

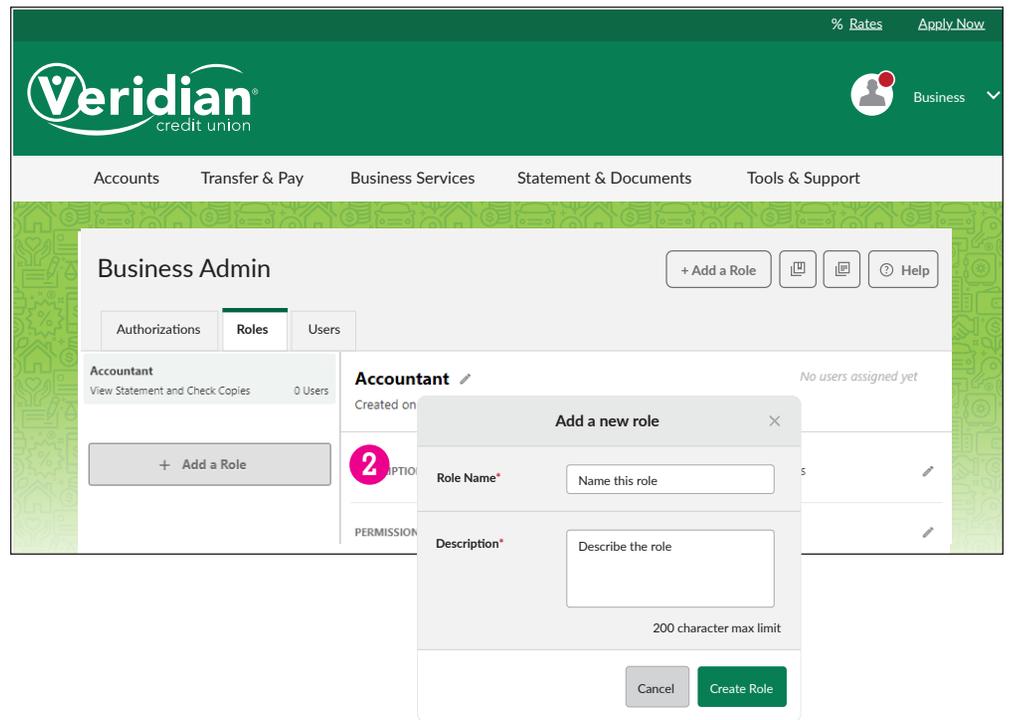
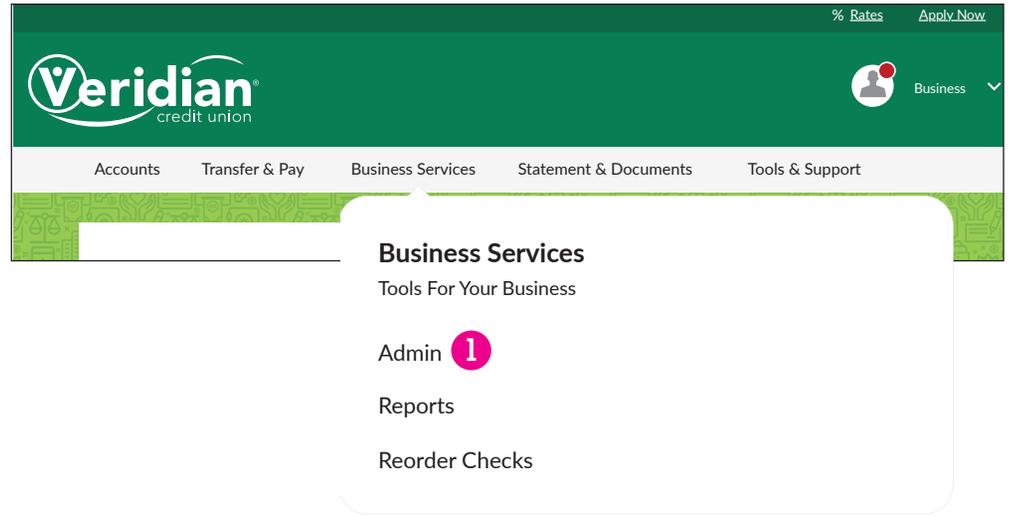
Business Online Banking FAQ

Q: How do I add a Role in online banking?

