



# 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.

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!

## 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?

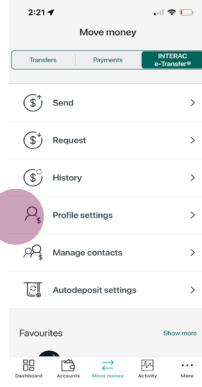
Once logged in, go to **Move Money > INTERAC e-Transfer > Profile Settings**.

Confirm your legal name and email address.

Press **Continue**.

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

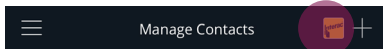
**You are now set up!**



## add an e-transfer contact.

To add a contact, go to **Move money > 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 **Move Money > INTERAC e-Transfer > Send**.

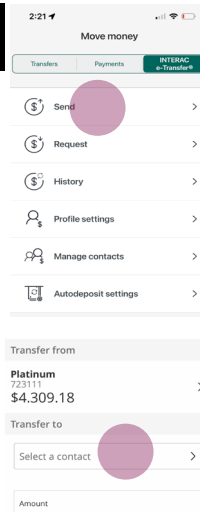
From there, choose the account you want to withdraw from, select a contact and enter the amount.

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.

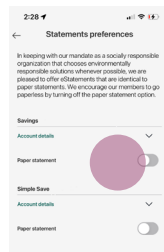
To access your eStatements, go to **Activity > View eStatements**, select the account and the year and month you wish to view.

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

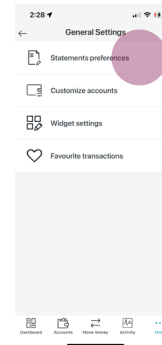
## → statement preferences.

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

On the app, go to **More > General Settings > Statement Preferences**. Toggle the button to turn off and on your paper statements for your specific accounts.



Paper statements ON = Green



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

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# Digital Banking Guide.

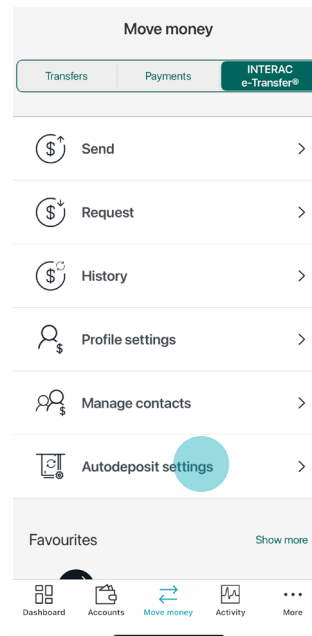
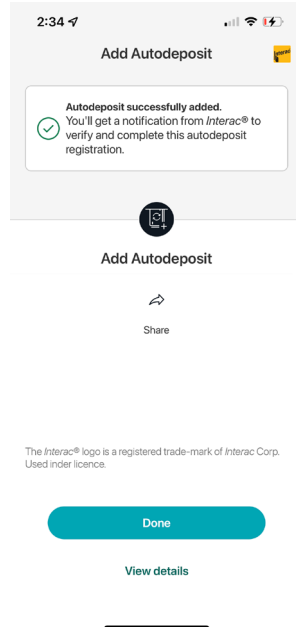
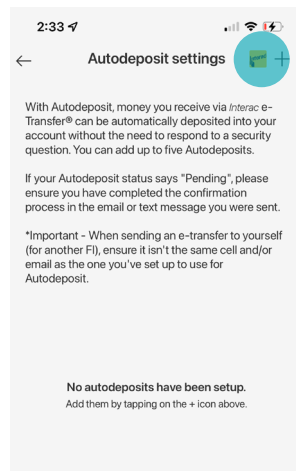
Added features and security.



## → auto-deposit registration.

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

Select + in the top right corner.



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.

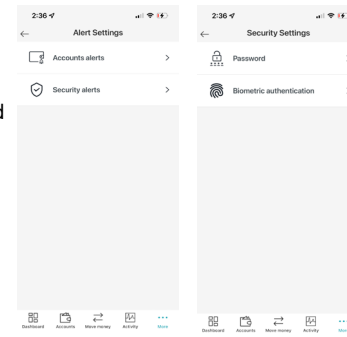
## → security alerts, notifications.

