

MEMBER INFORMATION GUIDE – CUSTOMIZING YOUR ACCOUNT

Table of Contents

Customize Your Accounts.....2
 Renaming Your Accounts.....3
 Hiding or Displaying Your Account.....6
 Changing Your 'Main' Account.....10
 Changing the Order of Your Accounts.....12

Customize Your Account and Security Alerts.....16

Customize Your Account and Security Alerts (Mobile App).....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, the CUA logo and version number (40.11.3.0) are on the left, and the user's name (CUA Member) and language options (EN, Sign out) are on the right. A blue navigation bar contains 'My CUA', 'Accounts', and 'Transfers & Payments'. The 'Accounts' menu is open, showing options like 'View accounts', 'View transactions', 'Favourite transactions', 'View eStatements', 'Customize accounts' (circled in blue), and 'Open account'. Below the menu, a section for 'MY CHEQUING ACCOUNT' shows a balance of \$5.85 and icons for 'Pay bills', 'Transfers', and 'Send Interac e-Transfer'. The bottom section, 'Financial Overview', features a donut chart with a total value of \$11.35, split into 'Assets' (\$11.35) and 'Liabilities' (\$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'. A search icon is in the top right. The main heading is 'Customize Accounts'. Below this, a list of customization options is provided:

- 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 lists the accounts with columns for Account Name, Account Number, Main Account?, Visible, and Order. The 'MY SAVINGS ACCOUNT' row has its edit icon circled in blue.

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"/>	

A green 'Save' button is located at the bottom right of the table area.

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 number '1)' is next to the text box, and '2)' is 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 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 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			
MY EQUITY SHARES		12272085			
Vacation Savings		773370129635			












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) 

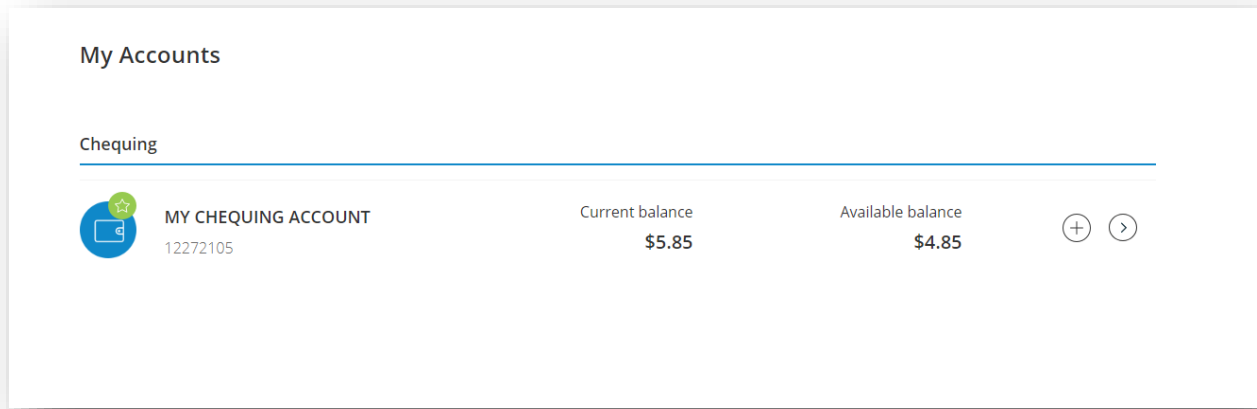
2) 

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 open, showing options like 'View accounts', 'View transactions', 'Favourite transactions', 'View eStatements', 'Customize accounts', and 'Open account'. Below the menu, 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			 1)
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 this, 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

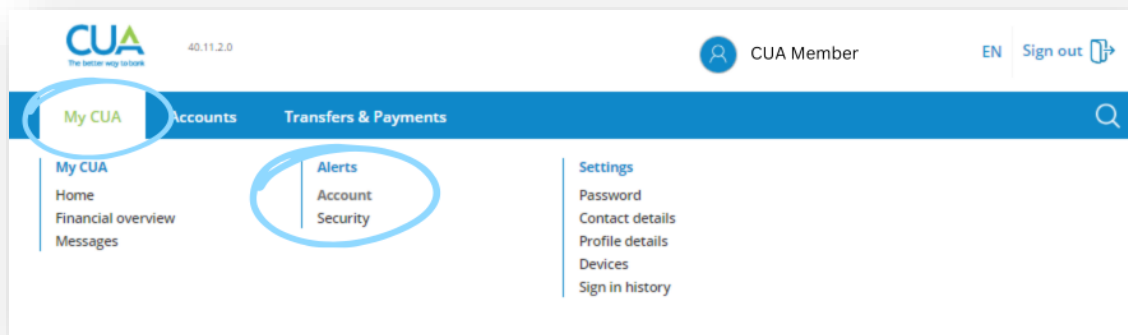
	MY CHEQUING ACCOUNT 12272105	Current balance \$4.85	Available balance \$3.85	 
---	--	----------------------------------	------------------------------------	---

