

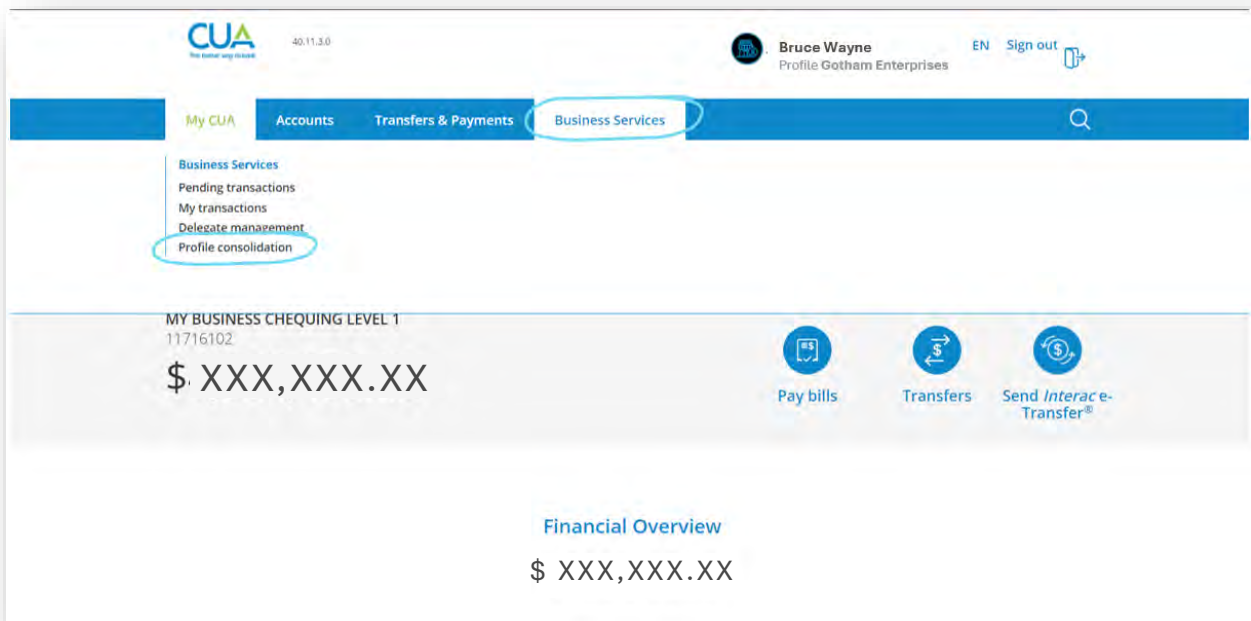
MEMBER INFORMATION GUIDE

GUIDE 21: HOW TO CONSOLIDATE YOUR PROFILES (BUSINESS SERVICE)

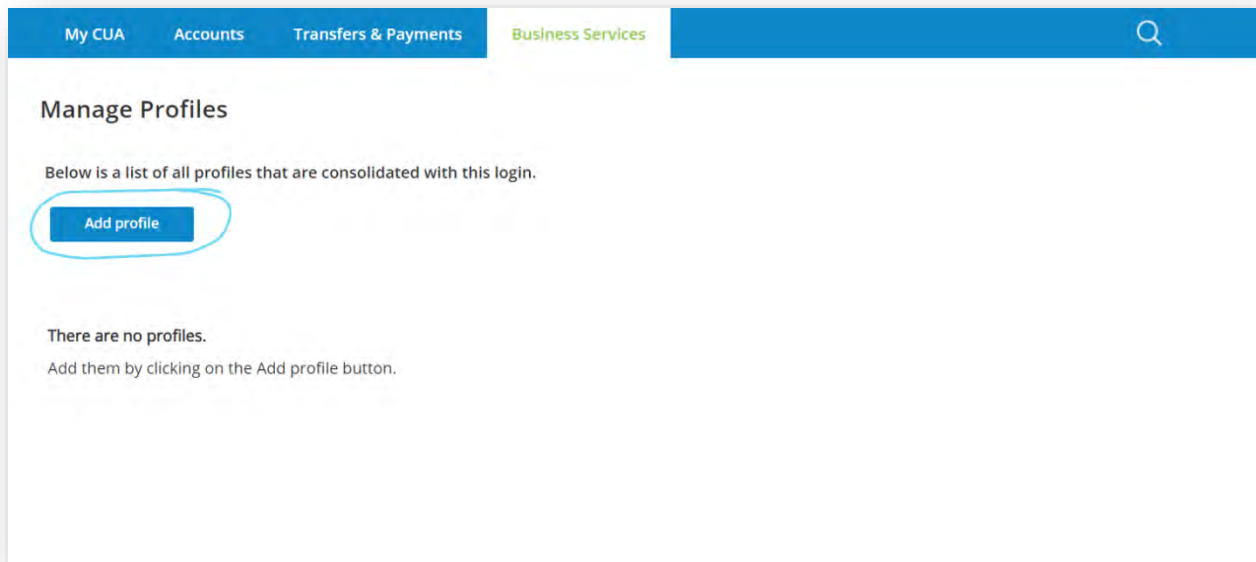
For business customers, the online banking system allows you to consolidate your profiles. You are able to consolidate multiple businesses or a combination of business and personal profiles. You are not able to consolidate multiple personal profiles without a business profile.