A: You can set up roles to allow specific permissions for each user. You must create roles before you can create any users.

1 Start by navigating to the **Business Services** dropdown menu on the toolbar, then select **Admin**.

2 From the top of the **Business Admin** window, open the **Roles** tab, then click **Add a Role** on the lefthand menu. Fill in the name of the role (such as **Accountant**) and a description (such as **Views statements and check copies**). Click the **Create Role** button.



3 On the lefthand menu, select the role you just created. Click any pencil icon to modify the description or customize permissions for people assigned to that role. Save your changes.

4 Under **Accounts and Limits**, click **Add Accounts** to assign accounts to the role you're creating. Save your changes.

5 Then, click the pencil icon under the **Limits** subsection to set limits for various methods enabled for this role. You can set authorized and maximum limits for daily, weekly and monthly intervals. Save your changes.

6 To delete a role, click the **Delete Role** link at the bottom of the role window.

The screenshot displays the Veridian credit union Business Admin interface. At the top, there is a navigation bar with the Veridian logo, user profile, and menu items like 'Accounts', 'Transfer & Pay', 'Business Services', 'Statement & Documents', and 'Tools & Support'. The main content area is titled 'Business Admin' and includes tabs for 'Authorizations', 'Roles', and 'Users'. A role named 'Accountant' is selected, showing its description and permissions. A callout box highlights the 'Accounts & Limits' section, which contains two subsections: 'ACCOUNTS' and 'LIMITS'. The 'ACCOUNTS' subsection shows a message 'This role has no assigned accounts.' and a green 'Add Accounts' button with a callout number 4. The 'LIMITS' subsection shows a message 'You have not configured limits for your accounts.' and a green 'Edit Limits' button with a callout number 5. At the bottom of the role window, there is a red 'Delete Role' button with a callout number 6.

