Certificate Forms

Defining Your Own Customized Forms for Member Certificate Accounts

INSIDE THIS GUIDE:

This guide describes configuring laser certificate forms, assigning laser forms to CD types, and printing these laser CD forms.

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Introduction

NOTE: This is an older-style form with limited configuration options. For more flexibility in creating certificate forms, use Misc. Member Account forms (**Tool #261**).

Sample Printed Form

Default margins are 0.75" on all sides. The CU name and address are taken from the Chart of Accounts configuration. Placement of the heading and the CU address is configurable. CBX inserts this information from the member's account record automatically. If desired, the member's SSN/TIN can print in the space below the account owner's name and address (determined at the time the certificate form is printed). Up to 12 lines of optional free-form text can be defined. The Signature lines are optional, and you may choose to display lines for up to two optional authorization signatures.

Considerations

- Both the certificate heading and up to 12 free-form lines of descriptive text can be custom configured by the credit union. You can even choose exactly where the credit union name, address, and certificate name are placed at the top of the form. The rest of the certificate, including information from the member's account files, is placed automatically.

- The text is laid out to fit within a 0.75" margin on all sides. Therefore, order any paper stock you like—something simple like plain white bond, or go all out with a fancy pre-printed border.

- Configure as many forms as you need (one for each certificate product you offer); change the free-form text and heading information as often as you like. If your credit union address or phone number changes, you can update the information on the forms easily yourself!

- Each certificate type configured in CBX can have a different form "attached" to it, so the system automatically knows which form to use when a certificate is created.

Configuring a Certificate Form

NOTE: This is an older-style form with limited configuration options. For more flexibility in creating certificate forms, use Misc. Member Account forms (**Tool #261**).

Step 1: Setting up the Form

In this step, you will enter the free-form text that makes up the center portion of the CD form, using **Tool #257 *Configure Laser Certificate Forms***.

Use the *CD Form Type* field at the top of the screen to enter a four-digit code name for the CD form. Use Enter to proceed to the second screen.

> *CU*TIP: To make it easier to keep track of the form types being created, you could use a naming system that matches the CD Type codes for the actual product. For example, if a form is being created for CD Type 01, the form could be named CD01 or something similar.*

Certificate Form Configuration (Tool #257)

Type	Description	Type	Description
CD01	IRA CERTIFICATE OF DEPOSIT	CD15	15 MONTH IRA CERTIFICATE OF D
CD02	CERTIFICATE OF DEPOSIT	CD16	24 Month "Bump" Certificate o
CD03	60 Month "Bump" Certificate o	CD17	24 Month IRA "bump" Certifica
CD04	60 Month IRA "Bump" CD	CD18	8 Month Certificate of Deposi
CD05	4 Month Certificate of Deposi	CD19	8 month IRA Certificate
CD06	4 Month IRA Certificate of De	CD20	13 Month Certificate of Depos
CD07	7 MONTH CERTIFICATE	CD24	21 Month Certificate of Depos
CD08	7 Month IRA Certificate	CD25	21 Month IRA Certificate of D
CD09	5 Month Certificate	CD26	25-Month Certificate of Depos
CD10	CERTIFICATE OF DEPOSIT	CD27	25-Month IRA Certificate of D
CD11	IRA CERTIFICATE OF DEPOSIT	CD30	30 MONTH CERTIFICATE OF DEPOS
CD12	12 Month "Bump" Certificate o	CD31	30 MONTH IRA CERTIFICATE OF D
CD13	12 Month IRA "Bump" Certifica	CD33	33 MONTH CERTIFICATE OF DEPOS
CD14	15 MONTH CERTIFICATE	CD34	33 MONTH IRA CERTIFICATE OF D

This screen is used to configure and enter text for the CD form. There are a total of 24 lines for entering text, which is the equivalent of 12 lines of text on the printed form. Every two lines on the screen is equivalent to one full line of print on the final form. For example, notice that on line 04 in the above example the word "original" is split between the lines. On the printed form, these two lines will be put back together as one long line of text.

In addition to specifying a title, signature information, and free-form text, the **Adjust Headings** feature is available to specify the position of the CD title and credit union address information at the top of the form. (See page 6 for details on using this feature.)

Roll keys can be used to display lines 07 through 12. When done with all free-form text, be sure to use Enter one last time to update all changes, then use the backup arrow to return to the previous screen.

Field Name	Description
CD form type	The four-character form name entered on the previous screen.
CD title	Enter the title that should print along the top edge of the certificate (see the sample shown on page 3).
# of signatures	If you wish to print lines for "Authorized Signature" at the bottom of the CD form, choose the number of lines to be printed here (maximum of 2). If you do not wish to include these signature lines, choose zero or leave the field blank.
Member's signature	If you wish to print a line for "Owner Signature" at the bottom of the CD form, choose the number of lines to be printed here (maximum of 2). If

Field Name	Description
	you do not wish to include these signature lines, choose zero or leave the field blank.

Adjusting Heading Positions

*This screen will appear when you use **Adjust Headings** on the CD form maintenance screen (shown above).*

Standard Laser CD Form Heading Positions (Tool #257 > Adjust Headings)

This screen is used to make minor adjustments to the placement of the CD Title, credit union name, and credit union address information at the top of the printed form.

The "X" position represents the left edge of each line of text, and the "Y" position represents the top edge of each line, relative to the edge of the paper. To adjust the headings to a different position, try entering a different number in the "X" or "Y" position. This is at best a trial-and-error process, so don't be afraid to experiment!

- **CU*TIP:** The following settings were used for the sample shown on page 2:

	Positions	
	X	Y
CD title line	0400	0800
CU name line	0400	0400
Address 1 line	0400	0500
Address 2 line	0400	0500
City, state, ZIP	0400	0550

When done, use Enter to record all changes and return to the previous screen. You will see a notation, "Record has been updated" referring to the heading changes. **Be sure to also use Enter again once you return to the previous maintenance screen so that any changes made to the free-form text are also saved**.

Step 2: Attaching the Form to the CD Product

In this step, you will tie the form you created directly to the CD Type code for the certificate product. Remember that you can tie the same form to multiple products if you like or have a unique form for each product.

Tool #194 *Certificate Products Configuration > Certificate type*

For each of your credit union's configured Certificate Type codes, use the *Laser certificate form* field to enter the CD form type you configured for this certificate product. When printing CD forms, the system will check the CD type recorded in the member's account information against this flag in order to determine which form to use.

Printing Certificate Forms

Certificate forms can be printed at any time after a CD account has been created. Because the system checks the CD Type configuration to determine which form to use, all that is needed is to enter the

member's account number, and the correct form will automatically be printed using your workstation's configured laser printer.

Tool #661 *Print Member Certificate Form*

CBX - Print Standard Laser CD Form

Account

Printer   P1

Drawer   M

Copies   1

☐ SSN or Tax ID on form

| Account Inquiry | Print |

(5229)

Enter the member's account base and suffix and specify whether or not you wish the primary member's SSN/TIN to print on the form. Use Enter to print the form associated with that certificate type. When the form has been printed, the fields will clear, and you may enter another account number or use the up arrow to exit.

> *If it has been configured in* **Tool #523 Membership Designation Configuration***, the DBA label will appear above the address instead of the member's or organization's name.*