

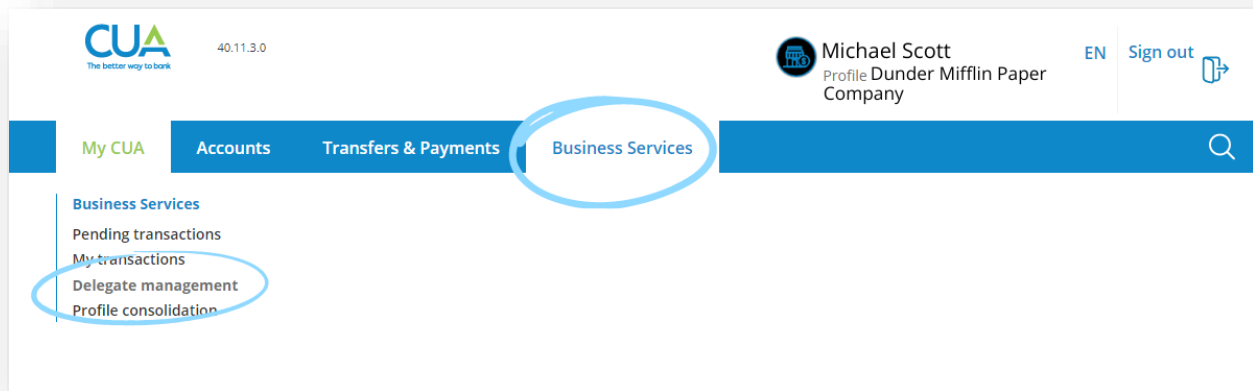
MEMBER INFORMATION GUIDE – BUSINESS SERVICES

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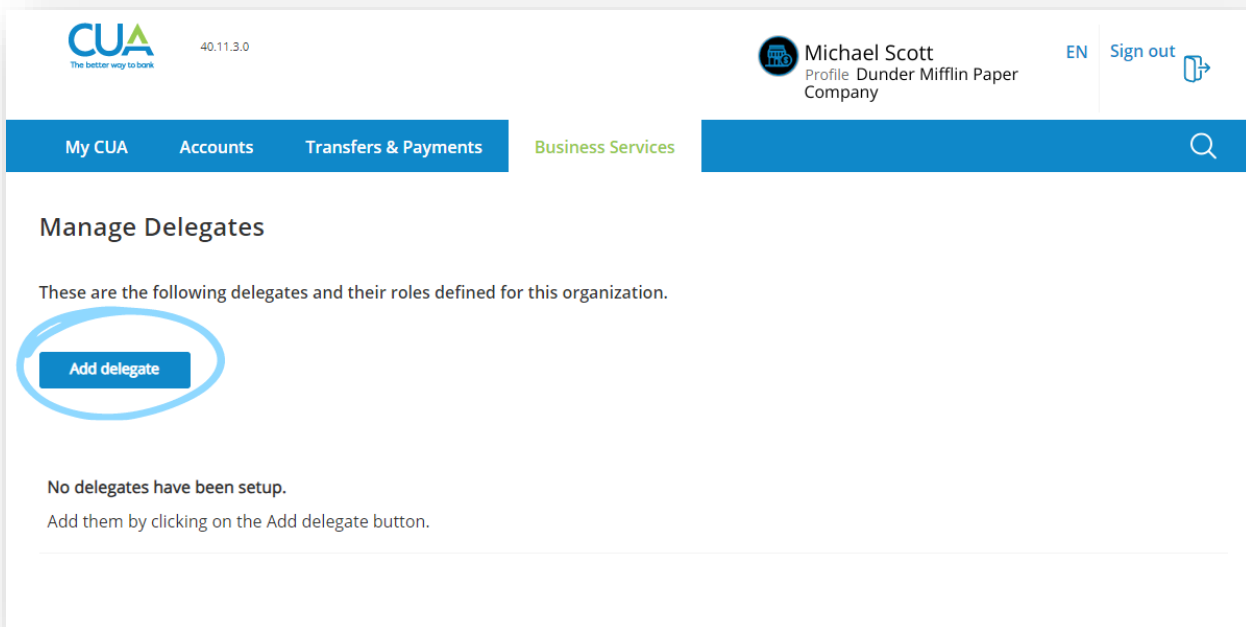
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ADDING DELEGATES (BUSINESS MEMBERS)

1. Any time after you've set up your online banking profile, you can begin accessing business services. To add delegates, hover your mouse over the 'Business Services' tab along the main menu. Select 'Delegate management' from the dropdown menu.



2. From the 'Manage Delegates' page, select 'Add delegate'.



CUA 40.11.3.0 The better way to bank

Michael Scott
Profile: Dunder Mifflin Paper Company

EN Sign out

My CUA Accounts Transfers & Payments Business Services

Manage Delegates

These are the following delegates and their roles defined for this organization.

