CU*BASE® Client Support Information

INTRODUCTION

As a credit union service organization, CU*Answers has put many systems in place to record important information about our clients' preferences and special needs, and to help us keep track of your contacts with us. Because some of these tools can be as helpful to credit union leaders as they are to our own staff, we are pleased to give clients access to three of our most critical client service tools:

CSR HELP DESK CALL TRACKING

As a credit union leader, do you know when, why, and how often your employees are calling CU*Answers for help? If one key issue keeps popping up over and over again, is it time to plan for some employee education? Or is there a topic causing regular frustration to your staff? What may be a "hot" service issue to your credit union might be sitting on a back burner at CU*Answers. Is it time to escalate your special need to someone in authority at CU*Answers? This system can help CU managers keep a handle on the topics and frequency of calls into the CU*Answers CSR department.

HELP DESK TRACKING ON THE WEB USING THE CU*ANSWERS ANSWERBOOK

Answer Book provides a secure method of communication to track your call activity for both online and Self Processing credit unions, and gives credit union leaders a complete picture of staff contacts with CU*Answers. Questions that are submitted via the Answer Book will be included, as well as all phone contacts added by our Client Service staff as they work with you over the phone.

Refer to the separate flyer, **"Using the CU*Answers Answer Book"** for complete details. Or just click the Answer Book icon (question mark) in the lower left corner of any CU*BASE GOLD screen, and then click the "Past Questions" button. You will need to log in your own email address and password. If you have not used the Answer Book before, you can quickly register using the links provided on that screen.

Revision date: May 22, 2020

For an updated copy of this booklet, check out the Reference Materials page of our website:
http://www.cuanswers.com/resources/doc/cubase-reference/
CU*BASE® is a registered trademark of CU*Answers, Inc.

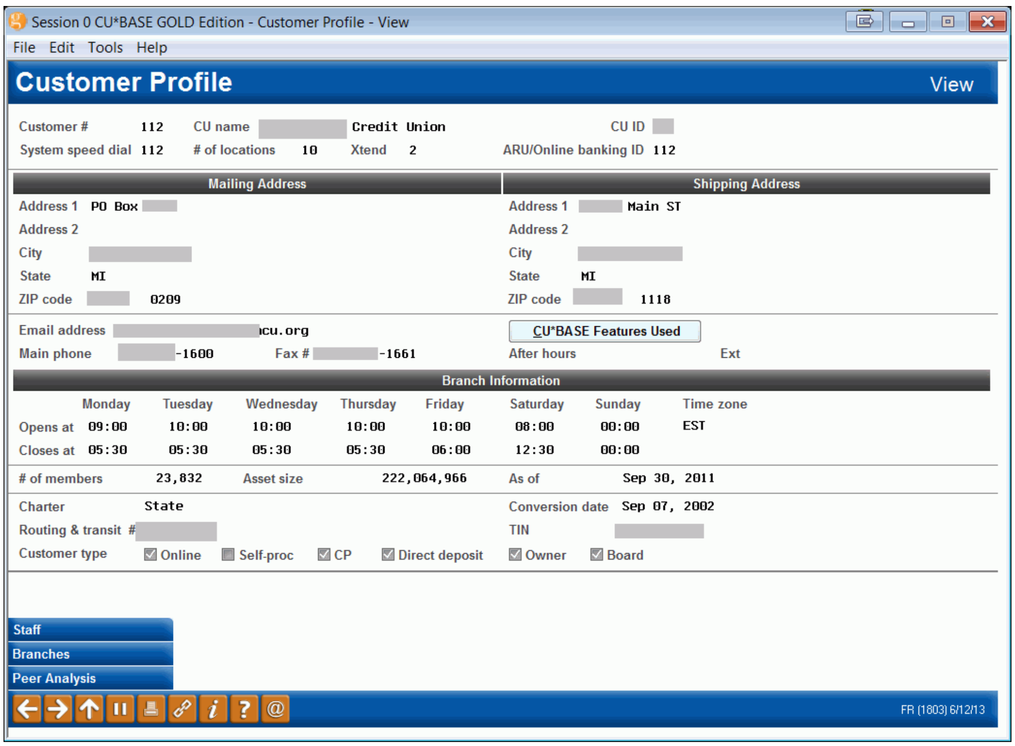
CUSTOMER MASTER DATABASE (ONLINE CLIENTS)

Being "in the know" is crucial in today's business world. How your business partners contact you or your organization at any given time might be paramount 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 name, 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 a.m. 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 on-line phone directory, too!

