

MEMBER INSTRUCTION GUIDE

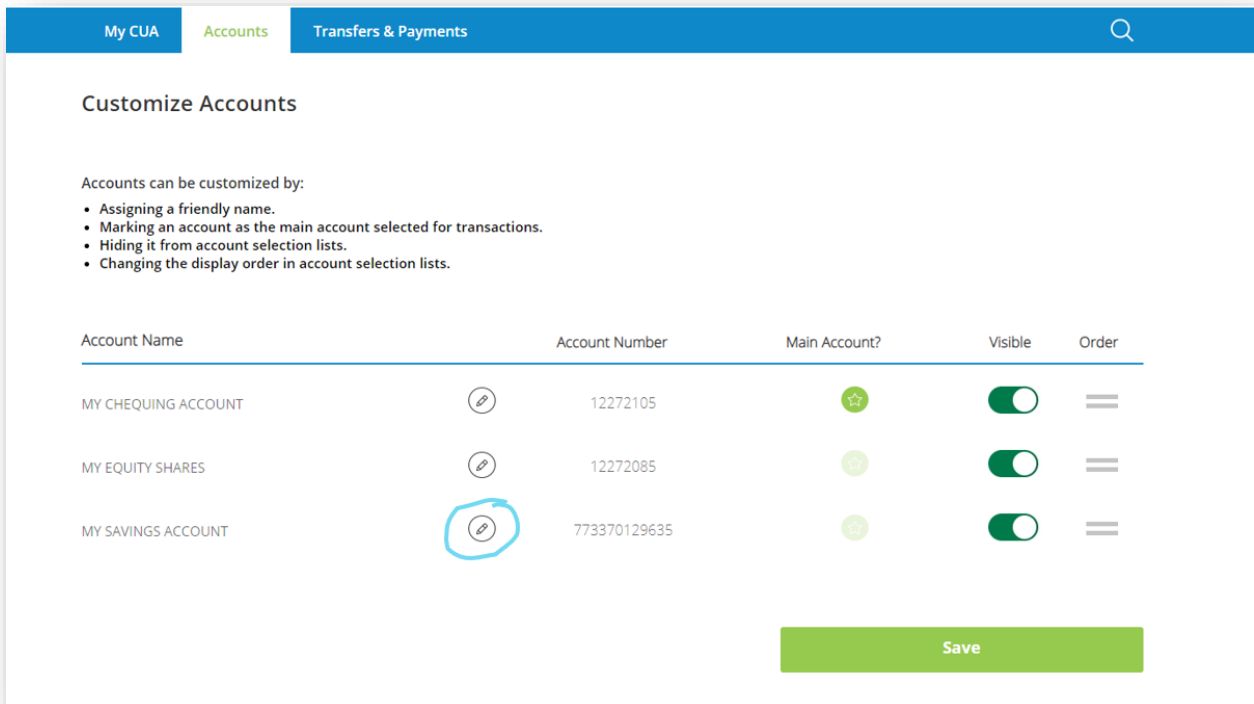
GUIDE 20: HOW TO CUSTOMIZE YOUR ACCOUNTS

To customize your accounts, hover your mouse over 'Accounts' in the menu bar, and then select 'Customize Accounts'.

The screenshot displays 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 shows 'CUA Member', 'EN', and a 'Sign out' button. A blue navigation bar contains 'My CUA', 'Accounts', and 'Transfers & Payments'. The 'Accounts' menu is open, listing options: 'View accounts', 'View transactions', 'Favourite transactions', 'View eStatements', 'Customize accounts' (circled in red), and 'Open account'. A secondary menu for 'Cheques' includes 'Stop cheques' and 'Download void cheque'. Below the navigation bar, a section for 'MY CHEQUING ACCOUNT' shows the account number '12272105' and a balance of '\$5.85'. To the right are icons for 'Pay bills', 'Transfers', and 'Send Interac e-Transfer®'. The 'Financial Overview' section features a donut chart with a total value of '\$11.35'. The chart is divided into three segments: a large green segment representing 'Assets' at '\$11.35', a small purple segment, and a small yellow segment. To the right of the chart, 'Liabilities' are listed as '\$0.00'.

Renaming Your Accounts

1. Within the 'Customize Accounts' section, you can begin by renaming any of your accounts. To do so, click on the pencil icon next to the account you would like to rename.