Savings

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

HOW TO CUSTOMIZE ACCOUNT & SECURITY ALERTS

1. You can customize the alerts you receive related to your online banking accounts and security settings. To manage your alerts, hover over the 'My CUA' tab along the main menu. Select 'Account' or 'Security' under the 'Alerts' section in the center of the drop-down menu.



2. If you selected 'Account', you will be brought to the 'Account Alerts' page. Begin by **1)** selecting the account for which you want to change the alert settings. (*For security alerts jump to step 4.*)

You can customize alerts related to transactions, account balances, insufficient funds, and failed transactions. **2)** To activate an alert, select from the toggle buttons to the right of the alert type, and beneath your preferred notification method(s), which include text message, email or push notification. Once you have completed your changes **3)** select 'Save' at the bottom of the page.

Note: For the transaction and low balance alerts you will also be required to indicate a limit (over/under) and a dollar amount.

The screenshot shows the 'Account Alerts' interface. At the top, a blue bracket labeled '1)' spans across the 'Select an account' section, which contains three account cards: 'MY CHEQUING UNLIM...' with a balance of \$0.00, 'Bills Loan Mortgage' with a balance of -\$89.70, and 'MY CHEQUING' with a balance of \$13,835.27. Below this, the 'Transaction' section has a table with columns for 'Type', 'Text message', 'E-mail', 'Push notification', 'Limit', and 'Amount'. The 'Withdrawal' row has its 'Text message' toggle circled in blue and labeled '2)'. The 'Deposit' row also has its 'Text message' toggle circled. The 'Balance' section has a similar table with rows for 'Daily balance', 'Weekly balance', 'Monthly balance', and 'Low balance'. The 'Low balance' row has its 'Limit' dropdown set to 'Under' and an 'Enter amount' field. The 'Insufficient funds' and 'Failed transactions' sections have similar tables with rows for 'Scheduled transfers or bill payments' and 'Scheduled bill payments'. At the bottom right, a green 'Save' button is circled in blue and labeled '3)'.

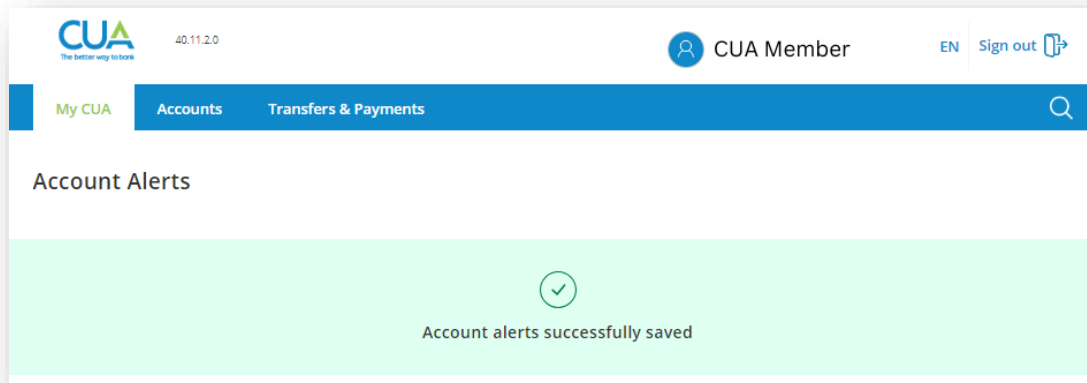
Transaction						
Type	Text message	E-mail	Push notification	Limit	Amount	
Withdrawal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Over	▼	Enter amount
Deposit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Over	▼	Enter amount

Balance						
Type	Text message	E-mail	Push notification	Limit	Amount	
Daily balance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
Weekly balance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
Monthly balance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
Low balance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Under	▼	Enter amount

Insufficient funds						
Type	Text message	E-mail	Push notification	Limit	Amount	
Scheduled transfers or bill payments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			

Failed transactions						
Type	Text message	E-mail	Push notification	Limit	Amount	
Scheduled transfers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
Scheduled bill payments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			

3. Your account alert settings have now been saved.



4. If you selected 'Security' you will be brought to the 'Security Alerts' page. You can customize alerts related to digital channels access and communications and support. To activate an alert, **1)** select from the toggle buttons to the right of the alert type, and beneath your preferred notification method(s), which include text message, email or push notification.

