

CGSDirect Online Platform

Frequently Asked Questions

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Can't view "Accounts"?

1. By default, when you login you will be in the Dashboard tab.
2. If you don't see any accounts you can either click on the Account Tab or do a search in the Dashboard.
3. Click on "Search Account: where the magnify glass symbol is and enter the name or number of the account, then click on "Go". When searching by account number, only input the first six digits; for example, account 100000.1, you would enter 100000.
4. Once you have completed the search, the account will appear in the Dashboard.

Can't view "Statements"/ Getting various error messages?

1. Log off of CGSDirect.
2. Delete the Internet browser cookies.
3. Close the current Internet browser.
4. Open a new Internet browser and log-in to CGSDirect again.
5. If it doesn't work, restart the computer and try again.

How to add or remove columns?

1. Click on Modify View.
2. Select Column Options tab.
3. Select the column you want to move from/to the Available Columns list to the Display Columns by using < and >.

How to export all pages?

1. Go to My Profile tab at the top of the page.
2. Select Export Type.
3. Select Export All Pages and click Save.

How to change your location setting?

1. Click on My Profile Tab.
2. Click on Set My Location.

3. Select either Canada or USA then click save.
4. The loading box may not disappear. After clicking on save, wait a few seconds then click on any tab to exit the “My Profile”.
5. To double check, repeat step 4 to check your location setting.

How to create account group profile?

1. Go to “My Profile” page then select “Account Group” under “My Account”.
2. Click on “New” to begin creating your customized group of accounts.
3. Enter a description for “Group Abbreviation” and “Group Description” then select the currency for the list of accounts to add. Select CAD for accounts valued in Canadian Dollars and USD for accounts valued in US Dollars. Once all fields are filled, click on “Create” to populate the account group folder for editing.
4. Search for the accounts by inputting the account number or name in the Search By/Account Number/Name section and click on Search. The portfolio(s) of the account will populate. Select the portfolios you want to add by clicking on the boxes next to the portfolios. Click on “Move To” to move the selected portfolios to your account group folder. Click on save to complete the move.
5. Repeat the process to add more accounts to the account group folder.

Where are the pension register reports?

1. Search for the account by name or number in the Dashboard tab if it is not in your recently viewed list; alternatively, you can select the account in the “Account Tab”.
2. Hover over “Select Action” or click on the double arrows >> to unhide the taskbar.
3. Select “Account Profile”.
4. Scroll to the bottom of the page until you see the heading “Documents”.
5. The reports are in *Adobe* .pdf format and they are sorted by oldest to newest. You may need to advance the page to view more statements.

Where are the statements?

1. Search for the account by name or number in the Dashboard tab if it is not in your recently viewed list; alternatively, you can select the account in the “Account Tab”.
2. Hover over “Select Action” or click on the double arrows >> to unhide the taskbar.
3. Select “Account Profile”.
4. Scroll to the bottom of the page until you see the heading “Documents”.

5. The reports are in *Adobe* .pdf format and they are sorted by oldest to newest. You may need to advance the page to view more statements.

Where to locate reports?

1. Search for the account by name or number in the Dashboard tab if it is not in your recently viewed list; alternatively, you can select the account in the Account Tab.
2. Hover over Select Action or click on the double arrows >> to unhide the taskbar.
3. Select the report you are looking for:
 - a. Statements are located in the Account Profile.
 - b. Holdings history is located in Holdings.
 - c. Transaction history is located in Transactions.