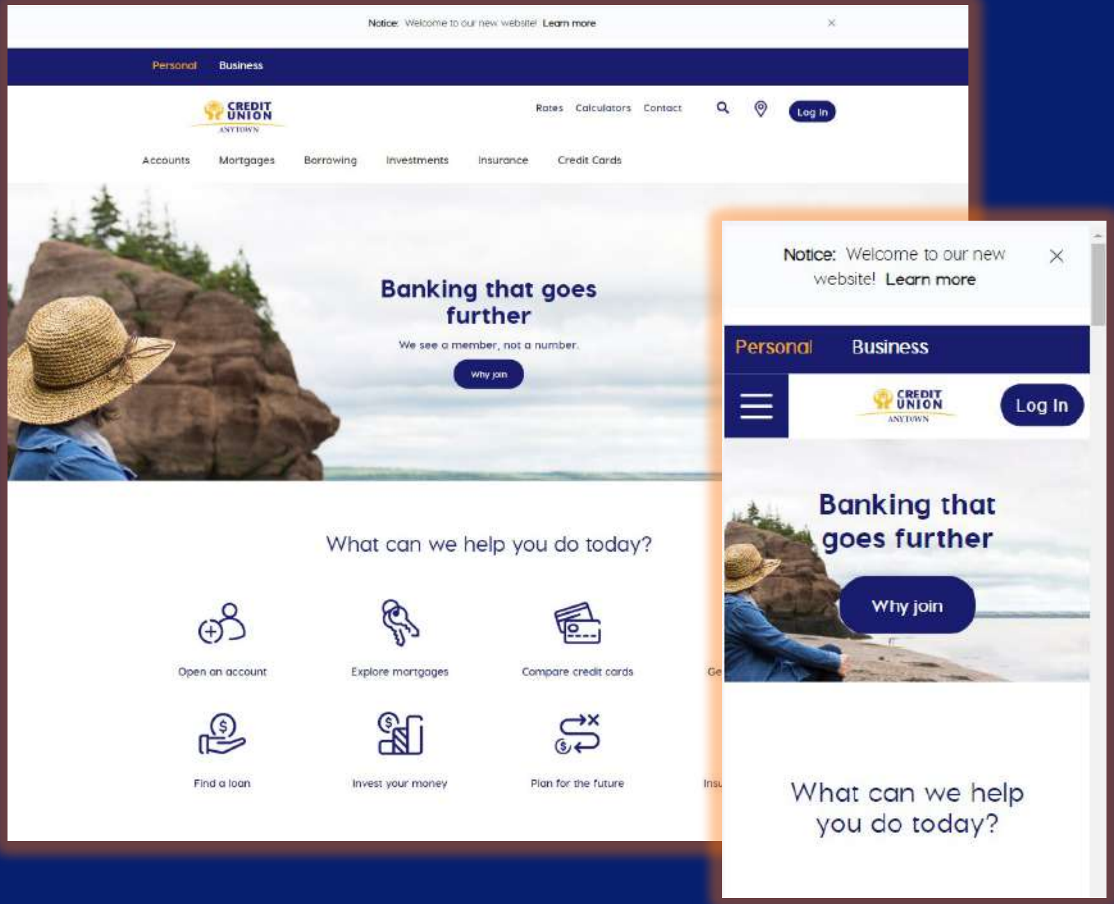
Valley Credit Union – Small Business Online Banking



Images are for reference only, and may not be the same as what you see on: valleycreditunion.com

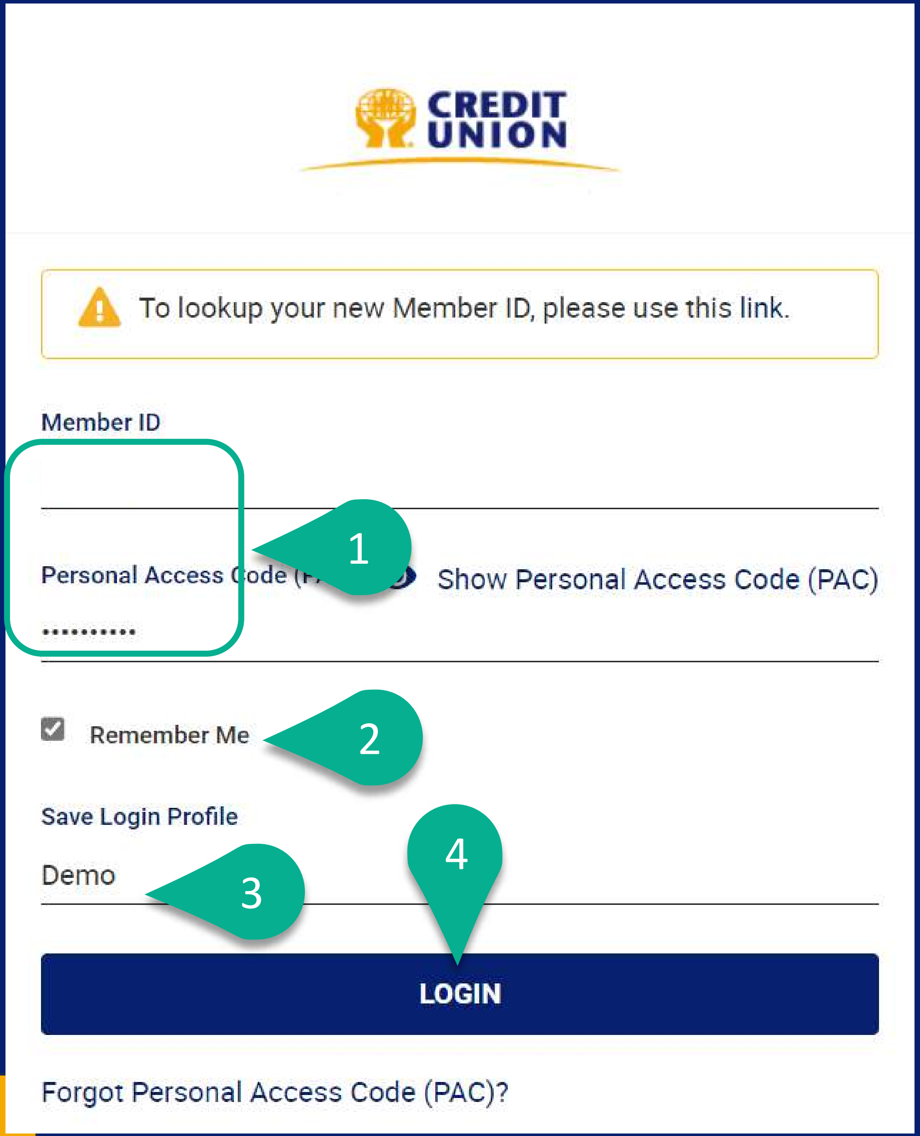
- ✓ Modern look and responsive design for a seamless experience on desktop and mobile devices
- ✓ Same great everyday banking services – and local honest advice!

Recommend bookmarking the website.

CREDIT UNIONS

Small Businesses - How to Login

- Enter your **“New Group Member ID”**
- Enter your current **“Personal Access Code (PAC)”**
- You can use the **“Forgot Personal Access Code”** link to reset your account
- Use the **“Remember Me”** checkbox to save your profile and give it a **“Nickname”**



Troubleshooting Tip – Clear your old Member ID before trying to login for your first time, after the upgrades.

