Customer Master Database Information

For Online Clients

INSIDE THIS GUIDE:

Learn more about how CBX stores and displays your credit union's information. This includes contact information, mailing address, branch details and everything in between!

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Find other Reference Materials page on our website: https://www.cuanswers.com/resources/doc/cubase-reference/

Start your online help journey here:
https://help.cubase.org/cubase/Welcome.htm

Table of Contents

Introduction

Keeping our connection to our clients is paramount to their success. The information in the customer database assures that the most current information about your credit union is communicated and shared with those who need to remain informed. This includes CU*Answers Customer Support Teams, Managers of CU*Answers Management Services, and your staff.

Consider the Customer Master Database as your online contact directory. Here you will find important demographic information about your unique profile, your branches, and your staff. Being "in the know" is crucial in today's business world. How your business partners contact you or your organization at any given time could be vital to your success. When decisions must be made, can the proper information be communicated to the proper people in a timely manner? What happens when a vendor or business partner has the wrong contact, calls the wrong phone number, or faxes an important document to the wrong branch? If a CU*Answers operator needs you to make a crucial decision about dividend postings at 3:00 AM in time for business to open the next day, can the right decision-maker be reached?

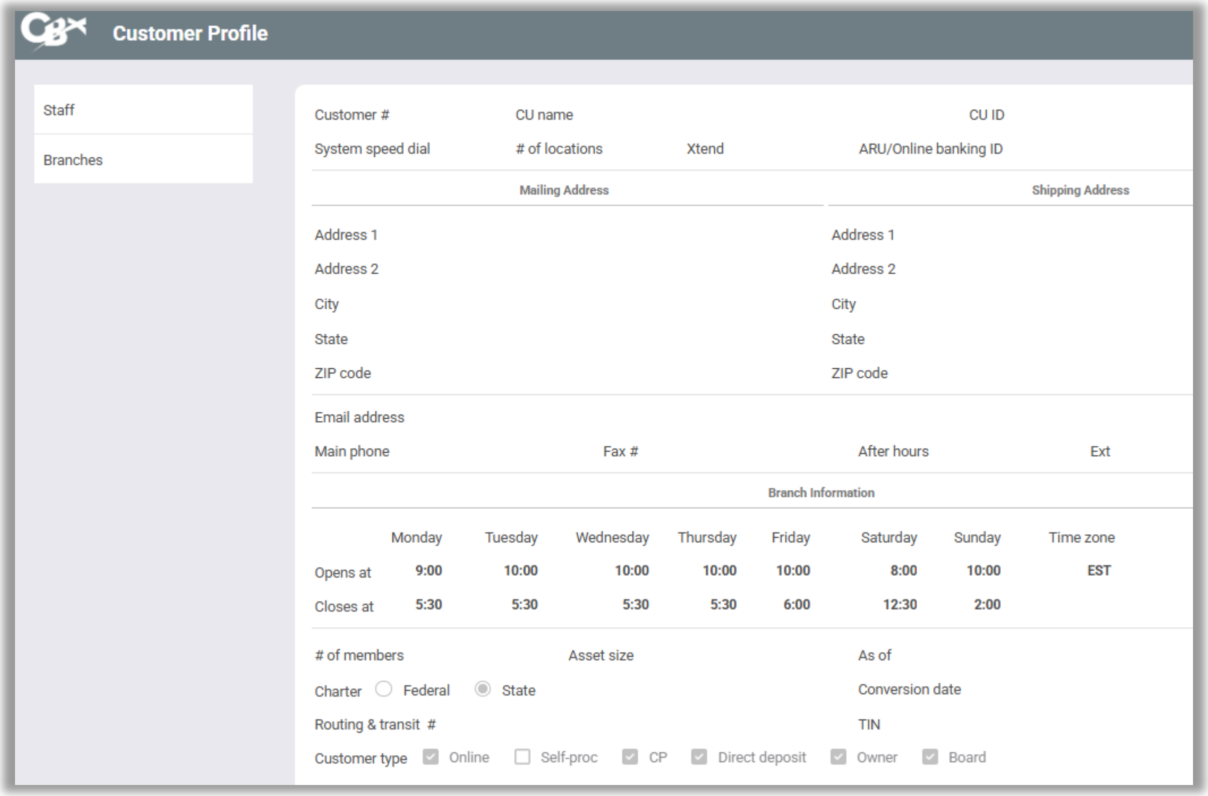
Allowing credit union clients to view the same contact information that we use to communicate with your credit union will help ensure that our data is up to date and that we can get in touch with the right person at the right time. Your staff may also find it helpful as a quick online phone directory, too!

