



Open a sub-account on desktop online banking

What is "Open New Account"?

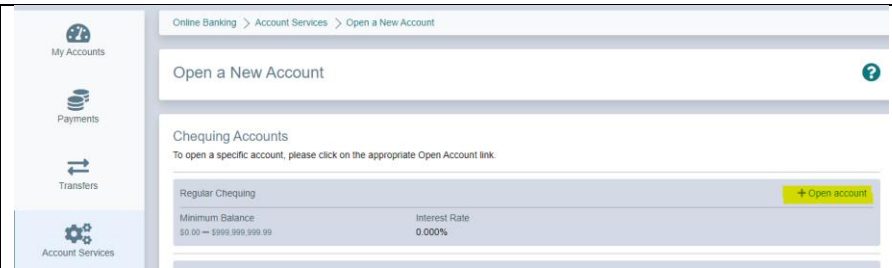
"Open New Account" is the ability to open sub accounts on desktop Member Direct.

The procedures for opening each product type differ slightly.

Chequing account example:

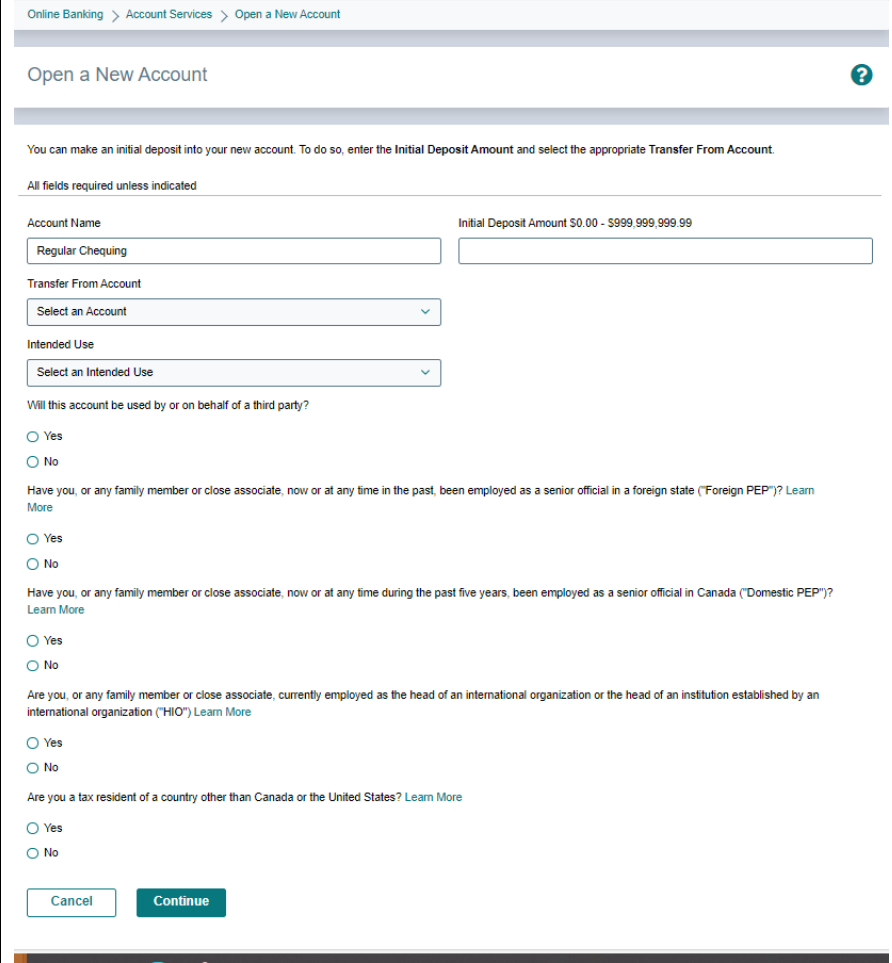
<p>After logging into On-Line Banking, select Account Services on the left-hand side menu bar and click on Open New Account.</p>	<p>The screenshot shows the Stride Credit Union online banking interface. The left-hand side menu bar has 'Account Services' highlighted. The main content area shows 'Account Summary' with a list of accounts including 'Business Chequing 00109' and several 'Regular Chequing' accounts. The 'Account Services' dropdown menu is open, and 'Open a New Account' is highlighted.</p>
<p>On the Open New Account page, it lists the product types available. Once the type of product is selected, then select the account type to open. RSP or TFSA product options will not be visible unless the applicable contract (RSP or TFSA) is already open at Stride.</p>	<p>The screenshot shows the 'Open a New Account' page. It features a heading 'Open a New Account' and a sub-heading 'Click on the type of the account you wish to open (savings, chequing, etc.)'. Below this are five buttons with right-pointing arrows: 'Savings Accounts', 'Chequing Accounts', 'Term Deposits', 'RRSP Products', and 'Tax-Free Savings Accounts'.</p>