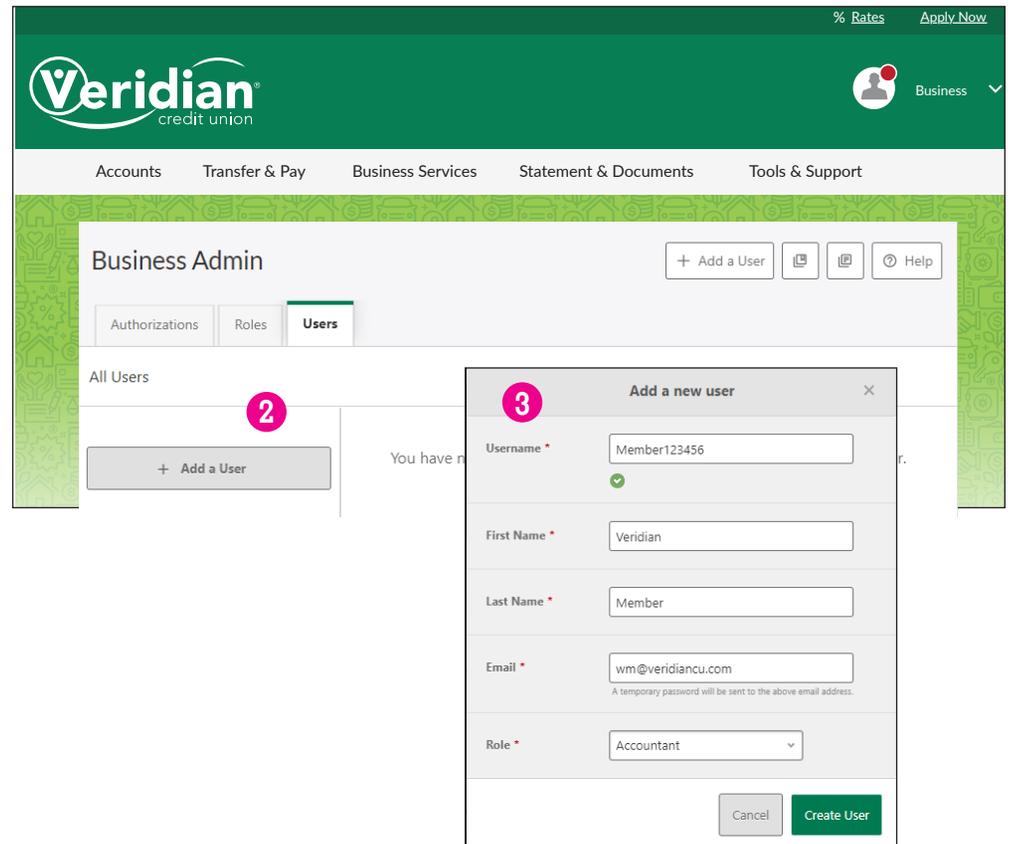
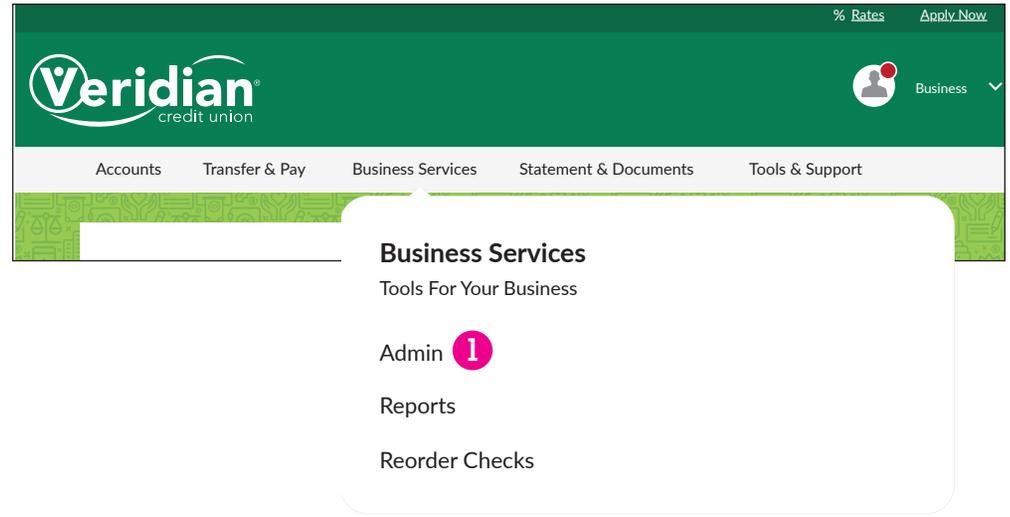
Business Online Banking FAQ

Q: How do I add a User?

A: First, ensure you have at least one role to assign new users.

Adding a user:

- 1 Start by navigating to the **Business Services** dropdown menu on the toolbar, then select **Admin**.
- 2 From the top of the **Business Admin** window, open the **Users** tab, then click **Add a User** on the lefthand menu.
- 3 Create a username, then fill in the first and last name, and email address. Then assign this user to a role. Click **Create User**. A temporary password is emailed to the new user. **This password is valid for 24 hours and, once expired, the master user must send a new password to the new user.**



- 4 From the **Users** tab, you can edit the user details or reset a password by clicking on any pencil icon in the user window. **You can only assign one role per user.**

- 5 To delete a user, click **Delete User** at the bottom of the user window.

