Documentation: Tricks of the Trade

December Top Picks—Try a New Feature in 2013!

Issue #15

Be sure to attend our first "Documentation Training" Webinar on January 8, 2013 at 1:30 PM ET. During this training we will cover in more detail how you can use documentation to assist you with the implementation of Debit Card Round Up and Automated Reports and Queries.

Pick #1: Debit Card Round Up

It's almost a new year—why not try a new feature with your members? Debit Card Round Up, allows your credit union to help members save by automatically "rounding up" each debit card purchase and depositing the funds into a designated savings or checking account.
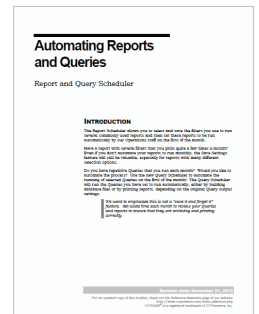
Check out the Debit Card Round Up booklet (shown to the right) for a detailed guide on configuration and setup. Use Show Me the Steps for quick directions to Activate Debit Card Round Up and Enroll a Member in Debit Card Round Up.

Pick #2: Automated Reports and Queries

If you haven't already used the Report Scheduler and Query Scheduler, now is the time to try out these features! With the Report Scheduler, you save the filters of commonly used reports and set these reports to run automatically by our Operations staff on the first of the month or by you at any time of the month. With the Query Scheduler you can automate the running of Queries on the first of the month.
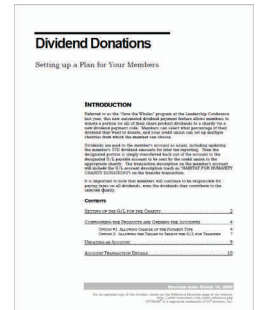
Check out the Automated Reports and Queries booklet (shown to the right) for more in depth documentation. In Show Me the Steps, check out quick directions for report automation in the Member Service/Lending section of the Statements/Reports help topic.

Pick #3: Dividend Donation

Dividend Donations is an automated dividend payment feature that allows members to donate a portion (or all) of their share-product dividends to a charity via a new dividend payment code. You select the charities and members can select what percentage of their dividend they want to donate. Help your members with their charitable giving by setting up this program at your credit union.
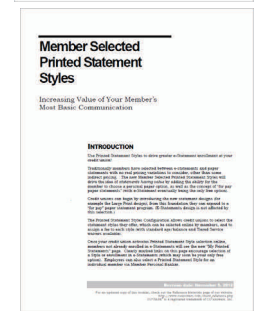
Learn more about setting up this program for your members in the Dividend Donation booklet.

Pick #4: Statement Styles

Statement Styles is more than just a way to allow members to select a "Large Print" statement style. Increase your eStatement enrollment by using this feature to charge members a fee for printed statements. Interested in updating the look of your current statement? Statement styles can help with that too.
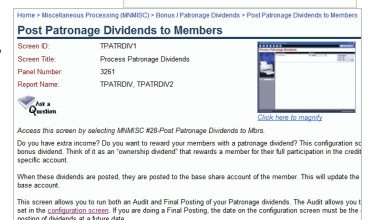
Check out the Member Selected Printed Statement Styles booklet. The Frequently Asked Questions (FAQ) section in the beginning of the booklet answers commonly-asked questions.

Pick #5: Patronage Dividends

Do you want to reward your members? Patronage Dividends allow you to schedule and post a special bonus dividend for members. Think of it as an "ownership dividend" that rewards a member for their full participation in your credit union, beyond simply a bonus dividend or interest rebate on a specific account.

Learn more about Patronage Dividends in the configuration and posting topics in the CU*BASE online help.

Refer to the Tricks of the Trade Newsletter Series page for all issues: http://www.cuanswers.com/tricks_of_trade.php