[Add delegate](#)

No delegates have been setup.
Add them by clicking on the Add delegate button.

- From the 'Add Delegate' page, you will be required to **1)** select a username for the new delegate. Next, **2)** enter the delegate's name and **3)** indicate their access level. Then, **4)** select which method should be used to send their temporary password and **5)** enter (and re-enter) the delegate's email and **6)** phone number details. **7)** Read and select the box agreeing to the consent statement. **8)** Select 'Continue'.

Note: The delegate will use the username you created to login to online and mobile banking.

The screenshot shows the 'Add Delegate' form in a web application. The form is titled 'Add Delegate' and has three tabs: 'Details', 'Confirm', and 'Completed'. Below the title, there is a note: 'Your confirmed personal mobile phone number and e-mail will be used to send authentication codes necessary to add a delegate to your business/organization profile.' The form is divided into sections: 'Delegate details' and 'Delegate notes (optional)'. The 'Delegate details' section contains several fields and options, each highlighted with a blue circle and a number:

- 1)** Delegate username: A text input field with the placeholder 'Enter delegate username'. Below it, a note states: 'The username should be between 5-34 alphanumeric characters. Periods, dashes, underscores and @signs are also allowed. The username should be communicated to the delegate separately.'
- 2)** Delegate name: A text input field with the placeholder 'Enter delegate name'.
- 3)** Access level: Two radio buttons, 'Read-only' (selected) and 'Initiator'.
- 4)** Send password: Two radio buttons, 'E-mail' (selected) and 'Mobile phone'. Below this is a link: 'View access level comparison table'.
- 5)** E-mail: A text input field with the placeholder 'Enter e-mail'.
- Re-enter e-mail: A text input field with the placeholder 'Re-enter e-mail'.
- 6)** Mobile phone: A dropdown menu with 'Canada +1' selected and a checkmark icon. Below it is a text input field with the placeholder 'Enter mobile phone number'.
- Re-enter mobile phone: A text input field with the placeholder 'Re-enter mobile phone number'.
- 7)** Delegate notes (optional): A large text area.
- 7)** Consent statement: A checkbox followed by the text: 'I confirm that I have obtained consent from the delegate named above for the collection, use and disclosure of the delegate's phone number and/or e-mail, as applicable, in connection with this sign in notification.'
- 8)** Continue: A green button with the text 'Continue'.

At the bottom of the form, there are two buttons: 'Cancel' and 'Continue'.

- Next you will be asked to confirm your new delegate's details. If the information appears correct, select 'Continue'. If the information is incorrect, you can select the 'back' button to edit the details.

The screenshot shows the CUA online banking interface. At the top left is the CUA logo with the tagline 'The better way to bank' and version number '40.11.3.0'. At the top right is the user profile for Michael Scott, Profile Dunder Mifflin Paper Company, with a 'Sign out' button. Below the header is a navigation bar with 'My CUA', 'Accounts', 'Transfers & Payments', and 'Business Services'. The main content area is titled 'Add Delegate' and has three tabs: 'Details', 'Confirm' (which is active), and 'Completed'. A message box says 'Confirm delegate details.' Below this is a table of delegate details:

Delegate username	StanleyHudson
Delegate name	Stanley Hudson
Access level	Read-only
Send password	E-mail
E-mail	stanleyhudson@dundermifflin.com
Mobile phone	1 (902) 123-4567

At the bottom of the screen are three buttons: 'Cancel', 'Back', and 'Continue'. The 'Continue' button is highlighted with a blue circle.

- To authenticate this transaction, a one-time code will be sent to the mobile number or email associated with **your** online banking profile (i.e., **not** the temporary password that was just emailed or texted to your delegate). Once you receive the code, enter it in the box and select 'Continue'.

CUA 40.11.3.0 The better way to bank

Michael Scott
Profile Dunder Mifflin Paper Company

EN Sign out

My CUA Accounts Transfers & Payments Business Services

Add Delegate

Details Confirm Completed

! This transaction requires authentication.

Confirmation code

⌵ E-mail

⌵ Text message

A text message with the authentication code has been sent to your phone XXX.XXX.X345. Enter in the code you have received.

Enter code

If you don't receive the text message within 10 minutes, [resend the code](#).

Cancel Back Continue

6. You have successfully added a delegate to your account.

Continue to step 7. for information on how your new delegate accesses your account.

Note: You can choose to print or save a copy of this transaction for your records before proceeding to the next step.