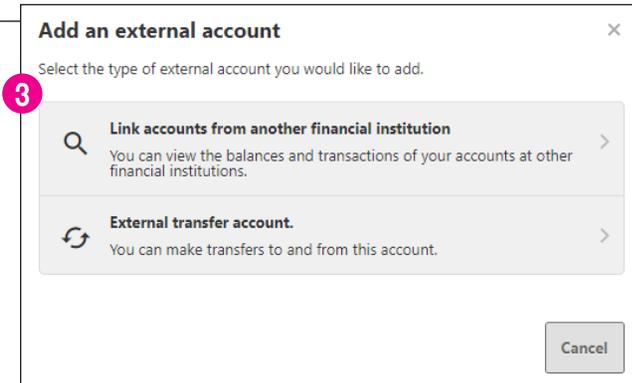
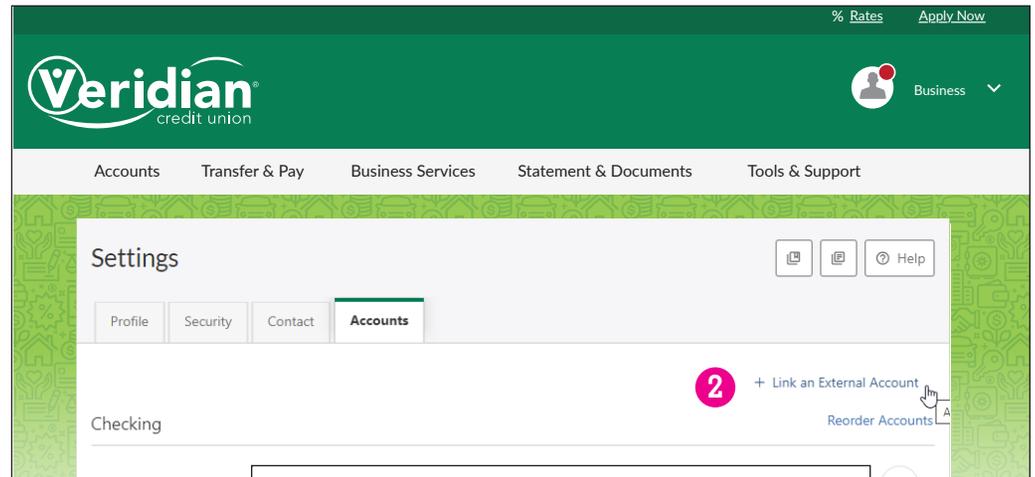
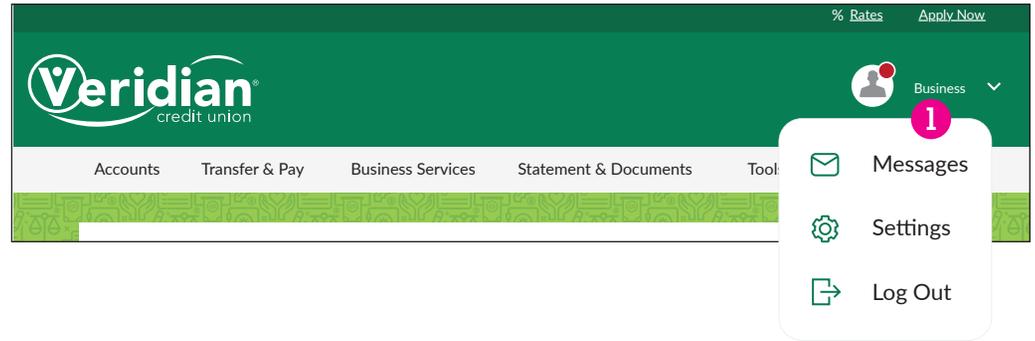
The screenshot displays the Veridian Business Admin interface. At the top, there is a green header with the Veridian logo and navigation links for Accounts, Transfer & Pay, Business Services, Statement & Documents, and Tools & Support. The main content area is titled 'Business Admin' and includes a '+ Add a User' button and a 'Help' icon. Below this, there are tabs for 'Authorizations', 'Roles', and 'Users', with 'Users' being the active tab. The 'All Users' section shows a list of users, with one user selected: 'Veridian Member' (Accountant). This user's details are shown in a window, including their status (ACTIVE), username (Member123456), name (Veridian Member), contact information (EMAIL: wm@veridiancu.com, PHONE: No phone number specified, ADDRESS: No address specified), and role (Accountant). At the bottom of this window, there is a 'Delete User' button.

