

The New Face of Commonly-Used Screens in CU*BASE

A sneak preview of the CU*BASE
Phone Op, Inquiry, Teller, Verify
ID, & Transfer screens changes
coming with the 10.0 Release

Prepared April 16, 2010

Changes to Phone Operator and Inquiry Screens

Session 0 CU*BASE GOLD - Phone Operator Account Processing

Click For Procedures **Individual Account**

SSN/TIN ***-**-0320
Birthdate Jul 04, 1940
Code word:
CODE WORD
Mother's maiden name:
JONES
Driver's license:
P 123 456 789 123
No ID on File

Name MARY J MEMBER

Graphics indicate male or female (or "unknown" or organization)

I'm a VIP-PLATINUM member!
(click for more info)

Transaction Activity

Household Statistics

New emphasis on Tiered Service points and rewards

Comments

Description	Next Pay	Last Tr	CD Maturity	ACH	ODP	BOX	J/O
Mar 10, 2010							
Jul 17, 2007							
May 15, 2010							

This will tie to a new "Photo ID On File" flag you will be able to update after you scan an ID into your electronic vault

History Inquiry List
Stop Transfer Wire

(393)

Learn About This Feature

Changes to Phone Operator and Inquiry Screens

Session 0 CU*BASE GOLD - Phone Operator Account Processing

Click For Procedures **Individual Account**

SSN/TIN ***-**-0320
 Birthdate Jul 04, 1940
 Code word:
CODE WORD
 Mother's maiden name:
 JONES
 Driver's license:
 P 123 456 789 123
 Verify My ID

Name MARY J MEMBER

Driver's license displayed on screen

Member name in larger font makes it easier to read

Home (555) 121-2121
 Work (333) 252-5252
 Email amember@yahoo.com

Other ph (444) 123-1231
 Fax (666) 363-6363

Household Statistics
 Secondary Names
 Online Banking
 Cross Sales
 Outstanding Follow-ups

Comments

Description	Loan Payment/Net Available	Next Payment/Last Trans/CD Maturity	IRA	P/R	ATM	AFT	FRZ	TRK	ACH	ODP	BOX	J/O
	2,241.88	Mar 10, 2010	.	.	Y	.	0	Y	Y	.	.	.
	0.03	Jul 17, 2007	.	.	.	.	0	.	.	.	.	.
	407.64	May 15, 2010	.	.	.	.	0	.	Y	.	.	.

Notice the button changes so you know whether to scan an ID, or just check one

History Inquiry List
 Stop Transfer Wire

(393)

Learn About This Feature

Changes to Phone Operator and Inquiry Screens

Session 0 CU*BASE GOLD - Phone Operator Account Processing

Click For Procedures **Individual Account**

SSN/TIN ***-**-**** MEMBER
 Birthdate ***-**-****
 Code word: CODE WORD
 Mother's maiden name: JONES
 Driver's license: P 123 456 789 123
 Verify My ID

Address 123 ANYSTREET
 ANYCITY, MI 49000
 Home (555) 121-2121
 Work (333) 252-5252
 Email amember@yahoo.com

I'm a PLATINUM Member!
 Online Banking
 Outstanding Follow-ups

Type	Description	Loan Payoff/ Current Balance	Loan Payment/ Net Available	Next Payment/ Last Trans/ CD Maturity	IRA	P/R	ATM	AFT	FRZ	TRK	ACH	ODP	BOX	J/O
000	REGULAR SAVINGS	2,246.88	2,241.88	Mar 10, 2010	.	.	Y	.	0	Y	Y	.	.	.
050	VACATION SAVING	0.03	0.03	Jul 17, 2007	.	.	.	.	0	.	.	.	.	.
600	SECURED CL END	44,310.60	407.64	May 15, 2010	.	.	.	.	0	.	Y	.	.	.

☐ Average ☐ CC Inquiry ☐ Check ☐ History ☐ Inquiry ☐ List
☐ Misc Rcpts ☐ Nicknames ☐ Payoff ☐ Stop ☐ Transfer ☐ Wire

Comments F1
 New Account F5
 Exit F7
 Add Cmt/Message F9
 Check Digit F12
 Names/Address F14
 Sales Tools F15
 OTB/Cards F17
 Tax File Inquiry F18
 ARU/HB Transfers F19
 Statements F20
 Nicknames F21
 A2A History Inq F24

(393) [Learn About This Feature](#)

Changes Only to Phone Operator

Session 0 CU*BASE GOLD - Phone Operator Account Processing

Click For Procedures **Individual Account**

SSN/TIN ***-**-0320
 Birthdate Jul 04, 1940
 Code word:
CODE WORD
 Mother's maiden name:
 JONES
 Driver's license:
 P 123 456 789
 Verify My ID

Name MARY J MEMBER
 Account #
 Name ID ME Corp ID 01

I'm a VIP-PLATINUM member!
 (click for more info)

