

Digital banking guide

Small business.

https://banking.connectfirstcu.com

consolidate your profiles.

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.

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

adding and managing delegates.

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



adding and managing delegates. Continued...

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.

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		The username should allowed. The usernam	be between 5-34 alphanumeric e should be communicated to t	characters. Periods, dashes, underscores ani he delegate separately.	d @signs are also
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You can also manage and troubleshoot delegate access on the **Delegate Management** page.

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Manage Dele	egates					
Add delegate						
Name	Username	Access level	Lock access	Unlock transaction authentication	Reset password	Edit details

approve delegate transactions.

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

Corporation Tax Installment Remittance (RC 160)



Add account

connecting to Quickbooks/Quicken.

Navigate to the Transactions history page, Select account,

connecting to Quickbooks/Quicken. Continued.



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



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

