
Check Ordering

From CU*BASE and Online Banking

INTRODUCTION

This booklet outlines the check vendors supported currently by CU*BASE and **It's Me 247** and the features and functionality each vendor offers. It then discusses configuration and shows examples of check ordering and reordering in CU*BASE and **It's Me 247**.

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LET CU*ANSWERS MANAGEMENT SERVICES “JUST TURN IT ON” FOR YOU

Use “Just Turn it On” and have CU*Answers Management Services drive the implementation of this feature from start to finish. We'll even do the work to get your Board, your management team, and your staff on board and ready to take over once the switch has been flipped. Learn more in the [“Just turn it on” brochure](#). Access this brochure directly at http://cuanswers.com/pdf/cms/Just_Turn_it_On.pdf.

SUPPORTED VENDORS AND VENDOR FEATURES MATRIX

Below is a matrix outlining the supported vendors and the features supported by each vendor.

	Harland Clarke	Main Street	Deluxe	Checks for Less	CPS
Pass-through credentials are sent when ordering checks (any access point)	● ¹	●	●	●	●
Order checks when opening an account via CU*BASE	●	●	●	●	●
Reorder checks in CU*BASE while maintaining account (Tool #3) or by directly ordering checks (Tool #566)	● ¹	●	●	●	●
Order checks when opening an account in It's Me 247	● ¹	●	●		
Reorder checks in It's Me 247	● ¹		●		
Available in Mobile Web Banking					

¹Clients using Harland Clarke prior to the implementation of the 18.10 release will need to contact Earnings Edge for an upgrade to the new platform to use these features.

Joint owner handling:

- If a single joint owner is attached to the account and is configured in CU*BASE for credit union correspondence, the joint owner's information is sent with the order. (See page 8.)
- If the account has *multiple* joint owners configured for correspondence (see above) or joint owners that are not configured for correspondence, joint information is not sent to the vendor.
- The employee or member can adjust the joint owner information prior to making the order.

FREQUENTLY-ASKED QUESTIONS

What is the benefit of using a check vendor that sends data from with CU*BASE to the vendor website?

The most obvious benefit of activating a vendor that interfaces with CU*BASE is that you will have fewer errors during check ordering since the member data will be pre-filled on the vendor website.

Additionally, it will speed up your processes for both opening new checking accounts and ordering checks since access to the vendor website is built right into the CU*BASE process. Your employees will not have to separately open the website.

What kind of training will I need for my staff?

Your employees will continue to use the same steps to open new checking accounts and to order checks in CU*BASE. What will change is that at the end of the check order, CU*BASE will automatically launch the vendor website on which the member's information will be displayed. Your employee will no longer need to open the site separately and key in the data manually.

What is the benefit of using a check vendor that sends data from "It's Me 247" to the vendor website?

Currently Harland Clarke, Main Street and Deluxe support this feature.

If check ordering via online banking is activated, the obvious benefit to your credit union is that opening new checking accounts online can be an entirely self-service product. If your member clicks the links provided in these locations, the vendor website is opened in a separate browser window with the member's information displayed. All the member needs to do is place the order.

With Deluxe, activation also allows members to reorder checks making this a self-service feature as well.

How are joint owners handled? What if a member wants another name on their checks such as a spouse's name?

Currently Harland Clarke, Main Street and Deluxe support the sending of joint owner information.

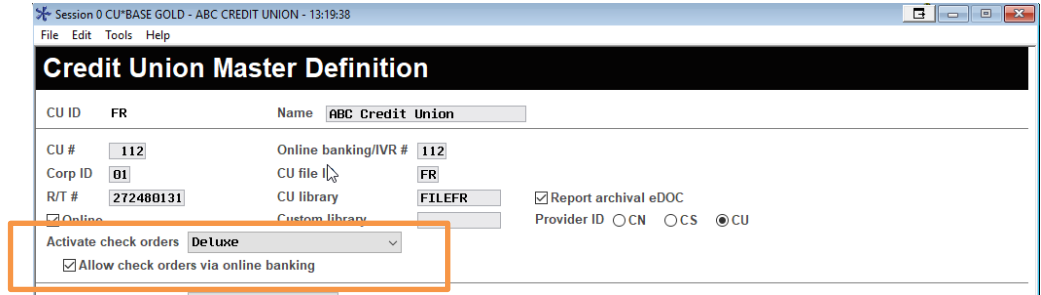
CU*BASE sends the name of one joint owner who is configured to have his or her name printed on credit union correspondence. (See page 8.) If two or more joint owners (or no joint owners) are configured for correspondence, no joint owner information is transmitted.

