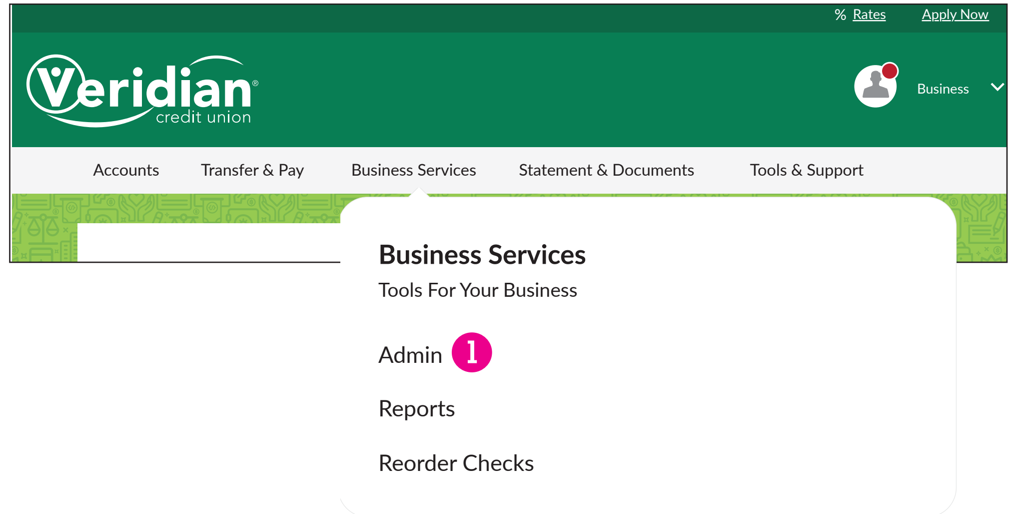
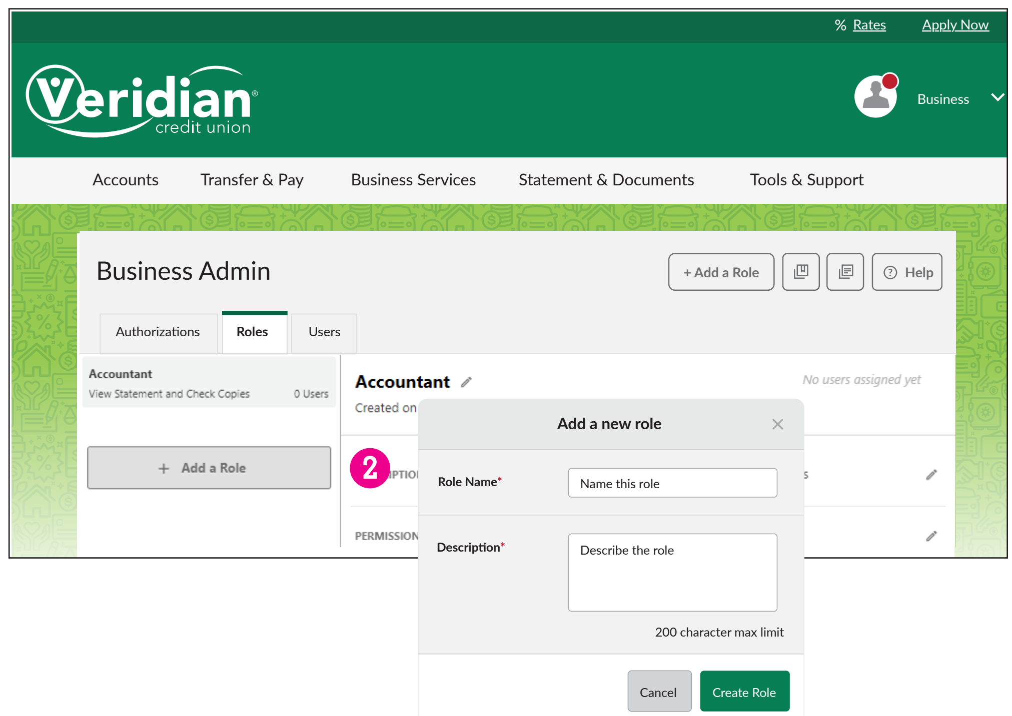
Business Online Banking FAQ



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***.