The screenshot shows the CUA online banking interface. At the top left is the CUA logo with the tagline 'The better way to bank' and version number '40.11.3.0'. At the top right, the user's name 'Michael Scott' and company 'Profile Dunder Mifflin Paper Company' are displayed, along with a 'Sign out' button. A navigation bar contains 'My CUA', 'Accounts', 'Transfers & Payments', and 'Business Services'. The main heading is 'Add Delegate' with sub-steps 'Details', 'Confirm', and 'Completed' (the current step). A green success banner contains a checkmark icon and the text: 'Delegate successfully added. A temporary password has been sent to the delegate. The username should be communicated to the delegate separately.' Below this are three icons: 'Print', 'Export', and 'Navigate to'. A 'Delegate details' section contains a table with the following information:

Delegate username	StanleyHudson
Delegate name	Stanley Hudson
Access level	Read-only
Send password	E-mail
E-mail	stanleyhudson@dundermifflin.com
Mobile phone	1 (902) 123-4567

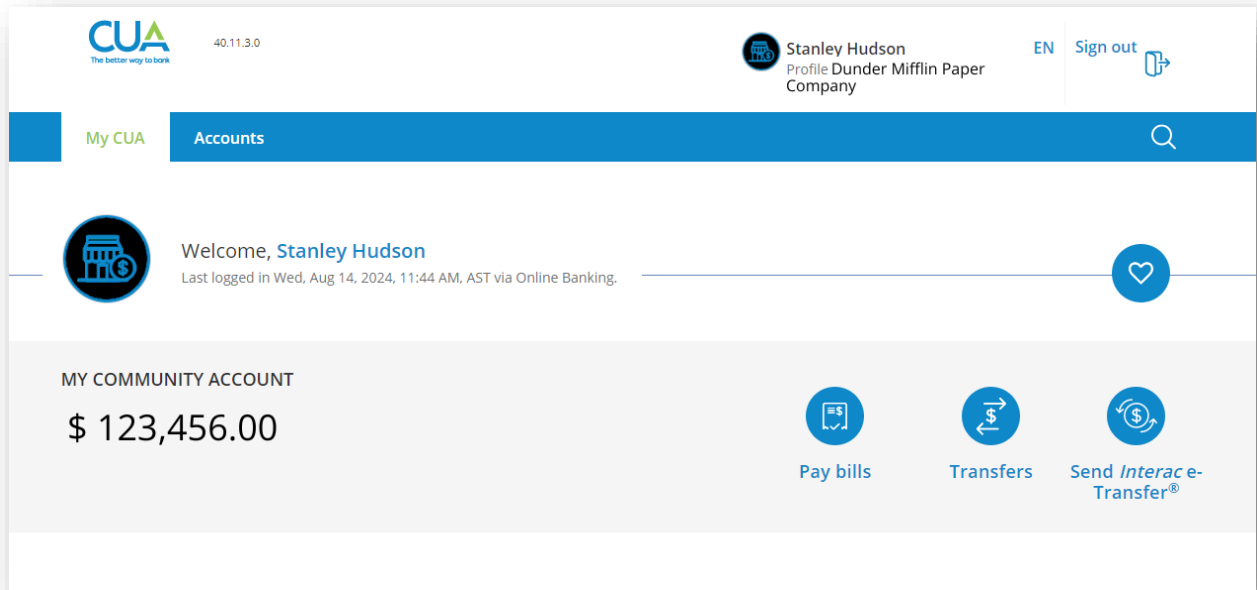
7. After successfully adding a delegate to online banking, a notification from CUA will be sent to your delegate containing a temporary password. Your delegate can use this password and the username you created in step 3 to log in to your account.

Upon logging in, an authentication code will be sent to the mobile number or email associated with **their** delegate profile. They will be required to **1)** enter the authentication code, and **2)** create a new password. Once the password has been entered (and re-entered), they can **3)** select 'Proceed to sign in'.

The screenshot shows a web form titled "Create New Password". At the top, there are two radio button options: "E-mail" (selected) and "Text message". Below these is a text box for the user's email address. A blue circle labeled "1)" highlights a text message notification: "A text message with the authentication code has been sent to your phone XXX.XXX.X363. Enter in the code you have received." Below this is an input field labeled "Enter code". A link "resend the code" is visible. Below the code field, a blue circle labeled "2)" highlights the "New password" section, which includes an input field "Enter new password", a password strength indicator showing "Weak", and four requirements, each with a red 'x' icon: "Minimum 10 characters", "Minimum 1 uppercase letter", "Minimum 1 lowercase letter", and "Minimum 1 number". Below these is a "Re-enter new password" input field. A blue circle labeled "3)" highlights the green "Proceed to sign in" button at the bottom of the form.

8. Your delegate now has controlled access to your account.

Note: You can edit delegate information or revoke privileges at any time through the Delegate Management section of online banking.