VIEWING YOUR CREDIT UNION'S PROFILE INFORMATION

Your Customer Profile **(Tool #1008)**



This screen shows the name, address and 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.)

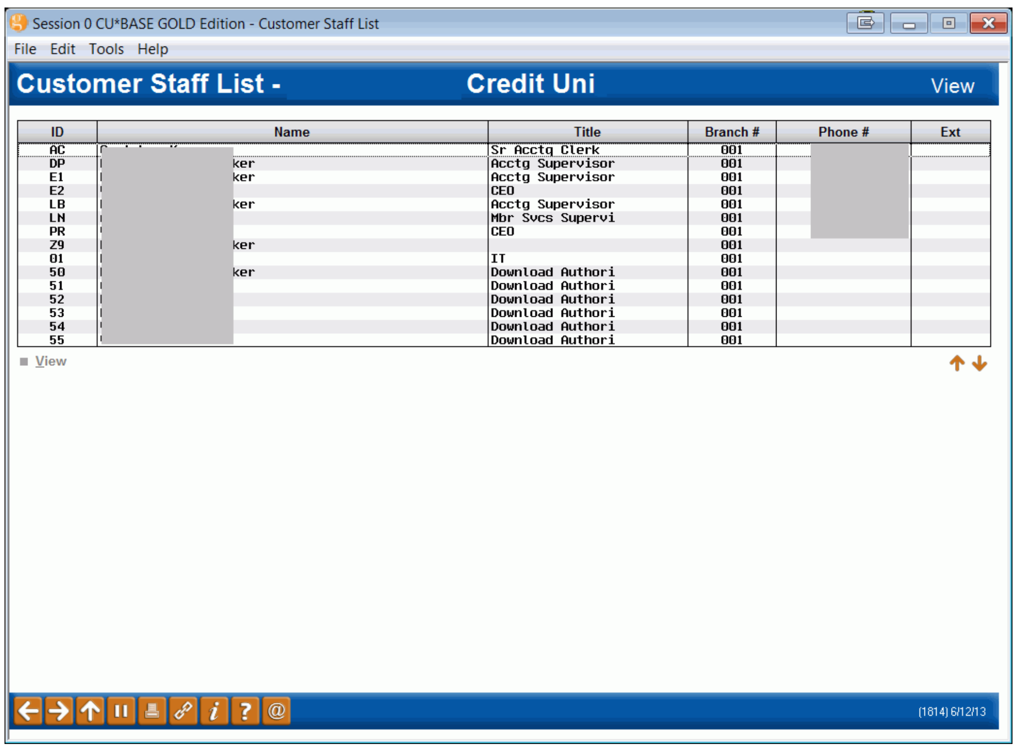
> NOTE TO SELF PROCESSORS: Access to this database is available to online clients only at this time. However, we will be happy to provide a copy of the data we have on file for your credit union. Just contact a Client Service Representative.

The address shown here is for the branch designated as your credit union's "main" branch (branch 001 as shown on Page 6). Notice that a separate mailing and shipping address is stored, with the shipping address used only for items sent by UPS or another shipper. Mail sent via the US Postal Service uses the mailing address.

> *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 a Customer Service Representative.*

- To see the list of branch locations which are used for mailings and client service contacts, use *Branches* (F9). The screen shown on Page 6 will appear.
- To see the list of staff contacts which are used for mailings as well as client service contacts, use *Staff* (F8). The screen shown below will appear.
- To see your credit union's settings as they will be presented in the Peer Analysis worksheet, use *CU*BASE Features Used* (F10). The screen shown on Page **Error! Bookmark not defined.** will appear.

"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'll 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.

