

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 Envision Financial user interface. On the left is a dark sidebar menu with the Envision Financial logo at the top. Below the logo is a 'Menu Search' field. The menu items include: Home, Accounts, Pay Bills, Pay Business Taxes, Interac e-Transfer®, Transfer Money, Services (with an upward arrow), Manage Delegates (highlighted in light grey), Consolidate Memberships, Pending Transactions, Transaction Audit Trail, Order Cheques, Stop Payments, Setup CRA Direct Deposit, Documents and Statements (with a downward arrow), Refer Us, Profile, Message Centre, and Security Settings (with a downward arrow). The main content area is titled 'Manage Delegates' and features a '+ Add New Delegate' button in blue. Below this is a white box with an orange question mark icon and the text 'No Delegate Found' and 'You don't have any delegate.'. A 'Back' button is located below the white box. In the top right corner, the user is logged in as 'Price Plumbing SA' with a 'Logout' button. Below the login information is a promotional banner for 'SMART SAVINGS, STEADY RETURNS' with a photo of a family and 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.

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

Envision Financial

Welcome Price Plumbing SA

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

Logout

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

SMART SAVINGS, STEADY RETURNS.
Find a term deposit that fits your financial goals.
Explore now >

Useful Links

[Offers](#)

[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

Profile

Message Centre

Security Settings

3. REVIEW AND CONFIRM

Check the delegate's information is accurate

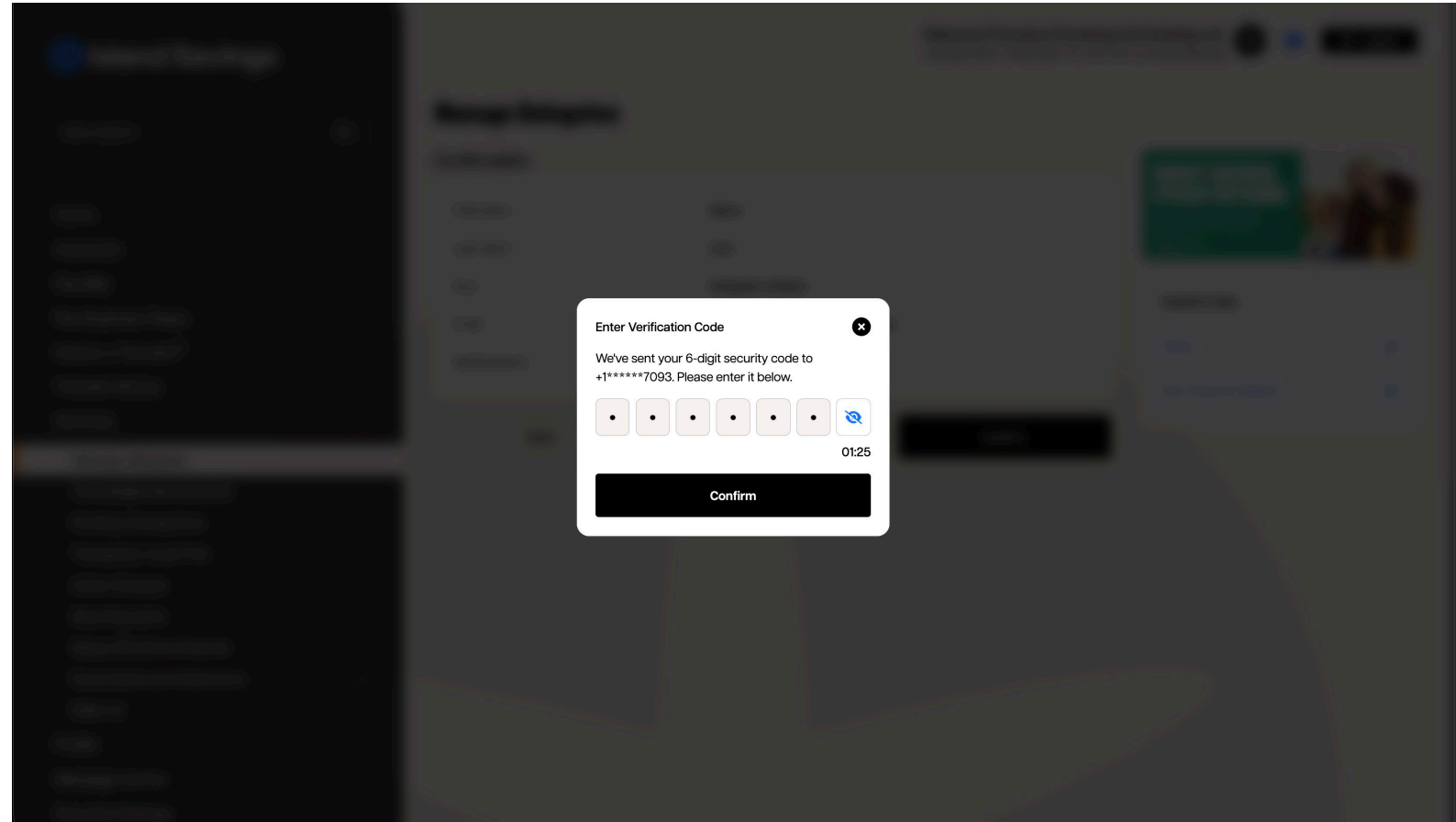
Click Confirm

The screenshot shows the Envision Financial user interface. On the left is a dark sidebar with the Envision Financial 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 (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 features a 'Confirmation' form with fields for First name, Last name, Role, Email, and Mobile phone. The form is pre-filled with 'Name', 'Last', 'Delegate-Initiator', and 'Mobile phone'. Below the form are three buttons: 'Back', 'Cancel', and 'Confirm'. The top right of the page shows a user profile for 'Price Plumbing SA' with a 'Logout' button and a timestamp: 'Last login: Mon, 11 May 2026, 11:27 AM, PST via Internet Banking'. There are also promotional banners for 'SMART SAVINGS, STEADY RETURNS' and 'Useful Links' with links for 'Offers' and 'Get a Second Opinion'.

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 Envision Financial user interface. On the left is a dark navigation sidebar with the Envision Financial logo at the top. Below the logo is a 'Menu Search' field with a magnifying glass icon. The sidebar lists various services: Home, Accounts, Pay Bills, Pay Business Taxes, Interac e-Transfer®, Transfer Money, and Services (with an upward arrow). The 'Manage Delegates' option is highlighted in a light pink color. Below it are several other menu items: Consolidate Memberships, Pending Transactions, Transaction Audit Trail, Order Cheques, Stop Payments, Setup CRA Direct Deposit, Documents and Statements (with a downward arrow), Refer Us, Profile, Message Centre, and Security Settings (with a downward arrow).

