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# 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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Revision date: October 19, 2018

For an updated copy of this booklet, check out the Reference Materials page of our website:  
<https://www.cuanswers.com/resources/doc/cubase-reference/>  
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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](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
Pass-through credentials are sent when ordering checks (any access point)	● <sup>1</sup>	●	●	●
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)	● <sup>1</sup>	●	●	●
Order checks when opening an account in <b>It's Me 247</b>	● <sup>1</sup>	●	●	
Reorder checks in <b>It's Me 247</b>	● <sup>1</sup>		●	
Available in Mobile Web Banking				

<sup>1</sup>Clients 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.

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## 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.*

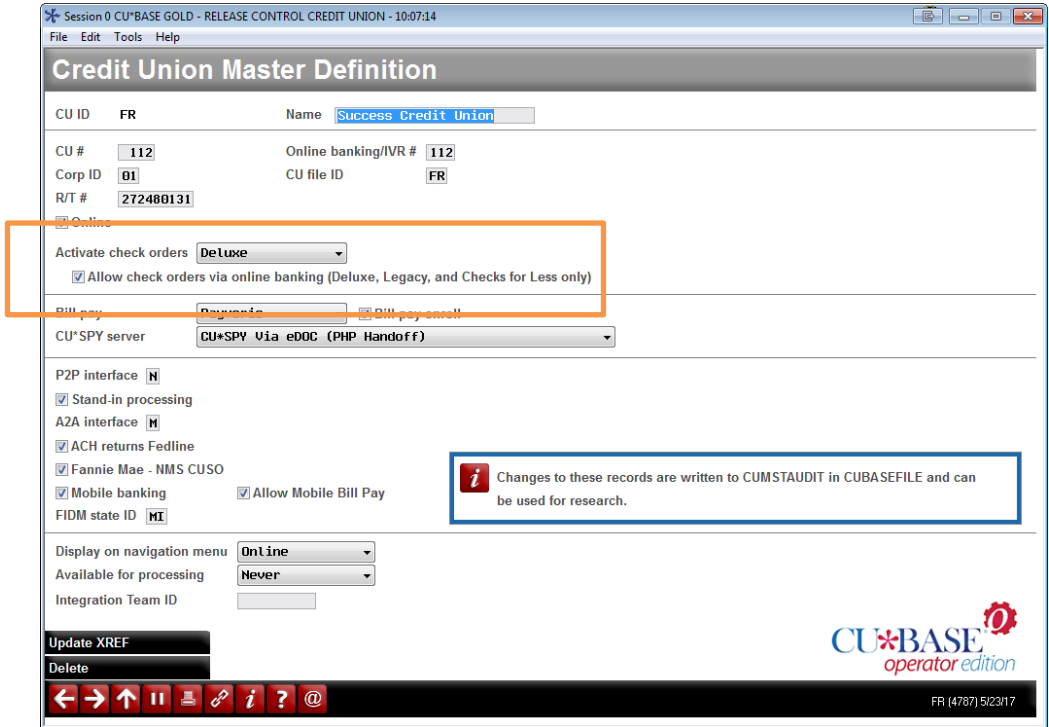
CU\*BASE sends the name of one joint owner who is configured to have his or her name printed on credit union correspondence. (See page 8.) If two or more joint owners (or no joint owners) are configured for correspondence, no joint owner information is transmitted.

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

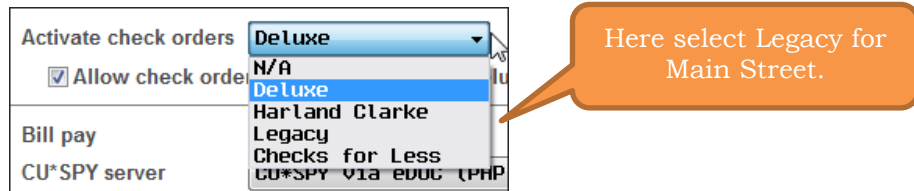
# CONFIGURING CU\*BASE FOR YOUR CHECK VENDOR

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.



