number and press Continue. It will then send you a verification code to your email address or mobile phone.

Press Continue.



Now that you've added your payees, you can pay your bills as well as add scheduled bill payments.

Under **Transfers and Payments > Pay bills**, choose the bill you would like to pay. Enter the amount and confirm.

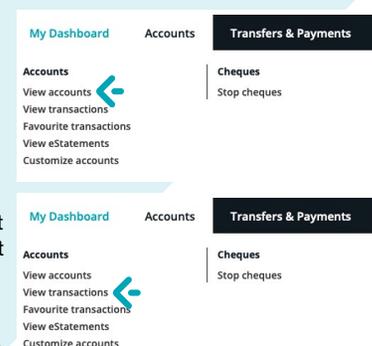
Press Continue.

accounts and transactions.

To view all your accounts, go to menu > **Accounts > View Accounts**.

Note that your account transactions are viewable by going to **Accounts > View Transactions** and then selecting the account you wish to look at. Recent transaction history is also available here. For information going further back, check out the eStatements section.

If you need assistance with anything digital banking-related, please reach out to us in-branch, over the phone, or on our website!



→ getting started.

First time sending or receiving an e-Transfer on the new app?

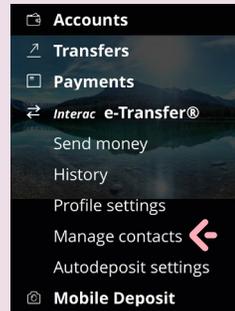
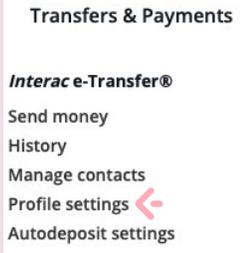
Once logged in, go to **Transfers > Interac e-Transfers > Profile Settings**.

Confirm your physical address and email address.

Press **Continue**.

You will be sent a confirmation code to verify that it's you. Enter this code > **Continue**.

You are now set up!



add an e-transfer contact.

To add a contact, go to **Interac e-Transfer > Manage Contacts**. Select **+** in the top right corner.



Add your contact's name plus their email address and/or mobile phone number. Select how you would like them to be notified. Next, create a secret question that only they'll know the answer to. Press **Continue** and you'll receive a code via email or text to authorize this.

send an e-transfer.

To send the e-transfer, go to **Interac e-Transfer > Send Money**.

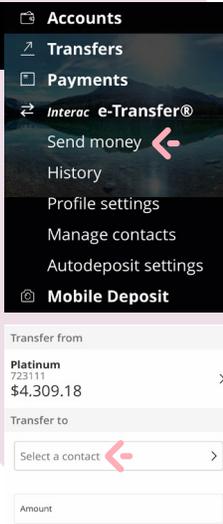
From there, choose the account you want to withdraw from, select a contact and enter the amount.

Press **Continue**.

You can include a message for the recipient if you like, but do not include the answer to the secret question.

Confirm the information you have sent is correct > **Continue**.

Congratulations! You've sent your first e-Transfer!



accept e-transfer via text.

Open the link > **Select Province or Territory > Alberta > connectFirst Credit Union > Deposit > Open in app > Input your password > Enter > Input the security answer > Accept**.

Next, choose an account for the deposit and **Continue > Review**

accept e-transfer via email.

Click **connectFirst Credit Union** or **Select a Different Financial Institution > Select Province or Territory > Alberta > Connect First Credit Union > Deposit**.

Then select **Open in app / Open on web > Input your password > Enter > Input the security answer > Accept**. Next, choose an account for the deposit.

You'll receive a notification that your funds have been deposited automatically. **That's it!**

→ e-statements.

To access your eStatements, go to **Accounts > View eStatements**, select the account and the year and month you wish to view.

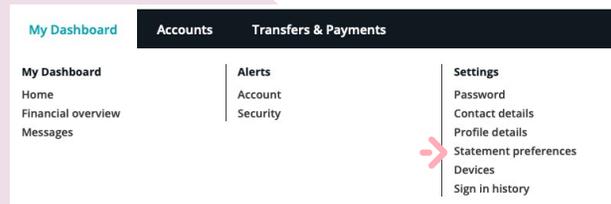
If the statement you are looking for isn't available, please contact us immediately and we'll set up your statement.

→ statement preferences.

Want to change how your statements are received? You can choose right on the app. Note that paper statements cost **\$2.50/month** to cover shipping and materials.