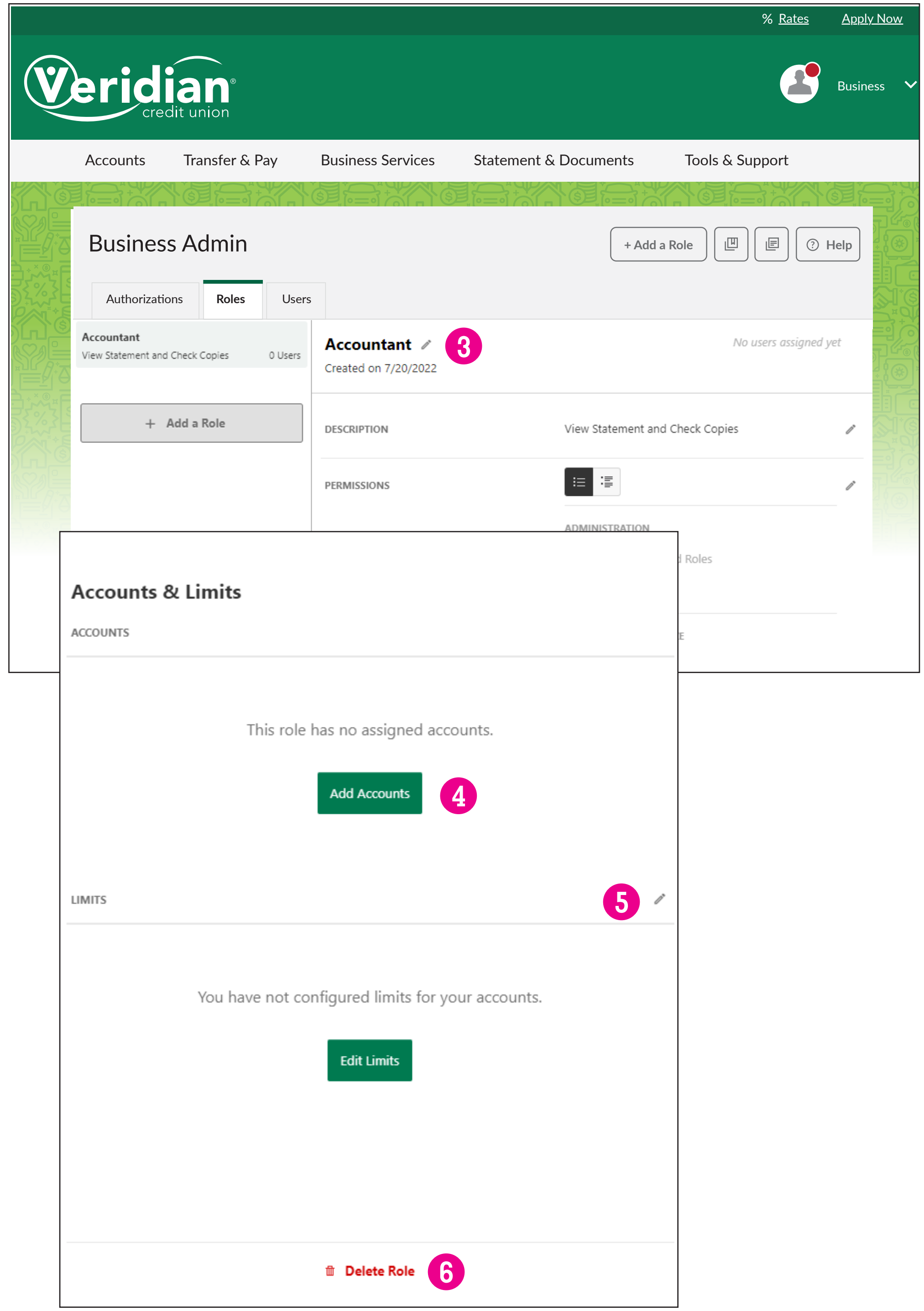
2. From the top of the ***Business Admin*** window, open the ***Roles*** tab, then click ***Add a Role*** on the lefthand menu. Fill in the name of the role (such as ***Accountant***) and a description (such as ***Views statements and check copies***). Click the ***Create Role*** button.