## SEPARATE ACTIVATION OF ORDERING CHECKS IN ONLINE BANKING

Once you select your vendor, if your vendor is Harland Clarke, Deluxe or Main Street (Legacy) the additional *Allow check orders via online banking will be below*. If you also would like to allow members to order checks in online banking, check this box.



*Checks for Less appears in this area, but online check ordering is not available at this time for this vendor. This is for future development.*



## Deluxe

Session 1 CU\*BASE GOLD - SUCCESS CREDIT UNION  
File Edit Tools Help

### Update Check Order Information for Deluxe

**OrderPoint**

URL:

FI ID:

TDES key:

**OrderPro**

URL:

FI ID:

TDES key:

Navigation icons: < > ↑ || 🖨️ 🔗 ⓘ ? @

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## Checks for Less

Session 0 CU\*BASE GOLD - RELEASE CONTROL CREDIT UNION  
File Edit Tools Help

### Update Check Order Information for Checks for Less

URL:

Developer ID:

User ID:

Password:

Action:

Navigation icons: < > ↑ || 🖨️ 🔗 ⓘ ? @

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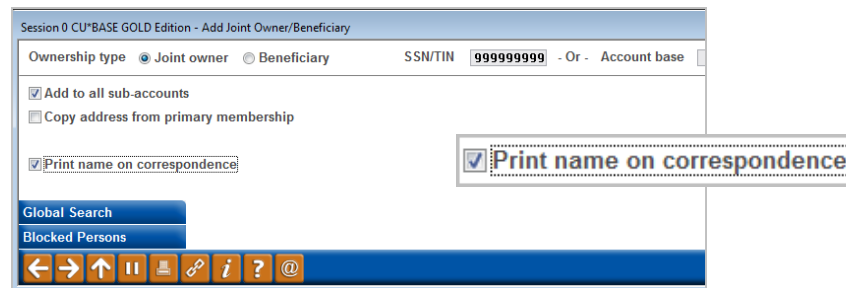
# JOINT OWNER CONFIGURED FOR CREDIT UNION CORRESPONDENCE

*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.





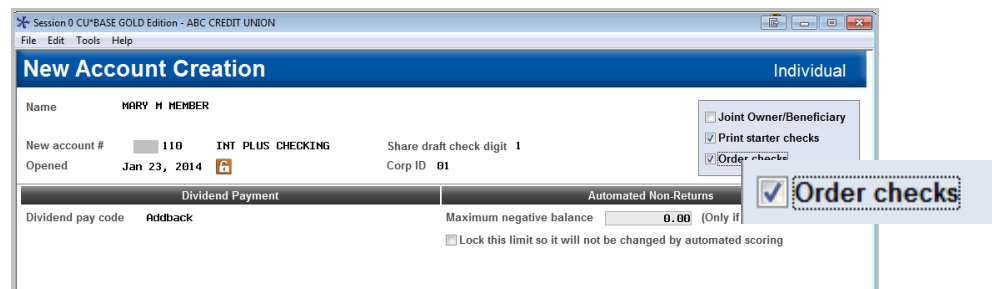
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# EMPLOYEES ORDERING CHECKS FROM CU\*BASE

## 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.



## REORDERING OF CHECKS

*Harland Clarke, Main Street and Checks for Less support this feature.*

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.

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# 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.

