

## Preview to Card Ordering Changes with the 14.0 Release

The 14.0 release will introduce some exciting new enhancements to ATM/debit and credit cards, including multiple card numbers per credit card loan and special stock handling for ATM/debit and credit cards. These features require activation (both with your vendor and the SettleMINT team) and are not available yet for all vendors. Please contact the SettleMINT team for more information.

**For all credit unions**, the 14.0 release will impact the credit card ordering process, as several screens have changed. Changes to credit card ordering screens and some other changes are covered in this PowerPoint.

## Ordering a Credit Card

This section will cover credit card ordering, showing both the current and new CU\*BASE screens. NOTE: If you are adding a new loan, everything up to the Authorized Users screen remains the same.

Session 1 CU\*BASE GOLD Edition - BEDROCK COMMUNITY CREDIT UNION

File Edit Tools Help

Card #  Account #  800

Status **OPEN ACTIVE STATUS**

Names Authorized To Use This Account		
1	Primary	<b>JOHN G MEMBER</b> (Name on membership account)
2	Secondary	(Co-borrower name on loan account)
3	Other name	<input type="text"/> KAREN MEMBER
4	Other name	<input type="text"/>
5	Other name	<input type="text"/>
6	Other name	<input type="text"/>
7	Other name	<input type="text"/>
8	Other name	<input type="text"/>
9	Other name	<input type="text"/>

**i** Note: Changes made to Master or Non-Member records do NOT affect the names listed here (or vice versa)

Note: If any cards have been ordered, be careful not to change the order in which the names appear

Save Changes

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The first screen you see when ordering a new credit card is the Authorized Users screen. This is what it currently looks like.

# Ordering a Credit Card (current look)

Session 0 CU\*BASE GOLD Edition - ABC CREDIT UNION

File Edit Tools Help

## Authorized User List UPDATE

Card #  Account #  Status **OPEN ACTIVE STATUS**

	Names Authorized to Use This Account	Name Available for Card Orders	Prior
1	Primary <b>MARY H MEMBER</b> (Name on membership account)	<input checked="" type="checkbox"/>	NO
2	Secondary (Co-borrower name on loan account)	<input checked="" type="checkbox"/>	NO
3	Other name <input type="text" value="JOHN W MEMBER"/>	<input checked="" type="checkbox"/>	NO
4	Other name <input type="text"/>	<input checked="" type="checkbox"/>	NO
5	Other name <input type="text"/>	<input checked="" type="checkbox"/>	NO
6	Other name <input type="text"/>	<input checked="" type="checkbox"/>	NO
7	Other name <input type="text"/>	<input checked="" type="checkbox"/>	NO
8	Other name <input type="text"/>	<input checked="" type="checkbox"/>	NO
9	Other name <input type="text"/>	<input checked="" type="checkbox"/>	NO

**i** Note: Changes made to Master or Non-Member records do not affect existing cards.  
 Note: If any cards have been ordered, be careful not to change the name on the card.

Save Changes

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The new Authorized Users screen is bigger and has this new section, but is otherwise unchanged. This new section is for upcoming enhancements. Do not make changes to this part of the screen.

# Ordering a Credit Card (14.0 release)

Session 0 CU\*BASE GOLD Edition - ABC CREDIT UNION

File Edit Tools Help

## Authorized User List UPDATE

Card #  Account #  Status **OPEN ACTIVE STATUS**

	Names Authorized to Use This Account	Name Available for Card Orders	Prior
1	Primary <b>JOHN G MEMBER</b> (Name on membership account)	<input checked="" type="checkbox"/>	NO
2	Secondary <b>MARY Q MEMBER</b> (Co-borrower name on loan account)	<input checked="" type="checkbox"/>	NO
3	Other name <input type="text"/>	<input checked="" type="checkbox"/>	NO
4	Other name <input type="text"/>	<input checked="" type="checkbox"/>	NO
5	Other name <input type="text"/>	<input checked="" type="checkbox"/>	NO
6	Other name <input type="text"/>	<input checked="" type="checkbox"/>	NO
7	Other name <input type="text"/>	<input checked="" type="checkbox"/>	NO
8	Other name <input type="text"/>	<input checked="" type="checkbox"/>	NO
9	Other name <input type="text"/>	<input checked="" type="checkbox"/>	NO

*As usual, use the Save Changes (F5) button to advance to the next screen.*

**i** Note: Changes made to Master or Non-Member accounts will not appear on the card.  
 Note: If any cards have been ordered, be careful not to change the order number. Changes will appear on the card.