Please Note: If a business / commercial member uses QuickBooks, the QuickBooks system will not allow this consolidation feature. Therefore, do not set up this feature if you require access to the QuickBooks System. A consolidated profile is set up through online banking. Once the profiles are consolidated, you can then access them either through online banking or on the mobile app.

1. To begin, please go through the process of [First Time Login](#) for *each* of the profiles you would like to consolidate. Each profile must have a unique username.
2. While logged in to your business account, navigate to 'Business Services' within the main menu, and then select 'Profile Consolidation'.



3. Within the 'Profile Consolidation' section, you can add a profile. To do so, click the 'Add profile' button.



4. You will then be prompted to enter the **1)** unique username and **2)** password for either your second business or personal profile which you set up during your First Time Login. Once you have entered the details, **3)** click the 'Continue' button.

My CUA Accounts Transfers & Payments Business Services

Add Profile

Details Confirm Completed

Would you like to switch between your personal and organization/business account profiles under the same login? Enter in the username and password for the personal profile you would like to add.

Details

Username **1)**

Password **2)**

3)

5. You will then be asked to confirm the details of the profile you are adding. You will be shown your username and the name associated with profile. If this information is correct, press 'Continue'. If it is not correct, you can select the 'Back' button and make the required changes.

The screenshot shows a web application interface for adding a profile. At the top, there is a navigation bar with tabs for 'My CUA', 'Accounts', 'Transfers & Payments', and 'Business Services'. A search icon is located in the top right corner. The main heading is 'Add Profile', with a progress indicator showing 'Details', 'Confirm' (the current step), and 'Completed'. Below the heading is a message box with an information icon and the text 'Confirm profile details.'. Underneath, a 'Details' section displays the profile information: 'Username: BruceWayneBatman' and 'Name: Bruce Wayne'. At the bottom, there are three buttons: 'Cancel', 'Back', and 'Continue'.