The CU*Answers Client Services and Education team is here to assist at any time. Find us, and learn more via The Store | The Website | AnswerBook

Your Customer Profile

The information in the customer database contains the most current information about your credit union, your branches, and your staff.

Tool #1008 *Your Customer Profile*



This screen shows the name, address, and other basic information about your credit union as it is stored in our master database. Only your credit union's data is available here; no other credit union can see these details about your organization.

> ***NOTE TO SELF PROCESSORS:*** *Access to this database is available to online clients only at this time. However, we will be happy to provide a copy of the data we have on file for your credit union. Just contact a Client Service Representative.*

Field Name	***Description***
Mailing Address	The address shown here is for the branch designated as your "main" branch. This is the address that is used for items sent via the US Postal Service. **Address Line 1:** This includes information other than the regular address line when applicable. For example, a suite. **Address Line 2:** The regular street address. **State:** The two-digit state abbreviation. **Zip:** The Zip code +4

Field Name	*Description*
	A note on PO Boxes: *From time-to-time, special mailings are delivered to the Mailing Address on File including the physical mailing of contracts and agreements. Due to the sensitive nature of these documents when a PO Box is the master address on file, an alternate means of shipping may be utilized. Typically, the shipping address is selected.*
Shipping Address	The shipping address is used only for items sent by UPS or another shipper. Please do not include PO Box information here.
Email Address	This is the email address utilized for general purposes. This is typically a generic mail account where a group of employees will monitor, review, and forward to all appropriate individuals within the credit union.
Main Phone	The published telephone number of your credit union. For credit unions with more than one branch, the main branch telephone number should be used here.
Fax #	The published fax line of your credit union. For credit unions with more than one branch, the main branch fax number should be utilized.
Afterhours Phone & Ext	There may be a need to reach your credit union outside of your normal operating hours. The afterhours phone is the number a decision maker can be reached.
Branch Information	The regular hours of operations for your credit union. For reference, it is best to include the earliest and latest times for your branches.
# of Members, Asset Size	This information is gathered from what you have entered in your most recent call report. The date in the “As Of” field will reflect the date the most recent update was made.
Charter, State, Conversion Date, Routing & Transit, TIN	Information gathered from data collected prior to your conversion to CBX.
Customer Type Fields	These flags indicate the method of processing (Online or Self-Processing) and other participation indicators such as check processing, direct deposit for invoicing, ownership in CU*Answers Stock and an active member of the CU*Answers Board of Directors.

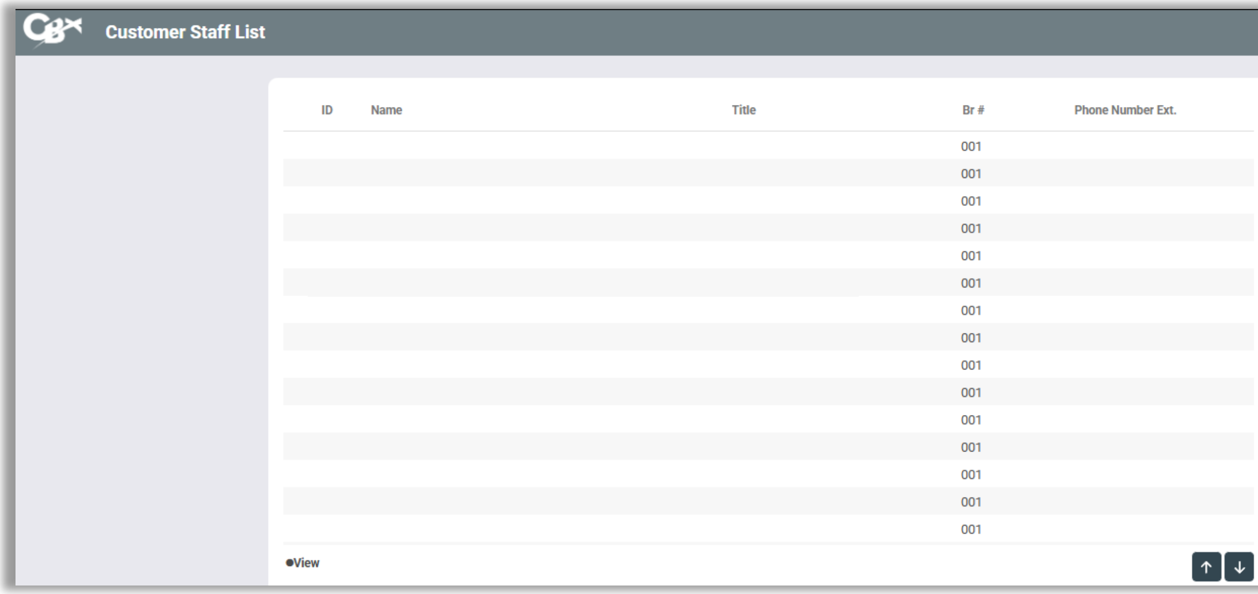
PLEASE REVIEW THIS INFORMATION CAREFULLY!