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.



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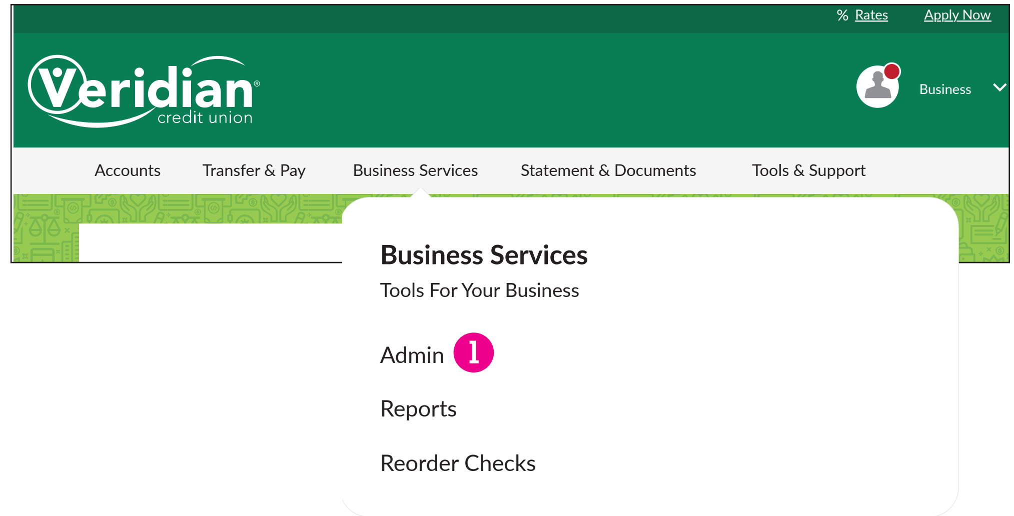
Q: How do I add a User?

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

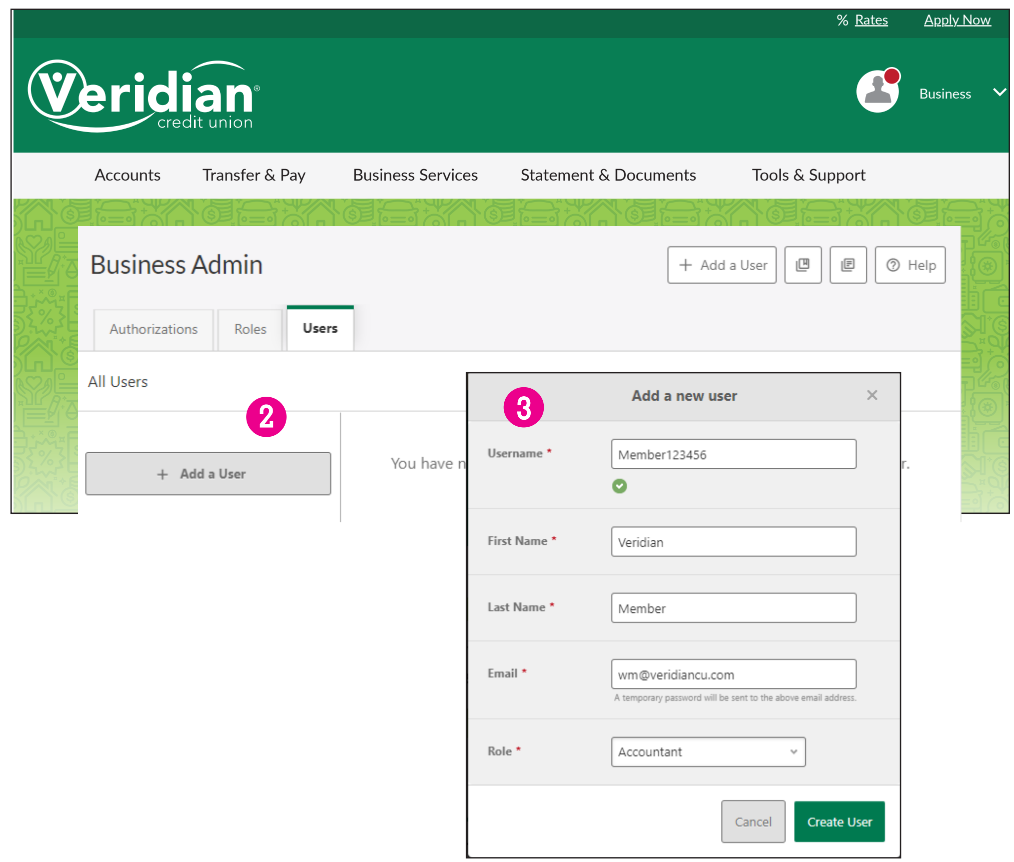
Adding a user:

