

MEMBERDIRECT SMALL BUSINESS ONLINE BANKING CHECKLIST

AFTER CONVERSION CHECKLIST ON OR AFTER NOVEMBER 22

FIRST LOGIN – ONLINE & MOBILE BANKING

When logging in to online banking for the first time after our conversion, you will need to use your Member Card or Secure Login ID (if you don't have a Member Card) and your temporary PAC to sign in to online banking.

Once you have successfully logged in you will need to:

- Accept the upgrade to MemberDirect Small Business (MDSB)
- Accept the MemberDirect Small Business Agreement
- Change your Personal Access Code
- Set up your Increased Authentication security questions



We recommend that Members who use our mobile app complete their first login on the desktop version of online banking before using the app.

FEATURES AND SETTINGS TO RESET AFTER CONVERSION

These features and settings will need to be reviewed and reset in online and mobile banking after the upgrade:

Interac® e-Transfers

- Create your profile** - Log into your online banking, navigate to "Transfers", select "Add or Delete Recipients" and then click on "Edit My Profile".
- Reset Interac® e-Transfer Recipient List**
- Set up Autodeposit** - Log into your online banking, navigate to "Transfers", select "Send Interac e-Transfer", click on "Autodeposit" and then complete the Autodeposit Registration and acknowledgments section. Click "Register". Interac will send an email to the email address used for your e-Transfer profile to verify your registration. Open this email and click on the "Complete Registration" button to activate registration for Autodeposit.

Alerts

- Create your Alert profile/set up Alerts** - Navigate to "Message and Alerts" select "Get Started Today" and then select the Alert you wish to add and "Accept" the Alerts Agreement. Input your Alert contact information and determine how you would like to receive your Alerts.

MDSB Features

- Reset Delegates (if applicable)
- Consolidate Accounts (if applicable)
To add delegates and consolidate accounts, log on to MDSB, select "Business Services" on the left and then select "Manage Consolidated Accounts" or "Add/Modify Delegates".

For more detailed instructions, visit our website > www.northsave.com