Once you have completed your changes **2)** select 'Save' at the bottom of the page.

Note: You will notice some alerts already have email notifications enabled – these are mandatory for your account security and cannot be edited. However, you can choose to enable additional notification methods for these alerts.

The screenshot displays the 'Security Alerts' configuration page. At the top, there is a navigation bar with 'My CUA', 'Accounts', and 'Transfers & Payments'. Below this, a header section titled 'Security Alerts' includes a note: 'For certain alerts, email notifications are enabled by default and cannot be edited. This is an additional step towards providing you a secure digital banking experience.'

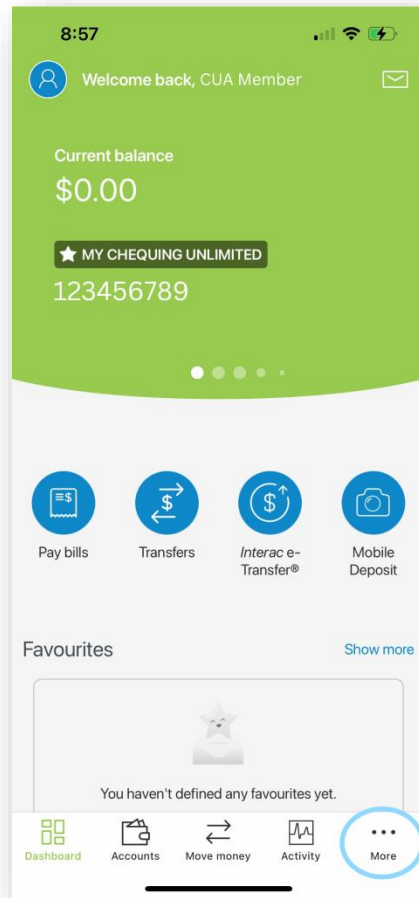
The main content is divided into two sections:

- Digital channels access:** A table with columns for 'Type', 'Text message', 'E-mail', and 'Push notification'. The 'Text message' toggle for 'Successful login' is circled in blue and labeled '1)'. Other alerts include 'Password changed', 'New biometric access', and 'Password attempt lock', each with toggles for all three notification methods.
- Communications and support:** A table with columns for 'Type', 'Text message', 'E-mail', and 'Push notification'. The 'Save' button at the bottom right is circled in blue and labeled '2)'. The only alert listed is 'New secure message'.

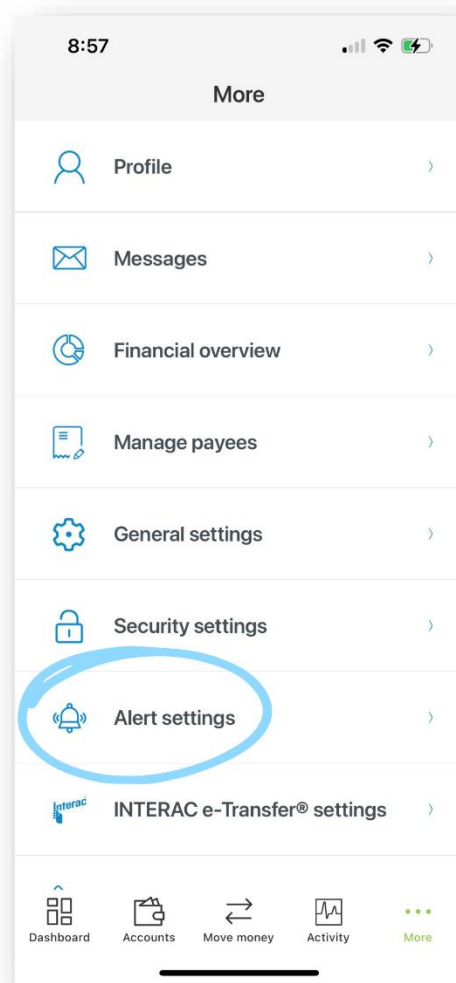
5. Your security alert settings have now been saved.