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



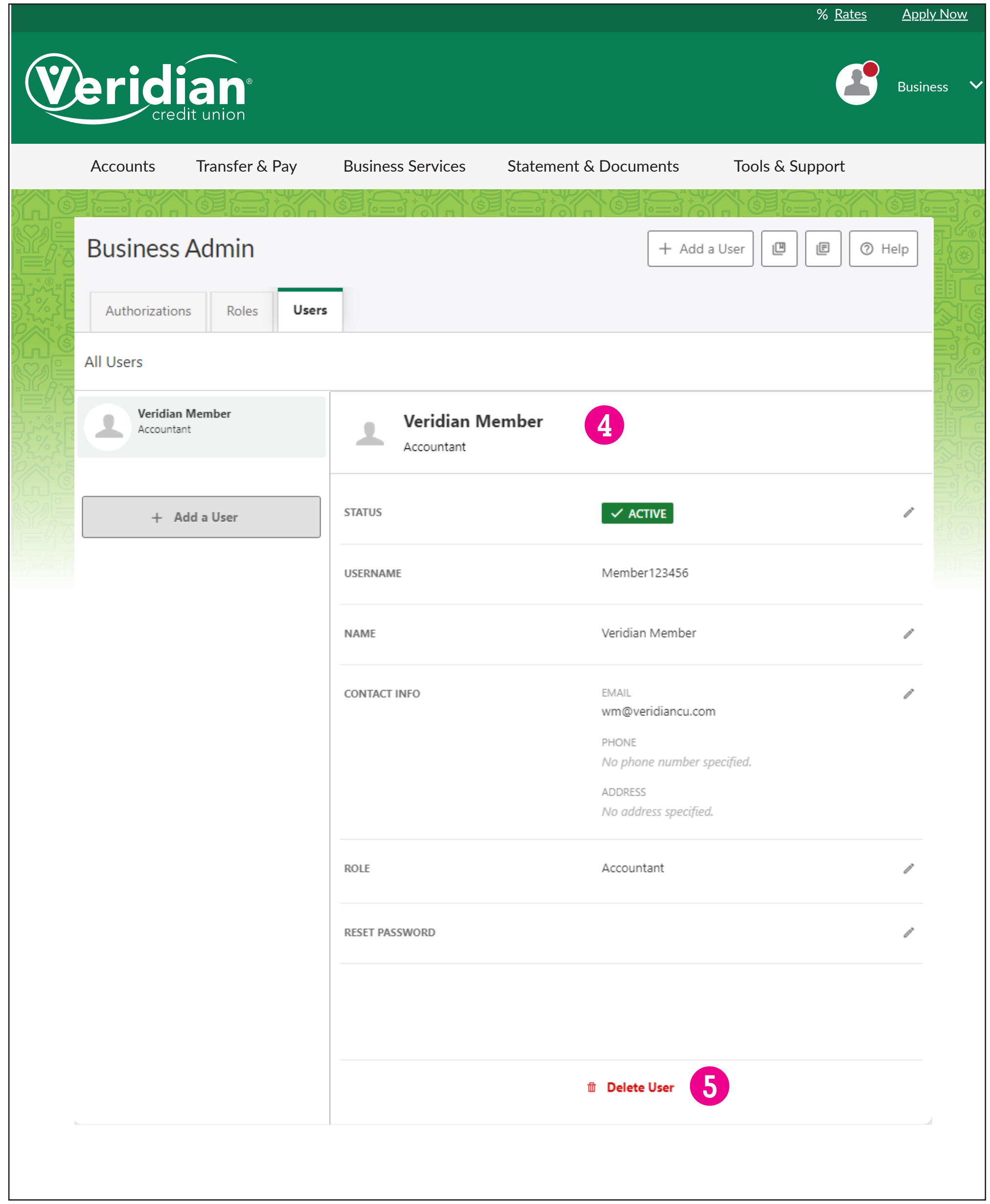
2. From the top of the ***Business Admin*** window, open the ***Users*** tab, then click ***Add a User*** on the lefthand menu.

