



Documentation: Tricks of the Trade

October Top Picks – Featuring the 13.2 Release

Issue #23

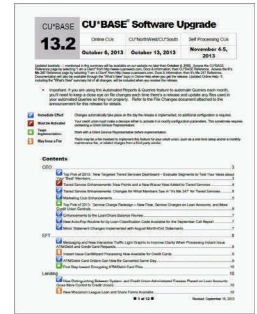
Be sure to attend our upcoming Tricks of the Trade webinar on October 15th from 3:30-4:00 PM ET. Watch for an invitation via email. During the training, we will review resources you can use to learn about new features included in the 13.2 release.

Pick #1: [Where can I find what was included in the 13.2 release?](#)

The 13.2 release was implemented to online credit unions on October 6th. To learn more about the new features and enhancements, you can look in two places.

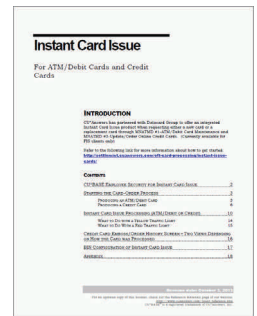
The [13.2 Release Summary](#) is posted on the Release Summaries page. This document outlines the changes of the release and is broken down by job description for easy reading. Color-coded icons at the beginning of each item let you know if the feature is automatically implemented, requires credit union activation, or should be activated with] assistance from a client services representative. It also tells you whether or not using the new feature will incur a fee.

Check out the [What's New page](#) in the CU*BASE online help for the same text that is included in the Release Summary.



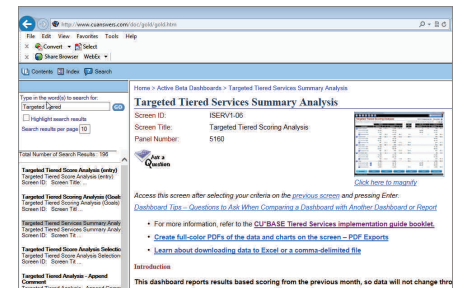
Pick #2: [How do I learn more about Instant Card Issue?](#)

Instant Card Issue allows you to create flat un-embossed cards that can be used immediately by your members. This feature is available with ATM, debit, and now also credit cards. We've written a new [Instant Card Issue booklet](#) that includes step-by-step directions for ordering a card and configuring the feature in CU*BASE. Included are pictures of the new interactive traffic light and improved messaging that will assist you during card order.



Pick #3: [Where can I learn more about the new Targeted Tiered Services dashboard?](#)

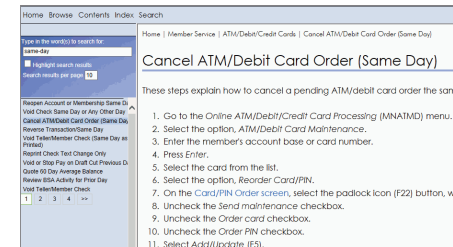
The Targeted Tiered Services dashboard allows you to compare a segment of your membership against your entire membership across Tiered Service levels and goals. Learn more about this feature, voted the #1 feature of 2013, in the [Tiered Services Levels Implementation Guide](#) as well as in CU*BASE online help. Use index keywords "Targeted Tiered."



Pick #4: [How do I cancel a same-day ATM or debit card order?](#)

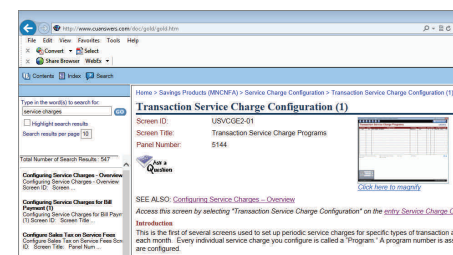
With the 13.2 release, you can now cancel a same-day ATM or debit card order, so that you can close the card. Find step by step directions in Show Me the Steps. Use index keywords "same-day".

Directions can also be found in the Frequently Asked Questions (FAQ) section of the ATM/Debit User Guide



Pick #5: [Where is there information about setting up new service charges and using the new audit feature?](#)

The service charge feature was completely revamped with the 13.2 release, giving credit unions more options for fee revenue. Learn more about the easy to use screens and the new audit feature in CU*BASE online help. Use index keywords "service charges."



Refer to the Tricks of the Trade Newsletter Series page for all issues:

http://www.cuanswers.com/tricks_of_trade.php