HOW TO CUSTOMIZE ACCOUNT & SECURITY ALERTS (MOBILE APP)

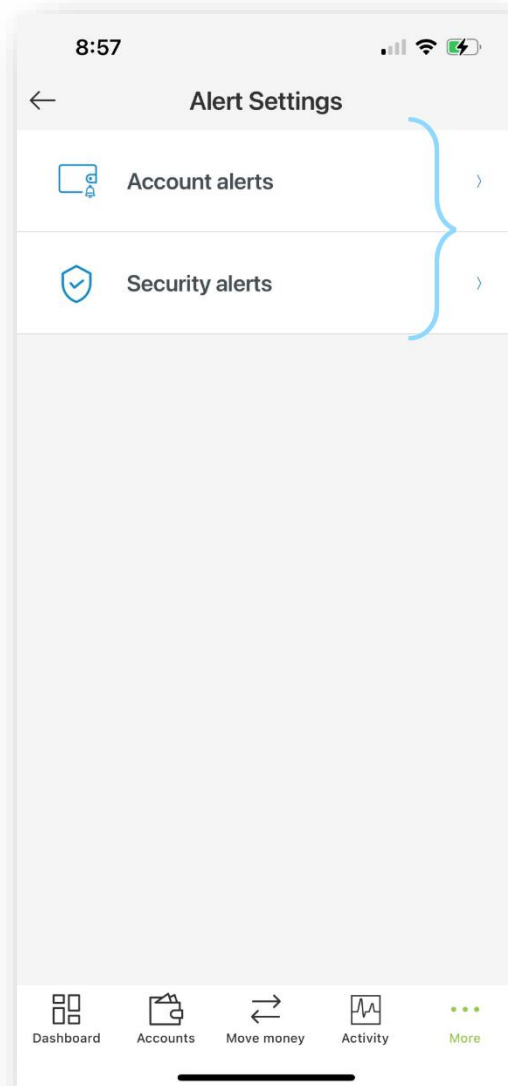
1. You can customize the alerts you receive related to your online banking accounts and security settings through the mobile app. To manage your alerts, select the 'More' option in the bottom-right corner.