My CUA Accounts Transfers & Payments Business Services

Add Profile

Details Confirm Completed

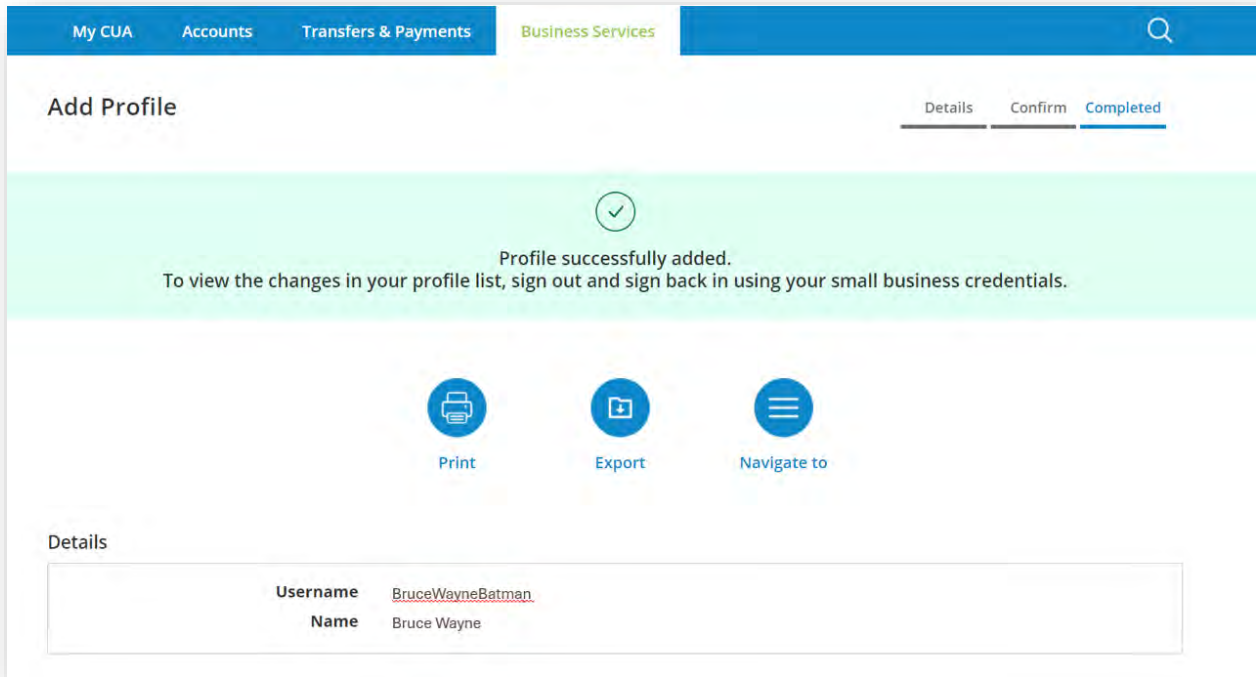
Confirm profile details.

Details

Username BruceWayneBatman
Name Bruce Wayne

Cancel Back Continue

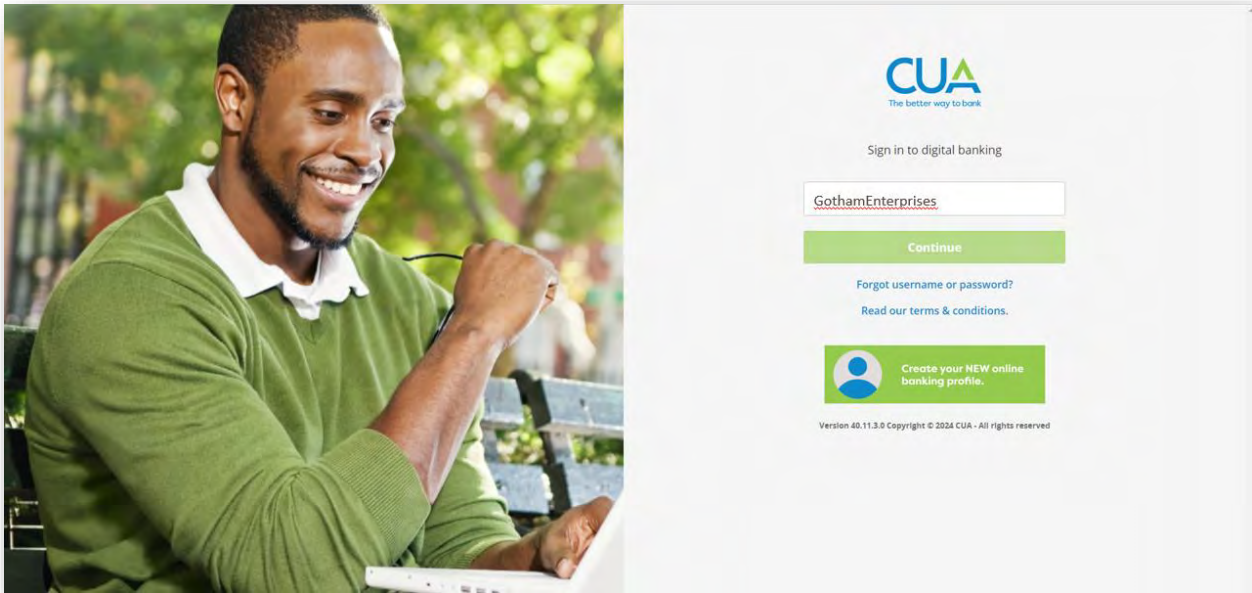
6. You will then receive a confirmation that your profiles have been connected.