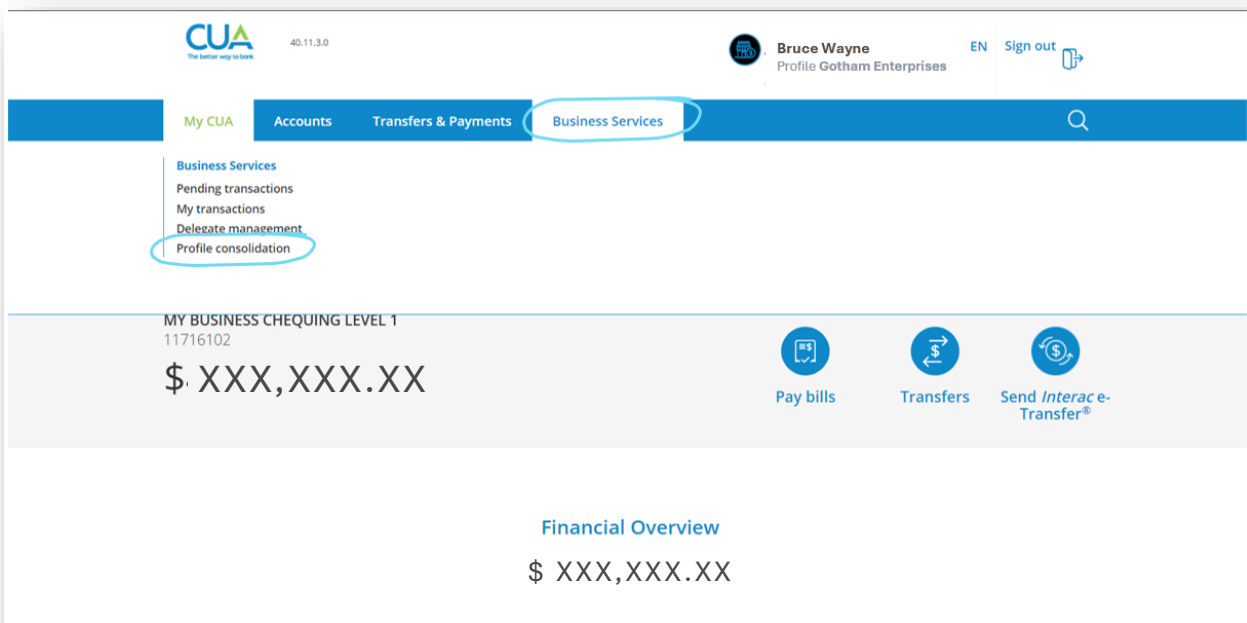


HOW TO CONSOLIDATE YOUR PROFILES (BUSINESS SERVICE)

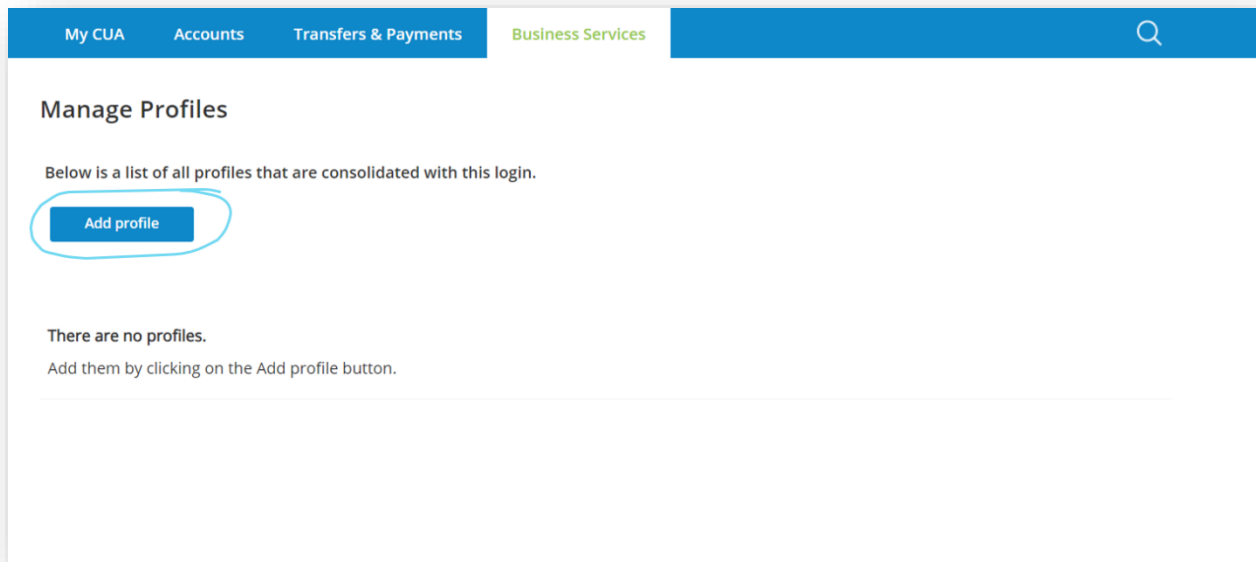
For business customers, the online banking system allows you to consolidate your profiles. You are able to consolidate multiple businesses or a combination of business and personal profiles. You are not able to consolidate multiple personal profiles without a business profile. A consolidated profile is set up through online banking. Once the profiles are consolidated, you can then access them either through online banking or on the mobile app.

