



Writing Team: Tricks of the Trade

March Top Picks: Member-Facing Features

Issue 40

Be sure to attend the upcoming Tricks of the Trade webinar on March 17 from 3:30-4:00 PM ET. Watch for an invitation via email. Learn about documentation on member-facing features.

Pick #1: When do my members receive system-generated emails and online banking messages from my credit union?

You send messages to members, but there are times that the system will automatically send emails as well. This includes everything from red-flag warnings, to eStatement notifications, to notifications of changes to the member's online banking password.

Learn more in the [Communication with Members](#) booklet available under "C" on the CU*BASE Reference page.

Pick #2: How can I use the online ballot feature for this year's board of directors election?

The online ballot tool is a great way to increase your membership involvement in your next board of directors election. Reach your members while they are checking their balance in online banking. All you need is a file containing your members' names. You can even schedule the ballot for a specific time.

Learn more about this feature in the [Online Ballots](#) booklet available under "B" on the CU*BASE Reference page.

Pick #3: What can I do with usernames if I don't want to require them?

One of last year's top picks was the required usernames feature. When this feature is activated, all members must create a username to use in place of their account number when they log into online banking. If your credit union has not yet activated the feature, you can still ENCOURAGE, but not require, your members to set up usernames.

Learn more in the [It's Me 247: Strategies for Securing and Controlling Member Access](#) booklet available under "S" on the [It's Me 247](#) Reference page

Pick #4: How can you tell that a member has not logged into online banking for a while?

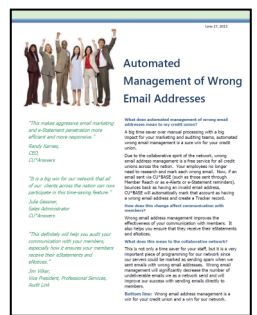
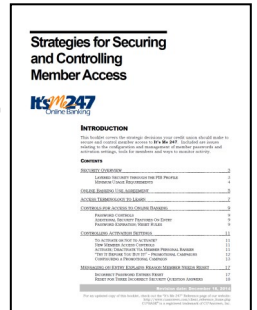
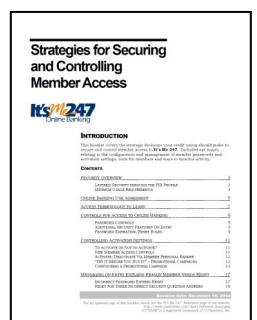
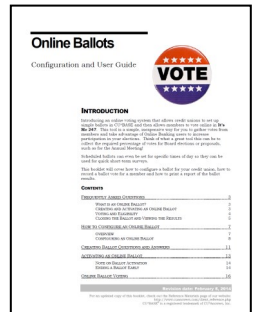
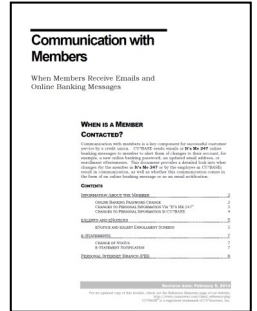
It is important to keep tabs on accounts that are active in online banking, but what if the member has not logged in for some time? In these cases, you may want to restrict access or at least monitor these accounts. Learn about the Audit Report for Inactive Members to keep tabs on these accounts.

Also learn more about this feature in the [It's Me 247: Strategies for Securing and Controlling Member Access](#) booklet available under "S" on the [It's Me 247](#) Reference page

Pick #5: What happens when a member's email address is marked as invalid?

Learn more about the automated process that tracks invalid email addresses, what happens if a member's email address is marked as invalid by the system, and other auditing controls in place.

Learn more in the [Automated Management of Wrong Email Addresses](#) brochure available under "E" on the CU*BASE Reference Page



[Refer to the Tricks of the Trade Newsletter Series page](#) to review previous Tricks of the Trade newsletters!