



Prospera Credit Union

Online Banking – Business Tips



Contents

Welcome to our new online banking platform.....	2
Business Services	3
Transaction Manager	3
Account Consolidation Manager	4
Delegate Manager	4
View Transaction History.....	5
Invoicing	6
Payroll.....	6
Business Products.....	7
Account Services	8
CRA Direct Deposit for Business	8
Miscellaneous	8

Welcome to our new online banking platform

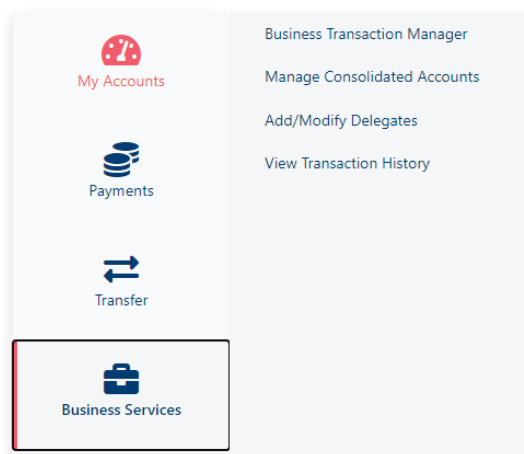
We are pleased to introduce our new online banking platform that features an updated modern design and a more responsive platform. This new platform includes all the same features you are used to and will allow us to provide new features in the future.

In this guide, you will find quick tips and visuals to help you navigate this new platform. If you still have any questions, please reach out to our Member Service Centre at 1 888 440 4480 or our 24/7 Online Technical Support at 1 888 884 4430 and they will be happy to assist.



All services can be accessed through the lefthand menu by clicking on the corresponding icon.

When clicking on the menu, a fly-out menu will appear. From the list, select the page you would like to go to by clicking on it.



Business Services

Transaction Manager

In the transaction manager, you can view your transaction history by clicking “View Transaction History” in the top right corner above the drop-down menu.

You can also view any transactions that require your approval, approval from others or rejected, recalled or expired transactions. You can hide or expand these sections by clicking on the – sign.

The screenshot shows the Transaction Manager interface. At the top left is the title "Transaction Manager" and a help icon. On the right is a "View Transaction History" link. Below this is a "Show:" label and a dropdown menu currently set to "All Transactions". A red "Update View" button is positioned below the dropdown. The main content area is divided into three expandable sections, each with a minus sign on the right:

- Transactions require your approval (0)**: No transactions require your approval.
- Transactions require approval from others (0)**: No transactions require approval from others.
- Transactions rejected, recalled or expired (0)**: You have no recalled, rejected or expired transactions.

From the drop-down menu on the Transaction Manager Page, you have the following options:

The screenshot shows the dropdown menu for the "Show:" label. The menu is open, displaying the following options:

- All Transactions
- Transfers
- Payments
- Payroll
- CRA Filing and Payment
-
- Within the last 7 days

Account Consolidation Manager

From the account consolidation manager, you can view any of your accounts that have been consolidated, enabling a single view. Up to three accounts can be consolidated.

Account Consolidation Manager ?

Consolidate Account (0/3) Manage Delegate Access to Accounts

Consolidated Accounts

Consolidating your accounts allows you to view all of them with a single login. You may consolidate up to 3 Debit Cards.

No accounts have been consolidated.

Delegate Manager

From the delegate manager, you can view delegates, or add new ones.

Add Delegate (0/3)

A delegate is a user with limited access to account functions. You can add up to 3 delegates.

No delegates have been added.

Delegates Created By Others —

No delegates have been added.

To add a new delegate, click on the blue plus icon and fill out the corresponding information.

Add Delegate (0/3)

View Transaction History

To search your archived transactions, enter the information on this page for your query and click the coral 'Find Transactions' button. This will then pull up a list of your transactions to view.

Transaction Manager - Archived Transactions Requests

Search Archived Transaction Requests

Show:

All Transactions

Show

10

most recent transactions in the last 30 days

Date Range:

From

06/06/2023



dd/mm/yyyy

To

21/06/2023



dd/mm/yyyy

Monthly:

June 2023

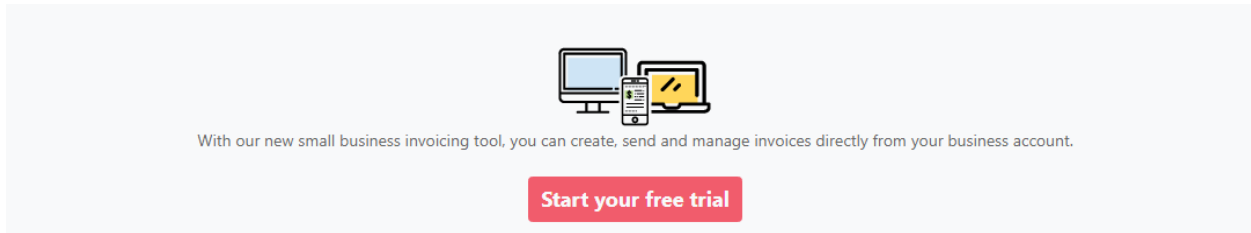
Show transactions with the status:

All Types

Find Transactions

Invoicing

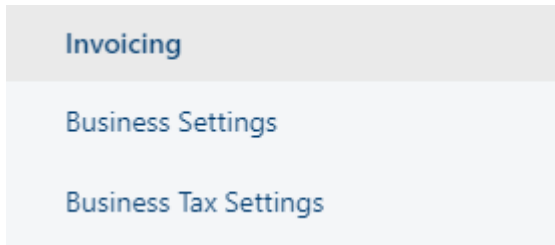
For some of our business banking members, this is a new feature that some may have not used before. You can select “start your free trial” as seen below. For more information on Business Invoicing, please view this video: [Business Invoicing - YouTube](#)



With our new small business invoicing tool, you can create, send and manage invoices directly from your business account.