Changes can be made by the employee or member on the vendor website before placing the order.

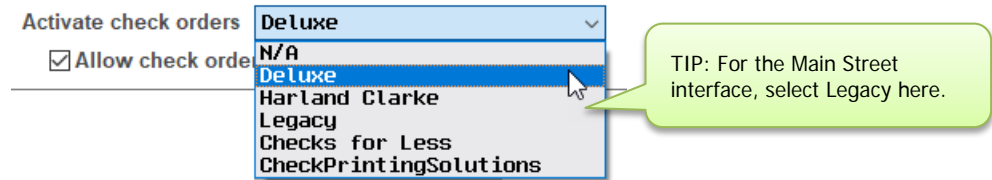
CONFIGURING CU*BASE FOR YOUR CHECK VENDOR

Contact a Client Services Representative for assistance with this step.

In order for CU*BASE to know which check vendor your credit union is using, the vendor must be selected in the CU Master Profile (CUMSTRPF) configuration in Oper 10 > 3.



First select the check ordering vendor.



ACTIVATING CHECK ORDERING VIA ONLINE BANKING

If your vendor is Harland Clarke, Deluxe or Main Street (Legacy), you can check the additional *Allow check orders via online banking* flag if you would also like to allow members to order checks in online banking.



CHECK ORDERING CONFIGURATION

Once the vendor is selected in the CU Master Profile (CUMSTRPF) in the Operations Edition of CU*BASE (see previous page), you can then enter the configuration parameters for the check order interface.

Use **Tool #204: Check Order Interface Configuration** to access this a vendor-specific screen (dependent on the vendor selected in the previous step). Enter the required information to allow CU*BASE to launch the correct vendor site. The information required on this screen will be supplied by your check vendor.

Deluxe

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

Update Check Order Information for Deluxe

OrderPoint

URL
FI ID
TDES key

OrderPro

URL
FI ID
TDES key

← → ↑ || 🖨 🔗 ⓘ ? @ FR (6348) 9/06/19

Harland Clarke

Session 0 CU*BASE GOLD Edition - Update Check Order Information for Clarke

URL
Client ID
User name Password
Action
Routing #
Branch
Consumer
TDES key

← → ↑ || 🖨 🔗 ⓘ ? @ FR (1753)

Main Street (formerly Legacy Services)

Session 0 CU*BASE GOLD - Update Check Order Information for Legacy

URL

Bank #

User ID

HMAC key

Navigation icons: back, forward, home, stop, refresh, print, search, help, @

FR (5077)

Checks for Less

Session 0 CU*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

Update Check Order Information for Checks for Less

URL

Developer ID

User ID

Password

Action

Navigation icons: back, forward, home, stop, refresh, print, search, help, @

FR (6391) 9/06/19

CheckPrintingSolutions (CPS)

Session 0 CU*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

Update Check Order Info for CheckPrintingSolutions

URL

Routing #

User Name

Vector String

TDES key

Navigation icons: back, forward, home, stop, refresh, print, search, help, @

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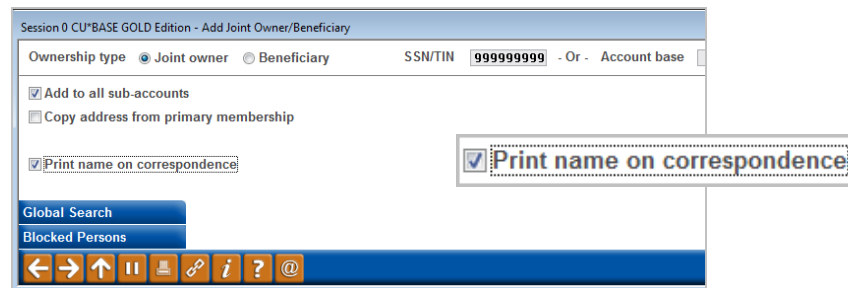
JOINT OWNER CONFIGURED FOR CREDIT UNION CORRESPONDENCE

Main Street, Deluxe, and Checks for Less currently support sending joint information with the order.

Your member may want a second name, for example a spouse's name, to appear on the checks. If one joint owner is configured to appear on credit union correspondence, the name will be transmitted with the order. This name will appear in the vendor website for review. If more than one name is configured or no name is configured for correspondence, no joint owner information is sent with the order.