One of the reasons for making these details available to you is so that we can be sure we have the most accurate, up-to-date information about your credit union for our staff to use and for mailing purposes. If you notice a discrepancy or have a question about how the data is used, please contact the Client Services and Education team.

View Staff Information

From the Customer Master Profile, select the **Staff** button to view staff information. Select any name and use the **View** button to see additional details such as email address or home phone (home phone is generally known only for the staff designated as emergency contacts).

Tool #1008 *Your Customer Profile* > Staff (F8)



Staff ID & Title

Each staff member works in a specific department and has a particular role within that department. The staff ID is a code assigned by CU*Answers that is indicative of this information. ID codes are used so that we can direct mailings as well as personal contacts to the appropriate person within your credit union.

You will notice there is often overlap between the different IDs, in situations where a credit union employee wears multiple "hats" as far as your relationship with CU*Answers. For example, the data processing coordinator often serves as the librarian as well.

Titles can be tricky. There are many credit unions with many staff members. Each of those credit unions can have several staff members with the same position all with unique titles. In order toe stablish and maintain meaningful connections to each staff member at relevant and meaningful times, CU*Answers has established a set of primary titles.

The following table reflects the specific convention utilized:

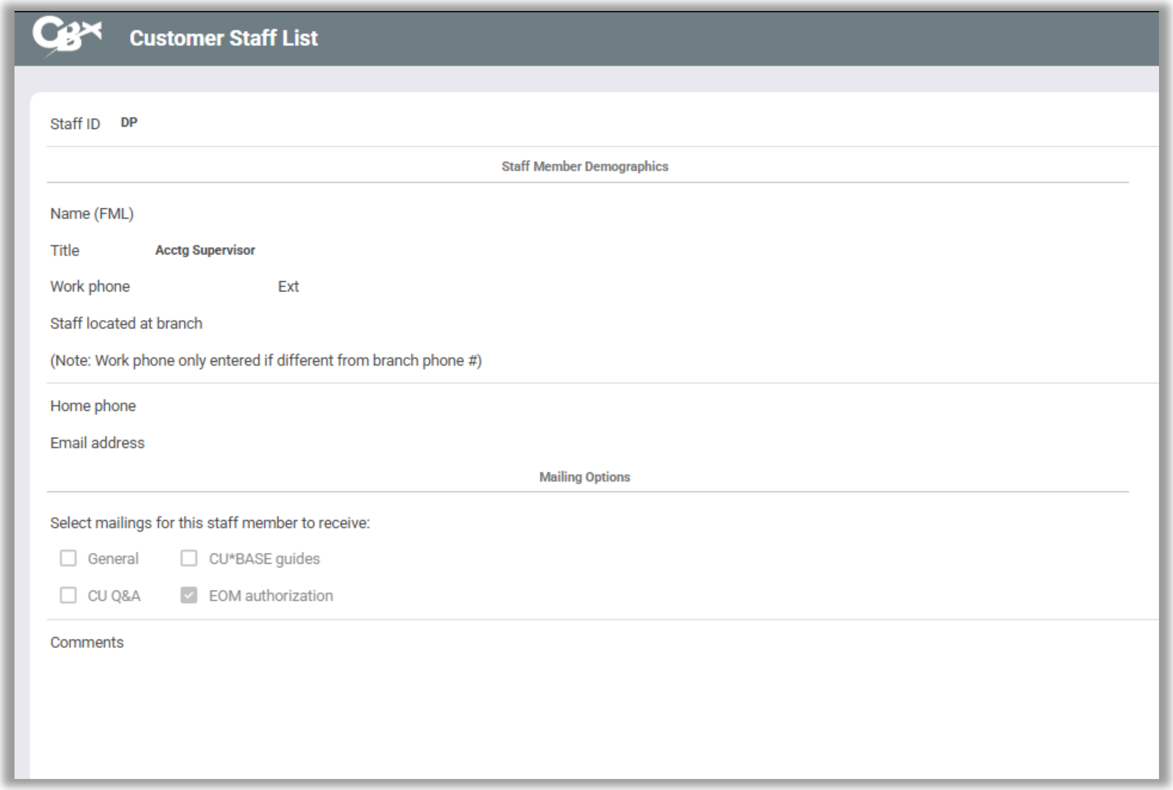
Department	***Title***	***Code***
CEO	CEO	PR
Finance	CFO	A1
Lending	CLO	L1
	Lending Manager	L2
	Collections Manager	L3
	Loan Officer	L4
	Collections Officer	L5

