



Writing Team: Tricks of the Trade

February Top Picks – Variety Pack

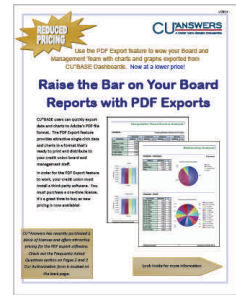
Issue 27

Be sure to attend our upcoming Tricks of the Trade webinar on February 19th from 3:30-4:00 PM ET. Watch for an invitation via email. During the training, we will highlight the a variety of documentation available, including some listed below.

Pick #1: [How do I get a copy of the software used for the PDF Export feature?](#)

With a single click on many CU*BASE dashboard, the PDF Export feature provides PDFs of data and charts in a format that's ready to print and distribute to your credit union board and management staff. In order for the feature to work, you must install the PDF Export software. It's a great time to buy as new pricing is now available!

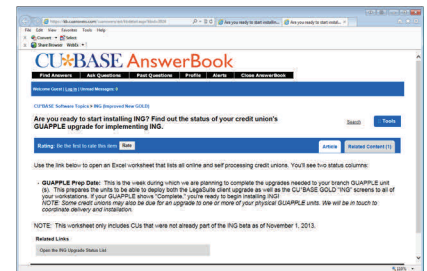
Check out the [PDF Export brochure](#) for details on purchasing the PDF Export software.



Pick #2: [I am ready to start installing ING. How do I find out the status of my credit union's GUAPPLE upgrade for implementing ING?](#)

This is the final month to convert to the new look of CU*BASE!

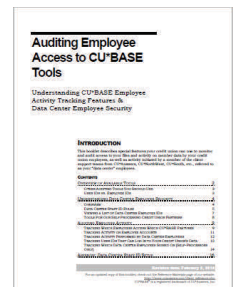
Click "Open the ING Upgrade Status List" in the lower left corner of this [AnswerBook](#) item for a listing of credit unions with GUAPPLES ready to convert to ING. (NOTE: It may take a moment for the Excel spreadsheet to download.)



Pick #3: [How can I audit employee access to CU*BASE Tools?](#)

This booklet describes special features your credit union can use to monitor and audit access to your files and activity on member data by your credit union employees, as well as activity initiated by a member of CU*Answers, referred to as your "data center" employees.

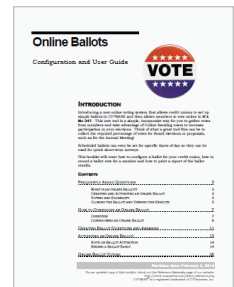
Check out the [Auditing Employee Access to CU*BASE Tools/Data Center Employee Security](#) booklet.



Pick #4: [How do I create an online ballot in "It's Me 247?"](#)

CU*BASE is equipped with an online voting system that lets you set up simple ballots and then allows your members to vote online in **It's Me 247**. It's a simple, inexpensive way for you to gather votes from members and take advantage of Online Banking users to increase participation in your elections.

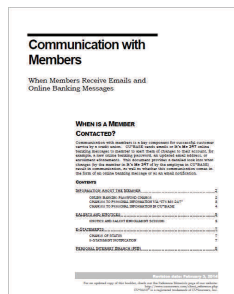
Check out the [Online Ballots](#) booklet to learn more.



Pick #5: [What actions in CU*BASE and online banking result in my members receiving communication from my credit union?](#)

Communication with members is a key component of successful member service. This document provides a detailed look into what changes (made by the member in **It's Me 247** or by the employee in CU*BASE) result in communication, as well as whether this communication comes in the form of an online banking message or an email notification.

Check out the [Communication with Members](#) booklet to learn more.



Refer to the [Tricks of the Trade Newsletter Series](#) page for all issues:

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