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.



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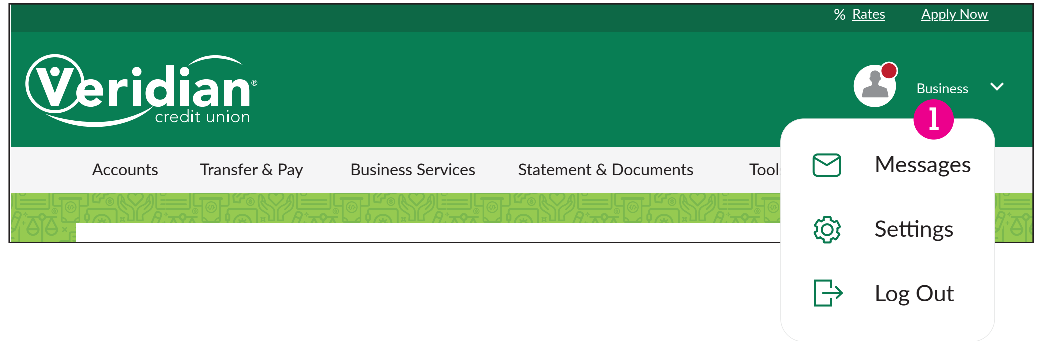
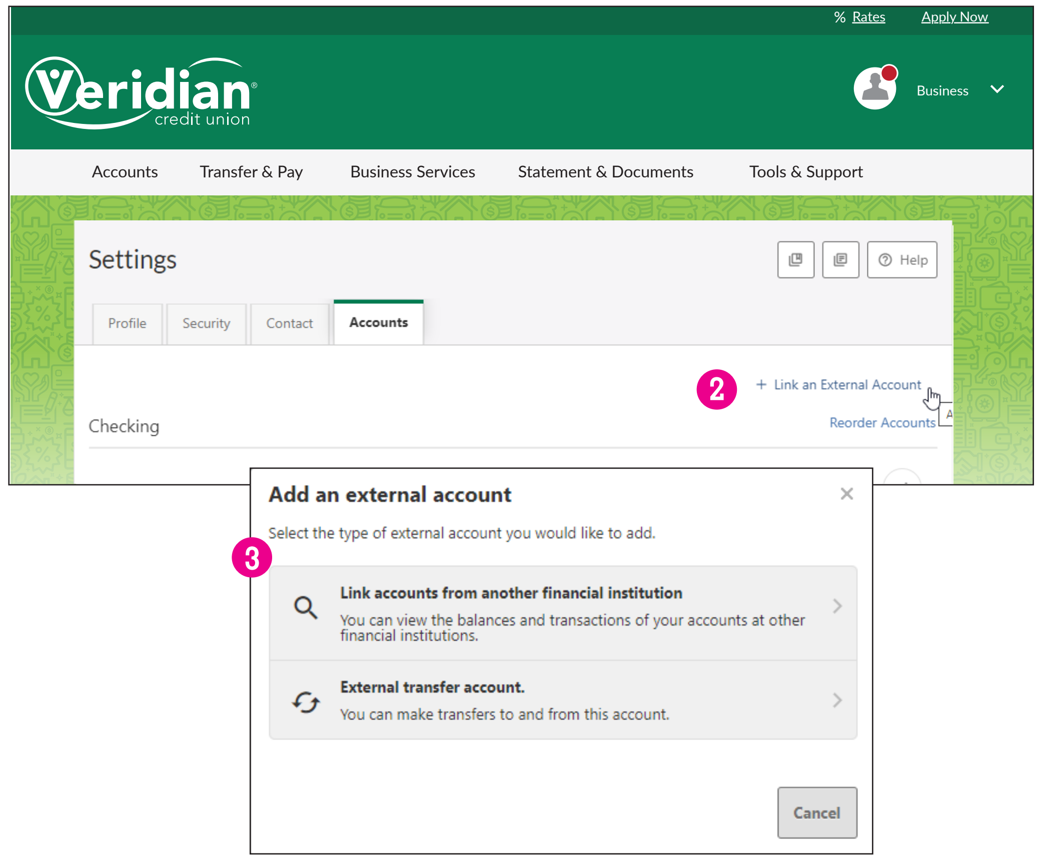


