



A DIVISION OF FIRST WEST CREDIT UNION

HOW TO: MANAGE DELEGATES

What are account delegates?

Delegates are account users (typically an accountant, manager, etc.) who have permissions to view and/or initiate transactions on the account.

Signers can also decide which consolidated accounts a delegate can access.

1. ADD A DELEGATE

From the left panel menu:

- Select "Services"
- Select "Manage Delegates"

When the page loads:

- Click "Add New Delegate"

The screenshot displays the Valley First online banking interface. On the left is a dark sidebar menu with the Valley First logo at the top. The menu items include Home, Accounts, Pay Bills, Pay Business Taxes, Interac e-Transfer®, Transfer Money, Services, Manage Delegates (highlighted), Consolidate Memberships, Pending Transactions, Transaction Audit Trail, Order Cheques, Stop Payments, Setup CRA Direct Deposit, Documents and Statements, Refer Us, Profile, Message Centre, and Security Settings. The main content area is titled 'Manage Delegates' and shows a 'No Delegate Found' message with a magnifying glass icon and the text 'You don't have any delegate.' Below this is a 'Back' button. In the top right corner, there is a user greeting 'Welcome Leeds Properties' with a profile icon, a notification icon, and a 'Logout' button. A 'Last login' timestamp is also visible. A promotional banner for 'SMART SAVINGS, STEADY RETURNS' is on the right, along with a 'Useful Links' section containing 'Offers' and 'Get a Second Opinion' with external link icons.

2. COMPLETE FIELDS

Add required information:

- First Name
- Last Name
- Role (select from the dropdown options)
- Email
- Mobile Phone