2. From the 'More' menu, select 'Alert Settings'.

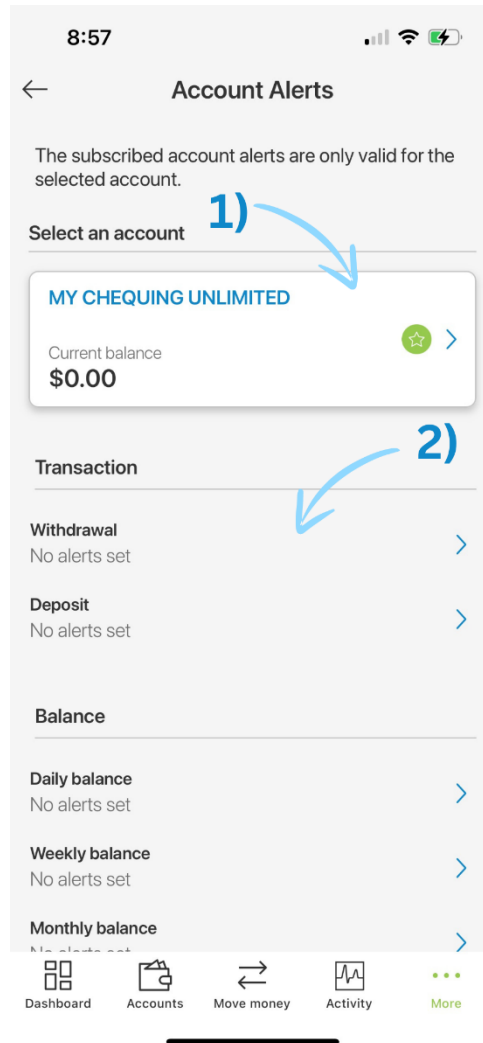


3. In the 'Alert Settings' menu, you can select from 'Account alerts' or 'Security alerts'.



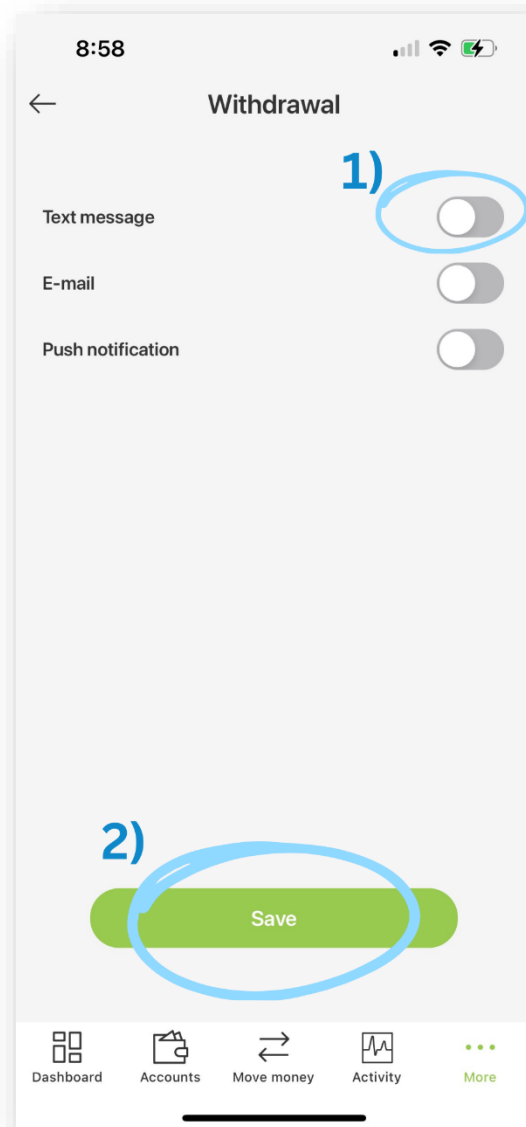
4. If you selected 'Account', you will be brought to the 'Account Alerts' page. Begin by **1)** selecting the account for which you want to change the alert settings. (*For security alerts jump to step 7.*) You can move through your various accounts by pushing the arrow on the right-hand side of the account box.

You can customize alerts related to transactions, account balances, insufficient funds, and failed transactions. **2)** Select an alert from the list to customize.

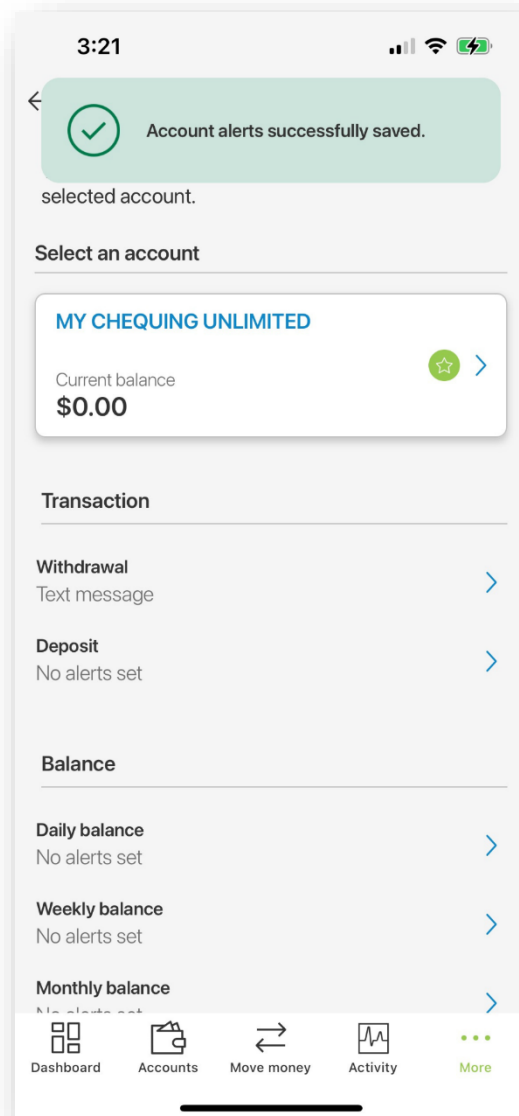


5. You will now be brought to the alert page you selected. From here, **1)** select the toggle buttons associated with your desired notification method(s), which include text message, email and push notification. You can select more than one notification method if you choose. When a toggle is “off” it will appear grey, and when it is “on” it will appear green. Once you have completed your changes **2)** select ‘Save’ at the bottom of the page.