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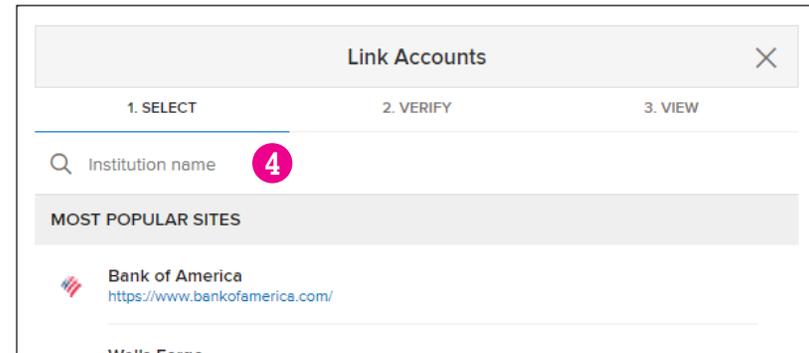
Q: How do I transfer money to an external account?

A: You'll need to start by linking an external account to your Veridian accounts.

- 1 From the dashboard, go to the carrot next to your business name in the top-right corner, and click on **Settings**.
- 2 Open the **Accounts** tab, then click **Link an External Account**.
- 3 Choose if you want to be able to transfer funds to and from your external accounts, or if you want them set to view-only.

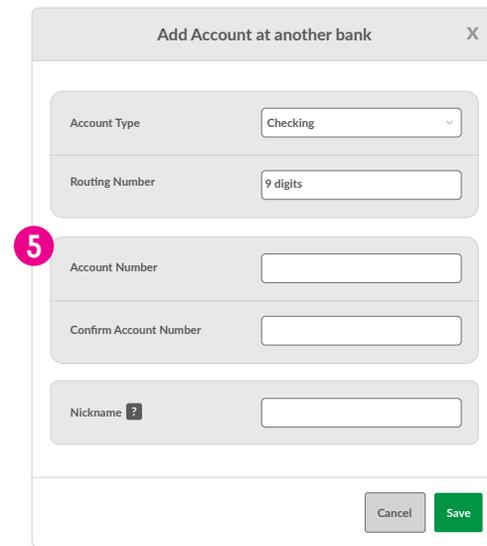


4 To link your accounts for view only, choose or search for the financial, then enter your login credentials for your external institution's online banking.



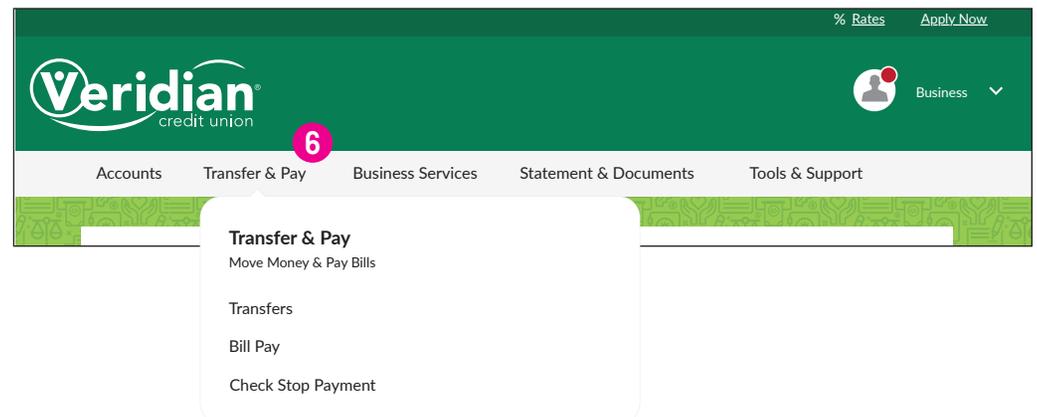
The screenshot shows a 'Link Accounts' window with a search bar labeled 'Institution name' and a list of 'MOST POPULAR SITES'. The first site listed is 'Bank of America' with the URL 'https://www.bankofamerica.com/'. The window has a progress indicator at the top with three steps: '1. SELECT', '2. VERIFY', and '3. VIEW'. A pink circle with the number '4' is placed over the search bar.

5 To enable transfers to and from external accounts, complete the fields in the **Add Account at another bank** window. Save your changes.



The screenshot shows the 'Add Account at another bank' window. It contains several input fields: 'Account Type' (a dropdown menu set to 'Checking'), 'Routing Number' (a text field with '9 digits' as a placeholder), 'Account Number' (a text field), 'Confirm Account Number' (a text field), and 'Nickname' (a text field with a question mark icon). At the bottom right, there are 'Cancel' and 'Save' buttons. A pink circle with the number '5' is placed over the 'Account Number' field.