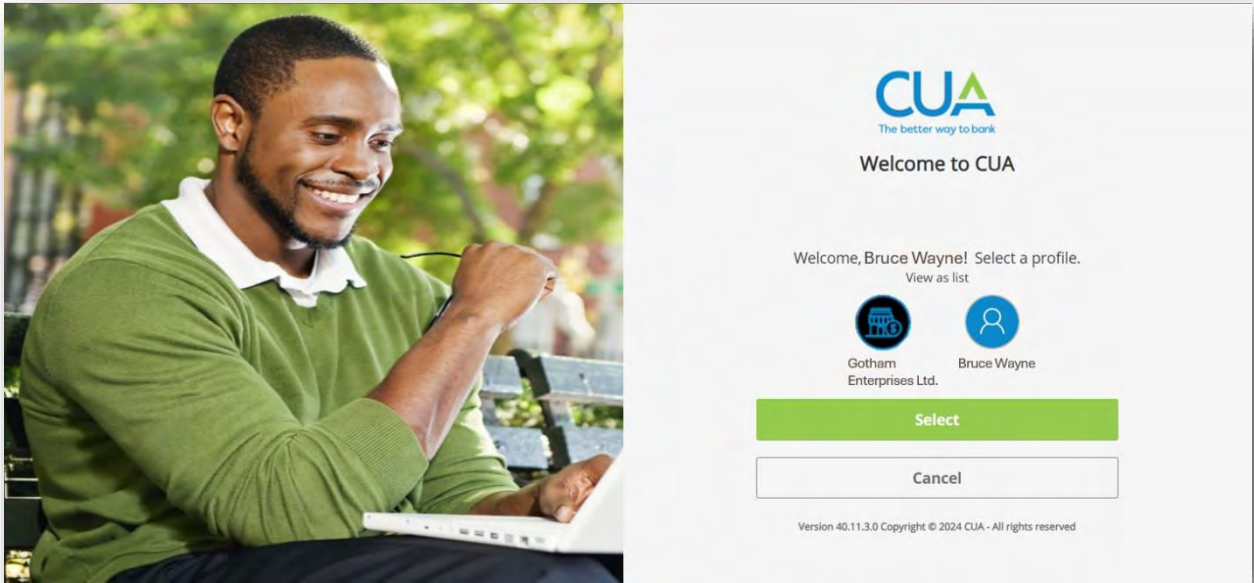
7. To see the changes reflected, you will need to log out and log in again using your business account. To do so, click the 'Sign out' button in the top right-hand corner of the screen.