Q: How do I transfer money to an external account?

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

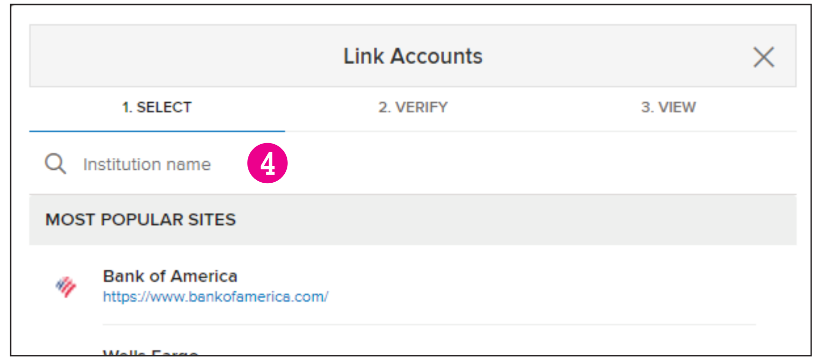
1 From the dashboard, go to the carrot next to your business name in the top-right corner, and click on ***Settings***.

2 Open the ***Accounts*** tab, then click ***Link an External Account***.

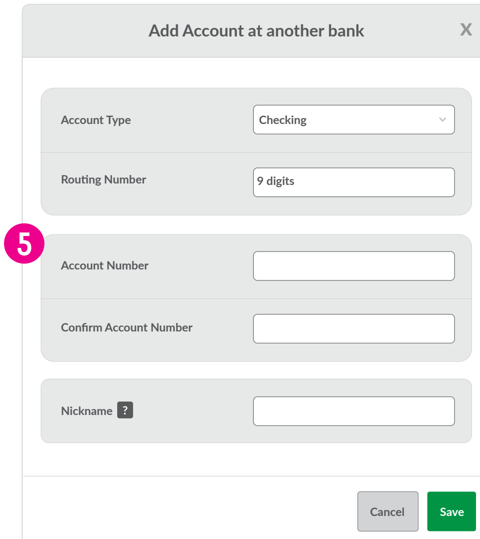


3 Choose if you want to be able to transfer funds to and from your external accounts, or if you want them set to view-only.

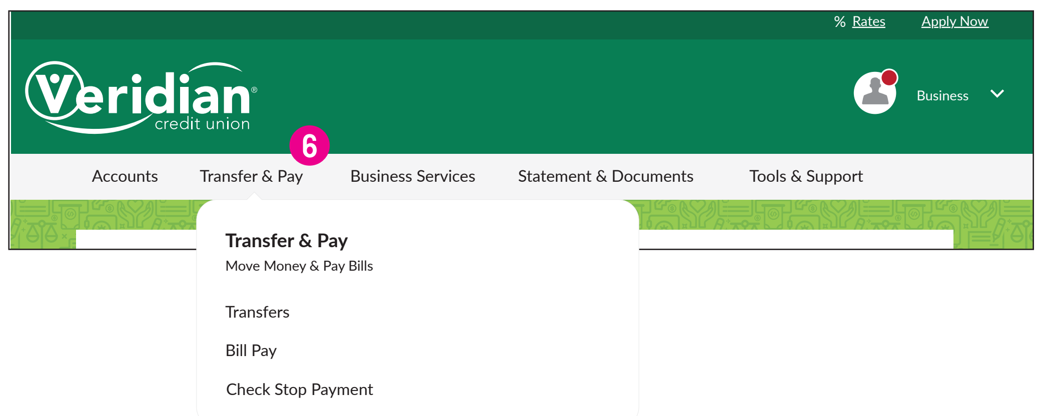
4 To link your accounts for view only, choose or search for the financial, then enter your login credentials for your external institution’s online banking.