Check the consent box

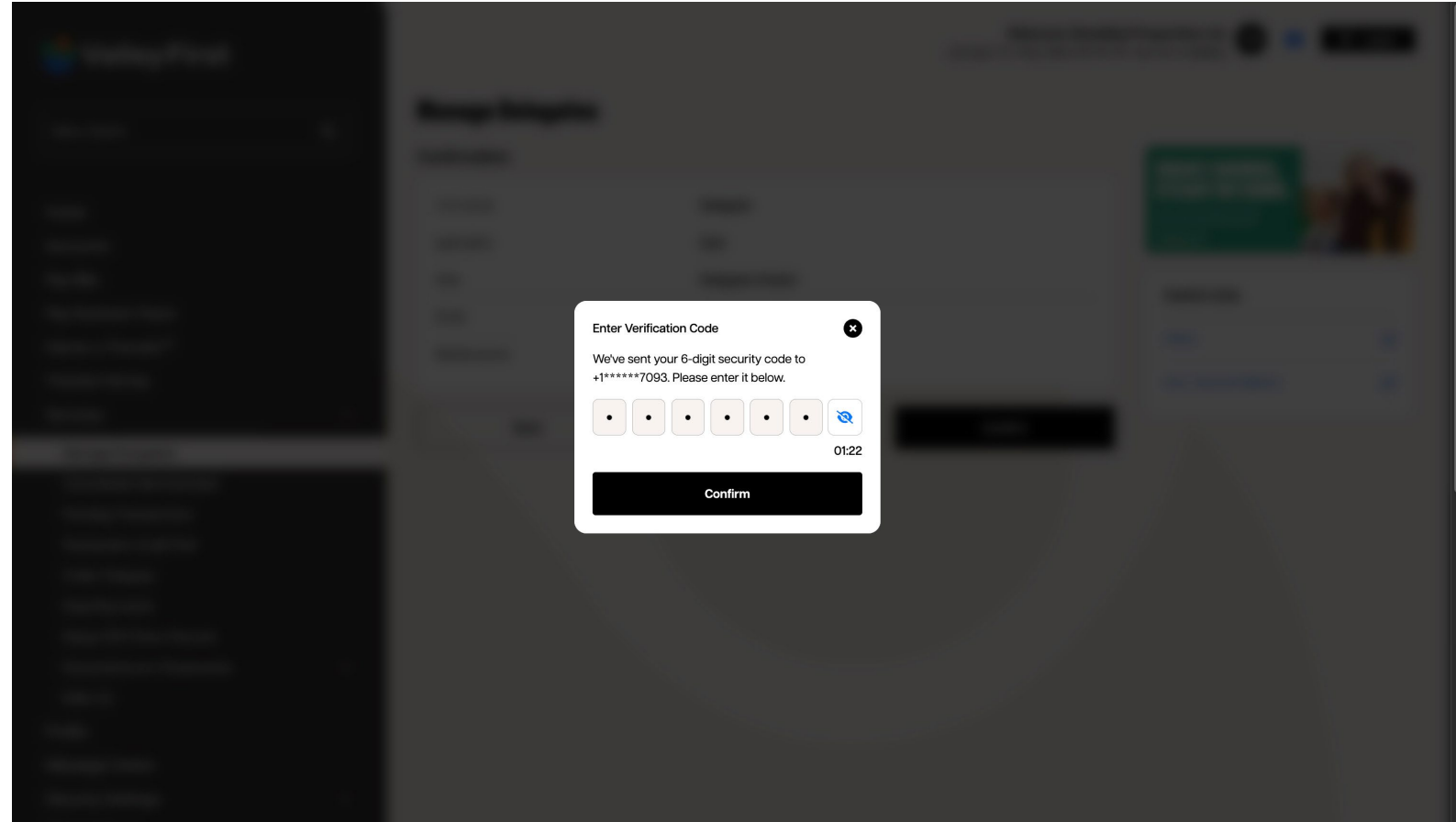
Click confirm

The screenshot shows the Valley First 'Add New Delegate' page. On the left is a dark sidebar with the Valley First logo and a menu search bar. The menu items include Home, Accounts, Pay Bills, Pay Business Taxes, Interac e-Transfer®, Transfer Money, Services, Manage Delegates, Consolidate Memberships, Pending Transactions, Transaction Audit Trail, Order Cheques, Stop Payments, Setup CRA Direct Deposit, Documents and Statements, Refer Us, Profile, Message Centre, and Security Settings. The main content area is titled 'Add New Delegate' and includes a welcome message for 'Leeds Properties' with the last login date and time. Below the title is a pink warning box stating 'Important: The temporary password will expire after 24 hours.' The form fields are: First Name (Delegate), Last Name (User), Role (Delegate-Initiator), Email (Delegateemail@business.com), and Mobile Phone (+1 (250) 000-0000). A consent checkbox is checked, with the text: 'I confirm that I have obtained express consent from the delegate named above for the collection, use, and disclosure of the delegate's phone number and e-mail address, as applicable in connection with this login notification.' At the bottom are 'Back' and 'Continue' buttons. On the right side, there is a promotional banner for 'SMART SAVINGS, STEADY RETURNS' and a 'Useful Links' section with links for 'Offers' and 'Get a Second Opinion'.

3. VERIFY THE CHANGE

Enter your One Time Passcode to complete 2-step-verification

Click confirm



4. REVIEW AND CONFIRM

Check the delegate's information is accurate

Click Confirm

The screenshot shows the Valley First online banking interface. On the left is a dark sidebar with the Valley First logo and a menu search bar. The main content area is titled 'Manage Delegates' and displays a confirmation form with the following details:

First name	Delegate
Last name	User
Role	Delegate-Initiator
Email	delegate@business.com
Mobile phone	+1 (250) 000-0000

At the bottom of the form are three buttons: 'Back', 'Cancel', and 'Confirm'. The 'Confirm' button is highlighted in black. In the top right corner, the user is logged in as 'Leeds Properties' with a 'Logout' button. A promotional banner for 'SMART SAVINGS, STEADY RETURNS' is visible on the right side of the page.

5. MANAGE DELEGATE ACCESS

Click “Back to Manage Delegates” to assign access levels to the user

The screenshot displays the Valley First online banking interface. On the left is a dark sidebar menu with the Valley First logo at the top. The menu items include: Home, Accounts, Pay Bills, Pay Business Taxes, Interac e-Transfer®, Transfer Money, Services, Manage Delegates (highlighted), Consolidate Memberships, Pending Transactions, Transaction Audit Trail, Order Cheques, Stop Payments, Setup CRA Direct Deposit, Documents and Statements, Refer Us, Profile, Message Centre, and Security Settings. The main content area shows a success message titled "Add New Delegate" with a green checkmark icon. The message states: "You're all set! Your delegate has been successfully added. They'll receive their username and password separately by email and/or text message. The temporary password will expire after 24 hours. You can provide your delegate with account and transaction access on the Manage Delegates page." Below the message, the username "D0114011" is displayed. A "Back to Manage Delegates" button is located at the bottom of the message box. In the top right corner, the user is logged in as "Leeds Properties" with a "Logout" button. A "SMART SAVINGS, STEADY RETURNS." banner is visible on the right side of the page.

6. ASSIGN ACCOUNT PERMISSIONS

When the page loads:

- Select the Delegate

From Delegate Details:

- Click Manage Account Access

When the options load:

- Select the accounts to which you want the delegate to have access

Click Confirm

ValleyFirst

Welcome Leeds Properties **OB** Logout

Last login: Fri, 1 May 2026, 6:15 PM, PST via Internet Banking

Manage Delegates

Uncheck accounts to remove the delegate's access in digital banking.