The screenshot shows a web interface for managing accounts. At the top, there are navigation tabs: 'My CUA', 'Accounts', and 'Transfers & Payments'. The 'Accounts' tab is active. Below the navigation is a search icon. The main heading is 'Customize Accounts'. Underneath, there is a list of customization options:

- Accounts can be customized by:
 - Assigning a friendly name.
 - Marking an account as the main account selected for transactions.
 - Hiding it from account selection lists.
 - Changing the display order in account selection lists.

Below this is a table with the following columns: Account Name, Account Number, Main Account?, Visible, and Order. There are three rows of accounts. Each row has a pencil icon next to the account name, which is circled in blue in the image. The 'Main Account?' column has a star icon for the first account and a minus sign for the others. The 'Visible' column has toggle switches, all of which are turned on. The 'Order' column has a three-line menu icon for each row.

| Account Name | Account Number | Main Account? | Visible | Order |
|---------------------|----------------|---------------|-------------------------------------|-------|
| MY CHEQUING ACCOUNT | 12272105 | ★ | <input checked="" type="checkbox"/> | ≡ |
| MY EQUITY SHARES | 12272085 | ✖ | <input checked="" type="checkbox"/> | ≡ |
| MY SAVINGS ACCOUNT | 773370129635 | ✖ | <input checked="" type="checkbox"/> | ≡ |

At the bottom right of the table area, there is a green 'Save' button.

2. You will then see a pop-up box showing the current account name. **1)** Click within the text box, delete the current name, and type in your desired name.

Once you are satisfied with the name, **2)** select 'Save'.

The screenshot shows a web interface with a blue header containing 'My CUA', 'Accounts', and 'Transfers & Payments'. Below the header is a search icon. The main content area is titled 'Customize Accounts' and includes a list of customization options:

- Accounts can be customized by:
 - Assigning a friendly name.
 - Marking an account as the main account selected for transactions.
 - Hiding it from account selection lists.
 - Changing the display order in account selection lists.

A table of accounts is displayed with the following columns: Account Name, Account Number, Main Account?, Visible, and Order. A pop-up box is overlaid on the first row, showing the current account name 'MY SAVINGS ACCOUNT' and a 'Save' button. The pop-up box is annotated with '1)' next to the text box and '2)' next to the 'Save' button.

| Account Name | Account Number | Main Account? | Visible | Order |
|--------------------|----------------|-------------------------------------|-------------------------------------|-------|
| MY SAVINGS ACCOUNT | 12272105 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | ≡ |
| MY SAVINGS ACCOUNT | 12272085 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | ≡ |
| Vacation Savings | 773370129635 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | ≡ |

Save










3. You will then see your updated account name reflected in your accounts list. You can continue renaming your other accounts if you choose. Once you are satisfied with all of your account names, select 'Save'.


Note: After selecting 'Save', you will not receive a confirmation message. The page will automatically refresh and retain any changes you made, and you will also see the new account names as you navigate throughout Online Banking.

Customize Accounts

Accounts can be customized by:

- Assigning a friendly name.
- Marking an account as the main account selected for transactions.
- Hiding it from account selection lists.
- Changing the display order in account selection lists.

| Account Name | | Account Number | Main Account? | Visible | Order |
|----------------------------|---|----------------|---|-------------------------------------|---|
| <u>MY CHEQUING ACCOUNT</u> |  | 12272105 |  | <input checked="" type="checkbox"/> |  |
| MY EQUITY SHARES |  | 12272085 |  | <input checked="" type="checkbox"/> |  |
| Vacation Savings |  | 773370129635 |  | <input checked="" type="checkbox"/> |  |












Hiding or Displaying Your Accounts


1. Within 'Customize Accounts' you can modify which accounts are visible by using the toggle switches in the 'Visible' column.

Customize Accounts

Accounts can be customized by:

- Assigning a friendly name.
- Marking an account as the main account selected for transactions.
- Hiding it from account selection lists.
- Changing the display order in account selection lists.

| Account Name | | Account Number | Main Account? | Visible | Order |
|---------------------|---|----------------|---|-------------------------------------|---|
| MY CHEQUING ACCOUNT |  | 12272105 |  | <input checked="" type="checkbox"/> |  |
| MY EQUITY SHARES |  | 12272085 |  | <input checked="" type="checkbox"/> |  |
| Vacation Savings |  | 773370129635 |  | <input checked="" type="checkbox"/> |  |













2. For any accounts that you don't want to see listed, **1)** toggle the corresponding switch to the off position. When it is off, it will appear grey. Once you are satisfied, **2)** Press the 'Save' button.