Save Changes

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FR (4169) 5/28/14

# Ordering a Credit Card (14.0 release)

Session 0 CU\*BASE GOLD Edition - ABC TESTING CREDIT UNION

File Edit Tools Help

## Order a Card: Choose Emboss Settings UPDATE

Account # [REDACTED] 811 CHERYL [REDACTED]  
Card # 43 [REDACTED]

Enroll in card rewards  
Transfer PIN, card rewards, and mobile alerts information from card 43 [REDACTED] **Not allowed with Instant Issue**

Card expiration date Oct 31, 2016 Months until expiration 36

Card activation method Issue with activation [v]  
Card stock 60121 [REDACTED] \*DEFAULT\*  
Flat card N

Send a new card to the member  
 Send a PIN mailer to the member:  Issue a new PIN  Keep the existing PIN

Request 3-day priority handling  
# of names to be embossed on the card 1 (1, 2)

Save/Continue

(4170) 10/04/13

Currently the next screen looks like this. (Your credit union may not use all of these features.)

# Ordering a Credit Card (current look)

Session 0 CU\*BASE GOLD Edition - ABC CREDIT UNION

File Edit Tools Help

## Order a Card: Choose Emboss Settings UPDATE

Account #  801 MARY H MEMBER  
 Card #  35

---

Enroll in card rewards  
 Transfer PIN, card rewards, and mobile alerts information from card  43 Not allowed with Instant Issue

Card expiration date Jun 30, 2016 Months until expiration 24

Card activation method

Card stock  +DEFAULT  
 Emboss style  Raised  embossed

Send a new card to the member  
 Send a PIN mailer to the member: Issue a new  
 Request 3-day priority handling  
 # of names to be embossed on the card  (1, 2)

Save/Continue

FR (4170) 6103114

The new screen is identical except that it indicates the emboss style more clearly (whether it is raised embossed or not raised).

# Ordering a Credit Card (14.0 release)

Session 0 CU\*BASE GOLD Edition - ABC TESTING CREDIT UNION

File Edit Tools Help

## Order a Card: Choose Emboss Settings UPDATE

Account # [REDACTED] 811 CHERYL [REDACTED]  
Card # 43 [REDACTED]

Enroll in card rewards  
Transfer PIN, card rewards, and mobile alerts information from card 43 [REDACTED] Not allowed with Instant Issue

Card expiration date Oct 31, 2016 Months until expiration 36

Card activation method

Card stock G0121 \*DEFAULT\*

Emboss style Raised embossed

Send a new card to the member  
 Send a PIN mailer to the member:  Issue a new PIN  Keep the existing PIN

Request 3-day priority handling  
# of names to be embossed on the card  (1, 2)

Save/Continue

As usual, use the *Save Changes* (F5) button to advance to the next screen.

# Ordering a Credit Card (14.0 release)

Session 0 CU\*BASE GOLD Edition - ABC TESTING CREDIT UNION

File Edit Tools Help

## Order a Card: Choose Names to Emboss

UPDATE

Account # [redacted] 811 CHERYL [redacted]  
 Card # 43 [redacted]

Top Name	
Top name	Bottom name
1 CHERYL [redacted]	1
2 STEPHEN [redacted]	2
3	
4	
5	
6	
7	
8	
9	

*My Credit Union*

43 [redacted] [redacted] [redacted] [redacted]

CHERYL [redacted]

Expires 10/16

Months until expiration 36

Submit Order  
 Instant Issue  
 Refresh Sample

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FR (4171) 10/04/13

The next screen allows you to select the names that will appear on the card. This is the current version.

# Ordering a Credit Card (current look)

Session 0 CU\*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

## Order a Card: Choose Names to Emboss UPDATE

Account #  MARY H MEMBER Card #

Current Order						Sample Card					
Card stock	TBD	Months until expiration 24									
Embossed names	SINGLE	Order <input type="text" value="01"/> copies of this card									
Embossed style	Raised										
Image ID											

Authorized User Names	Pending Order					Prior Order					
	Card Stock	Embossed Names	Embossed Styles	Design/Image ID	ST	Card Stock	Embossed Names	Embossed Styles	Design/Image ID	Date	ST
MARY H MEMBER					N						
JOHN W MEMBER					N						

Select

Submit Order Instant Issue Refresh Sample

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With the new screen, the biggest change you will see is that all cards will be ordered at the same time. These orders will be listed at the bottom of the screen.