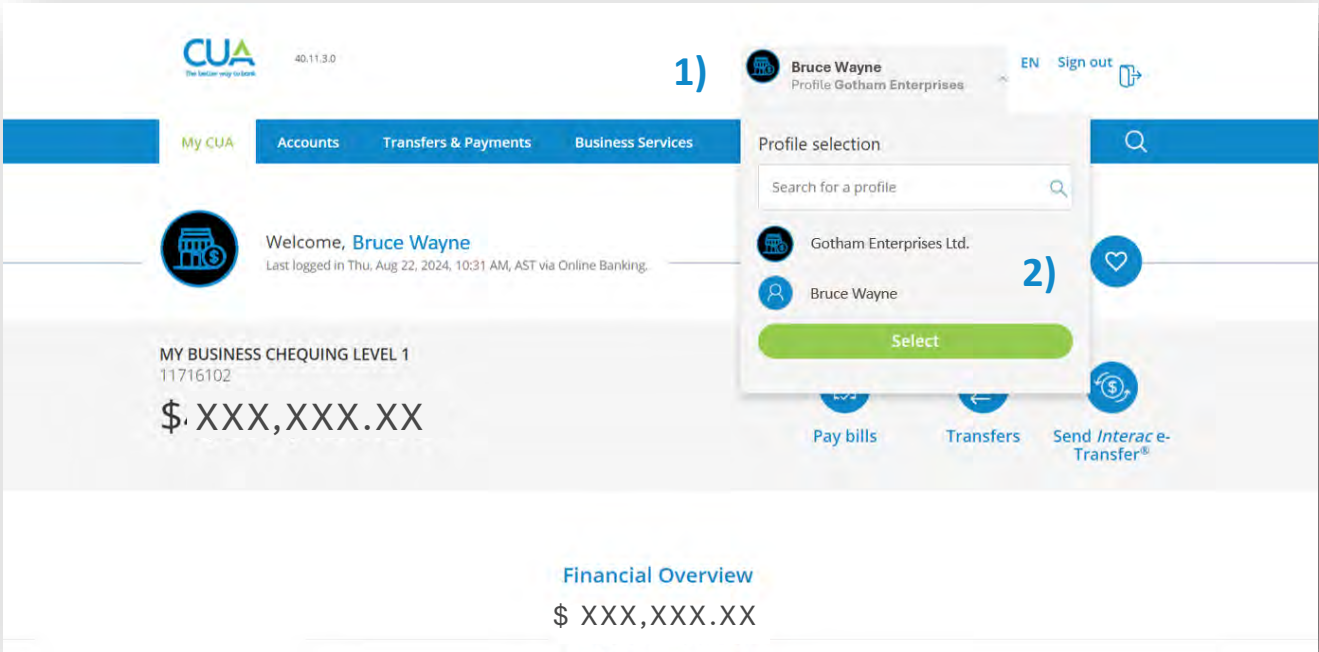
8. From the online banking Sign in page, log in as normal using your *business account*, by entering your username and password, when prompted to do so.



9. You will then be prompted to choose which profile you'd like to access. Click on the desired profile, and then press the 'Select' button.



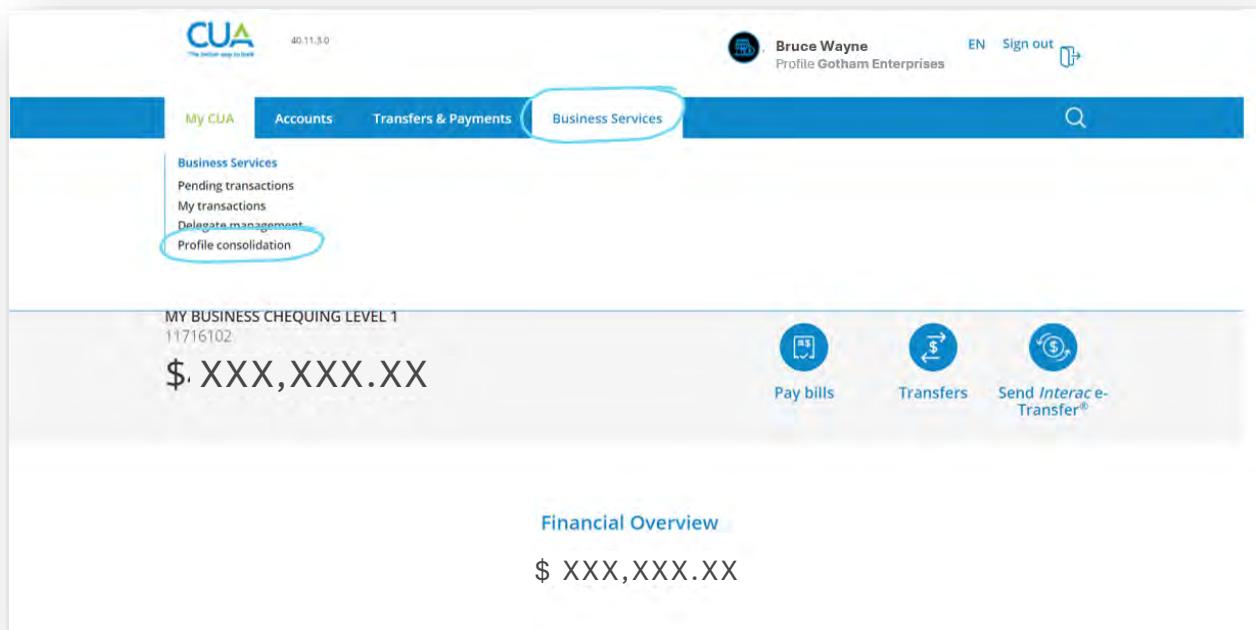
10. You will then be logged in to your business profile. You are able to switch between this profile and your second business profile / personal profile at any time. To do so, **1)** click on your profile name in the top right-hand corner, and then **2)** select the alternate profile you'd like to see.