Department	*Title*	*Code*
IT (Hardware/Software/ Imaging/Implementation)	CIO	I1
	IT Manager	I2
	Data Analyst	I3
	Web Services	I4
	Mobile Applications	I5
Human Resources	VP	H1
	HR Manager	H2
Operations	COO	O1
	Records Retention	O2
	Operations Manager	O3
	Member Service Manager	O4
	Front Line Staff	O5
	Security	O6
	Item Processing	O7
	Imaging Manager	O8
Marketing	Marketing Manager	M1
Internal Audit	Auditing Manager	S1
	Compliance	S2
Plastics	EFT	P1
	Debit	P2
	Credit	P3
Statement Processing	Statement Processing Coordinator	SC
Data Processing	*This person will receive mailings concerning day-to-day processing requirements, special requests for information about your credit union's processing needs, and announcements regarding problems or planned down times. In addition, we may also direct reports, microfiche, supplies, check copies and other Item Processing paperwork, and other similar system information using this title.*	DP
Librarian	*This person will receive copies of newsletters, release summaries and any mailed booklets or flyers. This person should be responsible for distributing these materials to all appropriate staff.*	LB
Emergency Contacts		E1
		E2

Information Detail & Mailing Options

Details relative to your team members can be retrieved by highlighting a staff member and selecting the **View** button.

Tool #1008 *Your Customer Profile > Staff (F8) > Highlight name > Select "View"*



Mailing options are general codes utilized by CU*Answers to define specific communications that individuals receive.

- **General:** When marked, these staff are included with any mailings to Librarians.
- The **CU Q&A** and **CBX Guides** are reserved for future use by the CU*Answers internal staff.
- **EOM Authorization:** The DP Coordinator is the only record that should have EOM Authorization marked. This flag is used by CU*Answers to perform the mail merge for EOM reminders issued by Client Services and Education.

Making Changes

CU*Answers ensures the ability to remain accessible to our clients. To help us do this it is important that we have the most current contact information for members of your team. Whenever you have a change in the status of your employees, make an inventory of your staff members in CBX a part of your checklist. Personal contact changes can be made in any of the following ways:

To request a new profile electronically/online:

- Visit https://www.cuanswers.com/solutions/cms/
- Select *Personnel Contact Changes*
    - Or navigate directly to: https://www.cuanswers.com/solutions/cms/keeping-the-connection/
- For credit unions new to our network, begin entering your information in the form on this page, and select next to continue until the end.

To add new staff members or make changes to existing profiles:

- For new staff members or changes to existing staff members, visit https://www.cuanswers.com/solutions/cms/keeping-the-connection/ and select *Add/Remove/Change Individuals*
    - Or navigate directly to: https://www.cuanswers.com/solutions/cms/keeping-the-connection-update-existing-info/
- To submit changes, fill out the form on this page.

Please note that additional forms may be required for processing.

See also:

User ID Additions and Deletions
https://store.cuanswers.com/product/user-id-additions-and-deletions/

CEO Changes
https://store.cuanswers.com/product/ceo-changes/

To request assistance at any time please connect to either of the following:

- **CU*Answers Client Services and Education**
    - Option 1 from our main number (800) 327-3478
- **CU*Answers Management Services**
    - Option 6 from our main number (800) 327-3478