

It's Me 247 Aggregation: See/Jump/Transfer Controls

CU*BASE[®] and It's Me 247
Online Banking Enhancements

Revised December 23, 2011
Design only; subject to change without notice

- A new kind of automation to give members total access to ALL of their accounts online

SEE

“Let me see all my accounts, no matter where they are at the credit union”

JUMP

“Let me move to my other memberships, but don't make me log in again”

TRANSFER

“Let me move money from my membership to others”

**Account Aggregation in
It's Me 247 Online Banking**

Other Accounts

Account Summary

My Other Accounts

Transfer Money

Separate navigation

Check Stop Payment

Dividend/Interest

Downloads

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for rates, hours, and more
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My Other Accounts

50: MARY K JOHNSON

[Jump to account](#)

Account	Name	Available Balance	Actual Balance	Last Transaction	Accrued Dividends
000	SHARES	\$120.16	\$125.16	1/20/2011	\$0.02
001	CHECKING	\$4,722.43	\$4,722.43	3/25/2011	\$0.00
025	MONEY MARKET SA	\$5,409.81	\$5,409.81	10/1/2010	\$5.16
111	VISA 7.9%	\$0.00	\$0.00	3/8/2011	\$0.00

18: JOSEPH E BROWN

[Jump to account](#)

20: JOHN L SMITH

Account	Name	Available Balance	Actual Balance	Last Transaction	Accrued Dividends
000	SHARES	\$725.14	\$730.14		
001	CHECKING	\$404.22	\$404.22		

Access can vary: This member can jump to Mary's account to perform other functions...

...but he can only view John's account information from here



Account Details

[Print](#)

My Accounts

Account Summary

My Other Accounts

→ Other Account Detail

Transfer Money

Payment

Dividend/Interest

Statements

Account Information

Account History

Downloads

Other account: 18: COLIN L PERSON

[Jump to account](#)

600

View history for: 000 - SHARES

[Show search options](#)

Transaction History

Date	Description	Amount	Balance
03/25/2011	ACH/KNAPE & VOGT DIRECT DEP	\$130.00	\$302.34
03/18/2011	ACH/KNAPE & VOGT DIRECT DEP	\$130.00	\$172.34
03/14/2011	ATM/XFR 107200006393 CHASE GRAND RAPID		\$42.34
03/11/2011	ACH/KNAPE & VOGT DIRECT DEP		\$2.34
03/10/2011	PC CU TRANSFER TO: 000000018-0		\$12.34

Navigation clues to help you keep track of where you are

While still logged in to your *own* account, view transaction history on your *other* accounts...just a click away



Account Details

[Print](#)

My Accounts

Account Summary

My O...

ACH

Checks Cleared

Check Stop Payment

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Downloads

Other account: 18: COLIN L PERSON

[Jump to account](#)

600

000 - SHARES

Now suppose you need to open a new certificate under Colin's membership

You click Jump to account...

	De	Amount	Balance
03/10/2011	ACH/KNAPE & VOGT DIRECT DEP	\$130.00	\$302.34
03/18/2011	ACH/KNAPE & VOGT DIRECT DEP	\$130.00	\$172.34
03/14/2011	ATM/XFR 107200006393 CHASE GRAND RAPIDS MI 1430 LAKE DR SE	(\$100.00)	\$42.34
03/11/2011	ACH/KNAPE & VOGT DIRECT DEP	\$130.00	\$142.34
03/10/2011	PC CU TRANSFER TO: 000000018-001	(\$50.00)	\$12.34



My Accounts | I'm a Silver tier member.

My Accounts

Account Summary

Transfer Money

Nicknames

ACH Transactions

Checks Cleared

Check Stop Payment

Dividend/Interest

Downloads

0



Signed on as guest to: 18: COLIN L PERSON

[Jump back](#)

IF 600

Share accounts

Account	Name	Available	Actual	Last Transaction	Accrued Dividends
000	SH			3/25/2011	\$0.03
001	CH			3/29/2011	\$0.00

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Account	Name	Balance	Accrued Dividends	Maturity Date
050	18 MO	0.00	\$500.00	12/21/2012

Loans

Account	Name	Regular Payment	Amount Due	Due Date	Payoff Balance
700	FIRST MORTGAGE	\$267.58	\$0.00	7/17/2011	\$0.00

...and now you're in Colin's membership (signed in as a guest, but with the same access as if you'd logged in using his password)

- You control which options are available:

Activate see controls Activate jump controls

Inter-member transfers set to

E = Enter acct & first 3 of last name	▼
B = Both E & M	
E = Enter acct & first 3 of last name	
M = Member defined list only	
N = Not allowed	

- The member controls who can see or jump to his accounts...

“I’d like my husband to be able to jump over to my account in online banking, without having to give him my password.”



Account Aggregation in It's Me 247 Online Banking

- CU*BASE configuration screen lets the CU confirm and securely set up the See and Jump settings, as requested by the account owner



See and Jump privileges can be granted by the account owner (the primary member) to:

- Accounts with the same primary SSN/TIN (i.e., other accounts the member owns)
- People who are joint owners on this 000 base share account

Account Aggregation in It's Me 247 Online Banking