Digital banking guide

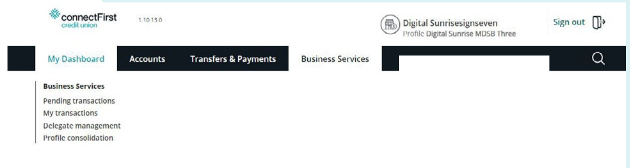
Small business.

https://banking.connectfirstcu.com

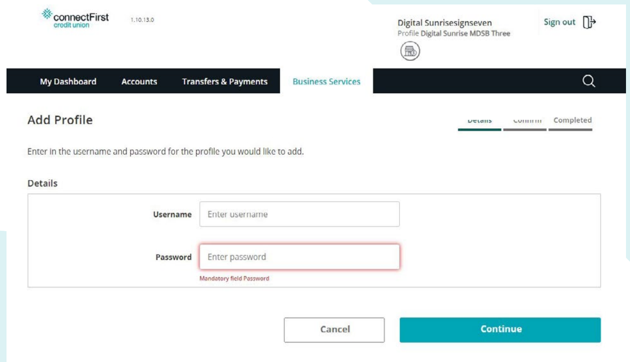
connectFirst
credit union

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.



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

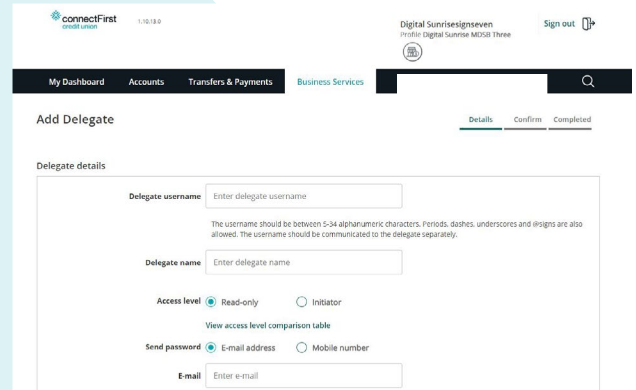
adding and managing delegates.

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

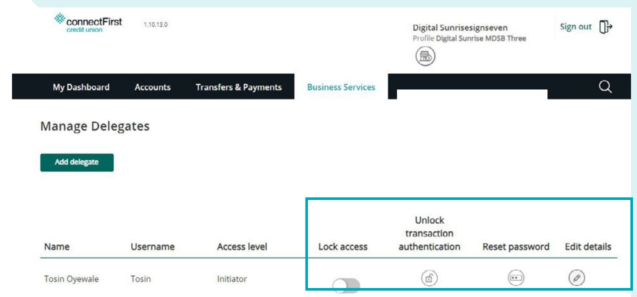
adding and managing delegates. *Continued...*

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.*



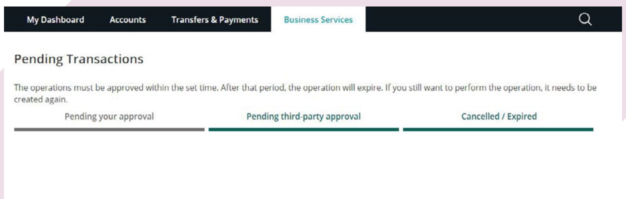
You can also manage and troubleshoot delegate access on the **Delegate Management** page.



approve delegate transactions.

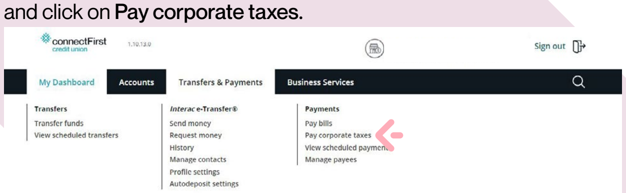
Select **Business Services** from the top menu and click on **Pending Transactions.**

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.

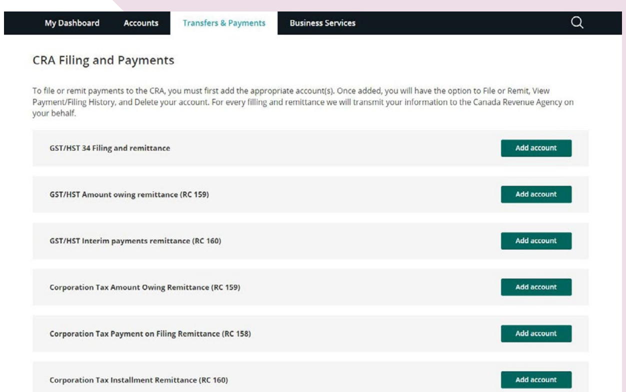


make tax payments.

