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**.

CONTENTS

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 <u>"Just turn it on" brochure</u>. Access this brochure directly at <u>http://cuanswers.com/pdf/cms/Just_Turn_it_On.pdf</u>.

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	Bank-A-Count	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]	●	●	●	●
Reorder (order) checks online in **It's Me 247**	●[1]	●	●	●	

> [1]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 9.)
- 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 CPS does not 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. Additionally, re-ordering checks is also entirely self-service.

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

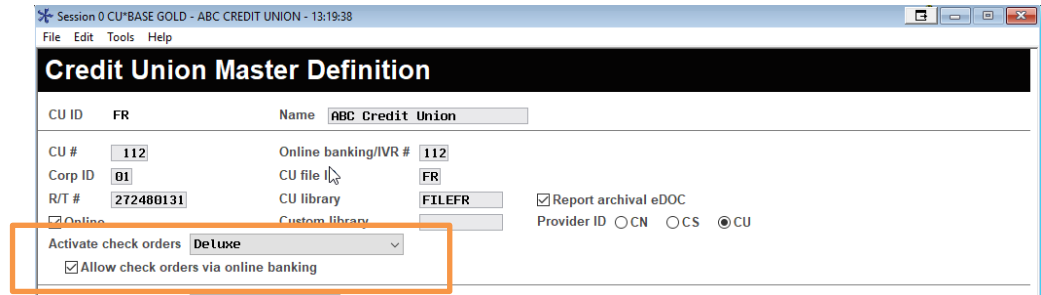*Currently CPS and Bank-A-Count do not support this feature.*

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 9.) If two or more joint owners (or no joint owners) are configured for correspondence, no joint owner information is transmitted.

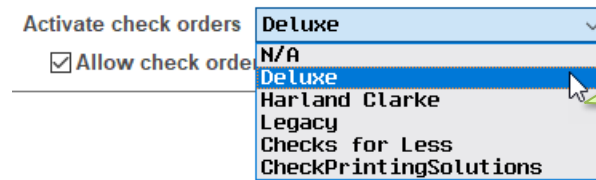Changes can be made by the employee or member on the vendor website before placing the order.

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, Tool #5368.
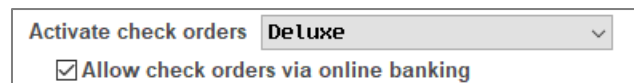

First select the check ordering vendor.

TIP: For the Main Street interface, select Legacy here. For Bank-A-Count, select Checks for Less.

ACTIVATING CHECK ORDERING VIA ONLINE BANKING

Currently CPS does not support this feature.

You can also 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

Harland Clarke

Main Street (formerly Legacy Services)

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

URL

Bank #
User ID
HMAC key

FR (5077)

Bank-A-Count (formerly Checks for Less)

Session 0 CU*BASE GOLD - ABC CREDIT UNION

File   Edit   Tools   Help

Update Check Order Information for Bank-A-Count

URL

Developer ID

User ID

Password

Action

FR (6391) 11/29/22

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

FR (6848) 9/06/19

JOINT OWNER CONFIGURED FOR CREDIT UNION CORRESPONDENCE

Currently CPS and Bank-A-Count do not support this feature.

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.

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 ONLINE

Activate check ordering (and reordering) 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 the check ordering feature in the contextual menu. They can also use this method to recorder checks at a later time.

## GRANTING ACCESS TO CHECK ORDERING IN ONLINE BANKING

For the member to access check ordering online, you must grant them access points in online banking. Below are several examples of options you might configure in ItsMe247 Manager. Other options and wording are available.

For more information contact the Internet Retailer Support Center at irsc@cuanswers.com. To purchase ItsMe247 Manager go to the CU*Answers store at https://store.cuanswers.com/store/irsc/cupublisher-self-service/