Go to **Dashboard > Settings > Statement Preferences** and select the account you wish to update preferences for. Toggle the button to turn off and on paper statements.

Paper statements ON = Green



Making banking easier, so you can spend time with those who matter most.

<https://banking.connectfirstcu.com>

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Digital banking guide:

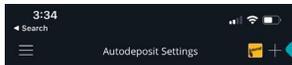
Added features and security.



→ auto-deposit registration.

To set up Autodeposit for receiving eTransfers, select **Interac e-Transfer > Autodeposit Settings**.

Select **+** in the top right corner.

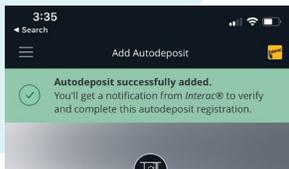


With Autodeposit, money you receive via Interac e-Transfer® can be automatically deposited into your account without the need to respond to a security question. You can add up to five Autodeposits.

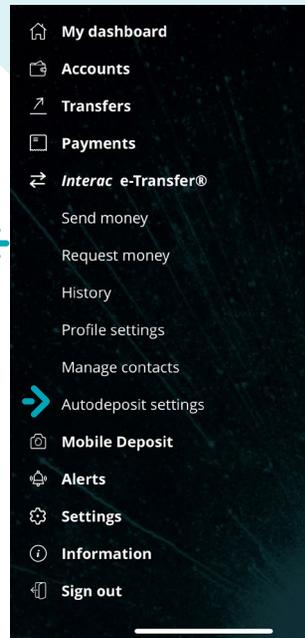
If your Autodeposit status says "Pending", please ensure you have completed the confirmation process in the email or text message you were sent.

*Important - When sending an e-transfer to yourself (for another FI), ensure it isn't the same cell and/or email as the one you've set up to use for Autodeposit.

No autodeposits have been setup.
Add them by tapping on the + icon above.



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Select **Register** with to add either your email or mobile phone and add information as required.

Next, choose the account you want to use for Autodeposit.

Acknowledge Disclaimer and Press **Continue**.

You'll receive a code via email or text to authorize this. Upon successful addition within digital banking, you will get a notification from Interac to complete your Autodeposit registration.

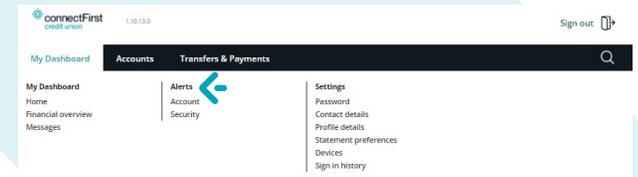
→ security alerts, notifications.

We recommend you set up alerts to help protect your account.

You can setup alerts for login, withdrawals, insufficient funds for scheduled transactions etc.

Go to **My Dashboard > Alerts > select Account** (For Transaction related alerts) or **Security** (For Login and Password related alerts).

Make sure to save your changes at the bottom of the page.

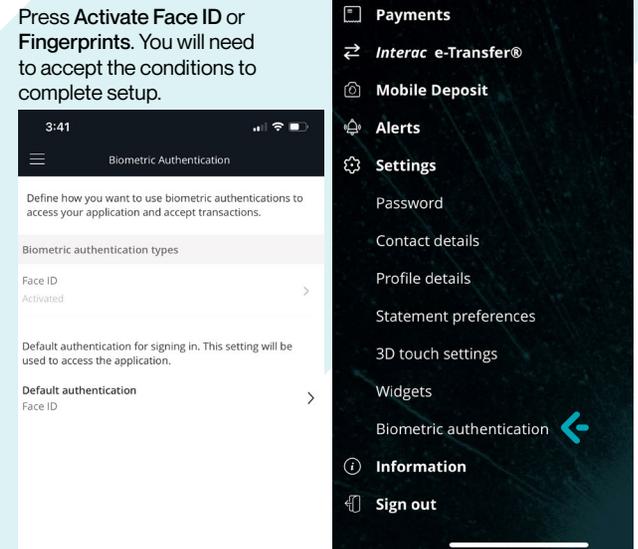
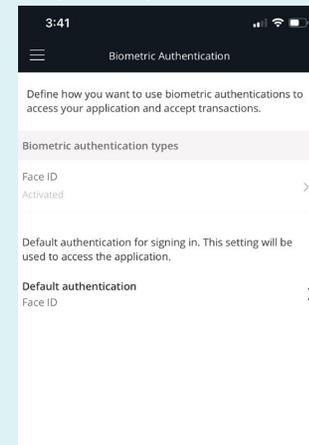


→ biometric authentication.

