# **Business Banking Anywhere**

Do all your everyday banking, quickly, easily and safely.

# Learn how to Update your Settings

**Small Business Online Banking** 



Online Guide

For more ways to bank from home, visit: www.meridiancu.ca/businessbankanywhere



#### Step 1: Go to the Settings page

Once you have signed in to online banking, select the *Settings* link.

BUSINESS PERSONAL	Welcome, Joe's Fishing Shop		Contac	t Us 🖂 Secure	Messages	Settings Sign Out
Meridian		Accounts	Bill Payments	Transfers	Alerts	Manage Users
Account Summary						

On the *Settings* page, you can update your account and profile settings, as well as consent to communications.

Settings			
Account Settings	>		
Modify, add or remove so Manage Account Nicknames	aved account names		
View historical activity ac You last logged in at 3:12PM (ES View Account Activity	T/EDT) on Jul 14, 2020.		
Profile Settings	>		
User ID	2345678		
Password	HIDDEN	Ċ	
Security Questions	Best friend's first name Maid of Honour's first name Name of your first pet	đ	
Contact Info	75 Corporate Park DR St. Catharines, ON Canada L25 3W3 POBOX 26 905 99999999 (Home) digitalbanking(Emeridiancu.ca		
Communications Login Messages	>		
These messages appear occasion	onally after successfully logging into Online Banking, M	esages include new feature tours, featured pro	oducts and expert advice.



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#### **Step 2: Update Account Settings**

Navigate to the *Account Settings* section where you can modify, add or remove nicknames for your accounts and view your account activity log. Click on the *Manage Account Nicknames* link.

BUSINESS	PERSONAL	Welcome, Joe's Fishing Shop		Contac	t Us 🖂 Secure	Messages	Settings Sign Out
Meridia	n		Accounts	Bill Payments	Transfers	Alerts	Manage Users
Settings							
Account Set	tings						
Modify, add or re Manage Account Nick	move saved a names	account names					
View historical ac You last logged in at 3 View Account Activity	tivity across ( 12PM (EST/EDT)	a <b>ll your accounts</b> on Jul 14, 2020.					

Enter a nickname for any or all of your accounts listed, then click *Submit*. If you wish to cancel this action, click on the *Back* button.

ename Accounts		
Your Accounts		
Personal Accounts	*	
Chequing - 0	Day to Day Business Expenses	
Business Advantage Plus – 0	Enter nickname	





The page will refresh and return you to the Settings page. A confirmation message will appear to confirm the changes.

	Account names have been updated.	
[	Account Settings	
l	Modify, add or remove saved account names Manage Account Nicknames	

## **Step 3: View Account Activity**

On the Settings page, click on the *View Account Activity* link.

Meridian	Accounts	Bill Payments	Transfers	Alerts	Manage Users
Settings					
Account Settings					
Modify, add or remove saved account names Manage Account Nicknames View historical activity across all your accounts You last logged in at 3:12PM (EST/EDT) on Jul 14, 2020. View Account Activity					



The *Activity History* page will provide a log of the most recent account activity and any changes made to your profile.

If you have any questions on any of the account transactions, you can send us a *secured message* or call our *Contact Center* at *1-866-592-2226.* 

Meridian		Accounts B	ill Payments	Transfers	Alerts	Manage Users
Activity History						
This reflects your most recent questions about these transa	account activity and any chang ctions, please send us a secure r	es made to your profile <mark>nessage</mark> or call our Cor	, including to you stact Center at 1–	ur personal acce 866-592-2226.	ess code. If	you have any
DATE / TIME	REFERENCE #	NAME		D	ETAILS	
Jul 15, 2020 2:31 PM	143116755	Login		S	mall Business	
Jul 15, 2020 2:31 PM	143114201	Login		Si	mall Business	
Jul 14, 2020 3:31 PM	153133578	Logout		S	mall Business	
Jul 14, 2020 3:12 PM	151223957	Login		S	mall Business	
Jul 09, 2020 1:19 PM	131958215	Added N	ew Bill Payee	Sr	mall Business ayee:	. #123456
Jul 09, 2020 1:10 PM	131047988	Updated	User Preference	Sr Uj Ar	nall Business pdated Defau ccount:	It Bill Payment
Jul 09, 2020 1:10 PM	131014111	Added N	ew Bill Payee	Si Pi E1 #1	nall Business ayee: NIAGAR NERGY NIAGA 123456789	A PENINSULA RA FALLS HYDRO
Jul 09, 2020 1:03 PM	130331129	Login		Sr	mall Business	