Joint owners are configured for correspondence by checking *Print name on correspondence* on the screen used to add the joint owner is to the account (shown below).

Your employee or member can add or change joint owners on the vendor website before placing the order.



EMPLOYEES ORDERING CHECKS FROM CU*BASE

ORDERING CHECKS DURING NEW CHECKING ACCOUNT OPENING

*Clients using the version of Harland Clarke available prior to the 18.10 CU*BASE release supports only launching the vendor website. Contact a CSR to update.*

When a member is opening a new checking account, your employee still checks the *Order checks* box on the final screen. When they press Enter, the vendor website is automatically launched and the member's information is securely transmitted, ready for the employee to place the order.

The screenshot shows the 'New Account Creation' window for an individual account. The title bar reads 'Session 0 CU*BASE GOLD Edition - ABC CREDIT UNION'. The window title is 'New Account Creation' and the account type is 'Individual'. The account details are as follows:

Name	JANE A MEMBER		
New account #	4355 111	CHECKING	Share draft check digit 8
Opened	Sep 06, 2019		Corp ID 01

On the right side, there is a list of checkboxes:

- Secondary Names
- Print starter checks
- Order checks
- Order ATM/Debit card
- Account nickname

At the bottom, there are two sections: 'Dividend Payment' and 'Automated Non-Returns'. Under 'Dividend Payment', the dividend pay code is 'Aadback'. Under 'Automated Non-Returns', the maximum negative balance is set to '0.00 (Only if eligible)'.

REORDERING CHECKS

Two methods can be used to reorder checks in CU*BASE:

- **Tool #3: Open/Maintain Memberships/Accts**, then *Update Membership Account Info*, and finally *Order Checks*.
- Additionally, you can assign employees a tool that allows them to order checks directly from the Home Page. Assign **Tool #566: Online Check Ordering** (Shortcut: ORDCK).

The vendor website is automatically launched the information is securely transmitted so the employee can place the order.

MEMBERS ORDERING CHECKS FROM ONLINE BANKING

Activate check ordering in **It's Me 247** so that opening checking accounts online is a completely self-service process. When members open a new checking account, they will see a link to order checks. When they click this link, a browser with vendor website will appear (with the member's information securely transmitted). Then they just need to place the check order. *This feature is supported by Harland Clarke, Main Street and Deluxe.*

With Harland Clarke and Deluxe, online ordering activation also allows members to reorder checks making this a self-service feature as well.

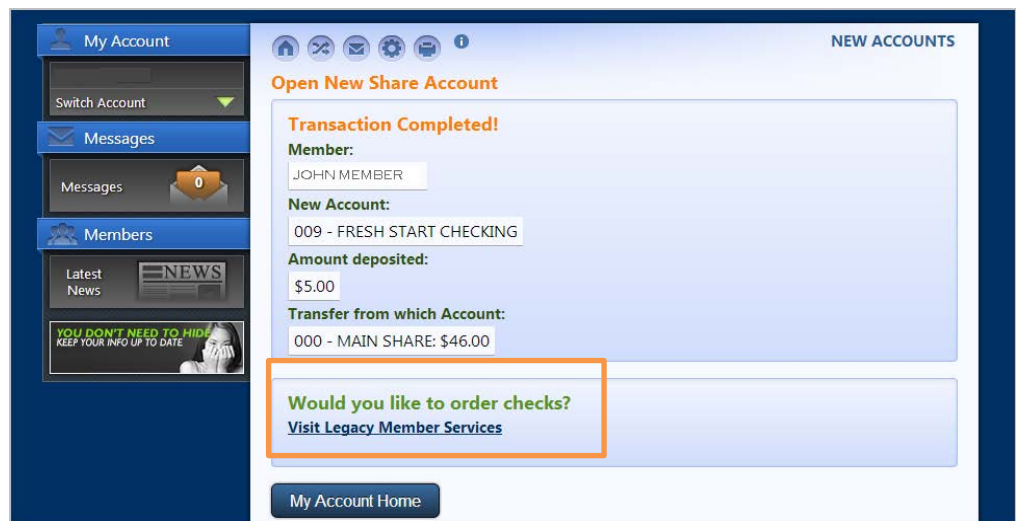
This only appears if online ordering is activated.

ORDERING AT ACCOUNT OPEN

Main Street

When the member completes the opening of the account, they simply click the link provided to order checks.