# Ordering a Credit Card (14.0 release)

Session 0 CU\*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

## Order a Card: Choose Names to Emboss UPDATE

Account #  MARY H MEMBER Card #

Current Order		Sample Card	
Card stock	TBD	Months until expiration	24
Embossed names	SINGLE	Order	<input type="text" value="01"/> copies of this card
Embossed style	Raised		
Image ID			

Authorized User Names	Card Stock	Emb Name															
MARY H MEMBER																	
JOHN W MEMBER																	

Select ↑ ↓

(5224) 6/03/14

There is no need to make changes to the card order. One pass of this screen is all you need.

# Ordering a Credit Card (14.0 release)

Session 0 CU\*BASE GOLD - ABC CREDIT UNION  
File Edit Tools Help

## Order a Card: Choose Names to Emboss UPDATE

Account #  MARY H MEMBER Card #

Current Order						Sample Card					
Card stock	TBD					Months until expiration	24				
Embossed names	SINGLE					Order	<input type="text" value="01"/> copies of this card				
Embossed style	Raised										
Image ID											

Authorized User Names	Pending Order					Prior Order					
	Card Stock	Embossed Names	Embossed Styles	Design/Image ID	ST	Card Stock	Embossed Names	Em/ S	Design/Image ID	Date	ST
MARY H MEMBER					N						
JOHN W MEMBER					N						

Select

Submit Order Instant Issue Refresh Sample

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You will notice that even though Mary is primary on this card, John's name appears here. This is because the last user always appears in this graphic.

# Ordering a Credit Card (14.0 release)

Session 0 CU\*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

## Order a Card: Choose Names to Emboss

Account #  MARY H MEMBER Card #

UPDATE

Current Order							Sample Card					
Card stock	TBD						Months until expiration 24					
Embossed names	SINGLE						Order <input type="text" value="01"/> copies of this card					
Embossed style	Raised											
Image ID												

Authorized User Names	Pending Order						Prior Order					
	Card Stock	Embossed Names	Embossed Styles	Design/Image ID	ST	#	Card Stock	Embossed Names	Embossed Styles	Design/Image ID	Date	ST
MARY H MEMBER					N	1						
JOHN W MEMBER					N	3						

Select

Submit Order Instant Issue Refresh Sa

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This column indicates that Mary is primary on the loan (1) and that John is the first authorized user (line 3).

# Ordering a Credit Card (14.0 release)

Session 0 CU\*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

## Order a Card: Choose Names to Emboss UPDATE

Account #  MARY H MEMBER Card #

Current Order							Sample Card						
Card stock	TBD						Months until expiration 24						
Embossed names	SINGLE						Order <input type="text" value="01"/> copies of this card						
Embossed style	Raised												
Image ID													

Authorized User Names	Pending Order						Prior Order					
	Card Stock	Embossed Names	Embossed Styles	Design/Image ID	ST	#	Card Stock	Embossed Names	Embossed Styles	Design/Image ID	Date	ST
MARY H MEMBER					N	1						
JOHN W MEMBER					N	3						

Select

Submit Order Instant Issue Refresh Sample

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You can also now see the pending and prior order. In this case since, since this is the first order, this area is blank.

# Ordering a Credit Card (14.0 release)

Session 0 CU\*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

## Order a Card: Choose Names to Emboss UPDATE

Account #  MARY H MEMBER Card #

Current Order						Sample Card					
Card stock	TBD	Months until expiration 24									
Embossed names	SINGLE	Order <input type="text" value="01"/> copies of this card									
Embossed style	Raised										
Image ID											

Authorized User Names	Pending Order						Prior Order					
	Card Stock	Embossed Names	Embossed Styles	Design/Image ID	ST	#	Card Stock	Embossed Names	Embossed Styles	Design/Image ID	Date	ST
MARY H MEMBER					N	1						
JOHN W MEMBER					N	3						

Select

Submit Order Instant Issue Refresh Sa

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Many of the other changes to this screen are informational or are for future enhancements.