To set up Biometric Authentication (Fingerprints, Face ID) and access your digital banking apps, go to **Settings > Biometric Authentication**.

From there, choose the biometric authentication type that comes with your device.

Press **Activate Face ID** or **Fingerprints**. You will need to accept the conditions to complete setup.

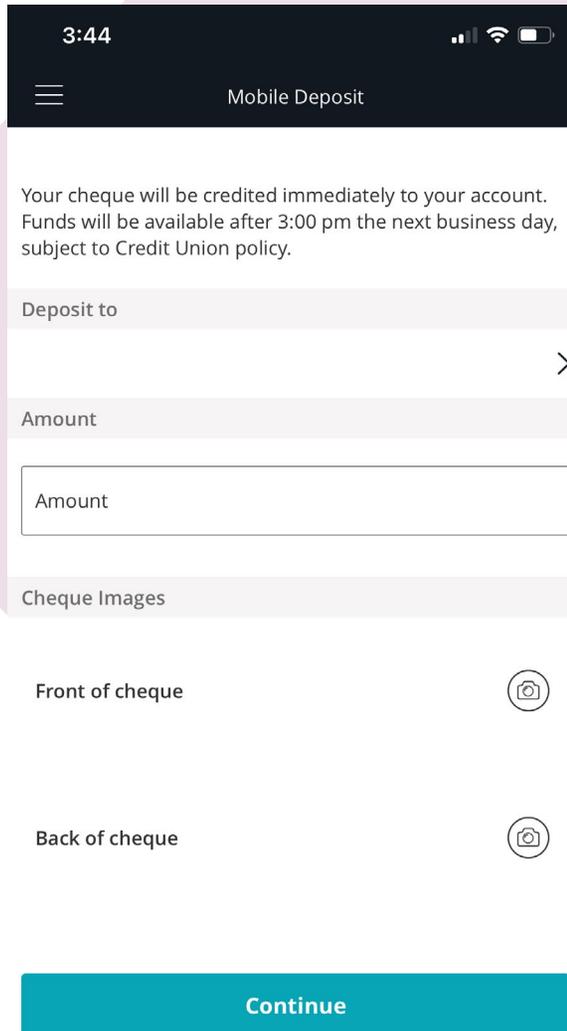


→ mobile cheque deposit.

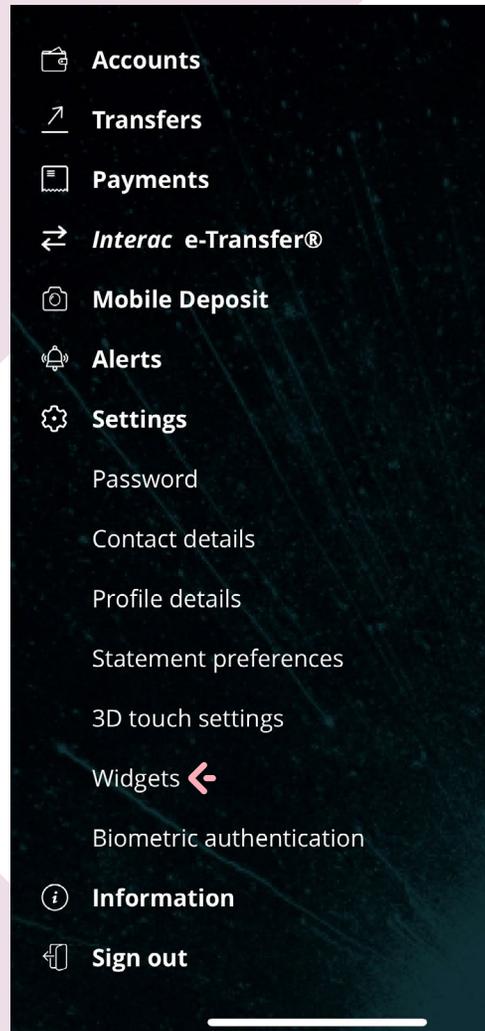
To deposit your cheques using the mobile app, device camera access is required. Go to **Mobile Deposit** in the menu options and select the account that you want to deposit to. Next select **Enter Amount** and then take pictures of front and back of Cheque.

Press **Continue** to complete your cheque deposit.

Note: Your cheque will be credited immediately to your account. Funds will be available to use as per credit union policy.



→ Quick balance view.



