

# Information Capsules for Using the EFT Platform

---

Topic: Logging on to the EFT platform



LAURENTIAN  
BANK

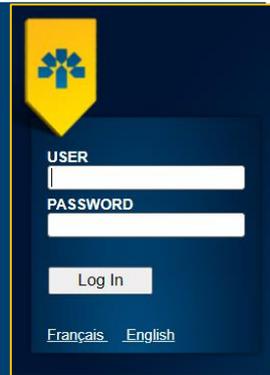
# Logging on to the EFT platform for the first time

Enter the following URL in your browser: <https://tef.banquelaurentienne.ca/tef>

## Step 1

On the login page, enter your user ID found in your welcome letter\* along with the temporary password that you received by email\* and click “**Log in.**”

*\* See slides 8 and 9 for an overview of the welcome letter and email.*

A screenshot of the EFT login page. At the top left is a yellow shield icon with a blue flower-like symbol. Below it are two input fields labeled 'USER' and 'PASSWORD'. A 'Log In' button is positioned below the password field. At the bottom, there are links for 'Français' and 'English'.

**Tip:** Your user ID can be found in your welcome letter. The temporary password is found in a second email sent by your coordinator.\*

## Step 2

Enter your 3 secret questions and answers. Make sure to choose answers that you will remember.

Click “**Submit.**”

A screenshot of the 'Set Secret Questions' page. It features a yellow shield icon with a blue flower-like symbol at the top. Below it, the text 'Set Secret Questions' is displayed. There are three pairs of input fields, each labeled 'QUESTION' and 'ANSWER'. At the bottom, there are 'Submit' and 'Cancel' buttons. At the very bottom, there are links for 'Français' and 'English'.

**Tip:** Choose simple answers. Answers should be between 6 and 30 characters per box. **Avoid using upper-case letters and accents in your answers.**



For additional support, call 514-522-6355 or 1-855-591-4797.

# Logging on to the EFT platform for the first time

## Step 3

Choose an image you will remember.  
Click “**Submit.**”



**Important:**  
You must select  
the same image  
each time you log in.

## Step 4

Log on to the platform for the first time.  
Answer the security question.  
Click “**Submit.**”



For additional support, call 514-522-6355 or 1-855-591-4797.



# Logging on to the EFT platform for the first time

## Step 5

Choose your secret image.  
Click “**Submit.**”



## Step 6

Replace the **temporary password** with a new password and click “**Save**”.

Modify User Password	
Required Information	
User	NatachaC2
* Old Password:	<input type="password"/>
* New Password:	<input type="password"/>
* Confirm New Password:	<input type="password"/>
<input type="button" value="Modify"/> <input type="button" value="Cancel"/>	

**Key points:**  
Password must at least 8 characters long: 1 lowercase and uppercase letter, 1 number and 1 special character (\$%?).



For additional support, call 514-522-6355 or 1-855-591-4797.

The slide features a dark blue background with several overlapping, semi-transparent geometric shapes on the left side, including a large diamond and a square, creating a modern, abstract design.

# Overview of Available Tabs

# Navigating the EFT platform for the first time



NatachaC 2022-03-03 09:14:27



Administration Transactions Reports

Help Logout

The EFT menu bar contains 3 main tabs: Administration, Transactions and Reports. The Help tab is also available for quick access to the user guide. The Exit tab is used to end your session.

## Main tabs



### Administration

This tab allows you to manage users:

- Add a user
- Edit a profile
- Manage passwords
- Enable/disable a user



### Transactions

This tab allows you to perform the following actions:

- Add/search a transaction
- Manage templates
- Import transaction files



### Reports

This tab allows you to create several types of reports:

- One-day financial settlement
- View billing notice for a specific month



For additional support, call 514-522-6355 or 1-855-591-4797.

The left side of the slide features a dark blue background with several overlapping, semi-transparent geometric shapes in a lighter shade of blue. These shapes include a large diamond, a rectangle, and a trapezoid, creating a layered, abstract design.

# Appendices

# Appendix: Sample Welcome Letter



LAURENTIAN  
BANK

WELCOMING LETTER  
WITH DIRECT DEPOSIT  
AND PRE-AUTHORIZED  
DEBIT

Montreal, Wednesday, July-14-21

Mr. Client

Dear

We are pleased to inform you that your account was successfully created in the new Electronic Funds Transfer ("EFT") application.

Here is the information that will allow you to access the website EFT Application:

Originator ID CT:

Originator ID DT:

Username:

Name of Super Administrator:

E-mail:

EFT website: <https://tef.banquelaurentienne.ca/tef>

Direct deposit maximum limit by due date:

When you login to the EFT application for the first time, please enter your username and the temporary password which will be forwarded shortly by separate e-mail. You will then be asked to replace the temporary password by one of your choice.

If you wish to create a hyperlink to the EFT application, please make sure that it points to the login page «<https://tef.banquelaurentienne.ca/tef>», otherwise you will not be able to access the application.

Please note that all transactions (credit or debit) must be sent at least 48 hours (open days) prior to the date on which it is payable (due date).

You will receive shortly, by separate e-mail, a short start up guide to help with your first login and transaction upload.

For more information, do not hesitate to contact our EFT support service at 514-522-6355 or 1-855-591-4797, available Monday to Friday between 8:00 ET 17:00.



For additional support, call 514-522-6355 or 1-855-591-4797.

# Appendix: Sample Email with Temporary Password

---

Good day,

As discussed in my previous email, you will find below the initial password of the client to send to log in to the EFT application.

Temporary PASSWORD:

\*\*\*For access to TEF to remain active, the user must absolutely **log in at least once a month**\*\*\*

\*\*\*\*For all password changes or connection problems, a phone number is available: **514-522-6355 or 1-855-591-4797**\*\*\*\*

On the welcome letter, the customer will find the contact details for the support telephone line if they **experience difficulty** connecting for the first time.

Thank you and good day.

**For additional support, call 514-522-6355 or 1-855-591-4797.**

