Digital Banking Guide.

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

connectFirst credit union

Logging in

First time logging in?
Great!

To get started, get the app or visit https://banking.connectfirstcu.com

✓ Enter your 19 digit Member Card number.

✓ Press Continue

Welcome to Connect First Credit Union

Sign in to Online Banking

Debit card number or username

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

✓ Enter your date of birth and your mobile phone number or email address

✓ You will receive an email or text with a code

✓ Enter the code and press Continue

✓ Next, choose a username and password.

✓ Note: your username is permanent. If you ever forget it, we can remind you at any time

✓ Passwords need to have a minimum of 1 of the following:

- 10 or more characters
- 1 or more uppercase letters
- 1 or more lowercase letters
- 1 or more numbers

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

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

✓ Now you're ready to access online banking

Bill payments

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

On the app go to **More > Settings > Manage Payees**

✓ You can add payees by clicking the + in the top right hand corner

✓ To delete a payee click the red trash can symbol to the right of the listed payee

Transfers & Payments

Interac e-Transfer®
- Send money
- History
- Manage contacts
- Profile settings
- Autodeposit settings

Payments
- Pay bills
- Pay corporate taxes
- View scheduled payments
- Manage payees

Note: you will be sent a verification code via text or email to confirm the change.

To make a bill payment go to Transfers and **Payments > Pay bills.**

✓ Choose the bill you would like to pay

✓ Enter the amount and date you would like to send the payment

✓ Press Continue

✓ Confirm the amount and date on the next page and press Continue

On the app go to **Move Money > Payments** and follow the steps above.

To cancel a bill payment go to **Transfers & Payments > View Scheduled Payments.**

✓ Click on the red trash can icon to the right of the listed bill payment

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Accounts and transactions

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

To view your transactions you can either click on your account or go to **Accounts > View Transactions >** select the account you wish to look at.

My Dashboard   **Accounts**   **Transfers & Payments**

Accounts
- View accounts
- View transactions
- Favourite transactions
- View eStatements
- Customize accounts

Cheques
- Stop cheques

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

e-transfers

Before sending an e-transfer for the first time you will need to set up your profile.

To set up your e-transfer profile go to **Transfers & Payments > INTERA e-Transfer > Profile Settings.**

✓ Enter your email address and phone number

✓ Confirm how you want to receive e-transfer notifications (by email or text)

✓ Press Continue

✓ A confirmation code will be sent to you. Enter the code and click Continue
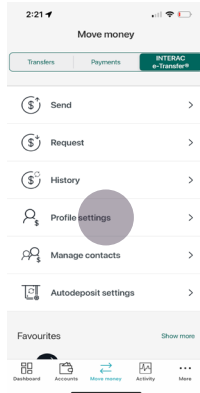
To set up your profile on the app go to **More > INTERAC e-transfer > Profile Settings**

Add a new e-transfer contact by going to **Transfers & Payments > INTERAC e-Transfer > Manage contacts**

✓ Press the + in the top right corner

✓ Add your contact's name, email address and/or mobile phone number

✓ Select how you want them to be notified

✓ Create a secret question that only they'll know the answer to

✓ Press continue

✓ You will receive a code via email or text to confirm the change

✓ Enter the code and press continue

To set up your profile on the app go to **More > INTERAC e-transfer > Manage contacts**
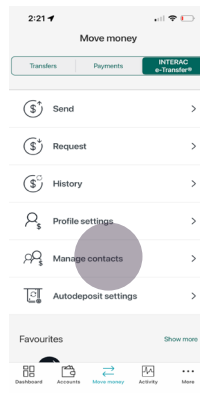
e-transfers

To set up your profile on the app go to More > INTERAC e-transfer > Manage contacts

To send an e-transfer to go **Transfers & Payments > INTERAC e-transfer > Send money**

✓ Choose the contact you want to send money to

✓ Enter the amount

✓ Click Continue

✓ Confirm details on the next page

✓ Click continue

To send an e-transfer on the app go to **More > INTERAC e-transfer** and follow the steps above.

e-statements

To view your eStatements go to **Activity > View eStatements**

✓ Select the account

✓ Select the year and month you want to view

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

To update your statement preferences go to More > General Settings > Statement Preferences.

✓ Toggle the button to turn off and on your paper statement for certain accounts.

✓ Note that paper statements cost $2.50/month to cover shipping and materials.
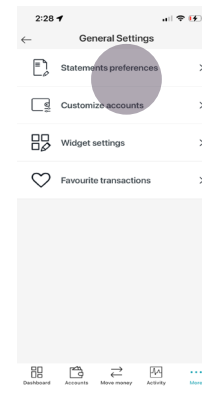
Making banking easier, so you can spend time with those who matter most.

https://banking.connectfirstcu.com

connectFirst credit union