6 You will now be able to transfer funds to and from this account from the **Transfer & Pay** dropdown menu on the dashboard.



The screenshot shows the Veridian credit union dashboard. The top navigation bar includes the Veridian logo, a user profile icon, and a 'Business' dropdown menu. Below the navigation bar, there is a main menu with options: 'Accounts', 'Transfer & Pay', 'Business Services', 'Statement & Documents', and 'Tools & Support'. The 'Transfer & Pay' option is highlighted, and a dropdown menu is open, showing options: 'Move Money & Pay Bills', 'Transfers', 'Bill Pay', and 'Check Stop Payment'. A pink circle with the number '6' is placed over the 'Transfer & Pay' menu item.

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Q: How do I set up automatic payments on my commercial loan?

A: You can set up automatic payments through the **Transfers** portal.

1 Navigate to **Transfer & Pay**, then select **Transfers**.

2 Click on the **Classic** tab

3 Select the account funds will be coming from

4 Choose which loan automatic payments are being set up for

5 Enter the monthly payment amount

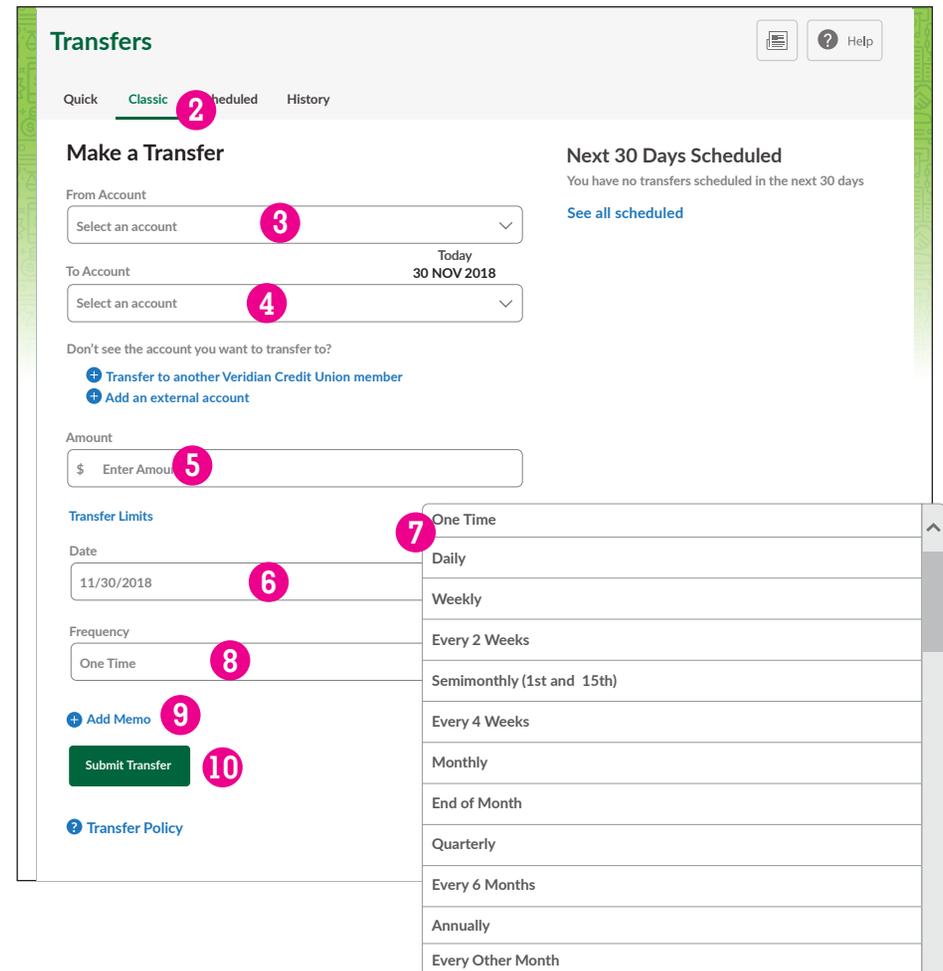
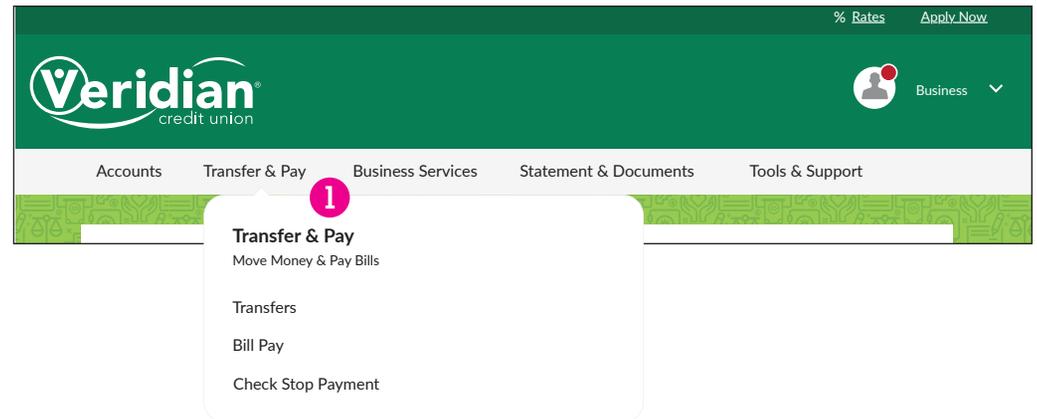
6 Choose the date you wish to begin auto payments