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

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

On the app, go to **More > Alert Settings > Account Alerts** (for transaction related alerts) or **Security Alerts** (for login and password related alerts).

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

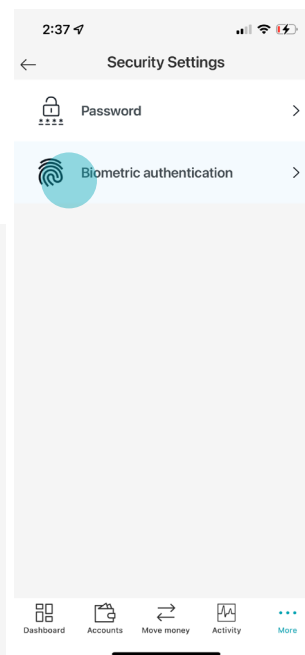
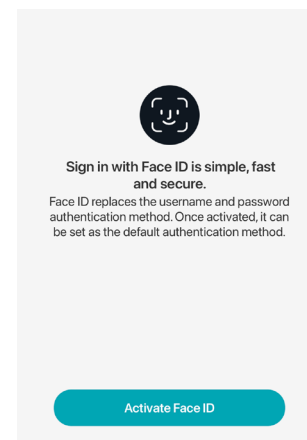


## → biometric authentication.

To set up biometric authentication (fingerprints or face ID) to access your digital banking apps, go to **More > Security 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.



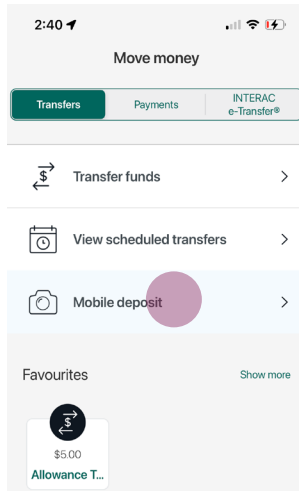


## → mobile cheque deposit.

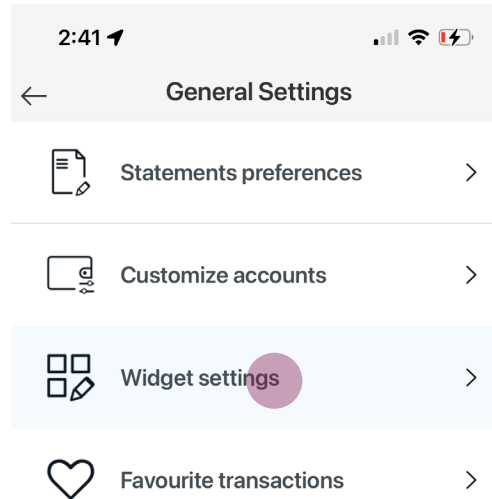
To deposit your cheques using the mobile app, device camera access is required. Go to **Move money > Transfers > Mobile deposit**. Select the account that you want to deposit to. Next add the amount of the cheque and then take pictures of front and back of cheque.

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

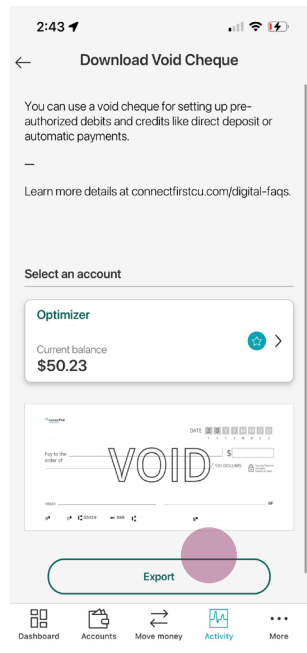
Note: Your cheque will be credited immediately to your account. Funds will be available to use as per credit union policy.