Contact Information Participation & Configuration

Opened May 18, 1979
 Other ph (444) 123-1231
 Fax (666) 363-6363

Transaction Activity \$
 Secondary Names
 Cross Sales
 Household Statistics
 Online Banking
 Outstanding Follow-ups

Comments F1
 New Account F5
 Exit F7
 Add Cmt/Message F9
 Check Digit F12
 Names/Address F14
 Sales Tools F15
 OTB/Cards F17
 Tax File Inquiry F18
 ARU/HB Transfers F19
 Statements F20
 Nicknames F21
 A2A History Inq F24

Options are now alphabetized

☐ Average
☐ CC Inquiry
☐ Check
☐ History
☐ Inquiry
☐ List
☐ Misc Rcpts
☐ Nicknames
☐ Payoff
☐ Stop
☐ Transfer
☐ Wire

(393) [Learn About This Feature](#)

Changes to Verify Member Screen

Session 0 CU*BASE GOLD - Verify Member

SSN/TIN ***-**-0320
Birthdate Jul 04, 1940

Code word:
CODE WORD

Mother's maiden name:
JONES

Driver's license:
P 123 456 789 123

Verify My ID

Name MARY J MEMBER

Account # Name ID ME Corp ID 01

Individual Details **Participation & Configuration**

Address 123 ANYSTREET
ANYCITY, MI 49000

Home ph 555-121-2121 Other ph 444-123-1231

Work ph 333-252-5252 Fax 666-363-6363

Email amember@yahoo.com

I'm a
VIP-PLATINUM
member!
(click for more info)

Transaction Activity \$

Secondary Names

Cross Sales

Type	Comment	ID	Date
000	NEED DL COPIES FROM BEV, JOHN, JEN	99	Sep 09, 2002
000	*** Wendy can make deposits to -052 and get balance ***	34	Dec 13, 2005
000	***** Wendy no withdrawls on -052 ***	34	Dec 13, 2005
000	*** open plan dated 3/03/06 joint no insurance ****	34	Mar 06, 2006
000	No email address. Please update.	89	Jun 19, 2006

Press Enter to confirm verification of member identity

(3778)

Some of the same
treatments for the
Teller and Transfer
"Verify Member"
pop-up window

Changes to Verify Member Screen

Session 0 CU*BASE GOLD - Verify Member

SSN/TIN **-***5339
Charter Jun 18, 1959

Code word:
CODE WORD

Mother's maiden name:
JONES

No ID on File

Verified Member
Cancel
Sales Tools
Tracker Review
Membership

(3778)

Name THE ABC COMPANY PEOPLE

Account # Name ID AB Corp ID 01

Organization Details Participation & Configuration

I'm a BASIC SERVICE member!
(click for more info)

Session 0 CU*BASE GOLD - Verify Member

SSN/TIN ***-**-0320
Birthdate Jul 04, 1940

Code word:
CODE WORD

Mother's maiden name:
JONES

Driver's license:
P 123 456 789 123

Verify My ID

Verified Member Ent
Cancel F12
Sales Tools F15
Tracker Review F21
Membership Design F23

(3776)

Name PAT A UNKNOWN

Account # Name ID

Individual Details Participation & Configuration

Address 123 STREET
ANYCITY, MI 48000

Home ph 555
Work ph
Email

Gender unknown
(time to update your database!)

Transaction Activity \$
Secondary Names
Cross Sales

Type	ID	Date
000 NEED UP	99	Sep 09, 2002
000 *** Wendy can't make it. 552 and get balance ***	34	Dec 13, 2005
000 ***** Wendy no withdrawals on -052 ***	34	Dec 13, 2005
000 *** open plan dated 3/03/06 joint no insurance ****	34	Mar 06, 2006
000 No email address. Please update.	89	Jun 19, 2006

Press Enter to confirm verification of member identity & comments.

Changes to Main Teller Posting Screen

Session 0 CU*BASE GOLD - CU#: TEST CREDIT UNION

Click For Procedures **Individual Account** Comments on File



Cash

Outside checks # items

In-house checks

Total funds in

Name **MARY J MEMBER**

Account #

Tiered Svc level **VIP-PLATINUM**

Outside checks Hold days Type

Loan Payoff Or Current Balance	Loan Payment Or Net Available	Description Toggle Nicknames	Account Type	Deposit Amount	IRA	Withdrawal Amount	IRA	Proc Code	JO
2,246.88	2,241.88	REGULAR SAVINGS	000	<input type="text" value="0.00"/>		<input type="text" value="0.00"/>		<input type="text"/>	<input type="text"/>
0.03	0.03	VACATION SAVING	050	<input type="text" value="0.00"/>		<input type="text" value="0.00"/>		<input type="text"/>	<input type="text"/>
44,310.60	407.64	SECURED CL END	600	<input type="text" value="0.00"/>				<input type="text"/>	<input type="text"/>