You can choose what deposit accounts (chequing and savings) you want to include in the **Account Balances Widget**.

You can set up widgets to be able to view your deposit account balances on the login screen. [Here's how:](#)

Go to **Settings > Widgets > select Account > Toggle on Account Balances > Name your Widget and Select the Account, display screen and type you want > Click add widget to complete action**



Making banking easier, so you can spend time with those who matter most.

<https://banking.connectfirstcu.com>





Digital banking guide:

Small business.

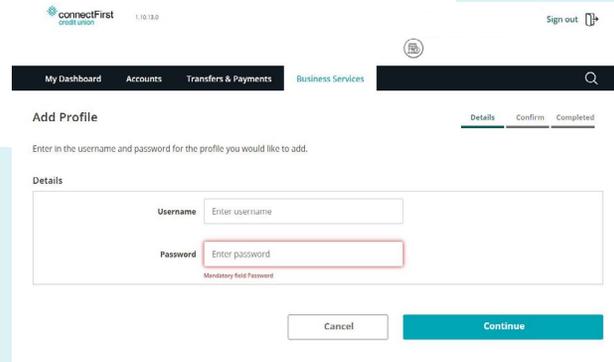
<https://banking.connectfirstcu.com>

→ profiles consolidation.

Select **Business Services** from the top menu and click on **Profile Consolidation**.



Add **Profile** by entering the username and the password of the second profile you wish to add.



Note: User must be a signer on the banking account if they wish to consolidate.

→ delegates – setup, change password, lock.

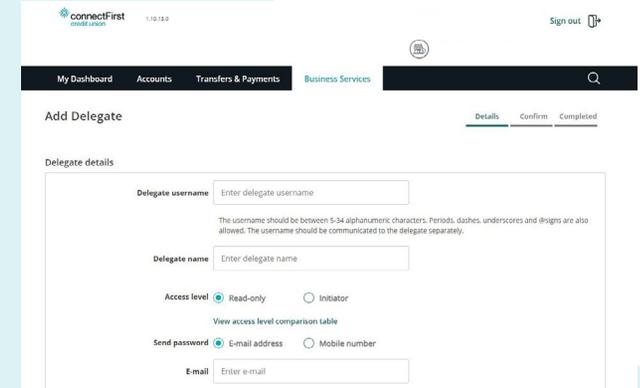
Select **Business Services** from the top menu and click on **Delegate Management**.



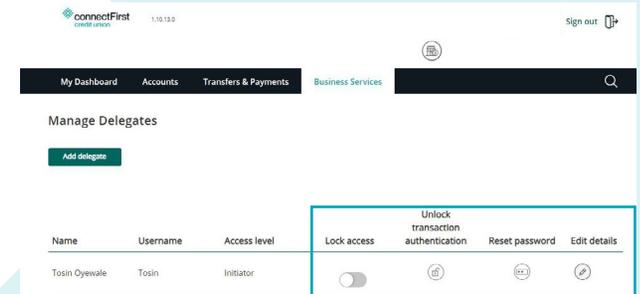
→ delegates – setup, change password, lock.

Click **Add delegate** and then follow the proceeding instructions. View the access level comparison table for the services you wish to make available to your delegate.

Note: You cannot delete a delegate, but you can lock the user to prevent access.



You can also manage and troubleshoot delegate access on the **Delegate Management** page.



Let's connect.
connectFirst
credit union

→ approve delegate transactions.

Select Business Services from the top menu and click on Pending Transactions.

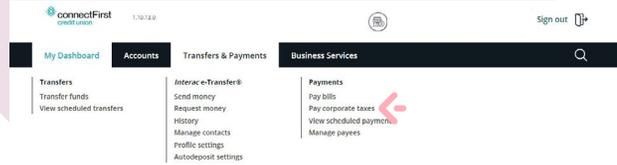


You will be able to see transactions from your delegate or other signers that are pending your approval. Follow the on-screen steps to complete.

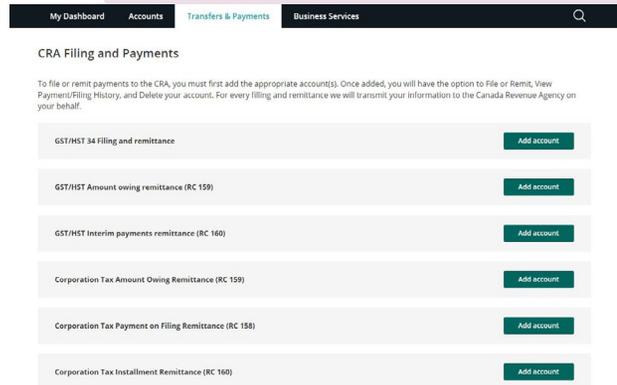


→ make tax payments.