# Ordering a Credit Card (14.0 release)

Session 0 CU\*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

## Order a Card: Choose Names to Emboss

Account #  MARY H MEMBER Card #

UPDATE

Current Order		Sample Card	
Card stock	TBD	Months until expiration	24
Embossed names	SINGLE	Order	<input type="text" value="01"/> copies of this card
Embossed style	Raised		
Image ID			

Authorized User Names	Card Stock	Embossed Names	Em Sty.
MARY H MEMBER			
JOHN W MEMBER			

Submit Order Instant Issue Refresh Sample

Navigation icons: back, forward, up, down, print, link, info, help, search

(5224) 6/03/14

As you do currently, you will use the *Submit Order* (F5) button to complete the ordering process.

# Ordering a Credit Card (14.0 release)

Session 0 CU\*BASE GOLD Edition - ABC CREDIT UNION

File Edit Tools Help

## Emboss/Order History UPDATE

Account #  803 MARY H MEMBER  
 Card #

Emboss Name(s)	Priority	# of Cards	Issue Action	Change Date	Order Status
MARY H MEMBER	N	01	Card Only - new PIN/No Mailer	Jun 04, 2014	Card Order Pending
JOHN MEMBER	N	01	Card Only - new PIN/No Mailer	Jun 04, 2014	Card Order Pending

Edit Pending Order  
  Delete Pending Order  
  View  
  Reorder Same Pattern  
  Update for Reissue  
 ↑ ↓

The Emboss/Order History screen does not change with the 14.0 release.

# Ordering a Credit Card (14.0 release)









## Ordering an ATM/Debit Card

This section will cover ATM/debit card ordering, showing both the current and new CU\*BASE screens.

Session 0 CU\*BASE GOLD Edition - ABC TESTING CREDIT UNION

File Edit Tools Help

## Card/PIN Order ADD

Card #  Card sequence #

Description **ATM CARD** Relationship account  **JOHN G MEMBER**

Name(s)		Embossed Name
Line 1 name (FML)	<input type="text" value="JOHN"/> <input type="text" value="G"/> <input type="text" value="MEMBER"/>	<b>JOHN G MEMBER</b>
Line 2 name (FML)	<input type="text"/> <input type="text"/>	

Expiration date **Aug 2016**  Send maintenance  Order card  Order PIN

Service charge grp   **ATM TRANSACTION FEE**

**Card Activation Fields**

SSN

Phone #

Daily Limits		Totals
PIN Online	<input type="text" value=""/>	<input type="text" value="500.00"/>
Offline	<input type="text" value=""/>	<input type="text" value="200.00"/>

Deposits allowed  
 Withdrawals allowed  
 Transfers allowed  
 POS purchases allowed

Add/Update Accounts Instant Card

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The only change to the ATM card ordering process is that you will now see the embossing type (raised or non-raised). This is the current screen, so this information is not shown.

# Ordering an ATM/Debit Card (current look)

Session 0 CU\*BASE GOLD Edition - ABC CREDIT UNION

File Edit Tools Help

## Card/PIN Order ADD

Card #

Description **ATM CARD** Relationship account  **MARY H MEMBER**

Name(s)		Embossed Name
Line 1 name (FML) <input type="text" value="MARY"/>	<input type="text" value="H"/>	<input type="text" value="MEMBER"/>
Line 2 name (FML) <input type="text"/>	<input type="text"/>	<input type="text" value="MARY H MEMBER"/>

Expiration date **Jun 2017**  Order card  Order PIN  Send maintenance

Service charge grp  **BRONZE TIER ATM FEE**

Emboss style  Raised emboss  Non-raised emboss

**Card Activation Fields**

SSN

Phone #

Daily Limits		Totals
PIN Online	<input type="text"/>	<input type="text" value="500.00"/>
Offline	<input type="text"/>	<input type="text" value="500.00"/>

Deposits allowed  
 Withdrawals allowed  
 Transfers allowed  
 POS purchases allowed  
 POS returns allowed

Add/Update Accounts Unlock Card

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Here is where this change appears on the screen. (The screen is also slightly rearranged, but includes all the information currently on the screen.)