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



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



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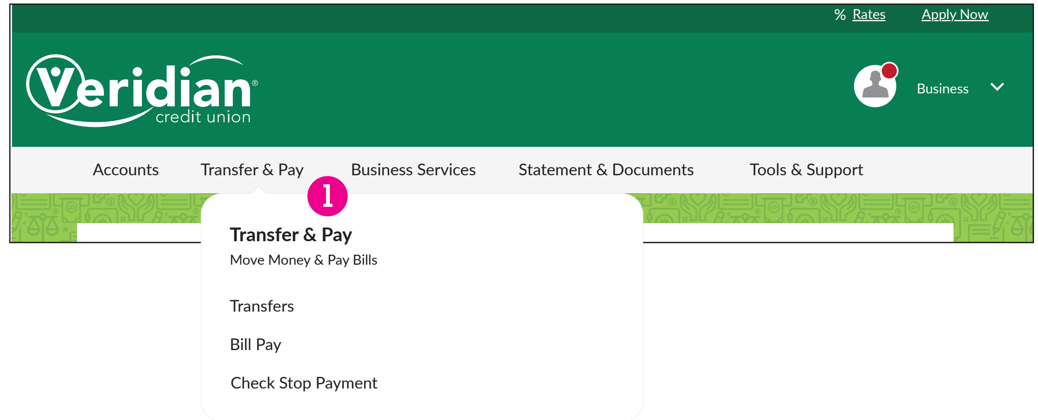
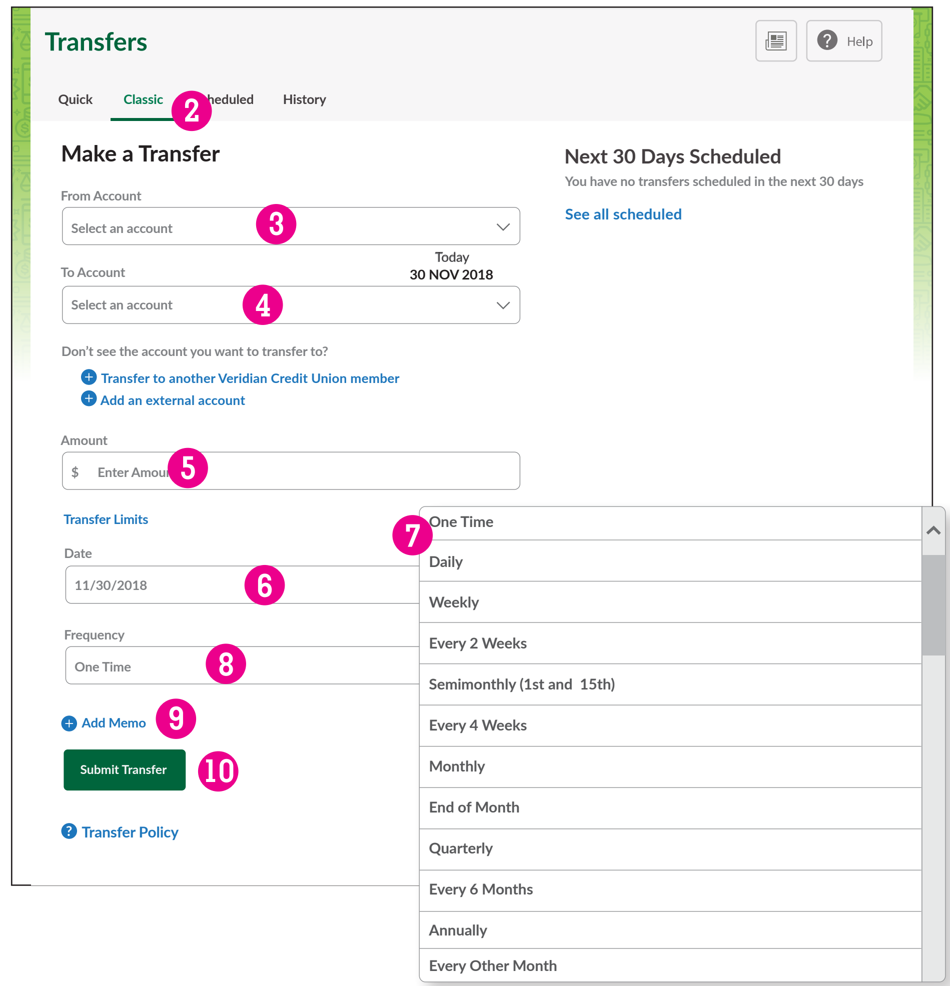
Q: How do I set up automatic payments on my commercial loan?

