

IslandSavings

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 shows the Island Savings web interface. On the left, a dark sidebar contains the 'Services' menu, with 'Manage Delegates' selected and highlighted in light blue. The main content area is titled 'Manage Delegates' and features a large white box with an orange question mark icon and the text 'No Delegate Found' and 'You don't have any delegate.' Below this is a 'Back' button. In the top right corner, the user is logged in as 'Price Plumbing SA' with a 'Logout' button. A promotional banner for 'SMART SAVINGS, STEADY RETURNS.' is visible on the right, along with a 'Useful Links' section containing 'Offers' and 'Get a Second Opinion' links.

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

Island Savings

Welcome Price Plumbing SA

Last login: Mon, 11 May 2026, 11:27 AM, PST via Internet Banking

Add New Delegate

A delegate is a user you authorize to perform limited account-to-account functions as specified in our Direct Services Agreement. Once added, they'll receive their username and password separately by email and/or text message, depending on the contact information you provide.

The temporary password for your delegate will expire after 24 hours. If the password expires, you can reset your delegate's password in the Manage Delegates section.

First name

Last name

Role

Email

Mobile phone
+1 (000) 000-0000

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.

Back Continue

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[Get a Second Opinion](#)

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

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3. REVIEW AND CONFIRM

Check the delegate's information is accurate

Click Confirm

Island Savings

Welcome Price Plumbing SA

Last login: Mon, 11 May 2026, 11:27 AM, PST via Internet Banking

[Logout](#)

Manage Delegates

Confirmation

First name	Name
Last name	Last
Role	Delegate-Initiator
Email	communications@firstwestcu.ca
Mobile phone	+1 (250) 213-7093

[Back](#) [Cancel](#) [Confirm](#)

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Useful Links

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Home

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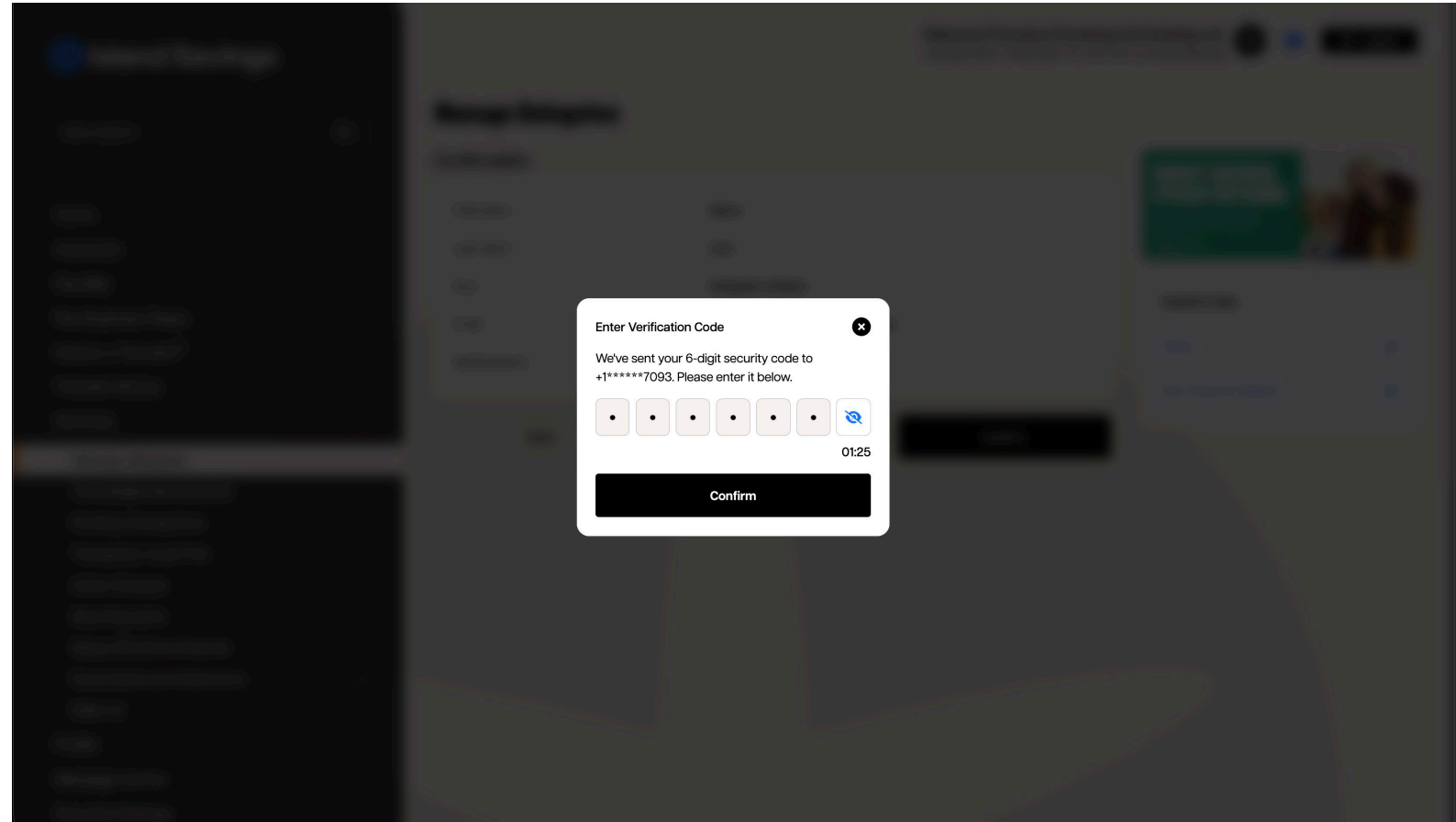
IslandSavings

