



# Documentation: Tricks of the Trade

## November Top Picks—Issue #14

### Pick #1: [Increase Your Loan Sales with Credit Score Soft Pulls](#)

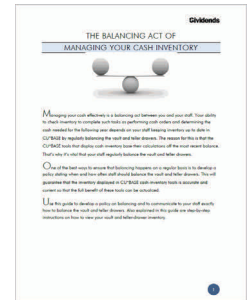
Credit unions can substantially increase their loan sales, by simply using more current credit scores, and Lender\*VP and Xtend are currently partnering to offer an excellent credit score soft pull offer! Read this brochure to learn where credit scores are shown in CU\*BASE, and how your front line staff, lenders, loan underwriters, and Xtend can use these scores to promote and analyze loan opportunities at your credit union. The last page contains a discussion of upcoming credit score programming, championed by Lender\*VP.



### Pick #2: [The Balancing Act of Managing Your Cash Inventory](#)

Managing your cash effectively is a balancing act between you and your staff. Your ability to check inventory to complete such tasks as performing cash orders and determining the cash needed for the following year depends on your staff keeping inventory up to date in CU\*BASE by regularly balancing the vault and teller drawers. The reason for this is that the CU\*BASE tools that display cash inventory base their calculations off the most recent balance. That's why it's vital that your staff regularly balance the vault and teller drawers.

Use this guide to develop a policy on balancing and to communicate to your staff exactly how to balance the vault and teller drawers. This guide also includes step-by-step instructions on how to view your vault and teller-drawer inventory.



### Pick #3: [Online Banking Makeover Flyer](#)

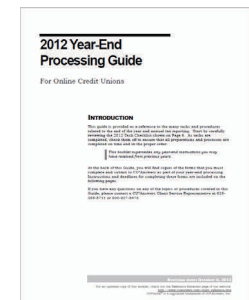
A new look and feel is coming to **It's Me 247** online banking in January 2013 to allow for hundreds of new features to be added to online banking in the future! Check out this flyer for details and to see some pictures of the new look!



### Pick #4: [2012 Year-End Processing Guide - Online Credit Union Version](#)

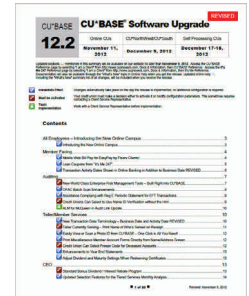
It's that time of year again! This guide is provided as a reference to the many tasks and procedures related to year-end and annual tax reporting. Start by carefully reviewing the 2012 Task Checklist shown on Page 6. As tasks are completed, check them off to ensure that all preparations and processes are completed on time and in the proper order.

[Click here for the self processing credit union version](#)



### Pick #5: [CU\\*BASE 12.2 Release Summary](#)

The CU\*BASE 12.2 Release Summary discusses the major programming changes implemented with the 12.2 release. Read more about the new education campus, EasyPay by Fiserv mobile bill pay, the new Enterprise Risk Management menus, and more! The summary is broken down by job description. Use the Table of Contents to advance directly to the section that interests you most.



Refer to the Tricks of the Trade Newsletter Series page for all issues: [http://www.cuanswers.com/tricks\\_of\\_trade.php](http://www.cuanswers.com/tricks_of_trade.php)