Once type is selected from the list of chequing products, click "Open account".

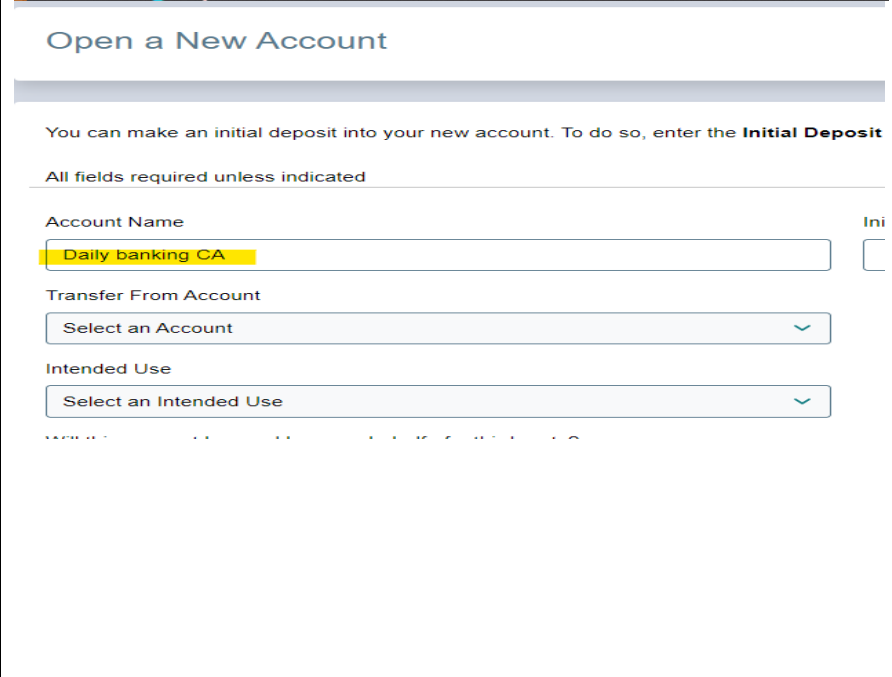


Fill out all fields on the Open A New Account screen - **if a field has been left blank, an error will display and will need to be filled in prior to moving to the next step.**

- Account Name defaults to the product you are opening. Rename the account if desired (see second screenshot in highlighted yellow area)
- Enter Initial deposit Amount - this cannot be blank
- Select an Account from the dropdown list to Transfer From
- Select Intended Use from the dropdown list. **This is required.**
- Answer the 5 questions presented. **If the answer to any one of the 5 questions is "Yes", you will receive an error message and will not be able to open the account online. You will have to visit a branch**



Once all fields have been filled out, click Continue.



Details of the account to be opened is displayed. Confirm to create the account or select cancel if there is an error.

Online Banking > Account Services > Open a New Account

Open a New Account ?

Account Name	Daily banking CA
Initial Deposit Amount	\$25.00
Transfer From Account	Regular Chequing 101

If "confirm" is selected, the new account is opened, The account is now ACTIVE and linked automatically in On-Line banking.

Online Banking > Account Services > Open a New Account

Open a New Account - Receipt ?

[Go to My Accounts](#) [Open Another Account](#) [Print Receipt](#)

Success

Member Card Number :	Date	Wednesday, January 15, 2025
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You have successfully opened your new Chequing Account Daily banking CA with an opening balance of \$25.00.