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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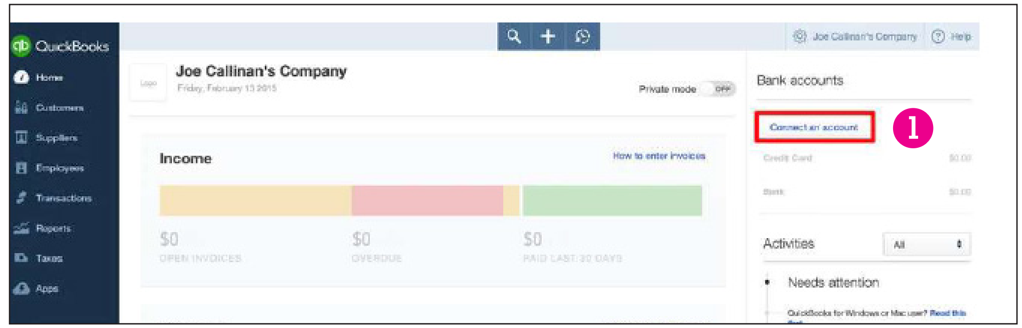
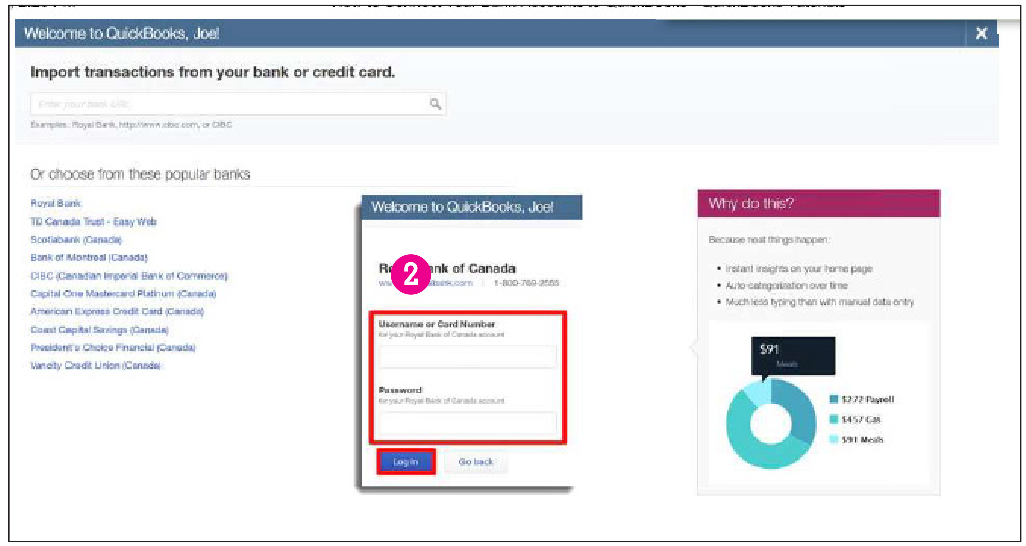
Q: How do I sync my accounts to QuickBooks?

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.