7 Choose the Frequency (Monthly)

8 Choose an End Date if preferred

9 Add a memo if preferred

10 Submit Transfer



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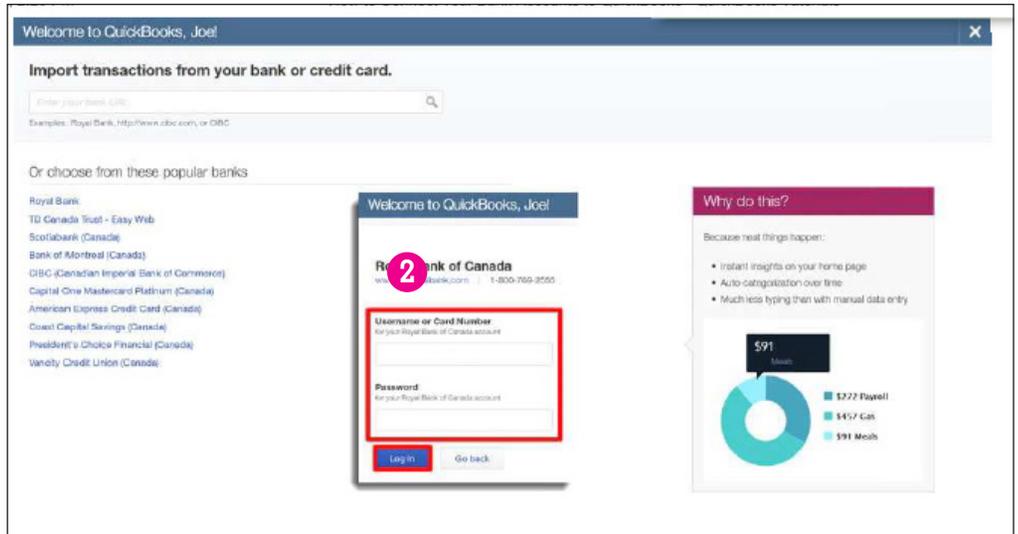
Q: How do I sync my accounts to QuickBooks?

A: You will need to set this up through the QuickBooks dashboard.



1 On the QuickBooks homepage under bank accounts, select **Connect an account**.

2 Choose Veridian Credit Union and enter the username and password you use to access your accounts in online banking. Click **Log In**.



3 Once you're logged in, you'll be able to see all your Veridian accounts. Choose the account you use for your business and tell QuickBooks what kind of accounts they are.

4 Click **Connect** and QuickBooks will begin downloading your transactions.