Opening a Checking Account Confirmation Screen



Deluxe

With Deluxe, the member clicks the link on the account opening confirmation screen and the vendor website is launched, allowing the member to order checks. *This only appears if online ordering is activated.*

Opening a Checking Account Confirmation Screen for Deluxe

NEW ACCOUNTS | I'M A VIP-GOLD MEMBER

Open New Share Account

Transaction Completed!

Member:
JOSH

New Account:
CASH

Joint Owners:
ASHLEY M

Minimum deposit required:
\$ 0.00

Amount to Deposit:
\$ 50.00

Transfer from which Account:
110 - SAFE N EASY CHE: \$156.06

Overdraft protection account 1:
000 - REGULAR SAVINGS

Overdraft protection account 2:
NONE

Overdraft protection account 3:
NONE

Overdraft protection account 4:
NONE

Would you like to order checks?
[Visit Deluxe Member Services](#)

My Account Home

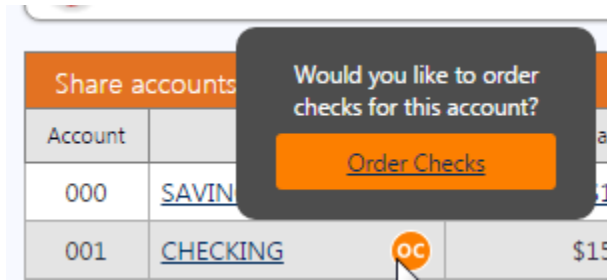
Harland Clarke

Members of credit unions using Harland Clark order their checks for their new accounts in the manner that is described in the Reordering section below.

REORDERING CHECKS

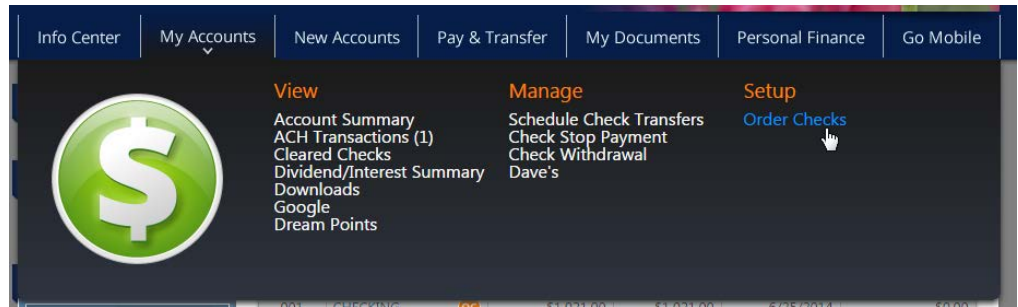
With Harland Clarke and Deluxe members can reorder checks from the Account Summary page and from the My Accounts drop-down menu. *These only appear if online ordering is activated and Harland Clarke or Deluxe is the selected vendor.*

Reordering Checks from Account Summary Page

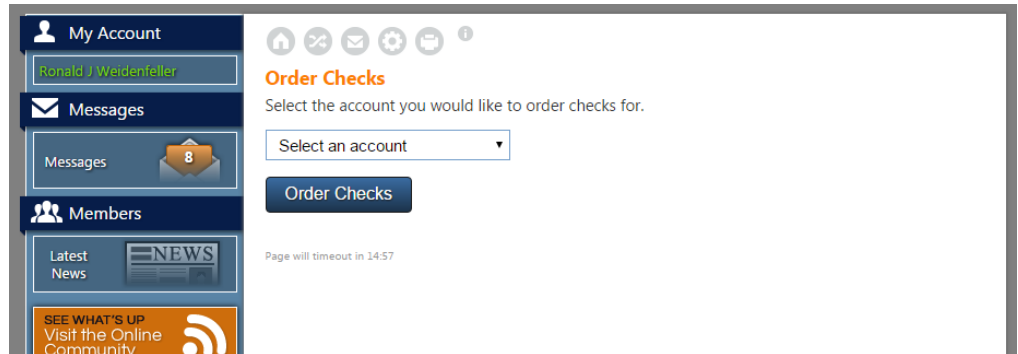


From the Account Summary page, the member clicks the *OC* icon and then *Order Checks*.

Reordering Checks from My Accounts



Reorder Checks Page Accessed When "Order Checks" is Selected



From the *My Accounts* drop-down, the member selects the checking account and clicks the *Order Checks* button.