Delegate User Delegate-Initiator-Active

Select All

MEMBERSHIP: 15248		
<input type="checkbox"/> Commercial High Interest Savings 0	Savings	\$383,419.37
<input checked="" type="checkbox"/> Kyalami R Reserve 4	Savings	\$66,815.83
<input checked="" type="checkbox"/> Kyalami Rent Dep 5	Savings	\$11,662.37
<input type="checkbox"/> MVM Rent Dep 7	Savings	\$15,813.71
<input checked="" type="checkbox"/> TTR Reserve 8	Savings	\$165,889.55
<input checked="" type="checkbox"/> TT Rent Dept 9	Savings	\$8,978.99
<input type="checkbox"/> Volunteer Program 10	Savings	\$0.00
<input type="checkbox"/> LSCSS CAPC Program 11	Savings	\$9,311.55
<input type="checkbox"/> LSCSS CYMH Program 12	Savings	\$0.00
<input type="checkbox"/> Business Long Term Non-Redeemable 91	Term Deposits	\$60,000.00
<input type="checkbox"/> Business Long Term Non-Redeemable 95	Term Deposits	\$60,000.00

SMART SAVINGS, STEADY RETURNS.
Find a term deposit that fits your financial goals.
[Explore now >](#)

Useful Links

- [Offers](#)
- [Get a Second Opinion](#)

7. ASSIGN TRANSACTION PERMISSIONS

From the left panel menu:

- Select "Services"
- Select "Manage Delegates"

When the page loads:

- Select the Delegate

When the options load:

- Select the transactions you want the delegate to be able to perform

Click Confirm

Valley First

Menu Search

Home

Accounts

Pay Bills

Pay Business Taxes

Interac e-Transfer®

Transfer Money

Services

Profile

Message Centre

Security Settings

Manage Alerts

Quick Actions

- Book an Appointment
- Chat with an Advisor
- Send Us a Message
- Find a Branch/ATM

Welcome Leeds Properties **OB** [Logout]

Last login: Fri, 1 May 2026, 6:15 PM, PST via Internet Banking

Manage Delegates

First Name Delegate

Last Name User

Role Delegate-Initiator

Transfers —

- Transfer To Another Member
- Send Money
- Request Money
- Manage Existing Contacts
- Add Contact
- Pending Transfers & Requests
- Interac e-Transfer® History

Payments +

Other Services +

Back Confirm

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Explore now >

Useful Links

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- Get a Second Opinion

Additional delegate management

From the “Manage Delegate” menu, you can:

- View delegates and access level
- Modify delegate access and information, including: name; role; contact information; active status; reset password; country; account; transactions; day and time
- Unlock delegate accounts
- Delete delegates

The screenshot displays the Valley First online banking interface. On the left is a dark sidebar menu with the Valley First logo at the top. Below the logo is a search bar labeled 'Menu Search'. The menu items include: Home, Accounts, Pay Bills, Pay Business Taxes, Interac e-Transfer®, Transfer Money, Services (with a dropdown arrow), Profile, Message Centre, Security Settings (with a dropdown arrow), and Manage Alerts. At the bottom of the sidebar is a 'Quick Actions' section. The main content area is titled 'Delegate Details' and shows a table of delegate information:

Username	D0114011
First Name	Delegate
Last Name	User
Role	Delegate-Initiator
Update Delegate	>
Change Password	>
Manage Country Access	>
Manage Account Access	>
Manage Transactions	>
Manage Day & Time Access	>
Delete Delegate	>

At the bottom of the main content area is a 'Back' button. In the top right corner, there is a user greeting: 'Welcome Leeds Properties' with a profile icon, a mail icon, and a 'Logout' button. Below the greeting, it says 'Last login: Fri, 1 May 2026, 6:15 PM, PST via Internet Banking'. On the right side of the page, there is a promotional banner for 'SMART SAVINGS, STEADY RETURNS.' with the text 'Find a term deposit that fits your financial goals. Explore now >'. Below the banner is a 'Useful Links' section with two links: 'Offers' and 'Get a Second Opinion', both with external link icons.

FAQs

How many delegates can be added by a signor?

There are no restrictions.

Can I edit any delegate?

Signers may only manage the information and access for their own delegates.

Signers can delete any delegate.

What is “inactive” status?

Inactive delegates cannot access Business Online Banking.

What are the permissions for each delegate?

Read-only delegates are only able to view accounts/transactions.

Initiator delegates can view accounts/transactions and initiate transactions. Delegate-initiated transactions must be approved by a signer prior to posting.

How does my delegate log-in?

Once successfully added, the delegate will be separately emailed a temporary username and password. These emails will arrive 15 minutes apart.

The temporary credentials will expire after 24 hours.



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