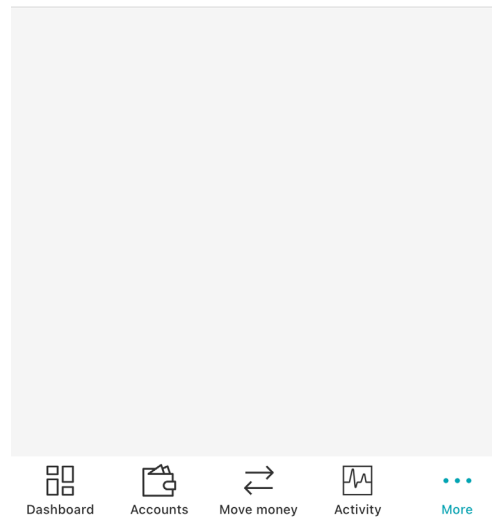
## → quick balance view.



## → Void cheque download.



You can download a void cheque for setting up pre-authorized debits and credits like direct deposit or automatic payments. Go to **Activity > Download void cheque**. Select the account you would like to use, and then export.



You can set up a widget to be able to view your deposit account balances on the log in screen, without ever having to log in.

Go to **More > General Settings > Widget Settings**. Toggle on Account Balances.

Next, name your widget and select the account, display screen and type you want. Click add widget to complete the action.



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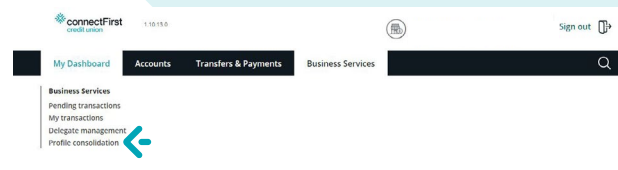
# Digital banking guide:

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.

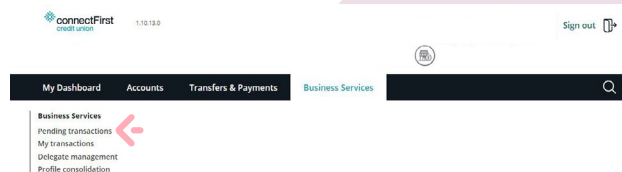
Name	Username	Access level	Lock access	Unlock transaction authentication	Reset password	Edit details
Tosin Oyewale	Tosin	Initiator	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



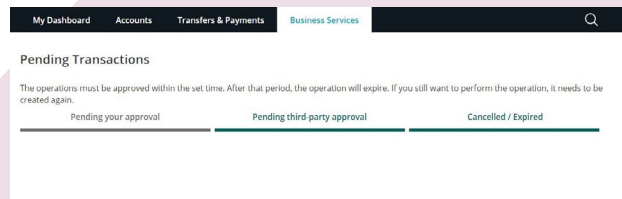
Let's connect.  
**connectFirst**  
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## → approve delegate transactions.

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

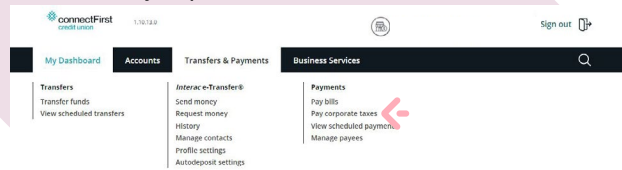


You will be able to see transactions from your delegate or other signers that are pending your approval. Follow the on-screen steps to complete.

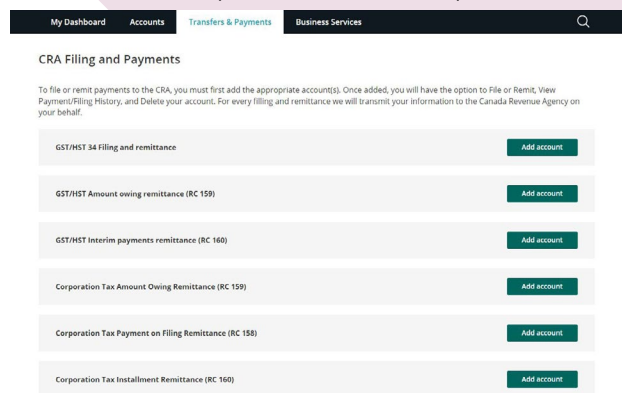


## → make tax payments.

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



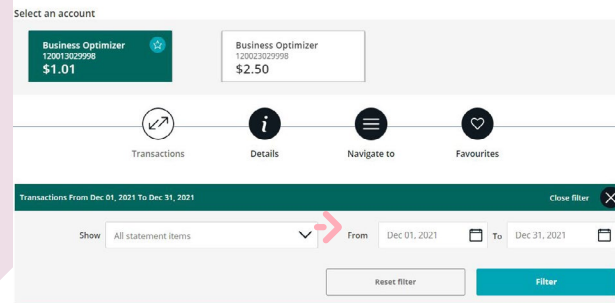
Add account and then proceed to file taxes as required.



