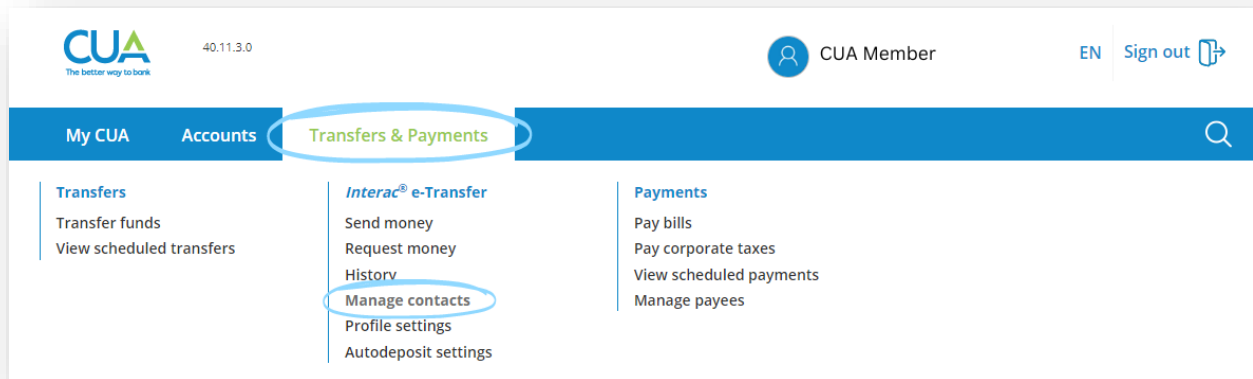


MEMBER WALKTHROUGH GUIDE

GUIDE 10: HOW TO ADD AN *INTERAC* E-TRANSFER CONTACT

1. Once you've set up your *Interac*® profile, the next step before sending an e-Transfer is adding an e-Transfer contact(s). Begin by hovering your mouse over the 'Transfers & Payments' tab along the menu bar and select 'Manage Contacts' under the '*Interac* e-Transfer' section in the center of the drop-down menu.



2. From the 'Manage Contacts' page, select 'Add contact'.

CUA 40.11.3.0 The better way to bank

CUA Member EN Sign out

My CUA Accounts Transfers & Payments

Manage Contacts

View your Existing Interac Contacts here. To add a contact please choose Add Contact from the Payments and Transfers menu

[Add contact](#)

No *Interac*® contacts have been set up.
Go to manage INTERAC contacts page to add them.

The *Interac*® logo is a registered trade-mark of *Interac* Corp. used under license.

3. To add a contact (also sometimes called a recipient), within the 'Contact details' box:
1) enter their name; **2)** e-mail; **3)** mobile phone number, including an area code from the dropdown menu; **4)** select their preferred language; and **5)** the method you would like them to be notified by.

Then, **6)** enter a security question, **7)** the answer to the question and **8)** re-enter the answer. Once all the fields have been satisfied, **9)** select 'Continue'.

Note: This will be the information and preferences for all e-Transfers sent to this contact. You can update this information at any time.

The screenshot shows the 'Add Contact' form in the CUA Member portal. The form is divided into two main sections: 'Contact details' and 'Security details'. The 'Contact details' section includes fields for Name, E-mail, Mobile phone (with a dropdown for area code), Preferred language (radio buttons for English and French), and Notification method (a dropdown menu). The 'Security details' section includes fields for Secret question, Answer, and Re-enter answer. A note below the security fields states: 'The security question and answer will be communicated to the contact separately.' At the bottom of the form, there are two buttons: 'Cancel' and 'Continue'. The 'Continue' button is highlighted in green. Blue circles and arrows with numbers 1 through 9 are overlaid on the form to indicate the sequence of steps for adding a contact.

CUA 40.11.3.0 The better way to bank CUA Member EN Sign out

My CUA Accounts Transfers & Payments

Add Contact Interac

Details Confirm Completed

Contact details

1)

Name Enter name **2)**

E-mail Enter e-mail

Mobile phone Canada +1 **3)**

Enter mobile phone number

4) Preferred language English French **5)**

Notification method Select notification method

Security details

6)

Secret question Enter secret question **7)**

Answer **1** Enter answer **8)**

The security question and answer will be communicated to the contact separately.