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4. VERIFY THE CHANGE

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

Click confirm



5. MANAGE DELEGATE ACCESS

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

The screenshot displays the Island Savings web interface. On the left is a dark sidebar menu with the following items: 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 "D0101587" is displayed. A "Back to Manage Delegates" button is located at the bottom of the message box. The top right of the page shows the user's name "Welcome Price Plumbing SA", the last login time "Last login: Mon, 11 May 2026, 11:27 AM, PST via Internet Banking", and a "Logout" button. A promotional banner for "SMART SAVINGS, STEADY RETURNS." 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

Island Savings

Welcome Price Plumbing SA
Last login: Mon, 11 May 2026, 11:27 AM, PST via Internet Banking

Manage Delegates

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

Name Last: Delegate-Initiator-Active

Select All

MEMBERSHIP: 3913		
<input checked="" type="checkbox"/> Operating Account 0	Chequing	\$19,461.80
<input checked="" type="checkbox"/> Business Savings 0	Savings	\$59,130.99
<input type="checkbox"/> FWCU Membership Shares 0	Shares	\$5.92
<input type="checkbox"/> Business 12 Month Cashable 1	Term Deposits	\$169,289.82

MEMBERSHIP: 8292		
<input checked="" type="checkbox"/> Chequing 0	Chequing	\$2,167.51
<input type="checkbox"/> Savings First 0	Savings	\$2.46
<input type="checkbox"/> Savings First 2	Savings	\$0.00
<input type="checkbox"/> FWCU Membership Shares 0	Shares	\$6.80

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Useful Links

- [Offers](#)
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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

The screenshot displays the Island Savings web interface. On the left is a dark sidebar menu with the following items: Home, Accounts, Pay Bills, Pay Business Taxes, Interac e-Transfer®, Transfer Money, Services (expanded), Profile, Message Centre, Security Settings (expanded), and Manage Alerts. Below the menu is a 'Quick Actions' section with icons for 'Book an Appointment', 'Chat with an Advisor', 'Send Us a Message', and 'Find a Branch/ATM'. The main content area is titled 'Manage Transactions' and shows a form for a delegate named 'Price Plumbing SA'. The form includes fields for 'First Name', 'Last Name', and 'Role'. Below these are several transaction permission options, each with a checkbox: 'Transfer To Another Member' (unchecked), 'Send Money' (checked), 'Request Money' (checked), 'Manage Existing Contacts' (checked), 'Add Contact' (unchecked), 'Pending Transfers & Requests' (unchecked), and 'Interac e-Transfer® History' (checked). At the bottom of the form are 'Back' and 'Confirm' buttons. The top right of the page shows the user's name 'Welcome Price Plumbing SA', the last login time 'Mon, 11 May 2026, 11:59 AM, PST via Internet Banking', and a 'Logout' button. A promotional banner for 'SMART SAVINGS, STEADY RETURNS' and a 'Useful Links' section with 'Offers' and 'Get a Second Opinion' are also visible.

8. NOTIFY DELEGATE

Email the delegate and ask them to complete setting up their access. Mention:

- Separate login and temporary password emails will be sent 15 minutes apart
- The temporary credentials will expire after 24 hours
- Complete set-up during that window

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 'Manage Delegate' interface. On the left is a dark sidebar menu with a search bar and various navigation options. The main content area is titled 'Delegate Details' and contains a form with fields for Username, First Name, Last Name, and Role. Below these fields are several action buttons with right-pointing chevrons. At the bottom of the main area is a 'Back' button. To the right of the main content are two promotional banners: one for 'SMART SAVINGS, STEADY RETURNS' and another for 'Useful Links' containing 'Offers' and 'Get a Second Opinion'.

Menu Search [Search Icon]

Home
Accounts
Pay Bills
Pay Business Taxes
Interac e-Transfer®
Transfer Money
Services [Chevron]
Profile
Message Centre
Security Settings [Chevron]
Manage Alerts

Quick Actions
Book an Appointment [Calendar Icon]
Chat with an Advisor [Headset Icon]

Delegate Details

Username	D0101587
First Name	Name
Last Name	Last
Role	Delegate-Initiator

- Update Delegate [Chevron]
- Change Password [Chevron]
- Manage Country Access [Chevron]
- Manage Account Access [Chevron]
- Manage Transactions [Chevron]
- Manage Day & Time Access [Chevron]
- Delete Delegate [Chevron]

Back

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Useful Links

- Offers [External Link Icon]
- Get a Second Opinion [External Link Icon]

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.