The main content area is titled 'Add New Delegate'. At the top right, there is a user greeting: 'Welcome Price Plumbing SA' with a mail icon and a 'Logout' button. Below this, it says 'Last login: Mon, 11 May 2026, 11:27 AM, PST via Internet Banking'. The central focus is a white success message box with a green checkmark icon. The text reads: '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 black button labeled 'Back to Manage Delegates' is positioned at the bottom of the message box.

On the right side of the main area, there is a promotional banner for 'SMART SAVINGS, STEADY RETURNS.' with a photo of a family and the text 'Find a term deposit that fits your financial goals. Explore now >'. Below the banner is a 'Useful Links' section containing two links: 'Offers' and 'Get a Second Opinion', each with an external link icon.

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

The screenshot displays the 'Manage Delegates' interface. On the left is a dark sidebar with the Envision Financial logo and a menu search bar. Below the search bar are navigation links: Home, Accounts, Pay Bills, Pay Business Taxes, Interac e-Transfer®, Transfer Money, Services, Profile, Message Centre, Security Settings, and Manage Alerts. At the bottom of the sidebar are 'Quick Actions' like 'Book an Appointment', 'Chat with an Advisor', 'Send Us a Message', and 'Find a Branch/ATM'. The main content area is titled 'Manage Delegates' and includes a 'Manage Account Access' section. It instructs users to 'Uncheck accounts to remove the delegate's access in digital banking.' There is a 'Name Last' search field and a 'Delegate-Initiator-Active' status. A table lists accounts for two memberships (3913 and 8292) with checkboxes for selection and their respective balances. At the bottom of the main area are 'Back' and 'Confirm' 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'. The top right corner shows the user's name 'Welcome Price Plumbing SA', a mail icon, and a 'Logout' button. The last login information is 'Last login: Mon, 11 May 2026, 11:27 AM, PST via Internet Banking'.

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

Envision Financial

Welcome Price Plumbing SA
Last login: Mon, 11 May 2026, 11:59 AM, PST via Internet Banking [Logout]

Manage Transactions

First Name Name
Last Name Last
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 +

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

Useful Links

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

Quick Actions

- [Book an Appointment](#)
- [Chat with an Advisor](#)
- [Send Us a Message](#)
- [Find a Branch/ATM](#)

Back Confirm

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, Role, and Delegate-Initiator. Below these fields are several action buttons with right-pointing chevrons. At the bottom right 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	>
Change Password	>
Manage Country Access	>
Manage Account Access	>
Manage Transactions	>
Manage Day & Time Access	>
Delete Delegate	>

Back

SMART SAVINGS, STEADY RETURNS.
Find a term deposit that fits your financial goals.
Explore now >

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.



1-888-597-6083