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

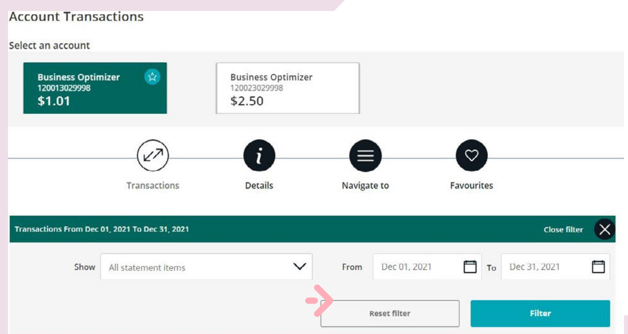


Add account and then proceed to file taxes as required.

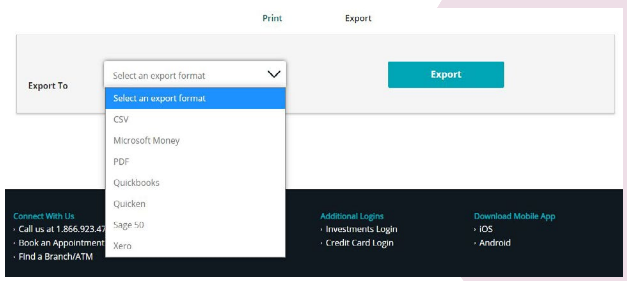


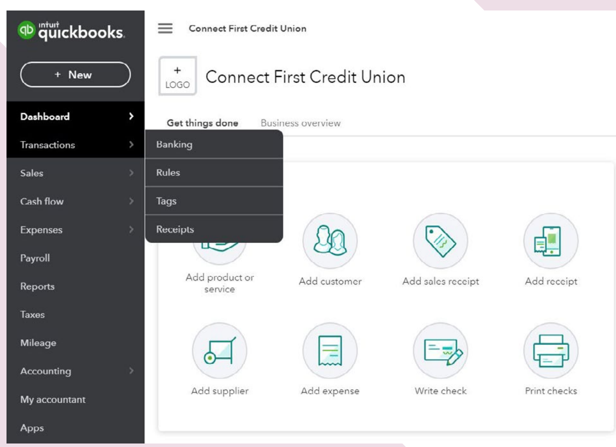
connecting to Quickbooks/Quicken.

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

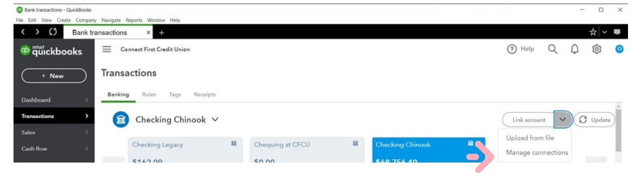


Navigate to the bottom of screen to download the required export format. Then proceed to upload export to your accounting tool.

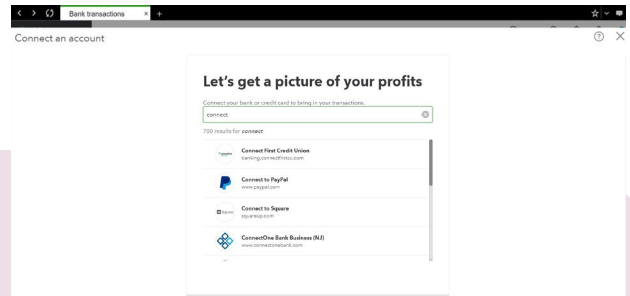




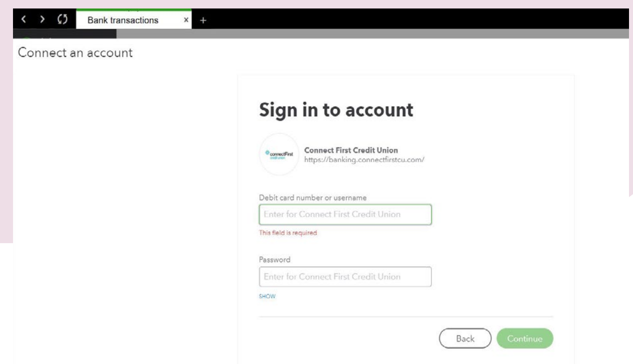
connecting to Quickbooks/Quicken. *Continued.*



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.

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