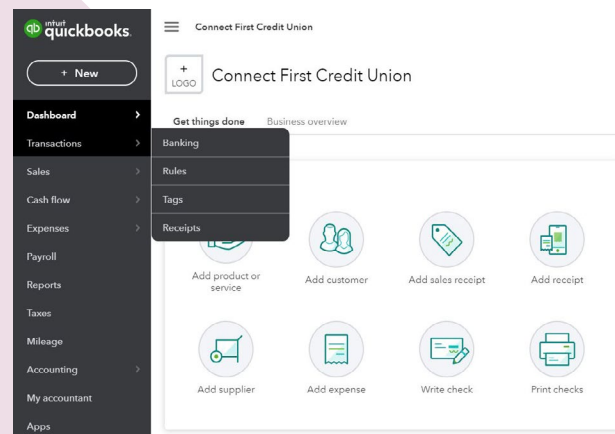
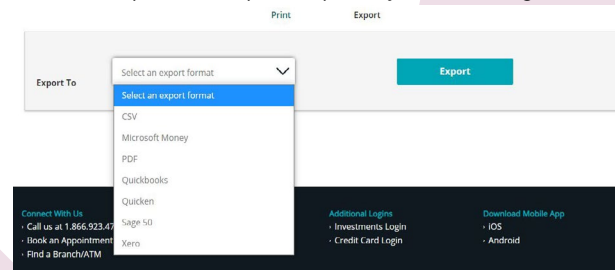
## → connecting to Quickbooks/Quicken.

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

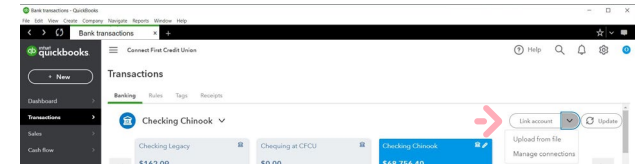
Account Transactions



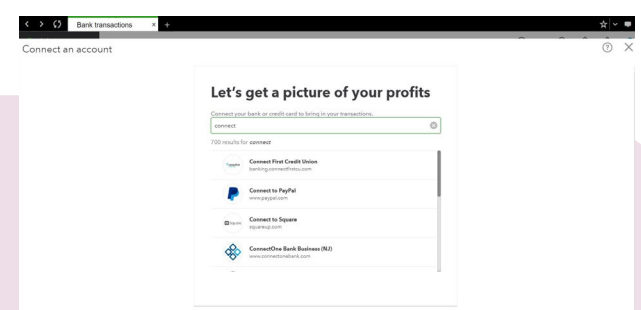
Navigate to the bottom of screen to download the required export format. Then proceed to upload export to your accounting tool.



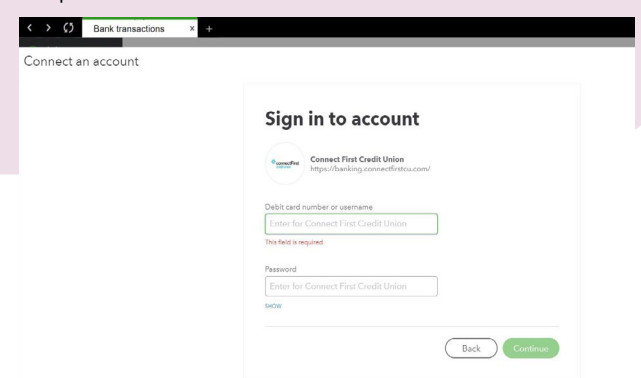
## → connecting to Quickbooks/Quicken.



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.