Please Note: If a business / commercial member uses QuickBooks, the QuickBooks system will not allow this consolidation feature. Therefore, do not set up this feature if you require access to the QuickBooks System.

1. To begin, please go through the process of [First Time Login](#) for *each* of the profiles you would like to consolidate. Each profile must have a unique username.
2. While logged in to your business account, navigate to 'Business Services' within the main menu, and then select 'Profile Consolidation'.



1. Within the 'Profile Consolidation' section, you can add another profile. To do so, click the 'Add profile' button.



2. You will then be prompted to enter the **1)** unique username and **2)** password for either your second business or personal profile which you set up during your First Time Login. Once you have entered the details, **3)** click the 'Continue' button.

My CUA Accounts Transfers & Payments Business Services

Add Profile

Details Confirm Completed

Would you like to switch between your personal and organization/business account profiles under the same login? Enter in the username and password for the personal profile you would like to add.

Details

Username **1)**

Password **2)**

3)

3. You will then be asked to confirm the details of the profile you are adding. You will be shown your username and the name associated with the profile. If this information is correct, press 'Continue'. If it is not correct, you can select the 'Back' button and make the required changes.

The screenshot shows a web application interface for adding a profile. At the top, there is a navigation bar with tabs for 'My CUA', 'Accounts', 'Transfers & Payments', and 'Business Services'. A search icon is located in the top right corner. Below the navigation bar, the page title is 'Add Profile'. To the right of the title are three tabs: 'Details', 'Confirm', and 'Completed', with 'Confirm' being the active tab. A light orange banner with a warning icon and the text 'Confirm profile details.' is displayed. Below this, the 'Details' section shows the profile information: 'Username' is 'BruceWayneBatman' and 'Name' is 'Bruce Wayne'. At the bottom, there are three buttons: 'Cancel', 'Back', and 'Continue'.

My CUA Accounts Transfers & Payments Business Services

Add Profile

Details Confirm Completed

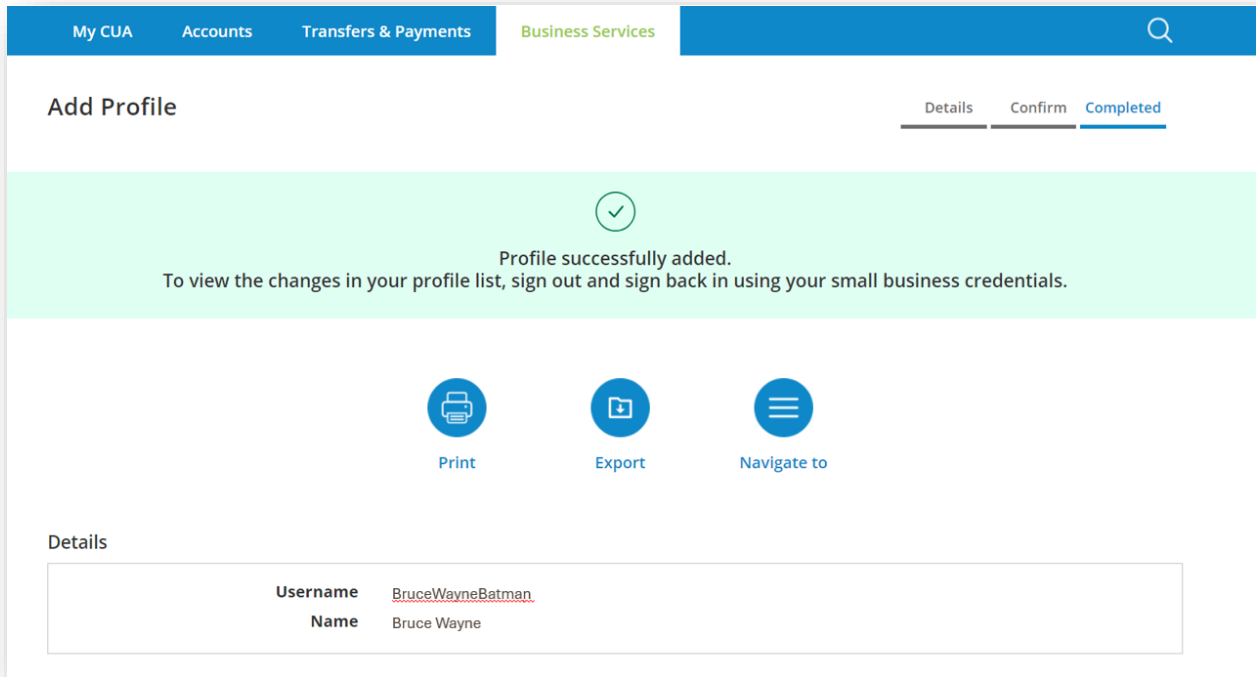
⚠ Confirm profile details.