In order to return to the Settings page, click on the Settings link at the top of your online banking.

BUSINESS	PERSONAL	Welcome, Joe's Fishing Shop	Contact	t Us 🖂 Secure	Messages	Settings Sign Out
Meridi	an	Account	Bill Payments	Transfers	Alerts	Manage Users



## **Step 4: Update Profile Settings**

Within the *Profile Settings* section, you can update your password and security questions.

Note: Contact Information cannot be updated in this section. In order to update your contact information, send us a *secured message* or call our *Contact Center* at 1-866-592-2226.

Profile Settings			
User ID	2345678		
Password	HIDDEN	C	
Security Questions	Best friend's first name Maid of Honour's first name Name of your first pet	ď	
Contact Info	75 Corporate Park DR St. Catharines, ON Canada L25 3W3 POBOX 26 905 9999999 (Home) digitalbanking@meridiancu.ca		
Communications			

In order to update your current password, click on the *Edit* icon.

Profile Settings			
User ID	2345678		
Password	HIDDEN	r 🔶 🚽 🖉	
Security Questions	Best friend's first name Maid of Honour's first name Name of your first pet	ß	
Contact Info	75 Corporate Park DR St. Catharines, ON Canada L23 3W3 POBOX 26 905 9999999 (Home) digitalbanking@meridiancu.ca		



Enter your *current password* into the Current Password field, then enter your *new password* into both the New Password and Confirm Password fields. Ensure to follow all 5 *password requirements* when changing to a new password.

Once complete, click on the *Save* button.

Change Password			
Password requirements: <ul> <li>Be 8 to 12 characters long</li> <li>Include an upper case letter</li> <li>Include a number</li> <li>Passwords match</li> </ul> Current Password			
New Password	 _		
Confirm Possword			
		SAVE	

Once the save button is pressed you will be brought back to the Settings page.

Click on the *Edit* button to update your security questions.

Profile Settings		
User ID	2345678	
Password	HIDDEN	C
Security Questions	Best friend's first name Maid of Honour's first name Name of your first pet	
Contact Info	75 Corporate Park DR St. Catharines, ON Canada L2S 3W3 POBOX 26 905 9999999 (Home) digitalbanking@meridiancu.ca	



Select the *security question* to update by clicking on the checkbox to add a *checkmark*. You can then choose to keep the same question or change the question in the drop down.

Enter a *new answer* into the Answer and Confirm Answer fields. Once complete, click on the *Submit* button.

Se	ecurity Questions						
Sel	lect a Security Question below to update and click Submit to continue.						
	Answer	X0000000X					
	Confirm Answer	300000000					
	Maid of Honour's first name						
	Name of your first pet						
				CANCEL	RESET	SUBMIT	

Once the Submit button is pressed you will be brought back to the Settings page.

Scroll down to the *Communications* section where you can set notifications ON or OFF on feature tours, featured products and expert advice when logging in to online banking.

By default, this setting is set to ON and can be change at any time. If you wish to turn off these notifications, click on the ON button to switch to *OFF* and click on the *Update* button below to save changes.

Communications	
Login Messages These messages appear occasionally after successfully logging into Online Banking. Messages include new feature tours, featured products and exper	t advice.
	UPDATE