Re-enter answer Re-enter answer **9)**

The Interac® logo is a registered trade-mark of Interac Corp. used under license.


Cancel Continue

4. Next, you will be asked to confirm the details for your *Interac* contact/recipient. If all the information appears correct, select 'Continue'. To make changes, select 'Back'.

The screenshot shows the CUA Member portal interface. At the top left is the CUA logo with the tagline 'The better way to bank' and the version number '40.11.3.0'. To the right, it says 'CUA Member' with a user icon, 'EN', and a 'Sign out' button with an external link icon. Below this is a navigation bar with 'My CUA', 'Accounts', and 'Transfers & Payments' tabs, and a search icon on the right. The main content area is titled 'Add Contact' with an Interac logo. There are three tabs: 'Details', 'Confirm' (which is active), and 'Completed'. A warning banner at the top of the main area says 'Confirm INTERAC contact details'. Below this, there are two sections: 'Contact details' and 'Security details'. The 'Contact details' section shows: Name: Morgan Wallen, E-mail: tennesseefan@hotmail.com, Preferred language: English, and Notification method: E-mail. The 'Security details' section shows: Secret question: What do cowboys shoot?, and Answer: *****. At the bottom, there are three buttons: 'Cancel', 'Back', and 'Continue' (which is highlighted in green). A small disclaimer at the bottom left states: 'The Interac® logo is a registered trade-mark of Interac Corp. used under license.'

CUA The better way to bank 40.11.3.0 CUA Member EN Sign out

My CUA Accounts Transfers & Payments

Add Contact  Details Confirm Completed

Confirm INTERAC contact details

Contact details

Name	Morgan Wallen
E-mail	tennesseefan@hotmail.com
Preferred language	English
Notification method	E-mail

Security details

Secret question	What do cowboys shoot?
Answer	*****

The Interac® logo is a registered trade-mark of Interac Corp. used under license.


Cancel Back Continue


- To authorize adding a new contact, you will be asked to enter a one-time authorization code. You can choose to have this code sent to your email or texted to the mobile number associated with your account. Once you have received your code, enter it in the appropriate box and select 'Continue'.

Note: For security purposes, you will be asked to enter an authorization code to confirm every new e-Transfer contact you create.

CUA 40.11.3.0 CUA Member EN Sign out

My CUA Accounts Transfers & Payments

Add Contact  Details Confirm Completed

 This transaction requires authentication.

Confirmation code

E-mail

Text message

A text message has been sent to your phone (XXX) XXX-XXXX. Enter in the code you have received.

If you don't receive the text message within 10 minutes, [resend the code](#).

The Interac® logo is a registered trade-mark of Interac Corp. used under license.


Cancel Back Continue

6. Congratulations! You have added your first *Interac* e-Transfer contact and can now send e-Transfers. You also have the option to print or export the page for your records.




The screenshot displays the CUA Member portal interface. At the top left, the CUA logo is accompanied by the tagline "The better way to bank" and the version number "40.11.3.0". The top right shows the user's profile as "CUA Member" with a "Sign out" button. A navigation bar includes "My CUA", "Accounts", and "Transfers & Payments". The main heading is "Add Contact" with an Interac logo. A progress indicator shows "Details", "Confirm", and "Completed" (the active step). A green success banner reads "Contact successfully added." Below this are three icons: "Print", "Export", and "Navigate to". The "Contact details" section lists: Name: Morgan Wallen, E-mail: tennesseefan@hotmail.com, Notification method: E-mail, Preferred language: English. The "Security details" section lists: Secret question: What do cowboys shoot?, Answer: *****. A footer note states: "The Interac® logo is a registered trade-mark of Interac Corp. used under license."

CUA The better way to bank 40.11.3.0 CUA Member EN Sign out

My CUA Accounts Transfers & Payments

Add Contact  Details Confirm **Completed**

✓
Contact successfully added.

  
Print Export Navigate to

Contact details

Name	Morgan Wallen
E-mail	tennesseefan@hotmail.com
Notification method	E-mail
Preferred language	English

Security details

Secret question	What do cowboys shoot?
Answer	*****

The Interac® logo is a registered trade-mark of Interac Corp. used under license.