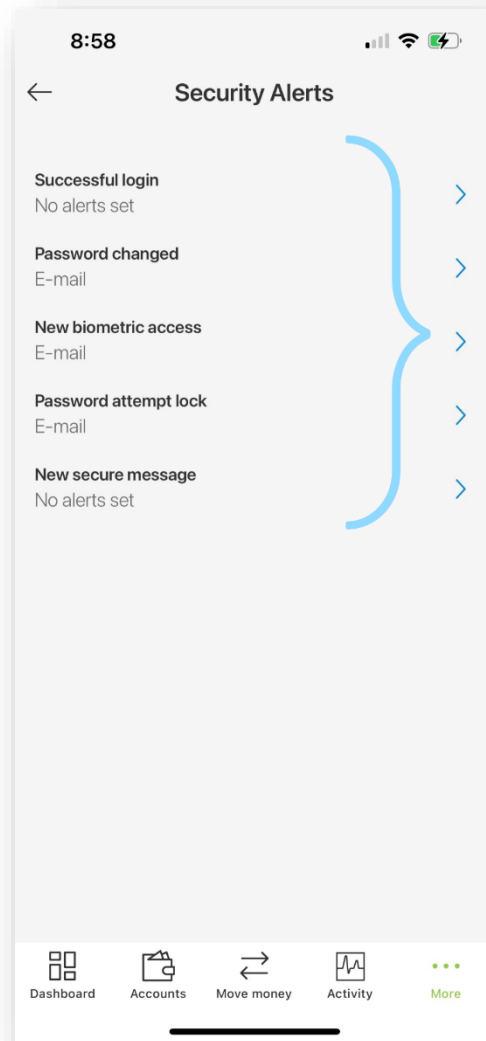
Note: For the transaction and low balance alerts you will also be required to indicate a limit (over/under) and a dollar amount.



6. Your account alert settings have now been saved.

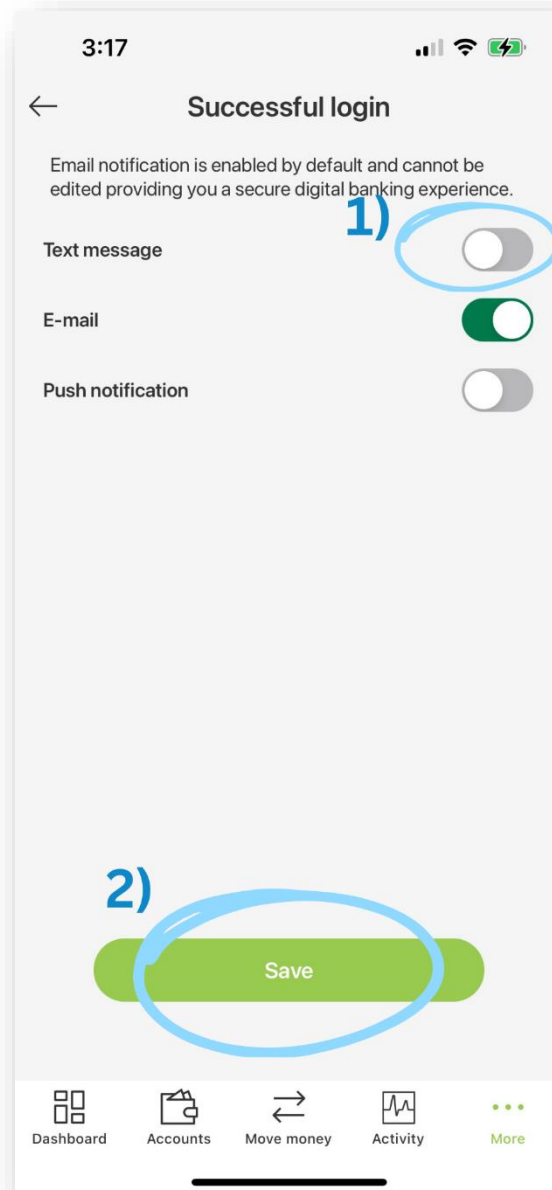


7. If you selected 'Security' you will be brought to the 'Security Alerts' page. You can customize alerts related to successful logins, changed passwords, new biometric access, password attempt locks, and new secure messages. Begin by **1)** selecting the alert you wish to customize.



8. From here, **1)** select the toggle buttons associated with your desired notification method(s). Once you have completed your changes **2)** select 'Save' at the bottom of the page.

Note: You will notice some alerts have email notifications enabled – these are mandatory for your account security and cannot be edited. However, you can choose to enable additional notification methods for these alerts.



9. Your security alert settings have now been saved.