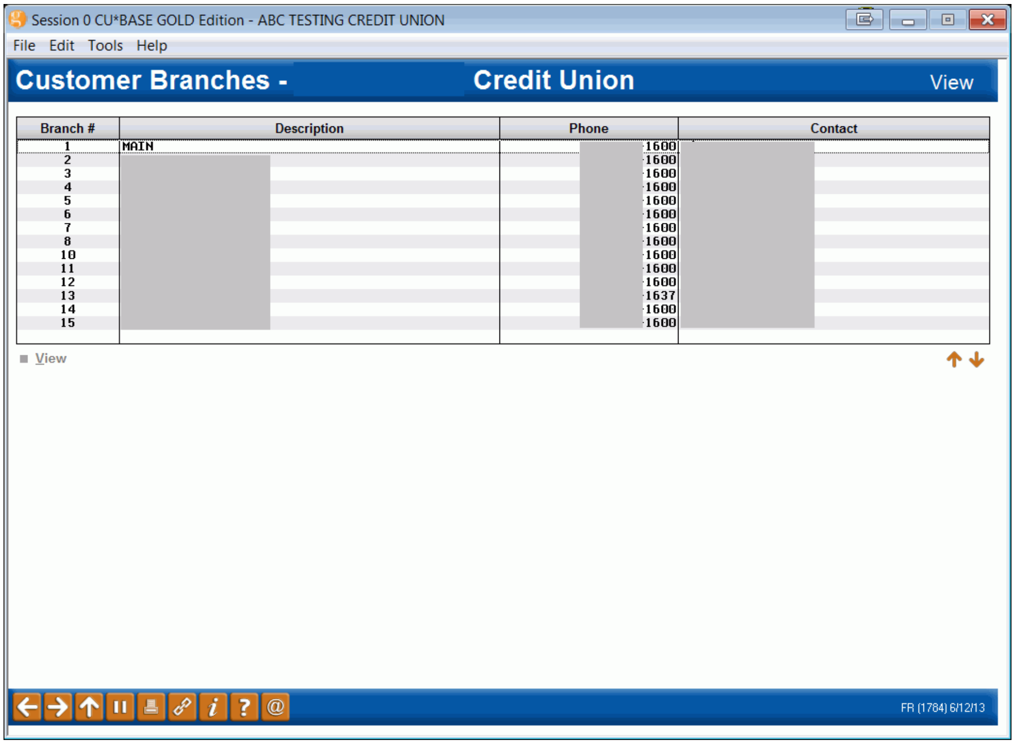
Titles can be tricky. There are many credit unions with many staff members. Each of those credit unions can have several staff members with the same position all with unique titles. In order to establish and maintain meaningful connections to each staff member at relevant and meaningful times, CU*Answers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

The following table reflects the specific convention utilized:

Department	*Title*	*Code*
CEO	CEO	PR
Finance	CFO	A1
	Account Manager	A2
Lending	CLO	L1
	Lending Manager	L2
	Collections Manager	L3
	Loan Officer	L4
	Collections Officer	L5
IT (Hardware/Software/ Imaging/ Implementations)	CIO	I1
	IT Manager	I2
	Data Analyst	I3
	Web Services	I4
	Mobile Applications	I54
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	08

Department	*Title*	*Code*
Marketing	Marketing Manager	M1
Internal Audit	Auditing Manager	S1
	Compliance	S2
Plastics	EFT	P1
	Debit	P2
	Credit	P3
Data Processing	*This person will receive mailings and faxes 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

“Branches” (F9)



Miscellaneous Notes

- The *Description* is the term that your employees typically use to describe a branch location. In most cases, the MAIN branch is generally your “corporate headquarters” and usually is wherever the CU CEO or President is located, but may also be designated as “MAIN” due to the location of your data processing coordinator, according to your credit union’s wishes.

> *The branch numbers here DO NOT correlate to any branch/location numbers you may configure in your CU*BASE Chart of Accounts. These branch numbers use a simple sequential numbering system.*

- Select any item and ***View*** to see complete mailing/shipping address, hours, and other contact information.