[Start your free trial](#)

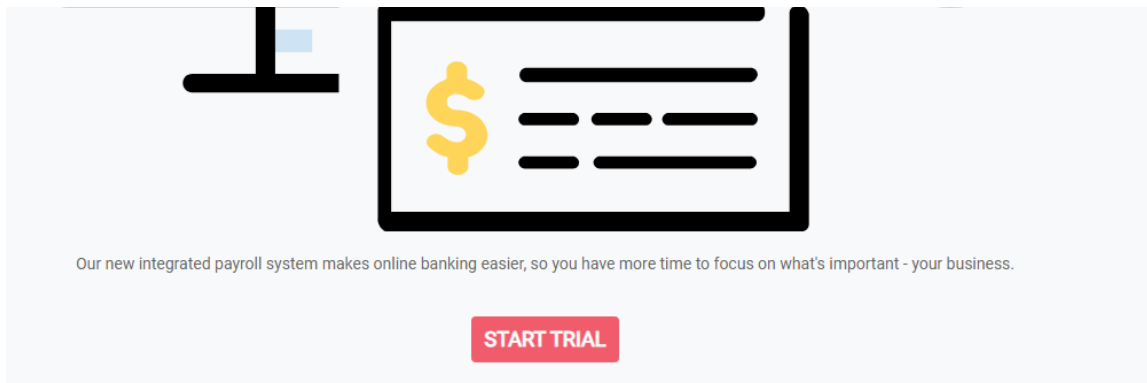
If you have already registered for invoicing, you can choose ‘Invoicing’ from the fly-out menu and you’ll be able to create and send invoices. You can adjust the settings for your invoices from ‘Business settings’, and you can adjust any invoice related taxes.



- Invoicing
- Business Settings
- Business Tax Settings

Payroll

If you are not enrolled in Payroll, you can select ‘start trial’ to enroll in this feature. For more information on Business Payroll, please view this video: [Prospera Credit Union Solution for local business - YouTube](#)




Our new integrated payroll system makes online banking easier, so you have more time to focus on what’s important - your business.

[START TRIAL](#)


Below the payroll video on the payroll page, you can also find more information about our services:

[Fully integrated payroll](#) [Payroll made easy](#) [Make the switch](#)




Easily pay your team directly through online banking with our integrated payroll system.

- **Integrated Payroll.** Introducing Payroll- an integrated tool that allows you to pay employees from within your online banking platform.
- **Auto-calculate.** Payroll automatically calculates taxes, benefits and any other deductions- all while providing automatic direct deposit reminders, so you never miss a payment.
- **Digital Pay Stubs.** Pay stubs and tax forms can get lost in the shuffle. Payroll generates these through the Paychequer app and acts as a digital library for you and your team.



If you are already enrolled in our Payroll services, clicking on the 'Payroll' link will take you to the platform you already know and enjoy. You will be able to adjust payroll settings and create payroll.

Business Products





Business Products

The Business Products link will take you to an overview of your products. From this page, you can start a trial, register, or deactivate products. It will also provide you with information regarding the status and the date that you registered.

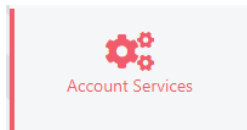
Online Banking > Business Products

Business Products

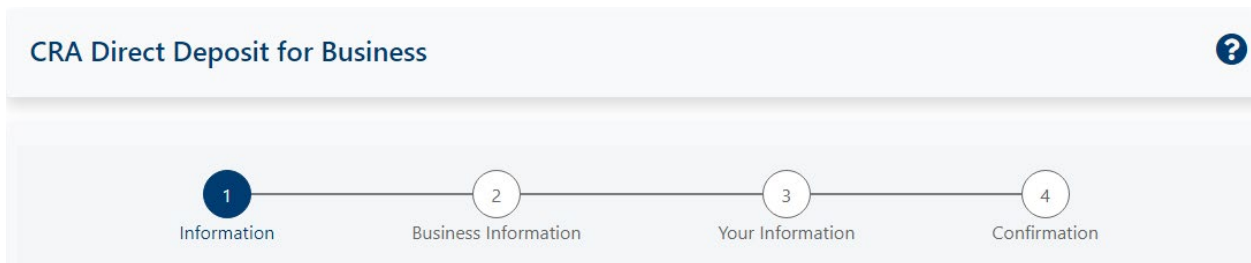
Business Invoicing	 Start Trial
Status	Date Registered
Business Payroll	 Start Trial
Status	Date Registered

Account Services

CRA Direct Deposit for Business



Business members also can set up their CRA Direct Deposit for Businesses.



Follow the prompts and provide the information necessary to complete set up.

Miscellaneous

At any point should you require additional help, look for the question mark icon on the screen and click it. A pop-up will open that will have a drop-down of available resources for you to view.



As a reminder, we're here to help. If you still have any questions, please reach out to our Member Service Centre at 1 888 440 4480 or our Online Technical Support at 1 888 884 4430 and they will be happy to assist.