Contextual Menu Method for Member to Access Check Ordering

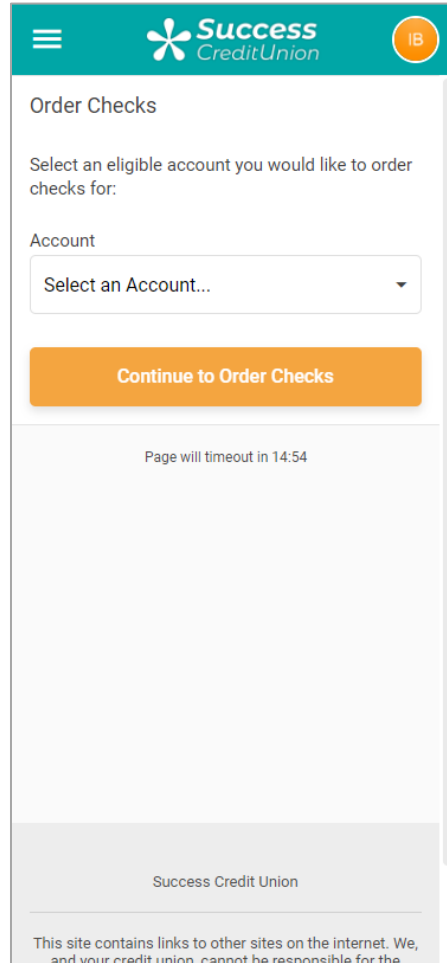This member clicks the contextual drop-down menu next to the account

The member selects *Order Checks*
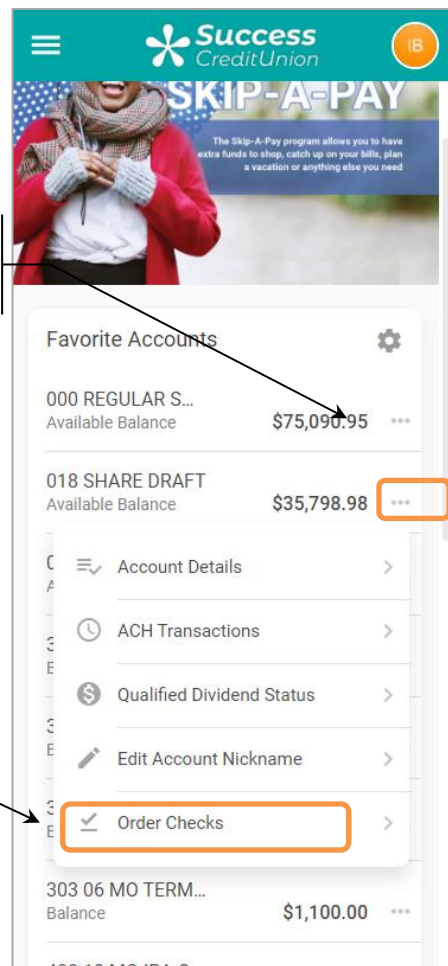
Other ways that your credit union can advertise your self-service check ordering include adding it to the mega menu at the top of the page

Either way, you access the Check Ordering landing page On the landing page, the member selects the account for which they would like to order checks and then clicks *Continue to Order Checks*.

Check Ordering Landing Page

Next the member will be prompted to click *Continue*.

Leaving Online Banking to Vendor Website
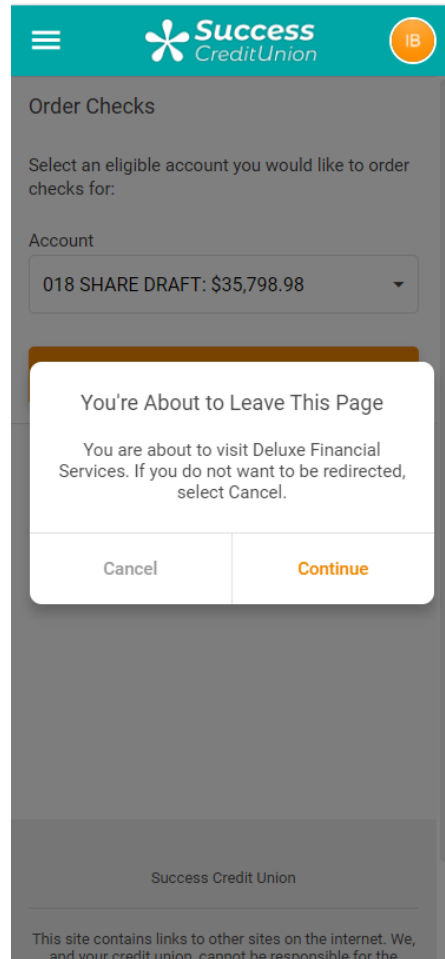
At that point, the member will leave **It's Me 247**. A new browser window will open of the check vendor website allowing them to complete their check order.