# Ordering an ATM/Debit Card (14.0 release)

## Viewing Authorized Signers with the 14.0 Release

This section will cover a new step in the process for viewing authorized signers from the credit card Account Inquiry screen.

Session 0 CU\*BASE GOLD Edition - ABC CREDIT UNION

File Edit Tools Help

## Member Account Inquiry

Account #  MARY H MEMBER Date opened **May 29, 2014**  
 G/L account 702.15-03

Account 801 CREDIT CARD VISA  
 Category 42 VISA SILVER  
 Purpose 80 CREDIT CARD VISA  
 Security 80 CREDIT CARD VISA  
 Proc type V CREDIT CARD LOAN CC# \*\*\*\*\*8335

Current balance 0.00 Club b  
 + Interest 0.00 Ac 0.00  
 + Delinquent fine 0.00 YTD interest 0.00 YTD 0.00  
 - Insurance rebate 0.00  
 = Loan payoff 0.00

Disbursement limit 7,000.  
 Interest accrued through May  
 Last disbursed balance  
 Last payment  
 Regular payment  
 Amount due  
 Partial pay

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Collateral  
 Secured  
 Delinquent  
 Additional signers  
 Pledged  
 Payroll  
 ACH  
 AFT  
 Pmt protection N  
 Misc coverages N  
 Frozen 0 NO  
 Check digit 8  
 Delivery channel CU

New Account  
 New Type  
 Credit Card Inq  
 NSF  
 Loan Officer  
 Loan Category  
 Tracker Review  
 OD Protection

Cardholder Info  
 Credit Card Inquiry

As you do currently, you will click the *Cardholder Info* button to view the authorized signers on a credit card. (You can also access authorized users from the **Online ATM/Debit/Credit Processing (MNATMD)** menu.)

# Viewing Authorized Signers (14.0 release)



Session 0 CU\*BASE GOLD Edition - ABC CREDIT UNION

File Edit Tools Help

## Authorized User List UPDATE

Card #  Account #  Status **OPEN ACTIVE STATUS**

	Names Authorized to Use This Account	Name Available for Card Orders	Prior
1	Primary <b>MARY H MEMBER</b> (Name on membership account)	<input checked="" type="checkbox"/>	NO
2	Secondary (Co-borrower name on loan account)	<input checked="" type="checkbox"/>	NO
3	Other name <b>JOHN W MEMBER</b>	<input checked="" type="checkbox"/>	NO
4	Other name <input type="text"/>	<input checked="" type="checkbox"/>	NO
5	Other name <input type="text"/>	<input checked="" type="checkbox"/>	NO
6	Other name <input type="text"/>	<input checked="" type="checkbox"/>	NO
7	Other name <input type="text"/>	<input checked="" type="checkbox"/>	NO
8	Other name <input type="text"/>	<input checked="" type="checkbox"/>	NO
9	Other name <input type="text"/>	<input checked="" type="checkbox"/>	NO

**i** Note: Changes made to Master or Non-Member records do NOT affect the names listed here (or vice versa)  
 Note: If any cards have been ordered, be careful not to change the order in which the names appear.

Save Changes

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This will take you to the list of authorized users.

# Viewing Authorized Signers (14.0 release)

## Menu Changes with the 14.0 Release

This section will cover a few menu changes with the 14.0 release.

Session 0 CU\*BASE GOLD Edition - ABC CREDIT UNION

File Edit Tools Help

## Online ATM/Debit/Credit Card Processing

Search for

**My Menus**

- 5300 Call Report Tools
- ACH/Payroll Processing
- Auditing Functions
- Back Office
- Check Processing
- Check/ATM Processing
- Collection Processing
- Configuration Functions
- CU\*BASE Main Menu
- CU\*BASE Report Builder 1
- CU\*BASE Report Builder 2

**My Shortcuts**

- Account Maintenance
- Acct Adjustment (Coded)
- Acct Adjustment (Full)
- Add Club Members
- ATM Check Digit Calc
- Calc Number of Days
- Calculate Check Digit
- Change Printer Outqueue
- Close Memberships/Accts
- Collateral - VIN# Lookup
- Collection Processing