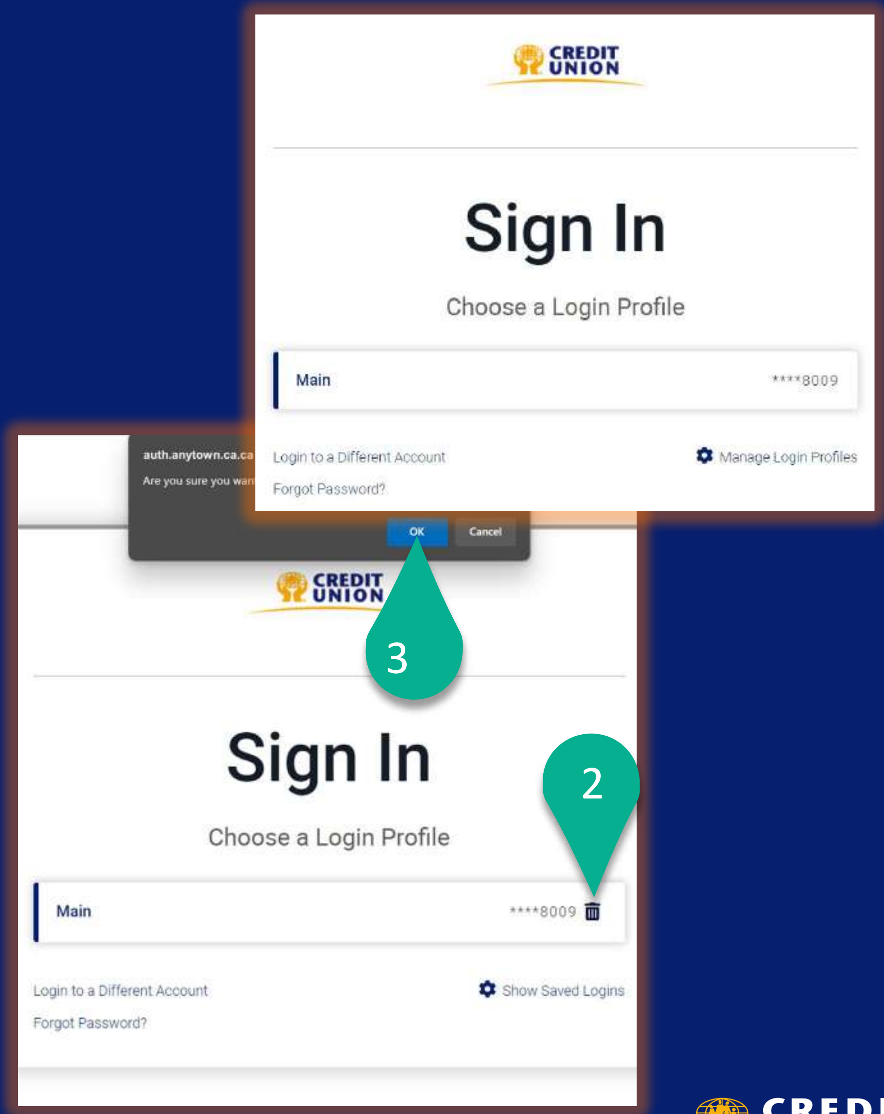
CREDIT UNIONS

How to Clear - Memorized Login Profile

Old profile(s) should be cleared after February 7, 2025

Steps to clear:

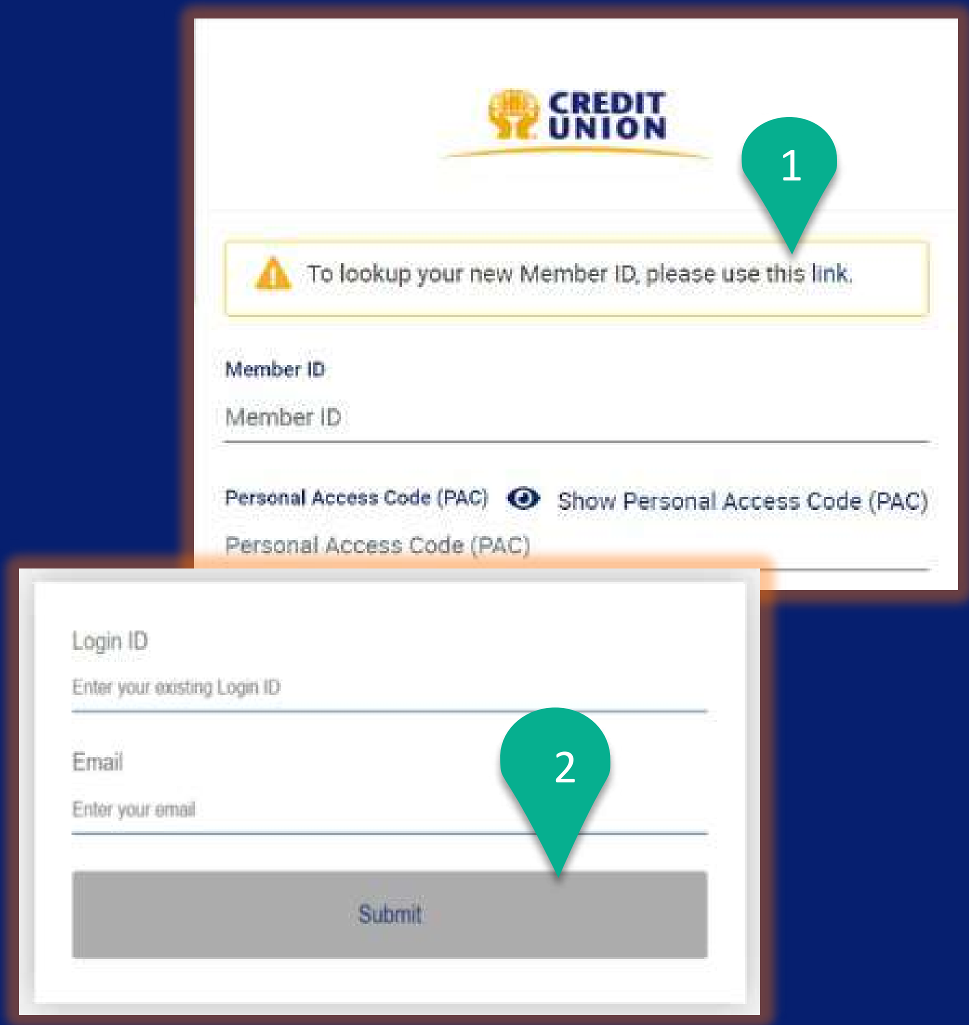
1. Select **“Manage Login Profiles”** gear icon
2. Click the **“trash”** icon
3. Select **“OK”** to clear/remove from your memorized list of accounts



NEW - Self-Serve Member ID Lookup Tool

Steps:

1. Use the link in the message box on the login screen
2. Agree to view the page outside of the app
3. Enter your old Primary Member Number (Login ID) and email address on record with Valley CU
4. Press submit



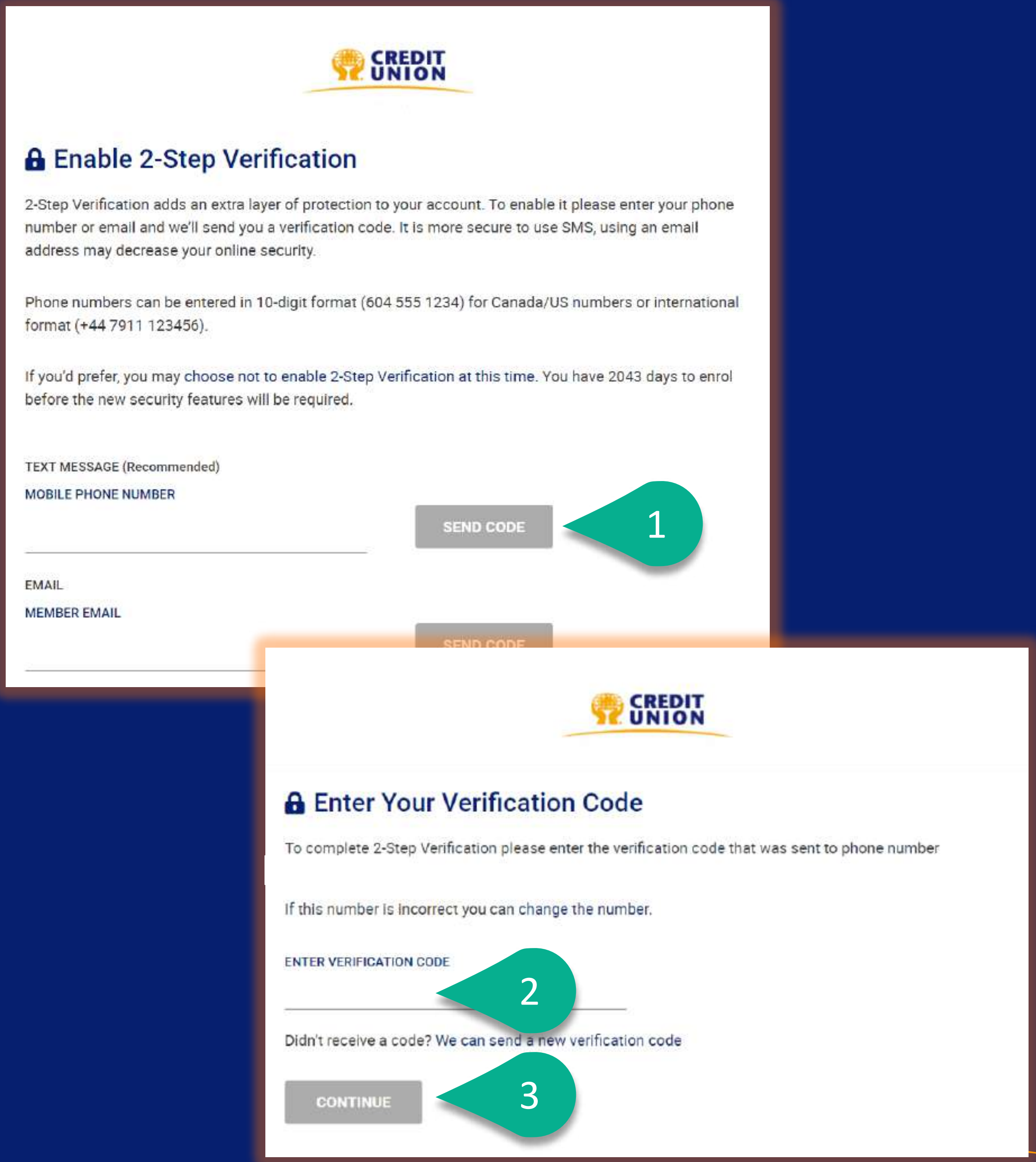
An email with the New Member ID will be sent if the credentials match. This feature is only available after the upgrades Feb 11, 2025.

