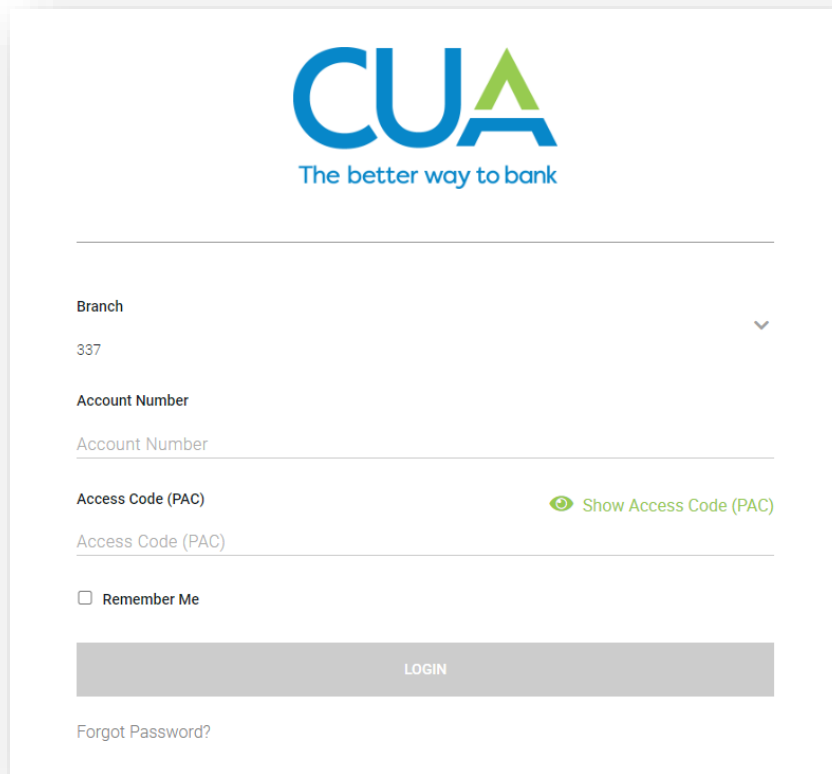


MEMBER WALKTHROUGH GUIDE

GUIDE 2: SAVE E-TRANSFER CONTACT INFORMATION 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, the CUA logo is displayed with the tagline "The better way to bank". 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 "Account Number".
- Access Code (PAC):** A text input field with the placeholder "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.
- Forgot Password?:** A link located below the LOGIN button.

2. Once you've logged in, you will be brought to the 'Account Summary' page. From here, navigate to the 'Transfers' page found on the lefthand menu.

Personal Banking > Online Banking > My Accounts

▼ 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

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

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. Navigate back to the lefthand menu and select the 'Add/Delete Contacts' option beneath the main 'Transfers' menu you previously selected.

Personal Banking > Online Banking > Transfers

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> **My Accounts**

> **Payments**

▼ **Transfers**

- View/Modify Scheduled Transfers
- Send via Interac e-Transfer®
- Add/Delete Contacts**
- Autodeposit
- Request Money via Interac e-Transfer®

> **Business Services**

> **Account Services**

> **Messages and Alerts**

> **Profile and Preferences**

Transfer Between Accounts

Transfer funds between your own accounts, or another member. Transfers can be sent immediately, scheduled for a later date, or set up on a recurring basis.

Transfer From 010 INTERNAL ACCOUNTS [Balance: \$0.00] ▼

Transfer Amount

Schedule Transfer

- Immediate Transfer
- Scheduled Transfer
- Recurring Transfer

Transfer To

- My own account
- Another Member Number

| [Cancel](#)

- Your e-Transfer contact information will appear in a list. You can now save this information to your computer as a PDF file by selecting the 'Print This Page' option at the top right corner of the page.

Before you save, you may want to first review these contacts and remove any that you no longer use.

Personal Banking > Online Banking > Transfers > Add/Delete Contacts

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

> My Accounts

> Payments

▼ Transfers

- View/Modify Scheduled Transfers
- Send via *Interac* e-Transfer®
- Add/Delete Contacts
- Edit Sender Profile
- Autodeposit
- Request Money via *Interac* e-Transfer®

> Business Services

> Account Services


> Messages and Alerts

> Profile and Preferences

Contacts

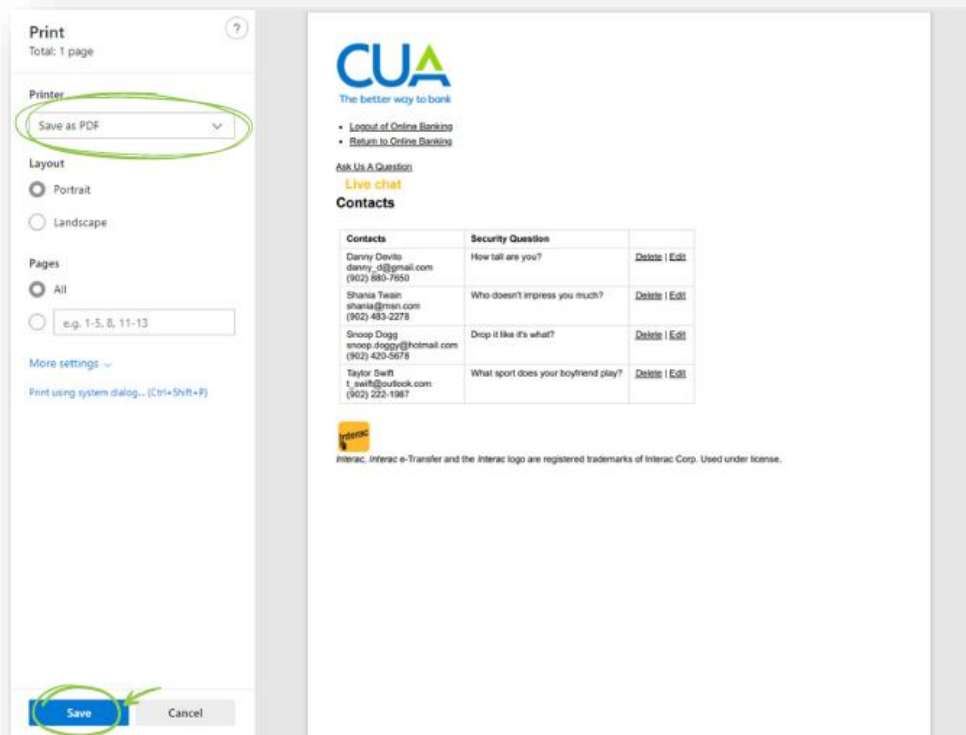
[Add Contact](#) [Edit *Interac*® Profile](#) View: [Pending](#) [History](#)

Contacts	Security Question	
Danny Devito danny_d@gmail.com (902) 880-7650	How tall are you?	Delete Edit
Shania Twain shania@msn.com (902) 483-2278	Who doesn't impress you much?	Delete Edit
Snoop Dogg snoop.doggy@hotmail.com (902) 420-5678	Drop it like it's what?	Delete Edit
Taylor Swift t_swift@outlook.com (902) 222-1987	What sport does your boyfriend play?	Delete Edit



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5. Your screen will now appear as a print preview. On the lefthand side, select the 'Printer' dropdown menu and choose 'Save as PDF' from the list. Now, select 'Save'.



6. You can now **a)** name your file and **b)** decide on the location you would like it to be saved to, to be easily referenced when setting up your e-Transfer contacts in the new online and mobile banking system. Finish by **c)** selecting save at the bottom of the window.