Menu option

Shortcut

**Daily ATM/Dbt/Crdt Card Process**

- 1 ATM/Debit Card Maintenance
- 2 ATM/Debit Card/Activity Inquiry
- 3 Update/Order Online Credit Cards
- 4 Update Restricted Credit Card #s
- 5 Card Expiration Processing
- 6 Release Holds on ATM Deposits

**ATM/Debit/Credit Card Reporting**

- 10 ATM/Debit Daily Exceptions Rpt
- 11 List Overlimit Credit Cards
- 12 List Inactive Credit Cards
- 13 List Duplicate Credit Cards

**View ATM/Debit/Credit Configs**

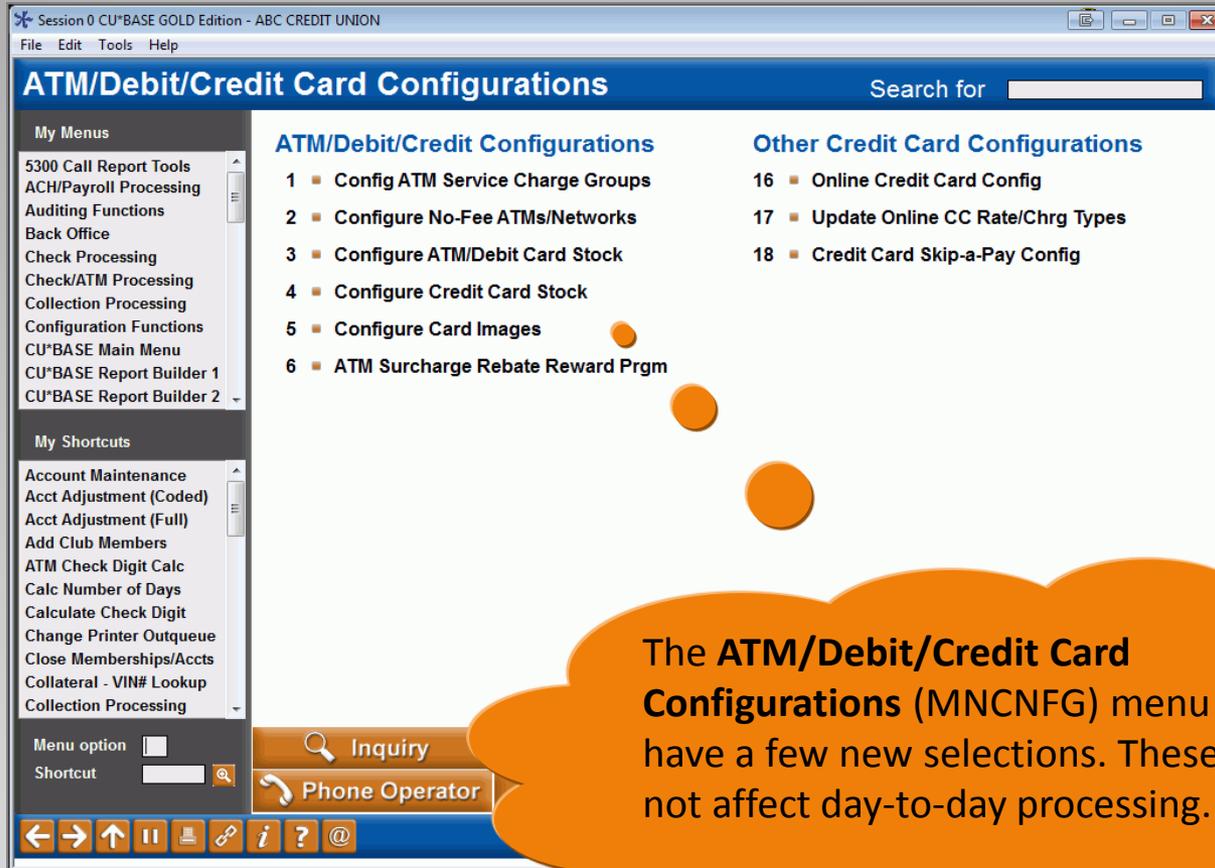
- 16 Vendor Features Config Inquiry
- 17 BIN Config Inquiry
- 18 Service Charge Groups Config Inq
- 19 ATM/Debit Card Stock Config Inq
- 20 Credit Card Stock Config Inquiry
- 21 ATM Surcharge Rebate Reward Prgm
- 22 CU Vendor Feature Preferences
- 23 CU Settings Code Preferences
- 24 Card Images Config Inquiry

