

HELP CENTRE



We've got you covered when it comes to understanding how to make the most of your digital banking experience with Synergy. Whether you need a hand navigating setup or don't quite understand how to use all of its amazing features, just visit our Help Centre on the Synergy website.

Our interactive video demos are helpful and easy to follow, but if you would rather chat directly with a local expert, we offer many simple options to connect on the contact page of our website.



SHOW US WHERE YOU FEEL AT HOME.

Share your #SynergySnapshots at synergycu.ca and help us decorate our digital branch.

synergycu.ca

ACCOUNTS



ONLINE BANKING

Choose how you want to view and manage your experience, with options to customize your digital banking experience to suit your needs.

VIEW

- See all of your Synergy account details in one spot
- View your account transactions
- Review eStatements (including an archive of several years)
- View and download a void cheque for direct deposits and automatic payments

CUSTOMIZE

- Create shortcuts for your favourite transactions
- Name your accounts
- Designate a primary account selected for transactions
- Hide accounts from view
- Change the order of account selection lists

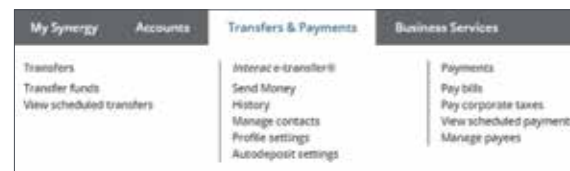
CONTROL

- Put stop payments on cheques you've issued (online banking only)



MOBILE APP

TRANSFERS AND PAYMENTS



ONLINE BANKING

We've made it even easier to pay bills, transfer funds between accounts and send money to others.

TRANSFER

- Transfer funds between accounts or to another Synergy member
- Transfer funds in real-time, schedule for a later date or set to recurring
- Send an INTERAC e-Transfer†

PAY

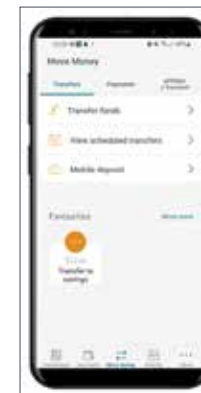
- Pay bills instantly
- Schedule future payments
- Set up recurring payments
- Pay business taxes, GST/HST, Corporation Tax as well as payroll and source deduction (online banking only)

VIEW

- Scheduled payments and transfers
- Recurring payments and transfers
- Past payments and transfers

MANAGE

- Delete scheduled payments (same-day payments cannot be deleted)
- Add, edit or delete INTERAC e-Transfer recipients
- Add, edit or delete bill payees



MOBILE APP



DIGITAL BUSINESS BANKING WITH SYNERGY

Synergy's digital banking experience was designed to enhance your operation and help you spend more time on your business and less on banking. Discover its potential.

† Trade-mark of Interac Inc. Used under license.

SIGN IN



ONLINE BANKING

Your digital experience begins by logging into your Synergy online or mobile banking and choosing your business profile. From there, just follow the prompts to access and customize your digital banking experience.



MOBILE APP

WELCOME

Once you have logged in through online or mobile banking, you will be greeted by name and the business profile you have selected. You will also see:

- a customizable profile photo option
- a dropdown menu that makes it easy to switch profiles
- a quick view balance of your favourite account



ONLINE BANKING

- shortcuts to pay bills and send transfers
- your financial overview, favourite transactions and recent activity (not shown here)

Helpful links are in place to support you as you explore and customize the digital banking experience to suit your business needs.



MOBILE APP

CHOICE AND CONTROL



ONLINE BANKING

Your Synergy digital business banking experience has been designed to offer you choice, control and simplicity. Whether navigating from a computer or a mobile phone, it's easy and intuitive to use.

MENU

Financial Overview - View a real-time snapshot of your assets and liabilities. To access this on the mobile app, select More.

Messages - Select the envelope icon to securely send, receive and archive messages to and from Synergy.

ALERTS

Account Alerts - Be notified of withdrawals, balance alerts, insufficient funds or failed transactions on your account(s).

Business Alerts - If there is a transfer or bill payment or transaction requiring your approval, you will be notified.

Security Alerts - Get alerts for password changes, attempt locks, successful logins and biometric access completions.

SETTINGS (More on the app)

Password - Change your password frequently for your security.

Contact Details - Update your address, phone and email. On the app, this can be done on the More screen under Profile.

Profile Picture - Upload an image of your choice as your profile picture.

Background Image (mobile app only) - Upload an image of your choice as your background picture.

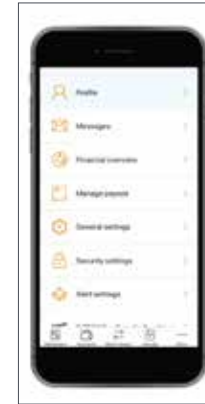
Statement Preferences - Toggle to select a paper or electronic statement.

Devices (online only) - View, lock or unlock devices used to access your digital banking.

Sign In History (online only) - View channels and dates used to log in to your digital banking.

Widget (mobile app only) - Create up to 4 shortcuts to favourite transactions and get a quick view of up to 3 spending (chequing) account balances.

Biometric Authentication (mobile app only) - Activate a fingerprint and/or facial recognition to log in into your mobile app.



MOBILE APP

BUSINESS SERVICES

Your Synergy digital business banking experience does more than make day-to-day transactions quick, simple and intuitive. It also offers simple tools to manage more complex challenges.



ONLINE BANKING

Pending Transactions

- See transactions that require approval from you or a third party as well as cancelled or expired transactions.

My Transactions - These are transactions you create which require additional approval. For your security, these transactions expire if not approved within 7 days.

Delegate Management (online only) - Add and manage your delegates.

Profile Consolidation

(online only) - If you have more than one digital banking login with Synergy, you can bring them together under one log in, making it easy to switch between your account profiles. To consolidate a profile you need to be a signor on the business account.



MOBILE APP