Details

Username BruceWayneBatman
Name Bruce Wayne

Cancel Back Continue

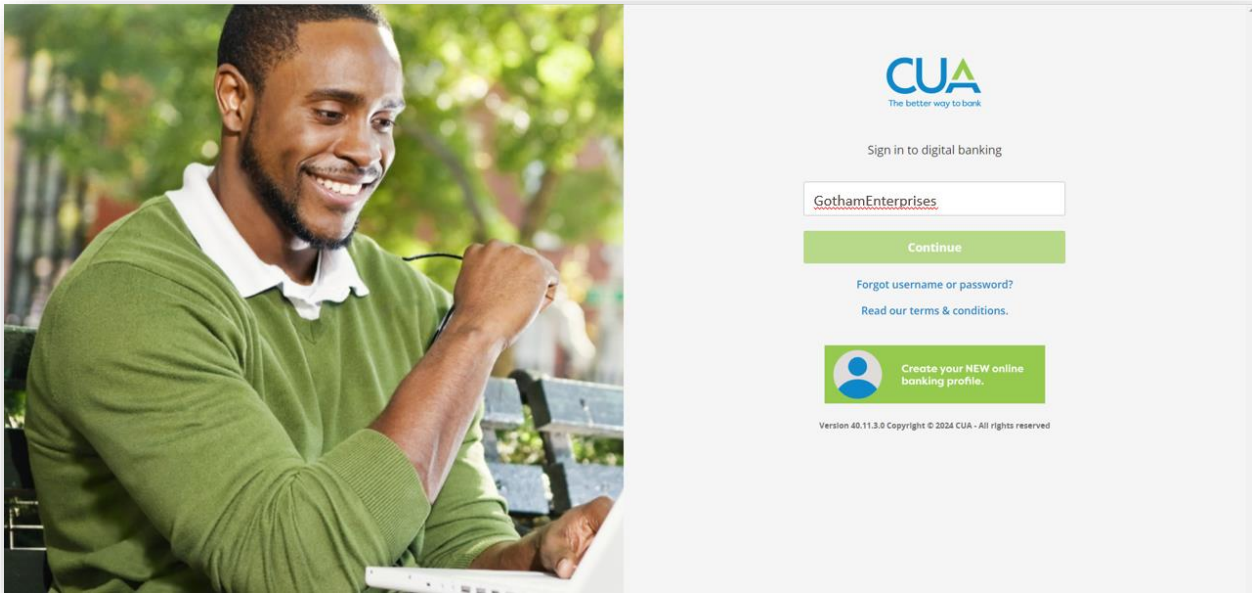
4. You will then receive a confirmation that your profiles have been connected.



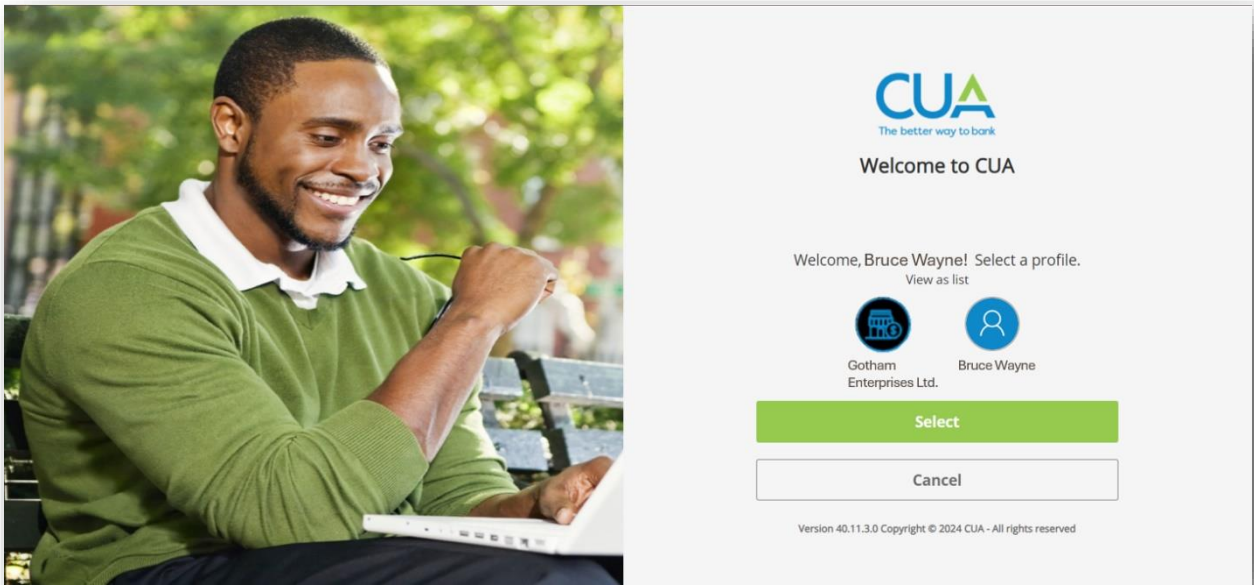
5. To see the changes reflected, you will need to log out and log in again using your business account. To do so, click the 'Sign out' button in the top right-hand corner of the screen.