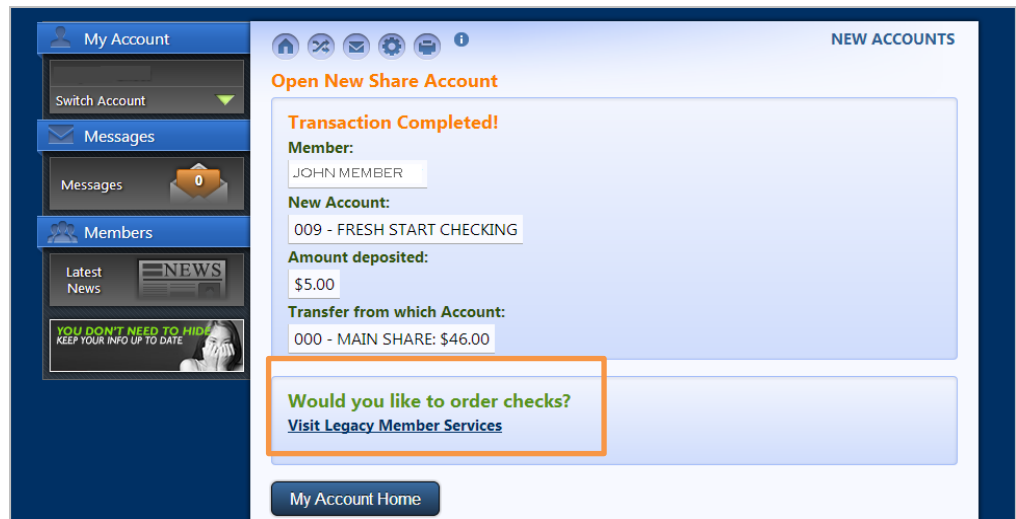
*This only appears if online ordering is activated.*

## 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

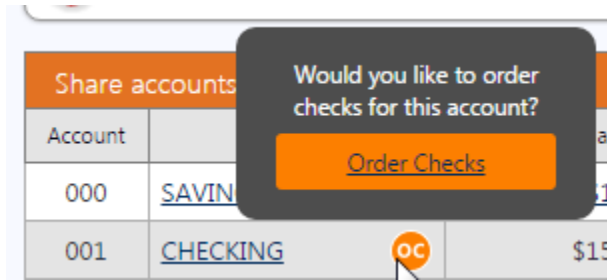
## Harland Clarke

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

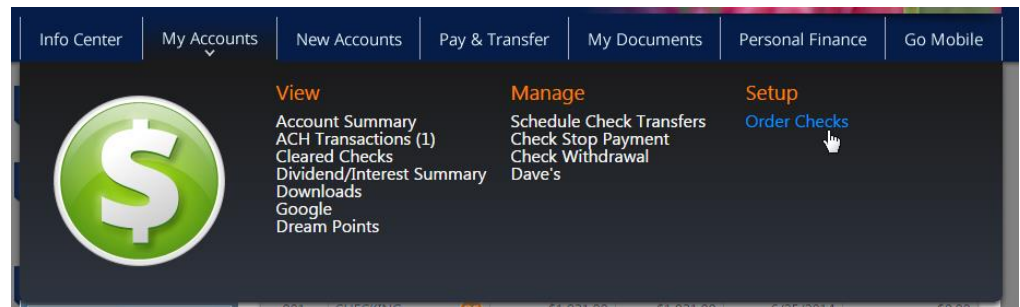
With Harland Clarke and Deluxe members can reorder checks from the Account Summary page and from the My Accounts drop-down menu. *These only appear if online ordering is activated and Harland Clarke or Deluxe is the selected vendor.*

## Reordering Checks from Account Summary Page

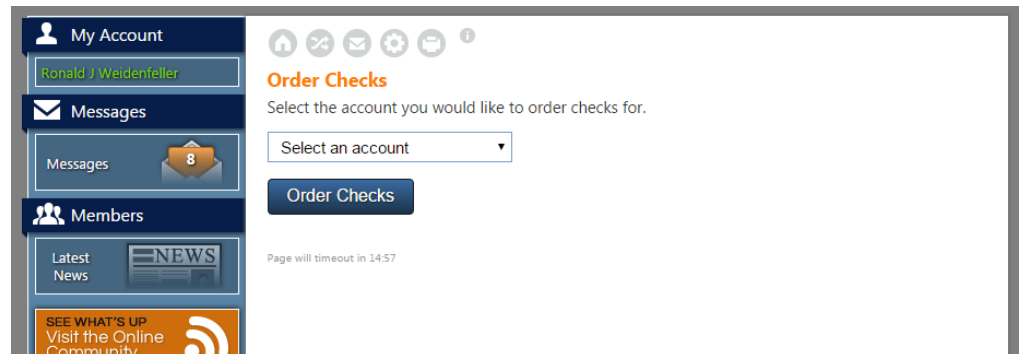


From the Account Summary page, the member clicks the *OC* icon and then *Order Checks*.

## 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.