



Writing Team: Tricks of the Trade

March Top Picks: CTR Uploads/Branding It's Me 247

Issue 28

Be sure to attend our upcoming Tricks of the Trade webinar on March 18th from 3:30-4:00 PM ET. Watch for an invitation via email. During the training, we will highlight the documentation and booklets that you can use to learn more about the Automated Upload of CTRs to FinCEN and the branding of It's Me 247.

[Pick #1: How does the Automated Upload of CTRs to FinCEN work? What else CTR-related was included in the recent 13.6 release?](#)

Interested in learning more about how your CTR (Currency Transaction Report) data can be uploaded from CU*BASE directly to FinCEN? Interested in learning about how errors are handled with this new automated feature? Maybe you would like to learn more about how you can have default contact information pre-fill into each CTR?

Read the book that has all these answers (as well as how to get started recording CTRs in CU*BASE) in the [Bank Secrecy Act Monitoring booklet](#).

[Pick #2: I am ready to sign up for the Automated Uploads of CTRs to FinCEN! Where do I find a sign-up form?](#)

The Automated Upload of CTRs to FinCEN must be activated by your credit union and a nominal monthly fee is charged for the service. To activate, your credit union CEO's signature is required.

To find the authorization form, check out Page 2 of this introductory brochure.

[Pick #3: How do I brand It's Me 247 Online Banking with my credit union logo, colors and more? What does it look like?](#)

You can now brand It's Me 247 with your credit union logo, theme (colors), and even a custom photo theme. To learn more about these new options, what they look like, how they are configured, and pricing, be sure to check out the comprehensive [It's Me 247 Branding Concepts brochure](#).

Also refer to the [Web Services Self-Service Custom Branding Options pages](#) devoted to all the custom branding options, including one that is FREE!

[Pick #4: How does branding affect Mobile Web banking?](#)

When you brand It's Me 247 Online Banking, your logo as well as your primary and secondary colors are carried over to Mobile Web Banking, and depending on your setup, to your mobile app as well!

To see what this branding looks like in Mobile Web Banking, check out the new Customization section in the [Mobile Web Banking booklet](#).

[Pick #5: What was included in the 13.6 CU*BASE Release?](#)

The 13.6 release summary was not that long, but what was included was really big news! Look here for a quick summary of the Automated Upload of CTRs to FinCEN feature.

Check out the [13.6 CU*BASE Release Summary](#) for more information.

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

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