Customize Accounts

Accounts can be customized by:

- Assigning a friendly name.
- Marking an account as the main account selected for transactions.
- Hiding it from account selection lists.
- Changing the display order in account selection lists.

| Account Name | | Account Number | Main Account? | Visible | Order |
|-------------------------|---|----------------|---|-------------------------------------|---|
| MY CHEQUING ACCOUNT |  | 12272105 |  | <input checked="" type="checkbox"/> |  |
| <u>MY EQUITY SHARES</u> |  | 12272085 |  | <input type="checkbox"/> |  |
| Vacation Savings |  | 773370129635 |  | <input type="checkbox"/> |  |

1) 

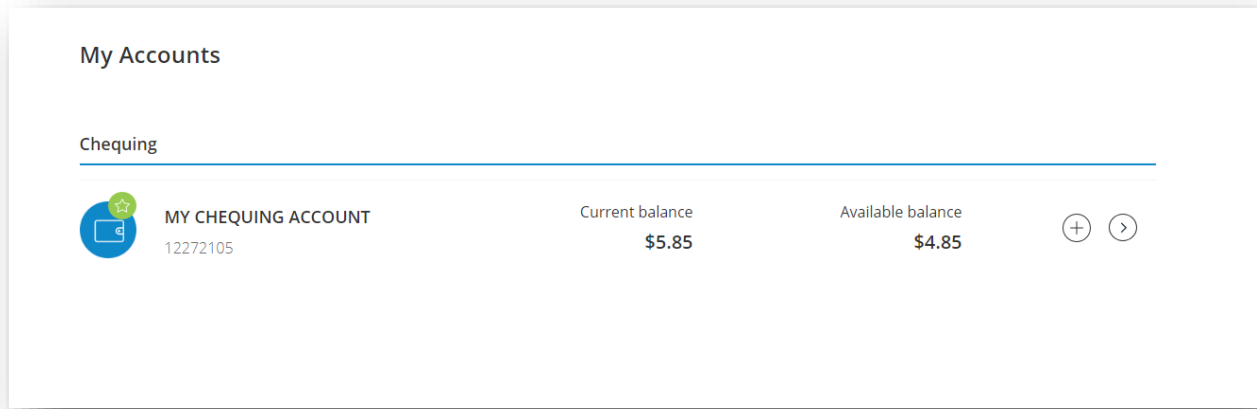
2) 

3. To see your changes, hover your mouse over 'Accounts' in the menu bar, and then select 'View accounts'.

The screenshot displays the CUA Member portal interface. At the top, the CUA logo is on the left, and the user is identified as a 'CUA Member' with 'EN' and a 'Sign out' option on the right. A blue navigation bar contains 'My CUA', 'Accounts', and 'Transfers & Payments'. The 'Accounts' menu is expanded, showing options like 'View accounts', 'View transactions', 'Favourite transactions', 'View eStatements', 'Customize accounts', and 'Open account'. Below the navigation, a 'MY CHEQUING ACCOUNT' section shows a balance of '\$5.85' and icons for 'Pay bills', 'Transfers', and 'Send Interac e-Transfer'. The 'Financial Overview' section features a donut chart with a total value of '\$11.35', split into 'Assets' (\$11.35) and 'Liabilities' (\$0.00).

4. You will then be able to see that only the accounts you have selected are shown.

Note: If you would like to make a hidden account visible again, you can follow the same steps, but switch the toggle to the green 'on' position.



Changing Your 'Main' Account













1. Within online banking, you have a 'Main Account'. This is the default account that is selected when you perform online transactions such as sending a transfer. For most people, it makes sense to have a day-to-day chequing account as the 'Main Account'.


You can change your main account at any time within the 'Customize Accounts' section and then the 'Main Account' column.

Customize Accounts

Accounts can be customized by:

- Assigning a friendly name.
- Marking an account as the main account selected for transactions.
- Hiding it from account selection lists.
- Changing the display order in account selection lists.

| Account Name | | Account Number | Main Account? | Visible | Order |
|---------------------|---|----------------|---|---|---|
| MY CHEQUING ACCOUNT |  | 12272105 |  |  |  |
| MY EQUITY SHARES |  | 12272085 |  |  |  |
| Vacation Savings |  | 773370129635 |  |  |  |















2. To change your 'Main Account', **1)** click on the star next to the account you would like to select. Once you are satisfied with your selection, **2)** press the 'Save' button.


Note: You will not receive a confirmation message that this change has been made. You will see it reflected in your accounts as you navigate throughout online banking. Your 'Main Account' is always shown with the green star icon.

