



# Writing Team: Tricks of the Trade

## September Top Picks: Doc to Go Paperless

Issue 34

Be sure to attend the upcoming Tricks of the Trade webinar on September 16 from 3:30-4:00 PM ET. Watch for an invitation via email. During the training, we will highlight materials to assist your credit union with being green and printing less paper.

### Pick #1: [How can my credit union build checking account products that encourage eStatement enrollment?](#)

Consider setting up a checking product that has specific eligibility requirements members must meet to receive a higher rate (the “qualified rate”) and not the base rate. Then require eStatement enrollment for the better rate.

Learn more in the [Qualified Dividends booklet](#), available under “Q” on the CU\*BASE Reference page.

### Pick #2: [How can I use statement styles to increase my credit union’s eStatement enrollment?](#)

Statement styles allow members to choose a printed style for their paper statement; for example, a member could select a large print style. This feature, however, can also be used to charge a fee for the regular statement. The online banking page where members select their statement style provides a link to enroll in eStatements.

Learn more in the [Member Selected Printed Statement Styles booklet](#), available under “S” on the CU\*BASE Reference page.

### Pick #3: [How can I advertise eStatement and eNotice enrollment for free?](#)

Smart Messages present advertisements in online banking for enrollment in these products. When the member clicks on the banner, they move to the page where they can enroll. Smart Messages are very easy to configure, and best of all they are free!

Learn more in the [Smart Message booklet](#), available under “S” on the CU\*BASE Reference page.

### Pick #4: [How does CU\\*BASE handle wrong email addresses sent by the system? How does this affect paper?](#)

Reduce the number of notices and statements your credit union sends by keeping your members’ email addresses current. It definitely can affect the amount of mail you send!

Learn more in the [Automated Management of Wrong Email Addresses brochure](#), available under “E” on the CU\*BASE Reference page.

### Pick #5: [How do I upload files directly to the general ledger?](#)

Eliminate the Excel spreadsheet you use to manage your debits and credits and upload your batch entries directly to your general ledger.

Learn more in the [Importing Files to the General Ledger booklet](#), available under “G” on the CU\*BASE Reference page.

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)

