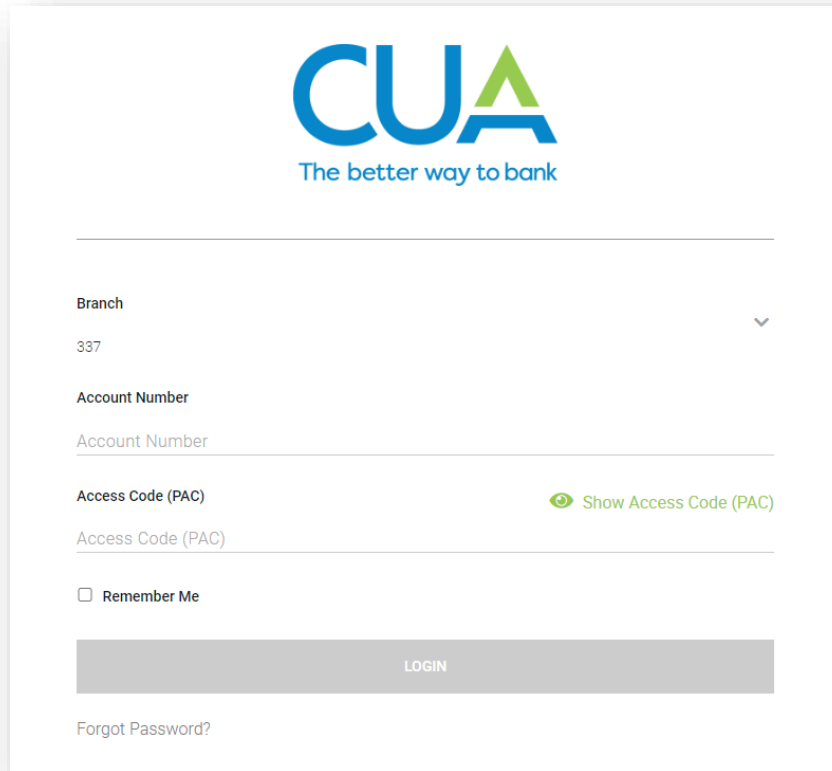


MEMBER WALKTHROUGH GUIDE

GUIDE 4: SAVE PAST BANK STATEMENTS / TRANSACTIONS THROUGH ONLINE BANKING

1. Login to your Online Banking at <https://cua.com/Home/OnlineBanking/>.



The screenshot shows the CUA Online Banking login interface. At the top center is the CUA logo, with 'CUA' in blue and 'A' in green, and the tagline 'The better way to bank' below it. Below the logo is a horizontal line. The form contains the following fields and elements:

- Branch:** A dropdown menu with '337' selected and a downward arrow.
- Account Number:** A text input field with the placeholder text 'Account Number'.
- Access Code (PAC):** A text input field with the placeholder text 'Access Code (PAC)'. To the right of the field is a green eye icon and the text 'Show Access Code (PAC)'.
- Remember Me:** A checkbox labeled 'Remember Me'.
- LOGIN:** A wide, grey button with the text 'LOGIN' centered on it.
- Forgot Password?:** A link located below the LOGIN button.

- Once you've logged in, you will be brought to the 'Account Summary' page. To view and download your past e-Statements, select 'View e-Statements' beneath 'My Accounts' at the top of the lefthand menu.

Personal Banking > Online Banking > My Accounts

Last logged in on Tue, Jun 4, 2024, 1:47 PM, ADT via [Print This Page](#) [Online Banking Help](#)
Online Banking.

Account Summary
Account: 99922001

My Accounts
[View Account Activity](#)
[Rename Accounts](#)
[View e-Statements](#)
[View e-Documents](#)

Payments
Transfers
Business Services
Account Services
Messages and Alerts
Profile and Preferences

Account Name	Balance
INTERNAL ACCOUNTS_00010	\$0.00

From Account	To Payee	Date	Amount
You currently do not have any Bill Payments Scheduled.			

From Account	To Account	Date	Amount
You currently do not have any Transfers Scheduled.			

Payee	Cheque #	Account	Date	Amount
You currently do not have any Stop Cheques Scheduled.				

For assistance, please call 1.888.CREDIT-U (273.3488) or email [Sonoma Online Technical Support](#)

3. Your e-Statements will appear sorted by year. Individual statements for the selected year appear below in a bulleted list, by date. To download a statement, click on the statement date from the list and a PDF download will start.

Note: This PDF file will be saved to your 'Downloads' folder, found on the lefthand menu of File Explorer (Windows) or Finder (macOS). You can also access your downloads from your browser by simultaneously pressing 'Ctrl' + 'J' (Windows) or 'Command' + 'Shift' + 'L' (macOS). From there you can choose to relocate your file to a secure location or print a physical record.

Personal Banking > Online Banking > My Accounts > View e-Statements

[Print This Page](#) [Online Banking Help](#)

e-Statements

Downloaded PDF e-statements will be stored to this computer. For privacy concerns we recommend deleting the PDF(s) once you are finished.

e-Statements are downloaded to this computer. If you are using a shared or public computer, ensure the e-Statement is deleted.