[Verify Member](#) F1

[Trans Override](#) F2

[Post](#) F5

[Misc Receipts](#) F8

[Bal Fwd/New Mbr](#) F9

[Bal Fwd/This Mbr](#) F11

[Cancel](#) F12

[Sales Tools](#) F15

[In-House Checks](#) F16

[Outside Checks](#) F17

[Phone Operator](#) F18

[Toggle Card #](#) F22

Calculate Cash Back button works just like Enter

Proc Code lookup, handy for less-used codes

☐ Suppress receipt ☐ Suppress balances

Total funds in **0.00**

Check cash fee - **0.00**

Net total of transactions - **0.00**

Cash back **0.00**

(3104)
[Learn About This Feature](#)

Changes to Main Teller Posting Screen

Session 0 CU*BASE GOLD - TEST CREDIT UNION

Click For Procedures **Individual Account** Comments on File

Cash Name **MARY J MEMBER**

Outside checks # items Account #

In-house checks Tiered Svc level **VIP-PLATINUM**

Total funds in **0.00** Outside checks Hold days Type

Loan Payoff Or Current Balance	Loan Payment Or Net Available	Description Toggle Nicknames	Account Type	Deposit Amount	IRA	Withdrawal Amount	IRA	Proc Code	JO
105.95	100.95	VACATION MONEY	301	0.00		0.00			
19,899.33	19,899.33	GROWTH SAVINGS	300						
20,146.13	146.13	CERTIFICATE	301						
32,057.37	1,551.24	CERTIFICATE	302						

[Verify Member](#) F1
[Trans Override](#) F2
[Post](#) F5
[Misc Receipts](#) F8
[Bal Fwd/New Mbr](#) F9
[Bal Fwd/This Mbr](#) F11
[Cancel](#) F12
[Sales Tools](#) F15
[In-House Checks](#) F16
[Outside Checks](#) F17
[Phone Operator](#) F18
[Toggle Card #](#) F22

☐ Suppress receipt ☐ Suppress balances

[Calculate Cash Back](#)

Total funds in **0.00**
 Check cash fee - **0.00**
 Net total of transactions - **0.00**
 Cash back **0.00**

(3104) [Learn About This Feature](#)

Access to Phone Operator directly from this screen
 Toggle for account nicknames (now directly above account name)

Changes to the Transfer Screen

Session 0 CU*BASE GOLD - Member Account Transfer

Network Links

Member Account Transfer

Journal Transfers (No fee)

Transfer amount

From account IRA/HSA code

To account IRA/HSA code

Description

☐ Print receipt

Optional secondary transaction description:

☐ Show on the TO account also

Refresh/Calc	Ent
Verify Member	F1
Post	F5
Post/Return	F6
Bypass	F8

	From Account	To Account
Name	MISTER D MEMBER	
Mbrshp designation	Individual	
Beginning available balance		2,246.88
Transfer amount		300.00
Ending available balance	218.00	Ending balance 2,546.88

Secondary Names

Enter a secondary transaction description; select whether to add it to a different To: account

(3442) 4/16/10 13:30:06 [Learn About This Feature](#)

Changes to the Transfer Screen – Security Features

Session 0 CU*BASE GOLD - Member Account Transfer

Member Account Transfer Journal Transfers (No fee)

Transfer amount

From account IRA/HSA code

To account IRA/HSA

Description **MEMBER TRANSFER**

☐ Print receipt

Optional secondary transfer

☐ Show on account

Refresh/Calc Ent
Verify Member F1
Post F5
Post/Return

From Account

Name MISTER D MEMBER

Individual

Secondary Names

518.00
300.00-

218.00

To Account

Name MARY A MEMBER

Mbrshp designation Individual

Secondary Names

Beginning balance 2,246.88
Transfer amount 300.00
Ending balance 2,546.88

(3442) 4/16/10 13:30:00 [Learn About This Feature](#)

Access to the Verify Member window for security information such as Code Word

Access to secondary names, such as Joint Owners and Beneficiaries, if they exist on the membership

Changes to the Transfer Screen – Phone Operator

Session 0 CU*BASE GOLD - Member Account Transfer

Member Account Transfer Phone Transfers

Transfer amount

From account 22 016 IRA/HSA code

To account 10 000 IRA/HSA code

Description PHONE TRANSFER

☐ Print receipt ☒ Charge fee

Optional secondary transfer

☐ Show on the TO account a/c

For transfers made through Phone Operator, a counter counts the number of Reg D withdrawals

Total shares	91,211.34
Total loans	253.35
MTD	48
Fee	18
	00
	1.00

From Account		To Account	
Name	MISTER D MEMBER	Name	MARY A MEMBER
Mbrshp designation	Individual	Mbrshp designation	Individual
# of Reg D withdrawals	6	Secondary Names	Mary
Beginning available balance	518.00		
Transfer amount	200.00		
Fee amount	1.00		
Ending available balance	317.00		

Warning message alerts your staff if withdrawal will exceed the allowed number

(3442) 4/16/10 13:26:45 2493-Transfer will cause Reg. D violation; follow CU policy Learn About This Feature