11. If you have a third profile you'd like to add, you can do so by repeating the previous steps. Otherwise, you can continue with your online banking as normal, switching between your profiles as necessary, without the need to log out and log back in.


Disconnecting Consolidated Accounts

1. If you have already consolidated profiles and you'd like to disconnect them, you can easily do so by navigating to 'Business Services' within the main menu and then selecting 'Profile consolidation'.



2. You will be shown a list of the profiles you have consolidated with your business profile. To remove a profile, click on the trash can icon next to the appropriate profile.

The screenshot displays the 'Manage Profiles' section of a web application. At the top, there is a navigation bar with tabs for 'My CUA', 'Accounts', 'Transfers & Payments', and 'Business Services'. Below the navigation bar, the page title is 'Manage Profiles'. A message states: 'Below is a list of all profiles that are consolidated with this login.' There is a blue button labeled 'Add profile'. Below this is a table with the following data:

Username	Name	Consolidation date	
BruceWayneBatman	Bruce Wayne	Aug 22, 2024	

3. You will be shown a summary of the profile details that you have selected. If this is the correct profile, click the 'Continue' button. If it is incorrect, or if you no longer want to remove it, click the 'Cancel' button.

The screenshot shows a web application interface with a blue header bar containing navigation links: 'My CUA', 'Accounts', 'Transfers & Payments', and 'Business Services'. A search icon is located in the top right corner. The main content area is titled 'Remove Profile' and features a progress indicator with three steps: 'Details' (active), 'Confirm', and 'Completed'. Below the title, a warning message states: 'Once you have removed the consolidation you will no longer be able to switch between your business/organization and personal profiles.' The 'Details' section is enclosed in a box and lists the following information: Username: BruceWayneBatman, Name: Bruce Wayne, and Consolidation date: Aug 22, 2024. At the bottom of the page, there are two buttons: a white 'Cancel' button and a green 'Continue' button.

My CUA Accounts Transfers & Payments Business Services

Remove Profile

Details Confirm Completed

Once you have removed the consolidation you will no longer be able to switch between your business/organization and personal profiles.

Details

Username	BruceWayneBatman
Name	Bruce Wayne
Consolidation date	Aug 22, 2024

Cancel Continue

4. You will then be asked to confirm the profile you are removing. Click the 'Continue' button.

The screenshot shows a web application interface for removing a profile. At the top, there is a blue navigation bar with tabs for 'My CUA', 'Accounts', 'Transfers & Payments', and 'Business Services'. A search icon is located in the top right corner. Below the navigation bar, the page title is 'Remove Profile'. To the right of the title are three tabs: 'Details', 'Confirm', and 'Completed', with 'Confirm' being the active tab. A light orange banner with a warning icon and the text 'Confirm profile details.' is displayed. Below this, a 'Details' section contains a table with the following information:

Username	BruceWayneBatman
Name	Bruce Wayne
Consolidation date	Aug 22, 2024


At the bottom of the screen, there are three buttons: 'Cancel', 'Back', and 'Continue'. The 'Continue' button is highlighted in green.

5. You will be shown a confirmation screen that your selected profile was removed, and you will no longer be able to navigate between them directly from online banking.


Note: For the remainder of your current online banking session (before you log out) you will still be able to see this profile in your profile list. Once you log out, the profile separation will be completed. At your next log in, you will no longer be able to switch between profiles.

Remove Profile


Details Confirm **Completed**




Profile successfully removed.
To view the changes in your profile list, sign out and sign back in.



Print



Export



Navigate to

Details

Username	BruceWayneBatman
Name	Bruce Wayne
Consolidation date	Aug 22, 2024