Customize Accounts

Accounts can be customized by:

- Assigning a friendly name.
- Marking an account as the main account selected for transactions.
- Hiding it from account selection lists.
- Changing the display order in account selection lists.

| Account Name | | Account Number | Main Account? | Visible | Order |
|---------------------|---|----------------|---|---|---|
| MY CHEQUING ACCOUNT |  | 12272105 |  1) |  |  |
| MY EQUITY SHARES |  | 12272085 |  |  |  |
| Vacation Savings |  | 773370129635 |  |  |  |

2) 

Changing the Order of Your Accounts

















Your accounts will always display in category groups, with chequing accounts displayed first, followed by savings accounts and then other account types. Changing the order of your accounts will not change this order. Changing the account order only impacts the way accounts within a specific category group are shown.


1. To change the order that your accounts are displayed, **1)** hover your mouse over the grey bars next to the account you would like to move. Then click and drag the account to the position you would like to see it in the list. Once you are satisfied with the order **2)** Press the 'Save' button.

Customize Accounts

Accounts can be customized by:

- Assigning a friendly name.
- Marking an account as the main account selected for transactions.
- Hiding it from account selection lists.
- Changing the display order in account selection lists.

| Account Name | | Account Number | Main Account? | Visible | Order |
|---------------------|---|----------------|---|---|---|
| MY CHEQUING ACCOUNT |  | 12272105 |  |  |  |
| MY EQUITY SHARES |  | 12272085 |  |  |  |
| Vacation Savings |  | 773370129635 |  |  |  |
| Emergency Fund |  | 773370130120 |  |  |  |













2) 

2. You will not receive a confirmation message that this change has been made. The page will refresh, and your accounts will be in the new order that you have chosen.

Customize Accounts

Accounts can be customized by:

- Assigning a friendly name.
- Marking an account as the main account selected for transactions.
- Hiding it from account selection lists.
- Changing the display order in account selection lists.

| Account Name | | Account Number | Main Account? | Visible | Order |
|---------------------|---|----------------|--|-------------------------------------|---|
| MY CHEQUING ACCOUNT |  | 12272105 |  | <input checked="" type="checkbox"/> |  |
| MY EQUITY SHARES |  | 12272085 |  | <input checked="" type="checkbox"/> |  |
| Emergency Fund |  | 773370130120 |  | <input checked="" type="checkbox"/> |  |
| Vacation Savings |  | 773370129635 |  | <input checked="" type="checkbox"/> |  |

[Save](#)

3. To see the new order of your accounts, hover your mouse over 'Accounts' in the menu bar, and then select 'View Accounts'.

The screenshot displays the CUA member portal interface. At the top, the CUA logo is on the left, and the user is identified as a 'CUA Member' on the right. A blue navigation bar contains 'My CUA', 'Accounts', and 'Transfers & Payments'. The 'Accounts' menu is expanded, showing options like 'View accounts', 'View transactions', 'Favourite transactions', 'View eStatements', 'Customize accounts', and 'Open account'. Below the navigation, a section for 'MY CHEQUING ACCOUNT' shows a balance of '\$5.85' and icons for 'Pay bills', 'Transfers', and 'Send Interac e-Transfer'. The 'Financial Overview' section features a donut chart with a total value of '\$11.35', split into 'Assets' (\$11.35) and 'Liabilities' (\$0.00).

CUA 4011.3.0

CUA Member EN Sign out

My CUA Accounts Transfers & Payments

Accounts

- View accounts
- View transactions
- Favourite transactions
- View eStatements
- Customize accounts
- Open account

Cheques

- Stop cheques
- Download void cheque

MY CHEQUING ACCOUNT
12272105
\$5.85

Pay bills Transfers Send Interac e-Transfer®

Financial Overview

\$11.35




Assets \$11.35 Liabilities \$0.00

4. On the accounts page, you will see the new order of accounts.







Note: As described above, you cannot change the order of account categories (chequing, savings, other), only the order of specific accounts within each category.

My Accounts

Chequing

| | | | |
|--|----------------------------------|------------------------------------|---|
|  MY CHEQUING ACCOUNT 12272105 | Current balance \$4.85 | Available balance \$3.85 |   |
|--|----------------------------------|------------------------------------|---|

Savings

| | | | |
|---|----------------------------------|------------------------------------|---|
|  Emergency Fund 773370130120 | Current balance \$1.00 | Available balance \$1.00 |   |
|  Vacation Savings 773370129635 | Current balance \$0.50 | Available balance \$0.50 |   |