Download Statement for:

- [2024](#) | [2023](#) | [2022](#) | [2021](#) | [2020](#) | [2019](#) | [2018](#)
- [2024-05-31](#)
- [2024-04-30](#)
- [2024-03-31](#)
- [2024-02-29](#)
- [2024-01-31](#)

4. Now, if you wish to capture other information, such as past transactions, select 'View Account Activity' beneath 'My Accounts' at the top of the lefthand menu.

Personal Banking > Online Banking > My Accounts > View e-Statements

[Print This Page](#) [Online Banking Help](#)

▼ My Accounts

- [View Account Activity](#)
- [Rename Accounts](#)
- [View e-Statements](#)
- [View e-Documents](#)

> Payments

> Transfers


> Business Services

> Account Services

> Messages and Alerts

> Profile and Preferences

e-Statements

 Downloaded PDF e-statements will be stored to this computer. For privacy concerns we recommend deleting the PDF(s) once you are finished.

e-Statements are downloaded to this computer. If you are using a shared or public computer, ensure the e-Statement is deleted.

Download Statement for:

[2024](#) | [2023](#) | [2022](#) | [2021](#) | [2020](#) | [2019](#) | [2018](#)

- [2024-05-31](#)
- [2024-04-30](#)
- [2024-03-31](#)
- [2024-02-29](#)
- [2024-01-31](#)

5. Then use the 'Search Account Activity' tool to **a)** select the account you want to access and **b)** filter by number of most recent transactions, a specific date range, or for a specific month. You can also **c)** select 'Advanced Options' to **d)** filter by statement item type, using the dropdown menu next to 'Show'.

The screenshot shows the 'Account Activity' search interface. On the left, a navigation menu includes 'My Accounts', 'Payments', 'Transfers', 'Business Services', 'Account Services', 'Messages and Alerts', and 'Profile and Preferences'. The main content area is titled 'Account Activity' and contains a 'Search Account Activity' section. This section includes a dropdown for 'Account' (010 INTERNAL ACCOUNTS [Balance: \$0.00]), a 'Show' dropdown (50) with the text 'most recent transactions in the last 15 days', a 'Date Range' section with 'From' (22/05/2024) and 'To' (06/06/2024) date pickers, and a 'Monthly' dropdown (June 2024). Below these is an 'Advanced Options' section with a 'Show' dropdown (All statement items) and a 'Format' dropdown (All statement items). A 'Search' button is also visible. Annotations 'a)', 'b)', 'c)', and 'd)' are placed on the interface: 'a)' points to the 'Account' dropdown, 'b)' points to the 'Show', 'Date Range', and 'Monthly' options, 'c)' points to the 'Advanced Options' section, and 'd)' points to the 'Show' dropdown in the 'Advanced Options' section.

- To download all the results of your search, select the 'Download to PDF' option from the 'Format' drop down menu, beneath 'Advanced Options'. Once you select 'Search', a PDF download will start.

Note: Refer to the note in step 3 for help locating your download.

Personal Banking > Online Banking > My Accounts > View Account Activity

[Print This Page](#) [Online Banking Help](#)

Account Activity

Current Balance \$0.00 Current Interest Rate 0.000%
[More Details](#)

Search Account Activity

Account: 010 INTERNAL ACCOUNTS [Balance: \$0.00]

Show 50 most recent transactions in the last 15 days

Date Range From 22/05/2024 To 06/06/2024
dd/mm/yyyy dd/mm/yyyy

Monthly June 2024

Advanced Options

Show All statement items

Format On screen with details

- On screen with details
- On screen without details
- Download to Quicken
- Download to QuickBooks
- Download to Microsoft Money
- Download to Sage 50 Accounting
- Download to Comma Delimited Text/Excel
- Download to Comma Delimited Text/Excel (Oldest to newest)
- Download to PDF

50 m 15 days June 06, 2024

Date	Description	Amount	Balance
06-Jun-2024	BALANCE AS OF 06/06/2024		\$0.00

[Return to My Accounts](#) [Top of Page](#)

7. You can also download any other information from your online banking to your computer by selecting the 'Print This Page' option at the top right corner of the page.

Personal Banking > Online Banking > My Accounts > View Account Activity

[Print This Page](#) [Online Banking Help](#)

Account Activity

Current Balance \$0.00 Current Interest Rate 0.000%
[More Details](#)

Search Account Activity

Account 010 INTERNAL ACCOUNTS [Balance: \$0.00]

Show 50 most recent transactions in the last 15 days

Date Range From 22/05/2024 To 06/06/2024
dd/mm/yyyy dd/mm/yyyy

Monthly June 2024

Advanced Options

Show All statement items

Format On screen with details

50 most recent transactions in the last 15 days

June 06, 2024

Date	Description	Amount	Balance
06-Jun-2024	BALANCE AS OF 06/06/2024		\$0.00

[Return to My Accounts](#) [Top of Page](#)