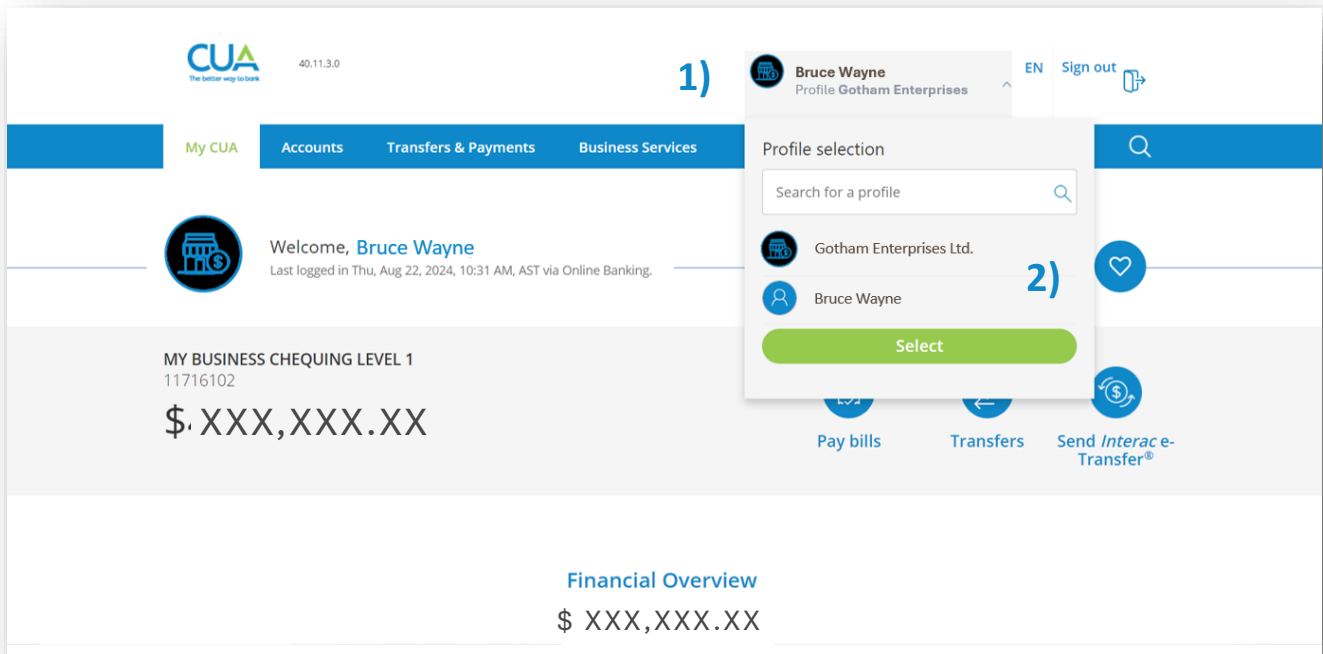
6. From the online banking Sign in page, log in as normal using your *business account*, by entering your username and password, when prompted to do so.



7. You will then be prompted to choose which profile you'd like to access. Click on the desired profile, and then press the 'Select' button.