Inquiry    Phone Operator

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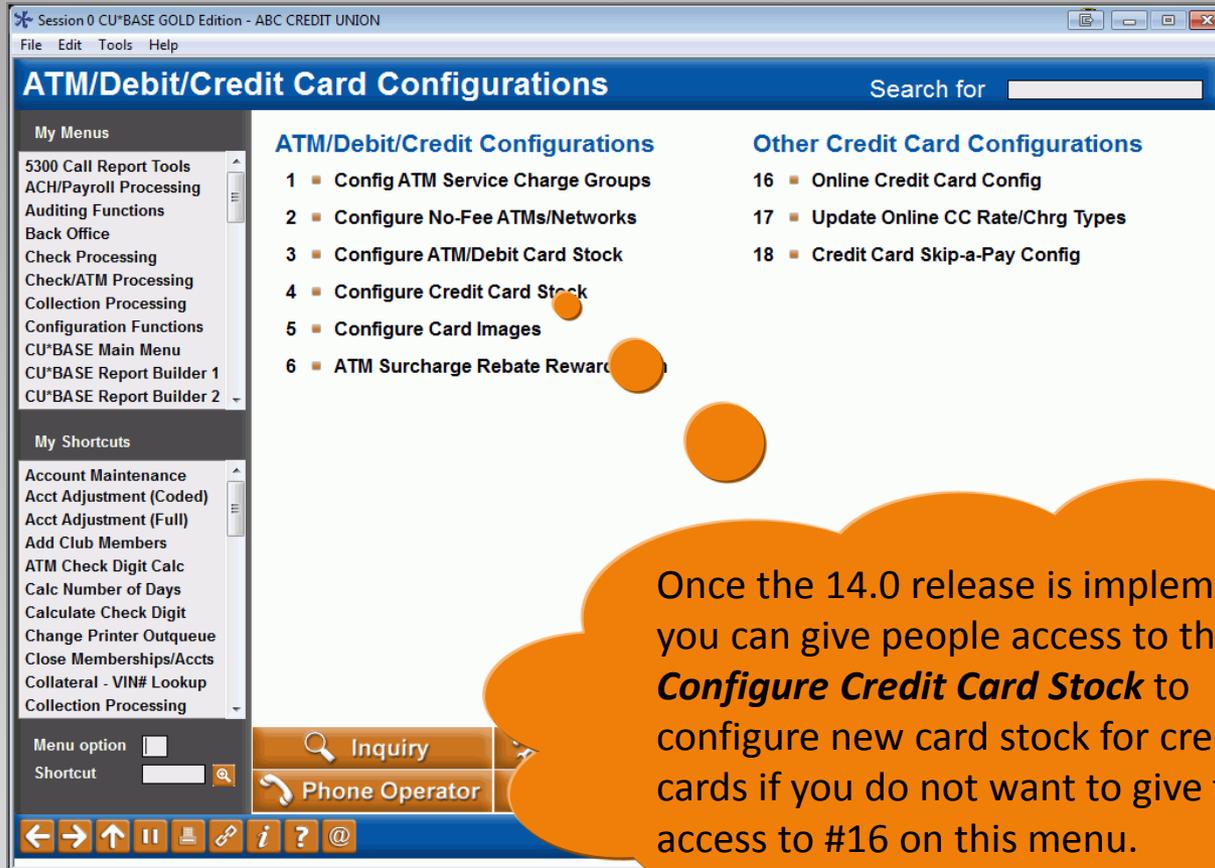
The **Online ATM/Debit/Credit Processing (MNATMD)** menu will have a few new selections. These will not affect day-to-day processing.

# Few Other Changes (14.0 release)



The **ATM/Debit/Credit Card Configurations** (MNCNFG) menu will have a few new selections. These will not affect day-to-day processing.

## Few Other Changes (14.0 release)



Once the 14.0 release is implemented, you can give people access to the new **Configure Credit Card Stock** to configure new card stock for credit cards if you do not want to give them access to #16 on this menu.

## Few Other Changes (14.0 release)

## Recap of the Changes

Exciting new enhancements to ATM/debit and credit cards will be available as vendors are certified. For now, the biggest change will be the changes to the credit card ordering screens.