



## Digital Banking Transition Guide

To ensure your transition to the new Digital Banking experience is as seamless as possible, we've created this quick reference guide to ensure you are up to speed on everything you'll need to consider pre-launch.

### Account Access

#### **Update Contact Information**

Ensure your email and mobile phone number are up to date. When you log in to Online Banking for the first time, you'll be required to verify your account using a One Time Passcode sent to either the mobile number or email we have on file.

To update your contact information:

1. Log in to Online Banking
2. Select 'Profile and Preferences'
3. Select 'Change Contact Information'
4. Enter your cell and email and click Submit!

#### **Personal Access Code**

If it's been a minute since you last signed in to Online Banking, we recommend that you do so now. This way, if you need to reset your Personal Access Code, we can get that completed for you before the new platform launches.

### Account Migration

The majority of your Online Banking account information will transition over to the new site, but there are a couple of items to note.

#### **Bill Payees and Recurring Bill Payments**

All your existing payees and recurring bill payments will migrate over to the new platform. However, this is a good opportunity to clean up your list of payees.

Note: bill payment nicknames will no longer be available.

#### **Recurring Transfers**

All your recurring account transfers will migrate over to the new platform, but you may want to take a screenshot for reference.

#### **Interac E-Transfers**

All e-Transfer recipients will migrate over to the new platform, but this may be a good time to review your recipients and clean up your list. It is also a great idea to make a copy of your recipient list just in case!

Note: please ensure you have no pending e-Transfers the day before launch as they will not be processed during the platform migration.

#### **Member-to-Member Transfers**

The Member-to-Member Transfer feature will continue to be available; however, your existing transfers will not migrate over to the new platform. You will need to re-add any desired Member-to-Member transfers after your first login. All you'll need is your recipient's 12-digit account number. This is a great time to make note of them by reviewing your Online Banking transactions.

## Business Accounts

### **Two-Signer Business Accounts**

Two-signer business accounts should onboard separately and will have their own unique username and password.

**Delegates** Any current delegates will not migrate over and will need to be re-added once you've logged in to the new platform.

### **CRA Payments**

Scheduled CRA payments will also need to be re-added once you've logged in.

## Common Transactions

Take a look through your transactions and jot down any that you make frequently. In your new Digital Banking experience, you can save them as Favourite Transactions to save time.

## Post Launch

### **Update Online Banking Bookmark**

Do you currently have Online Banking bookmarked? If so, don't forget to update it to our new URL.

### **Download Our New Mobile App**

Our current mobile app will be deactivated on launch day. You'll need to download the new app from the App Store or Google Play after this time.

Note: Our new mobile app will not be compatible with tablets. However, our website and Online Banking are responsive - that means they will properly resize within the browser on any device, tablets included!

### **Create Your Username**

On your first time logging in to Online Banking, you'll be asked to set up and pick a username. You will not be able to change your username once it's been set.

### **Review Interactive Demos**

Take some time to review our [Interactive Demos](#) to get a good feel of the experience you'll have with our new Digital Banking features.

## Questions?

You can get in touch with a member of our team by phone, email, or live chat on our website.

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