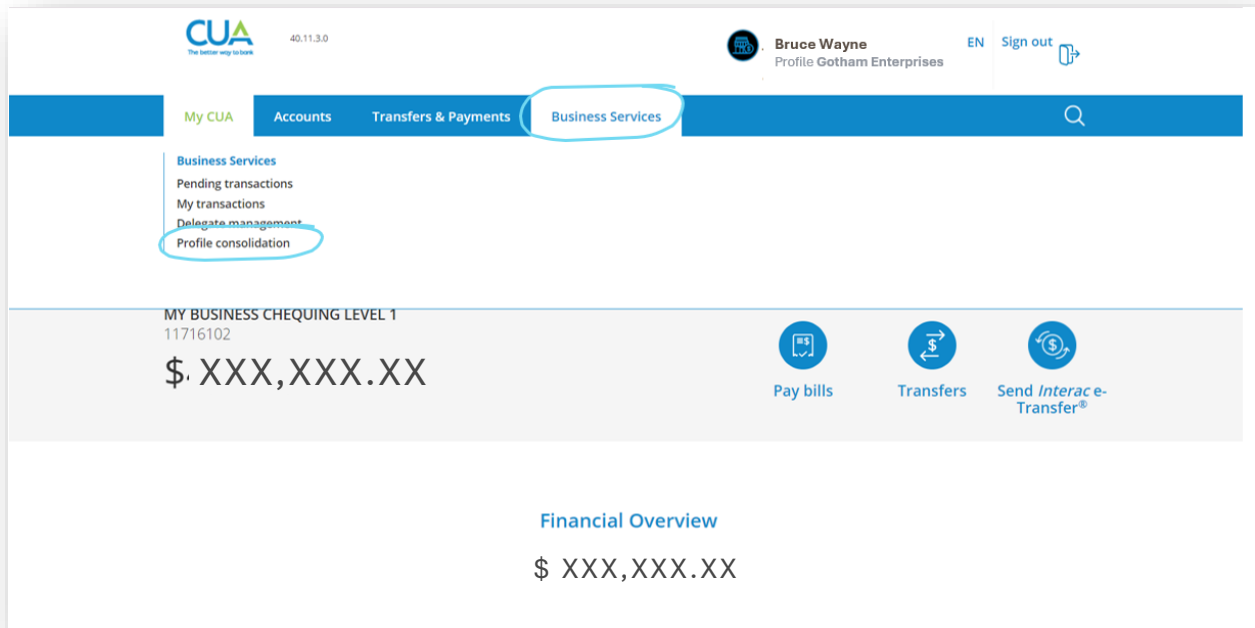
8. You will then be logged in. You are able to switch between this profile and your second profile at any time. To do so, **1)** click on your profile name in the top right-hand corner, and then **2)** select the alternate profile you'd like to see.



9. If you have a third profile you'd like to add, you can do so by repeating the previous steps. Otherwise, you can continue with your online banking as normal, switching between your profiles as necessary, without the need to log out and log back in.

Disconnecting Consolidated Accounts

1. If you have already consolidated profiles and you'd like to disconnect them, you can easily do so by navigating to 'Business Services' within the main menu and then selecting 'Profile consolidation'.




2. You will be shown a list of the profiles you have consolidated with your business profile. To remove a profile, click on the trash can icon next to the appropriate profile.

My CUA Accounts Transfers & Payments Business Services

Manage Profiles

Below is a list of all profiles that are consolidated with this login.

[Add profile](#)

Username	Name	Consolidation date	
BruceWayneBatman	Bruce Wayne	Aug 22, 2024	

3. You will be shown a summary of the profile details that you have selected. If this is the correct profile, click the 'Continue' button. If it is incorrect, or if you no longer want to remove it, click the 'Cancel' button.

The screenshot shows a web application interface with a blue header bar containing navigation tabs: 'My CUA', 'Accounts', 'Transfers & Payments', and 'Business Services'. A search icon is located in the top right corner of the header. Below the header, the main content area is titled 'Remove Profile' and features a progress indicator with three steps: 'Details' (the active step), 'Confirm', and 'Completed'. A warning message states: 'Once you have removed the consolidation you will no longer be able to switch between your business/organization and personal profiles.' Below this, a 'Details' section displays the following information:

Username	BruceWayneBatman
Name	Bruce Wayne
Consolidation date	Aug 22, 2024

At the bottom of the screen, there are two buttons: a white 'Cancel' button and a green 'Continue' button.

4. You will then be asked to confirm the profile you are removing. Click the 'Continue' button.

The screenshot shows a web application interface for removing a profile. At the top, there is a navigation bar with tabs for 'My CUA', 'Accounts', 'Transfers & Payments', and 'Business Services'. A search icon is located on the right side of the navigation bar. Below the navigation bar, the main heading is 'Remove Profile'. To the right of the heading are three tabs: 'Details', 'Confirm', and 'Completed'. The 'Confirm' tab is currently selected. Below the tabs, there is a light orange banner with a warning icon and the text 'Confirm profile details.'. Underneath the banner, the 'Details' section is displayed, showing the following information: Username: BruceWayneBatman, Name: Bruce Wayne, and Consolidation date: Aug 22, 2024. At the bottom of the screen, there are three buttons: 'Cancel', 'Back', and 'Continue'. The 'Continue' button is highlighted in green.

Remove Profile	
Confirm profile details.	
Details	
Username	BruceWayneBatman
Name	Bruce Wayne
Consolidation date	Aug 22, 2024


Buttons: Cancel, Back, Continue

5. You will be shown a confirmation screen that your selected profile was removed, and you will no longer be able to navigate between them directly from online banking.


Note: For the remainder of your current online banking session (before you log out) you will still be able to see this profile in your profile list. Once you log out, the profile separation will be completed. At your next log in, you will no longer be able to switch between profiles.

Remove Profile


Details Confirm **Completed**




Profile successfully removed.
To view the changes in your profile list, sign out and sign back in.



Print



Export



Navigate to

Details

Username	BruceWayneBatman
Name	Bruce Wayne
Consolidation date	Aug 22, 2024