2-Step Verification

Setting up your security details:

1. Enter “**Mobile Number**” (recommended) or “**Email Address**” and click **“Send Code”**
2. Enter the code received by method selected
3. Click **”Continue”**

A second step on your account protects against password-stealing scams.



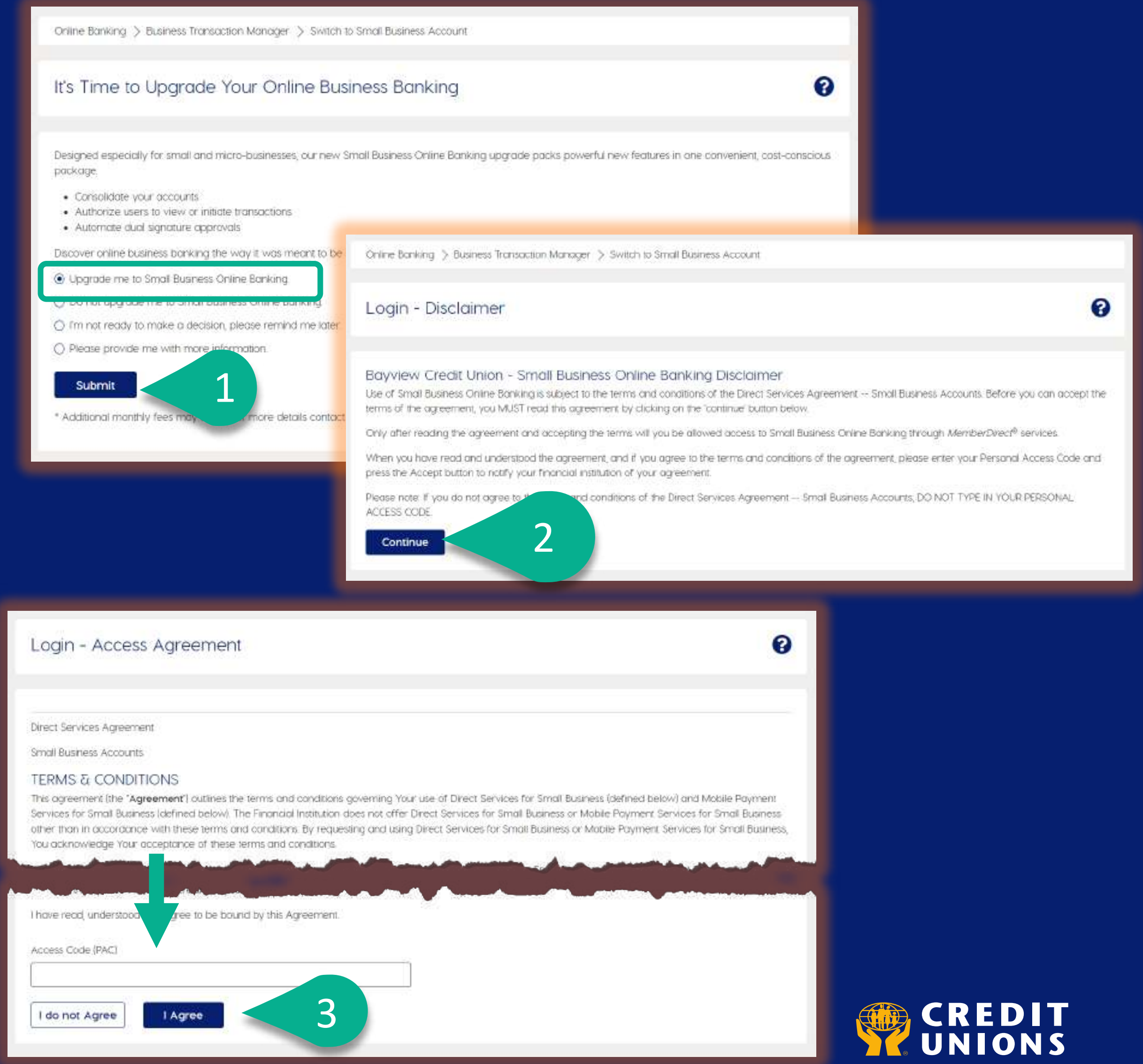
Small Business Banking Enrollment

Steps to enroll:

1. Accept the **“upgrade”** to Small Business Online Banking and **Submit**

1. Review and accept the disclaimer and **“Continue”**

2. Review and agree to the Direct Services Agreement, enter **“Personal Access Code (PAC)”**, and click **“I Agree”**

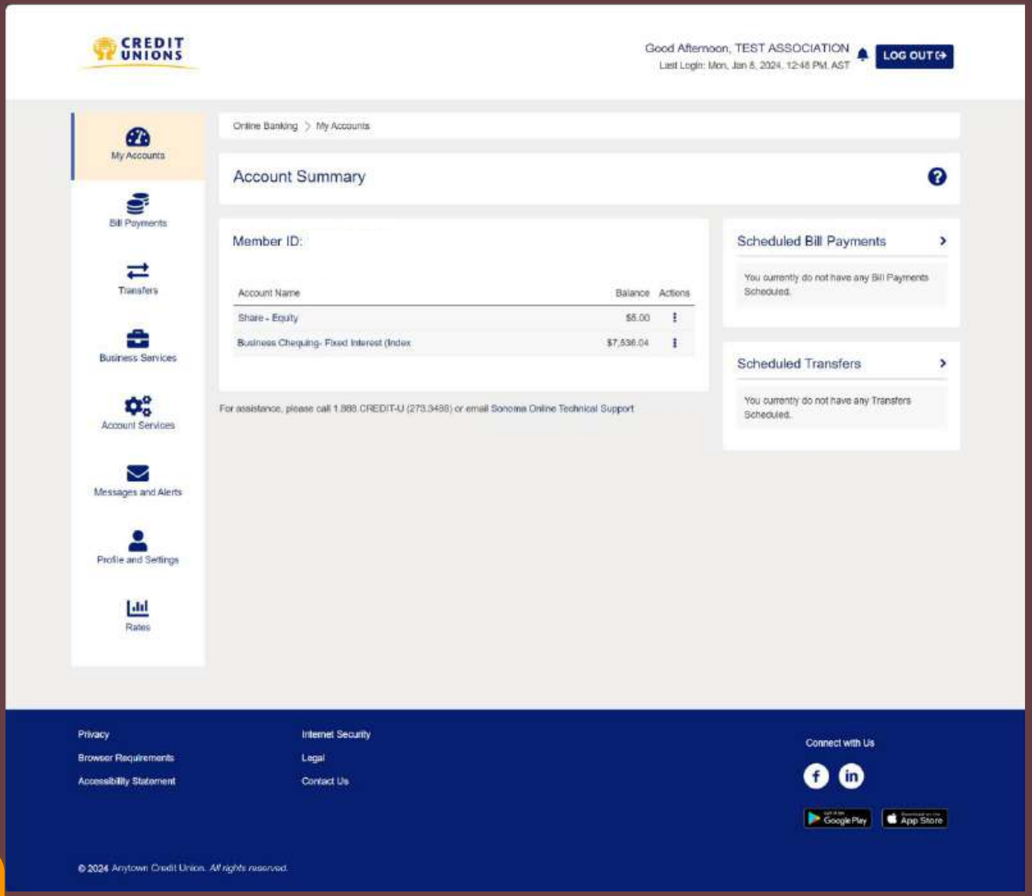


CREDIT UNIONS

Consolidated Account View - Dashboard

What’s New:

- New look and feel
- Consolidated view deduplicated business memberships under single login
- Accounts grouped under Membership/Group



Existing account nicknames will remain in place

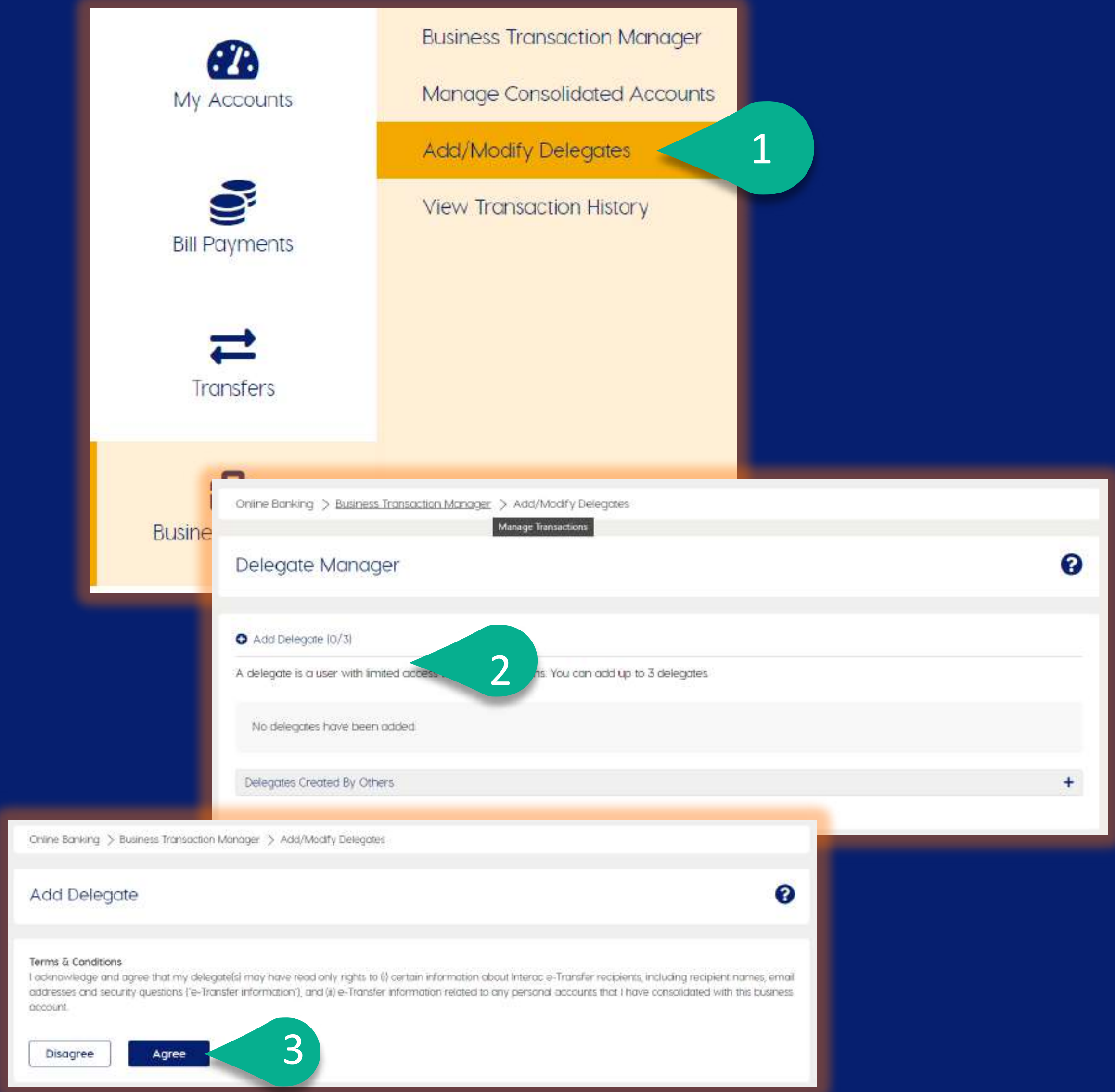
Add/Modify Delegates

Singer can add up to three (3) delegates.

Steps to set up:

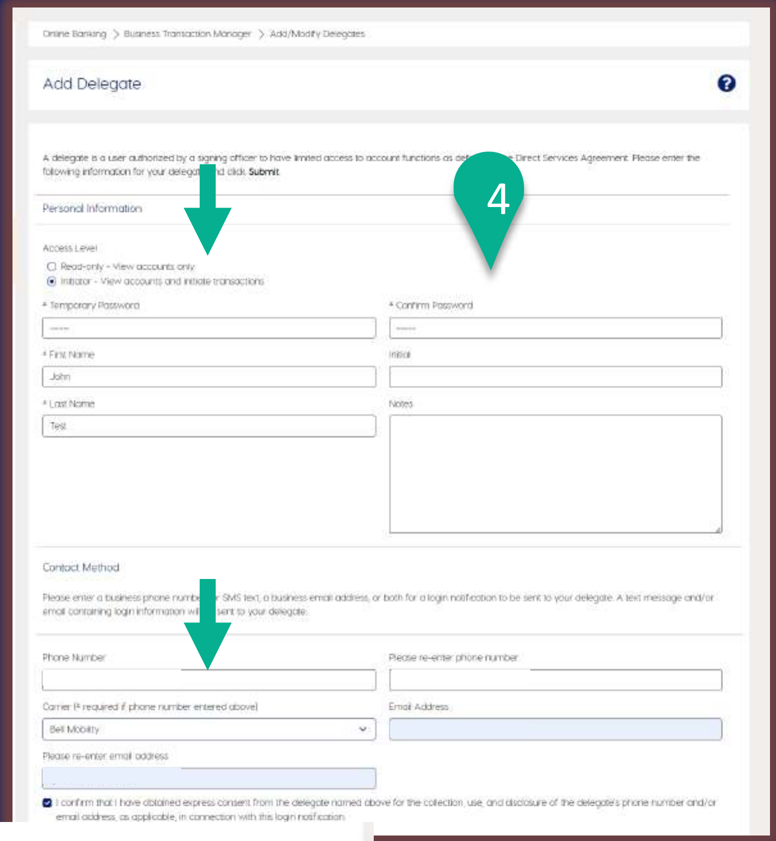
1. Select the **“Business Services”** menu and **“Add/Modify Delegates”**
2. Select **“Add Delegate”**
3. Review and **“Agree”** to the Terms & Conditions

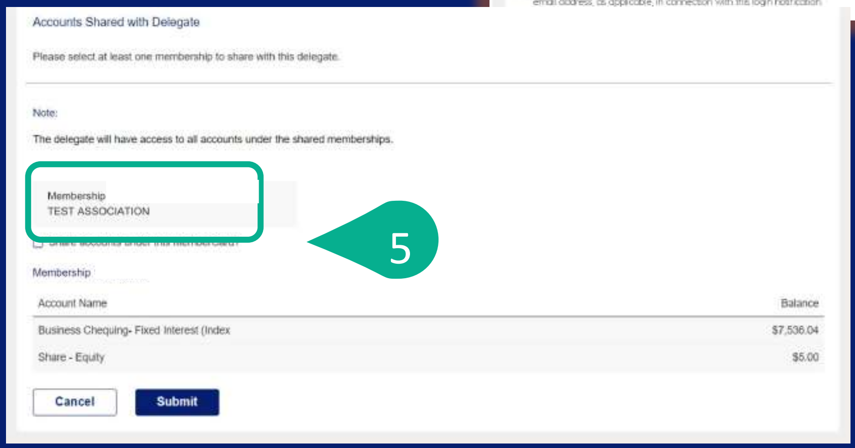
(steps 4-6 continued next page....)