Select Transfers and Payments from the top menu and click on Pay corporate taxes.

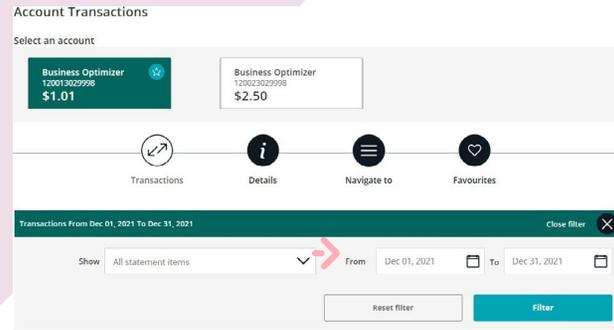


Add account and then proceed to file taxes as required.

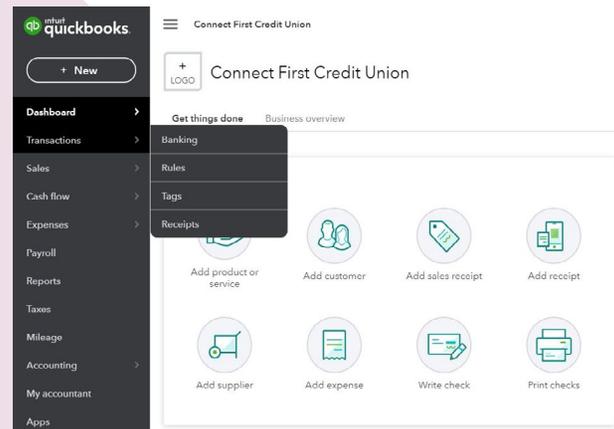
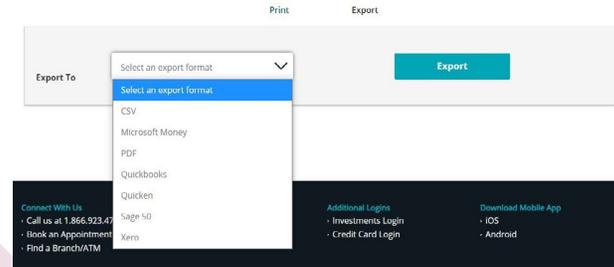


→ connecting to Quickbooks/Quicken.

Navigate to the Transactions history page, Select account, and then filter by desired date.



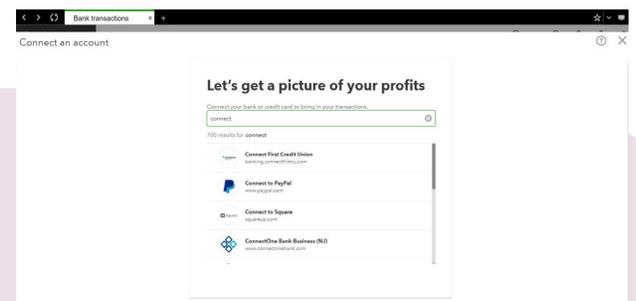
Navigate to the bottom of screen to download the required export format. Then proceed to upload export to your accounting tool.



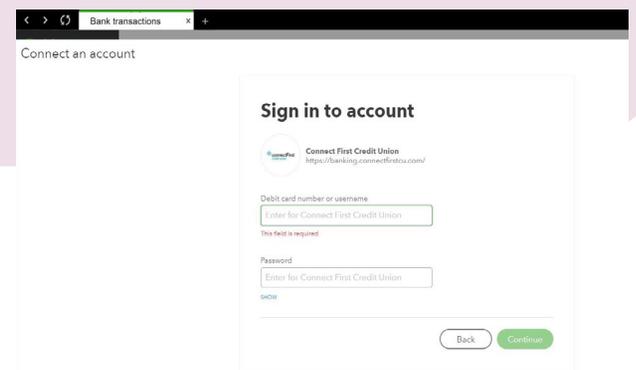
→ connecting to Quickbooks/Quicken.



Search for Connect First Credit Union.



Enter your connectFirst Digital Banking username and password to complete direct connection.



Questions? Give us a call at 1 (866) 923-4778.