Delegate Profiles

4. Complete the **“Personal”** information and **“Contact”** details
5. Select the **“Group Membership”** to share access to
6. Confirm the details and **“Submit”**

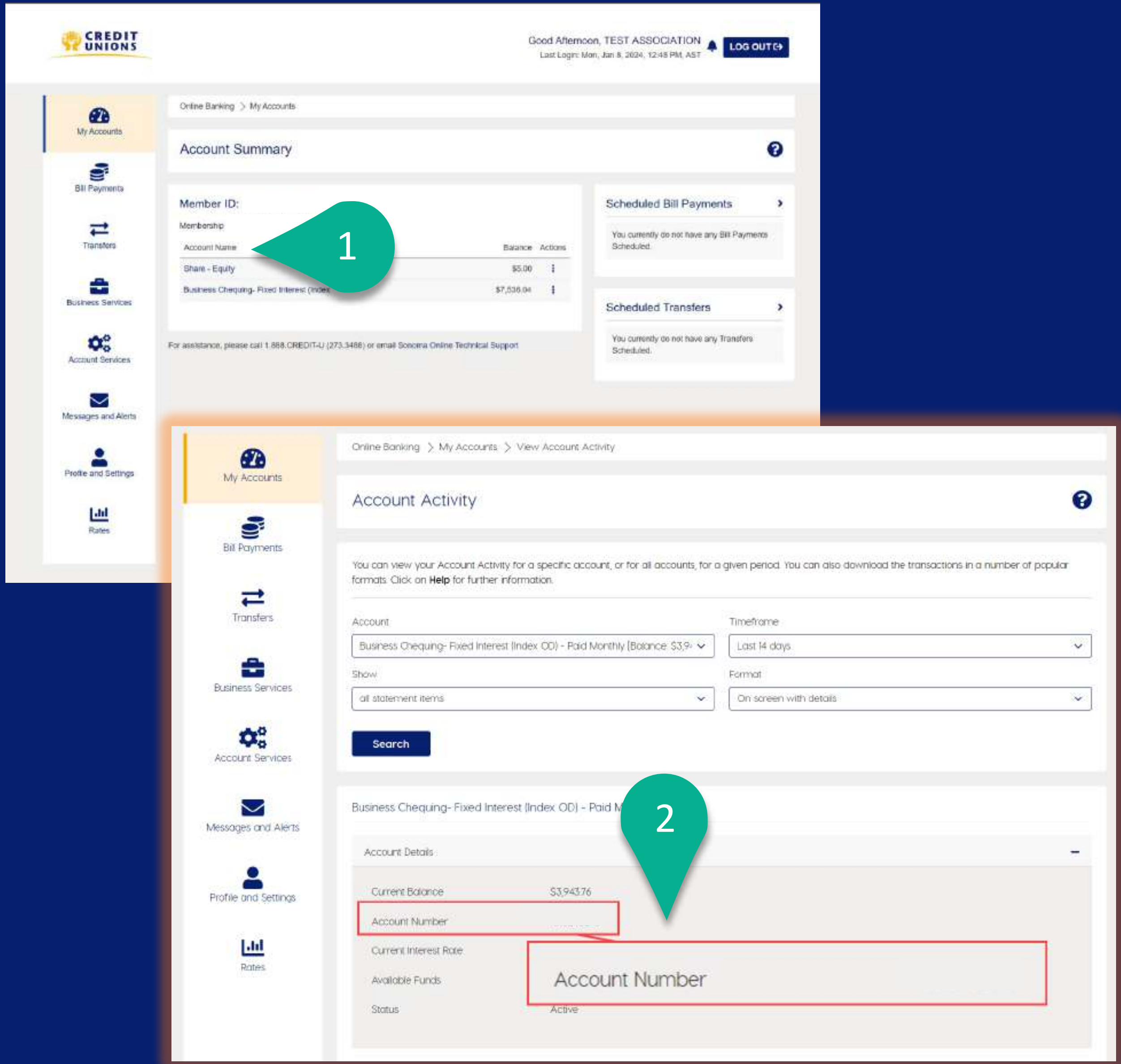




Account Numbers

How to find your Account Number

1. Click on the **“Account Name”** from your main dashboard
2. Open the **“Account Details”**



Interac e-Transfer®

Due to the Feb 2025 upgrades, you can expect a loss of:

- Sender Profile
- Recipient list
- History
- Autodeposit

Action After:

✓ Register for Interac e-Transfer

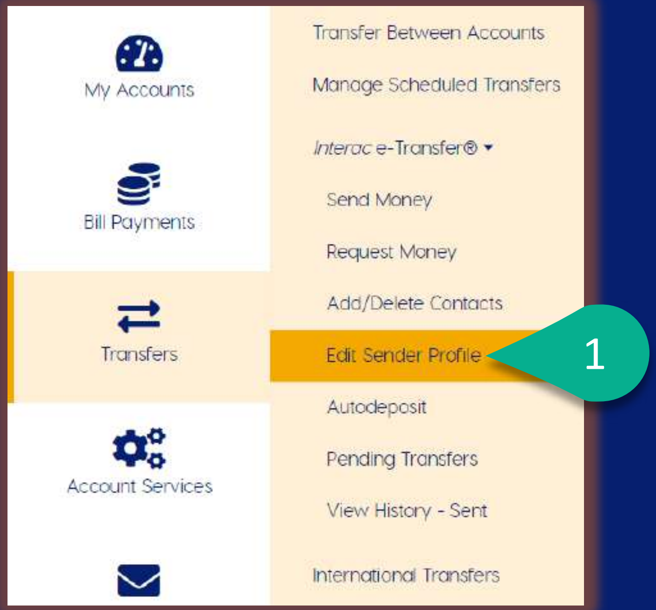
✓ Add recipient list

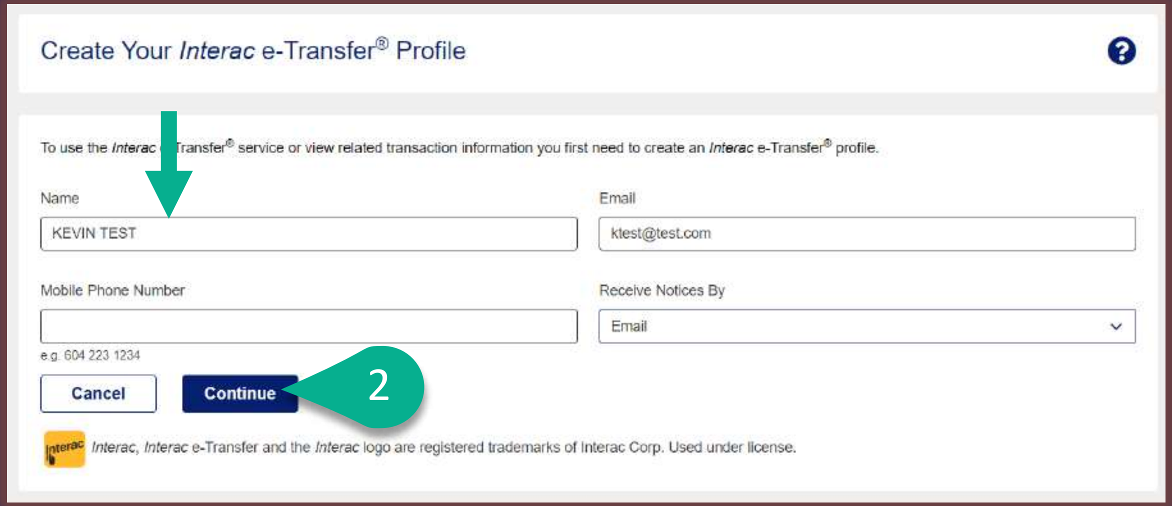
✓ Register for Autodeposit

Interac e-Transfer® Profile

Steps to set up profile:

1. Select “**Transfers**” menu item
2. Edit Sender Profile
3. Complete profile details
4. Click “**Continue**”



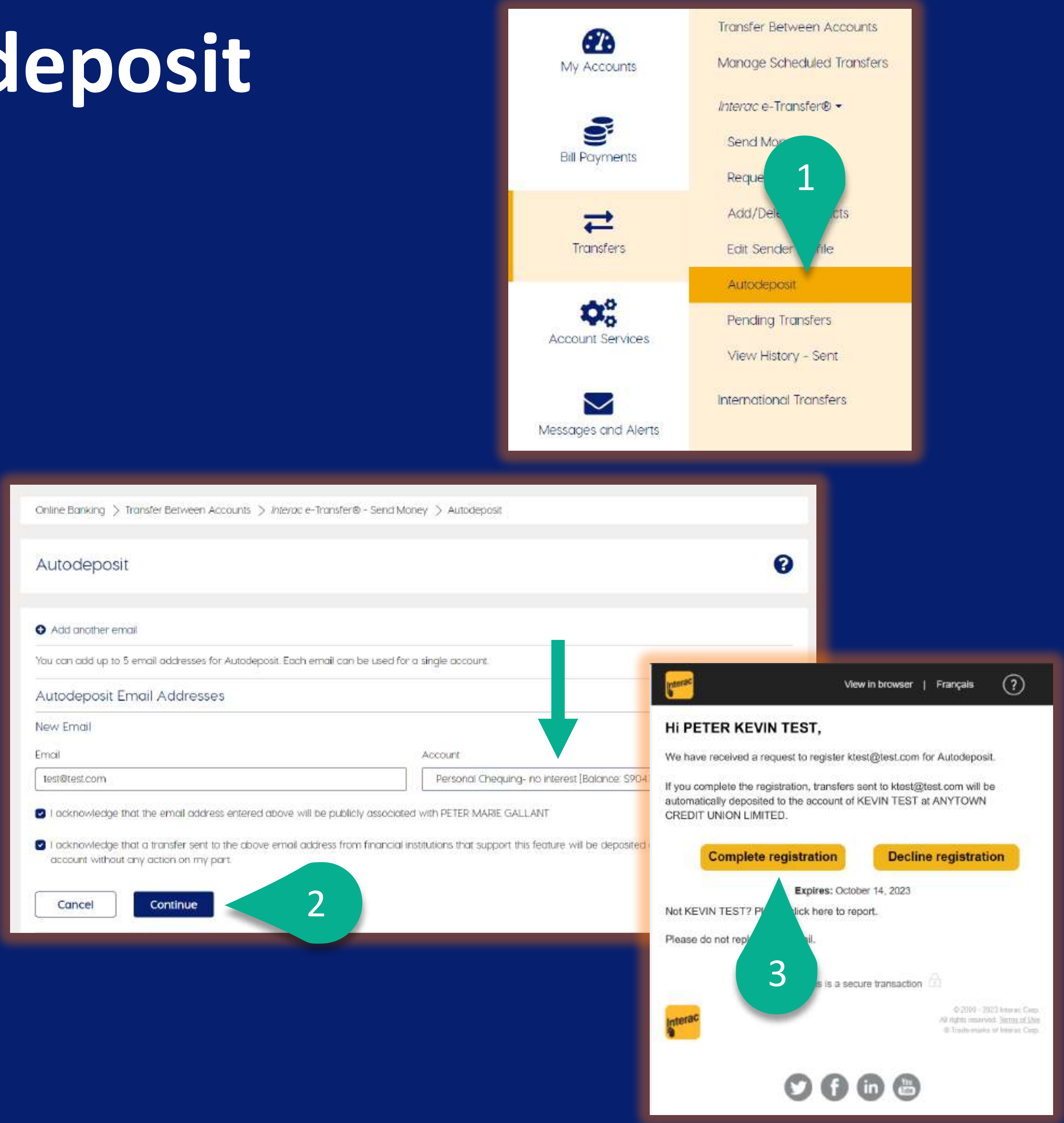


During the upgrades in February 2025, autodeposit will have a brief period where they may need to be manually accepted or may not show until you update your settings.

Interac e-Transfer ® Autodeposit

Steps to register:

1. Select **“Autodeposit”** menu item
2. Complete the details and **“Continue”**
3. Retrieve the registration email and **“complete registration”**



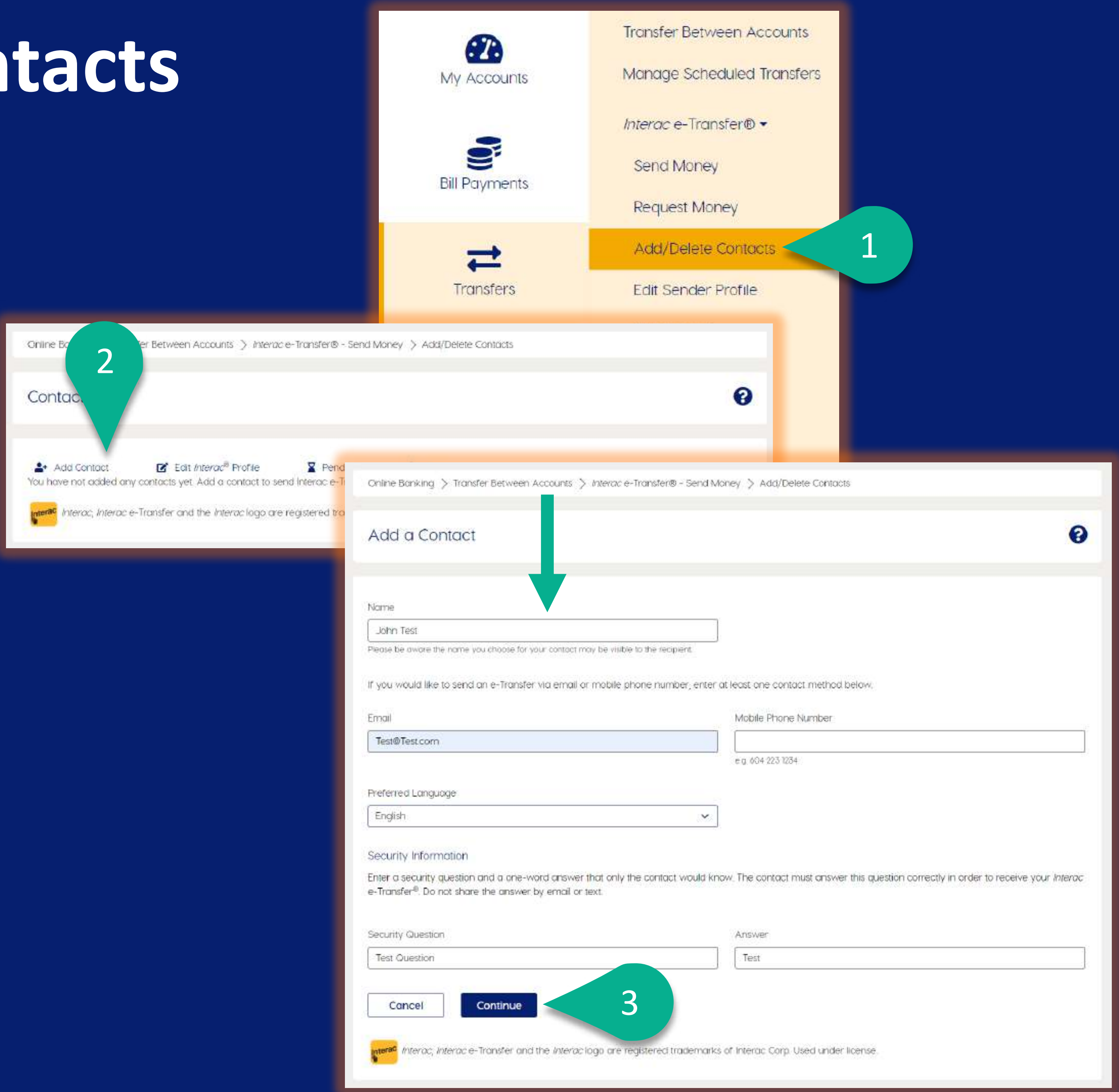
Interac e-Transfer® Contacts

Steps to set up contacts:

1. Select **“Transfers”** menu and **“Add/Delete Contacts”**

1. Click **“Add Contact”** link

2. Complete contact details and **“Continue”**

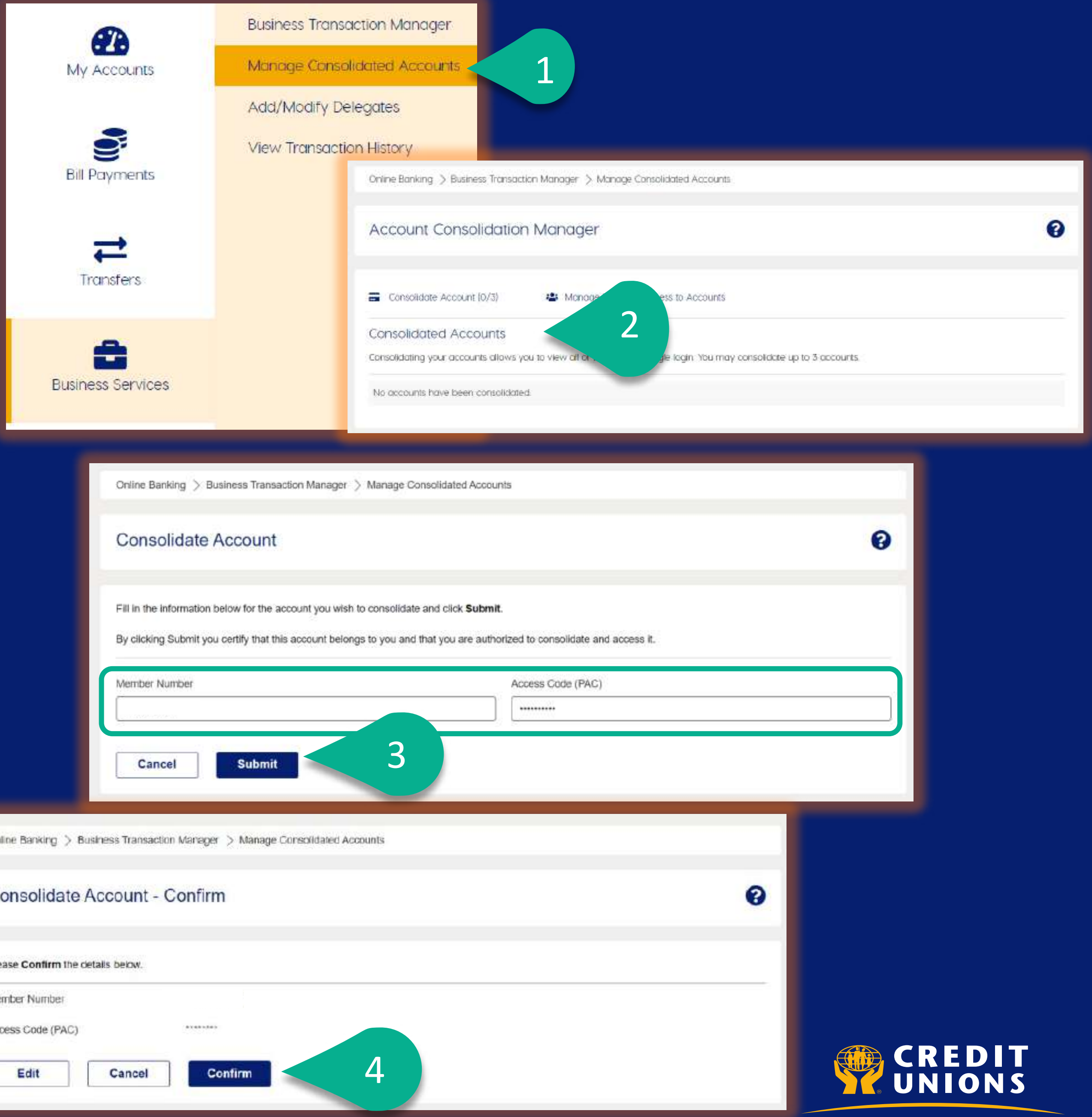


Account Consolidation

Signer can consolidate up to three (3) accounts

Steps to set up:

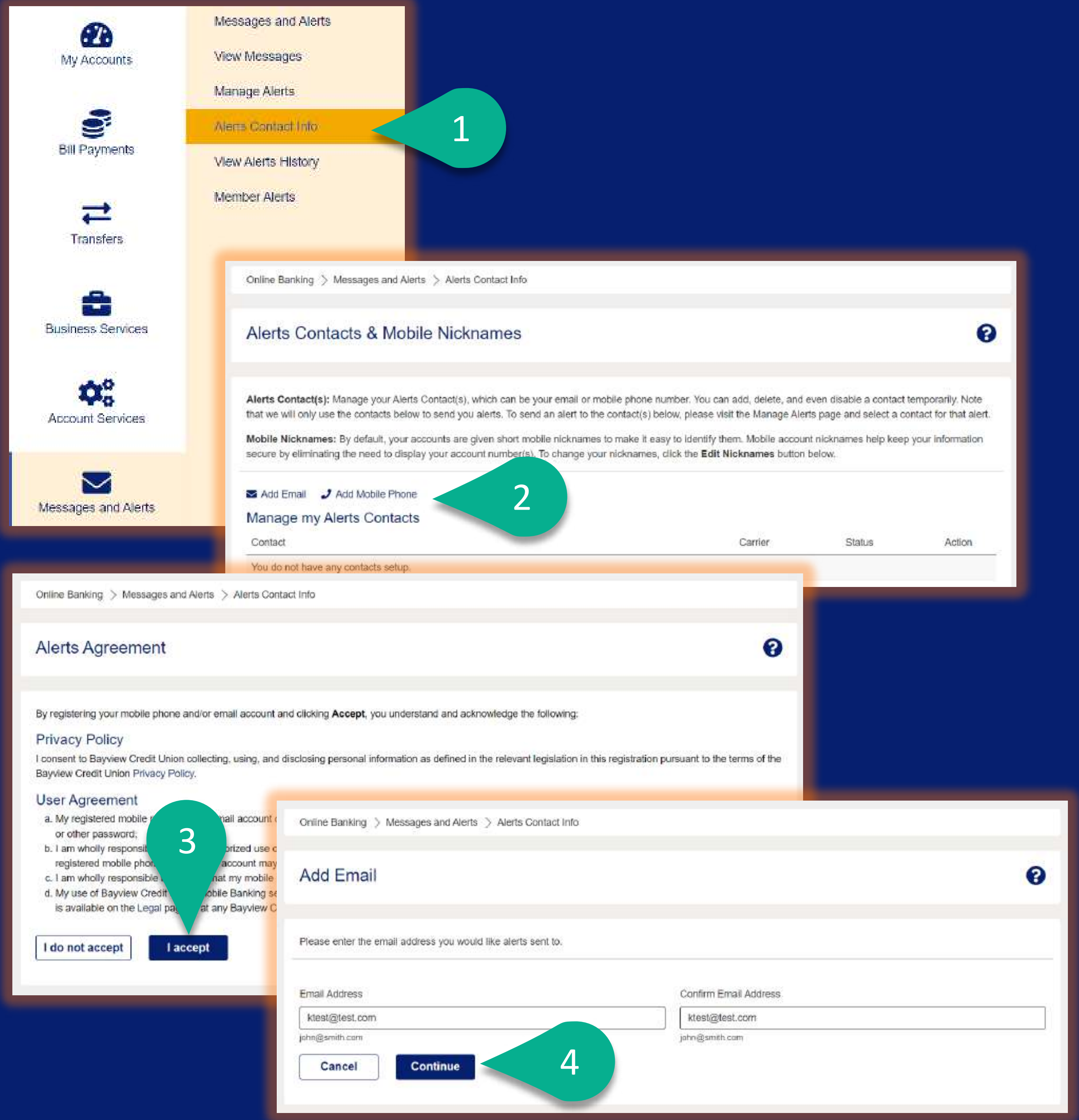
1. Select the **“Business Services”** menu and **“Manage Consolidated Accounts”**
2. Select **“Consolidate Account”**
3. Enter Member ID, PAC, and **“Submit”**
4. Review the details and **“Confirm”**



Alert Contact

Steps to add:

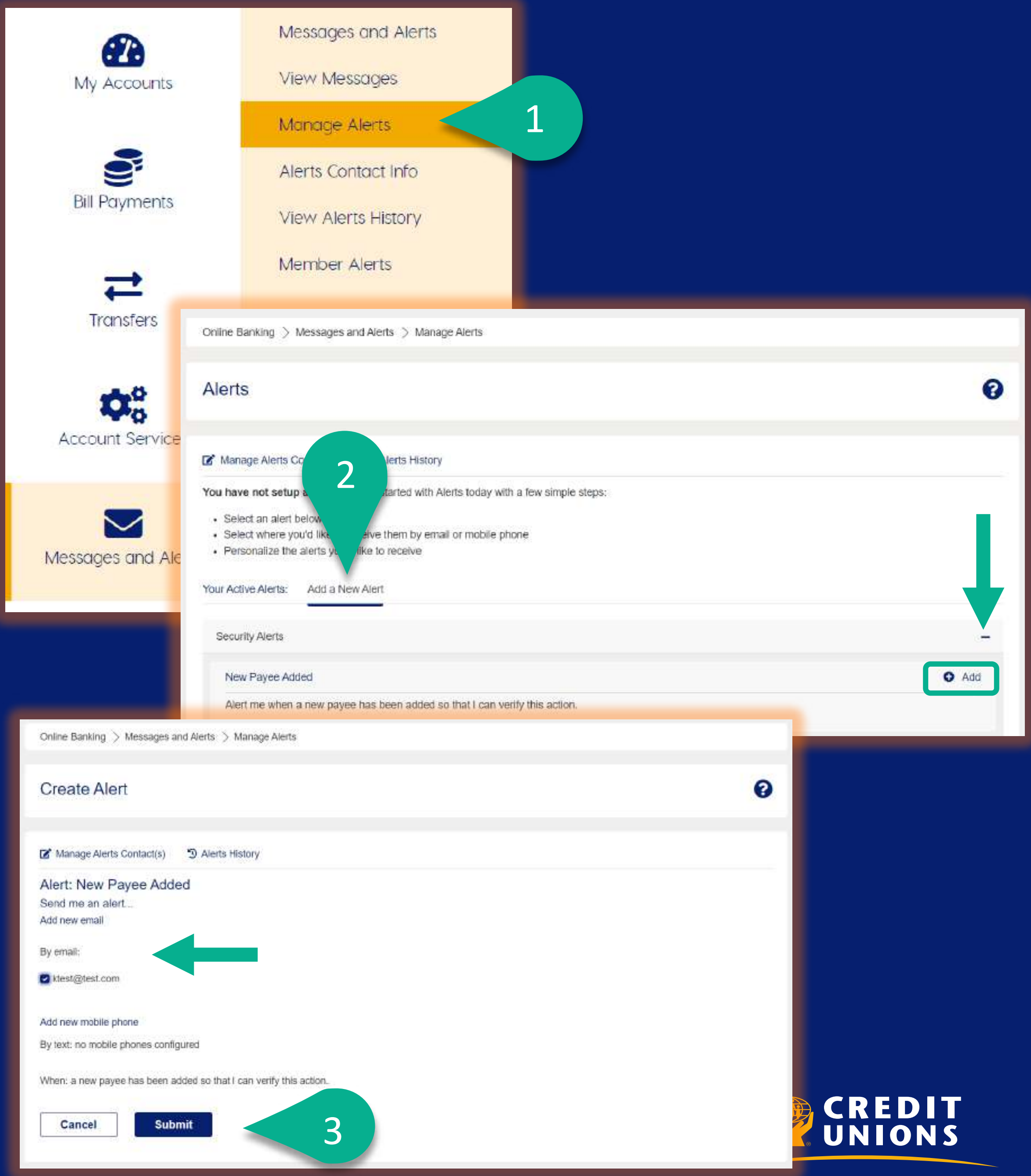
1. Select **“Messages and Alerts”** menu, and **“Alerts Contact Info”**
2. Click **“Add” Mobile Phone** or **Email**
3. Review and **“Accept”** the terms
4. Enter details and **“Continue”**
5. Follow any additional prompts on the screen



Turn On Account Alerts

Steps to add notifications/alerts:

1. Select **“Messages and Alerts”** menu, and **“Manage Alerts”**
2. Select **“Add a New Alert”** use the **+Add** icon to open the category, and click **“Add”**
3. Select either an email address or mobile phone number and **“Submit”**

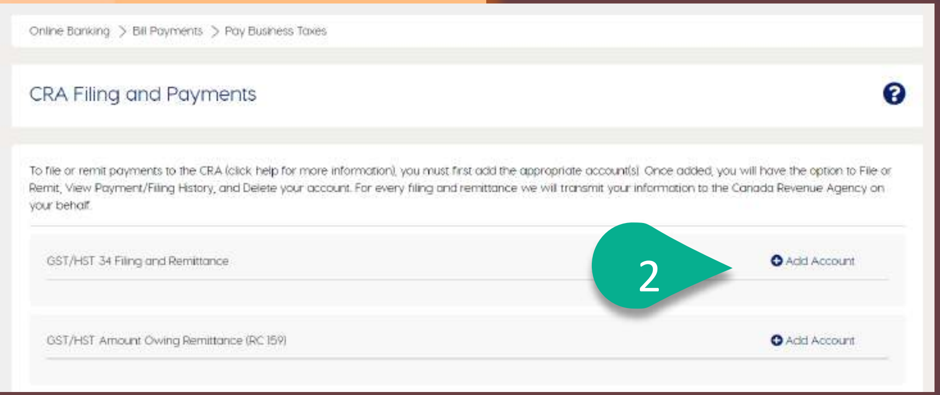


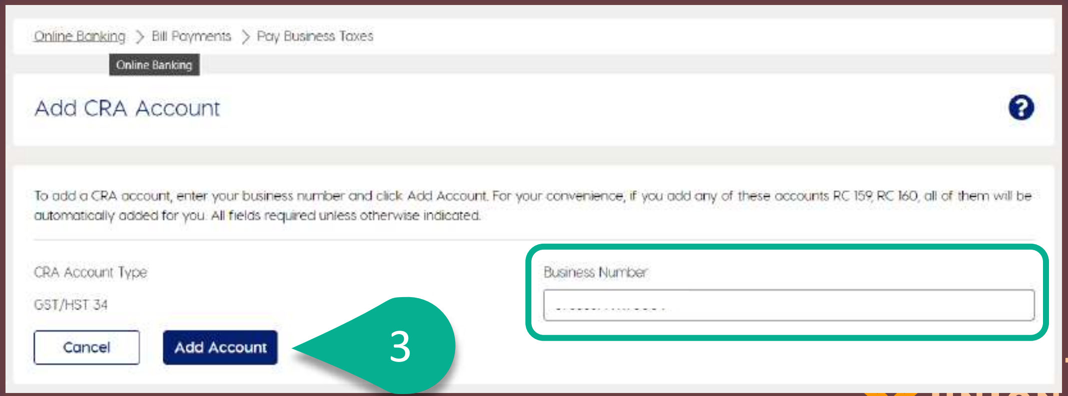
CREDIT UNIONS

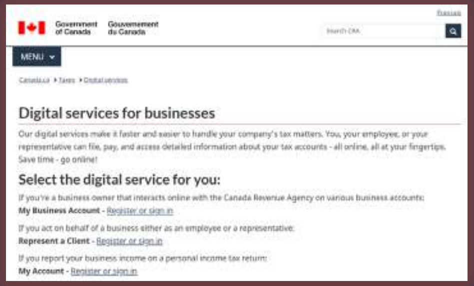
CRA Filing & Payments

Steps to add accounts:

1. Select the **“Payments”** menu and **“Pay Business Taxes”**
2. Select **“Add Account”** on the desired type of tax/remittance
3. Enter the business number and **“Add Account”**







[< Access Your History: Digital Services for businesses](#)

SMS/Text Telephone Banking

Steps to register:

1. Select the **“Account Services”** menu and **“Add/Modify Mobile Banking”**
2. Click **“Register Your Phone”**
3. Review and accept the User Agreement
4. Enter **“Mobile Phone Number”** and select **“Carrier”**
5. Enter one-time **“passcode”**