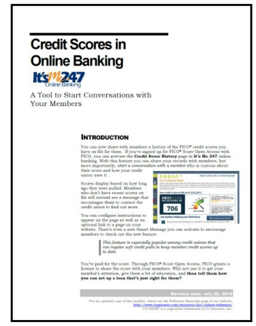
Writing Team: Tricks of the Trade

February Top Picks: Writing Team Top Five for 2015

Issue 51

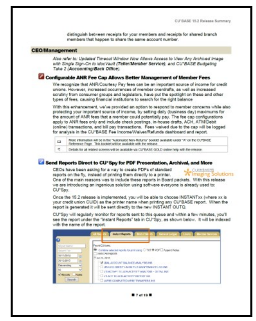
Be sure to attend the upcoming Tricks of the Trade webinar on February 23, 2015 from 3:30-4:00 PM ET. Watch for an invitation via email. Learn about the Writing Team's top five documentation picks for 2015!



Pick #1: Credit unions that are posting members' credit scores in online banking are selling more loans? We want more loans!

You can now share with members a history of the credit scores you have on file for them by activating the Credit Score History page in online banking. This allows you to be transparent about what your records show, but more importantly, to start a conversation with a member who is curious about their score and how your credit union uses it. Even better yet, credit unions that have activated this feature have sold more loans.

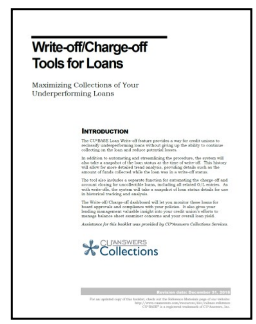
Find the Credit Scores in Online Banking booklet under "C" on the CU*BASE and **It's Me 247** Reference pages.



Pick #2: I can print a report and see it in CU*Spy in a few minutes? Tell me more about this new archiving tool!

You now have a way to create PDFs of standard reports on the fly, instead of just printing them to a printer. Choose the INSTANTxx OUTQ when printing your report, and the report will appear under the new "Instant" tab in CU*Spy in matter of minutes!

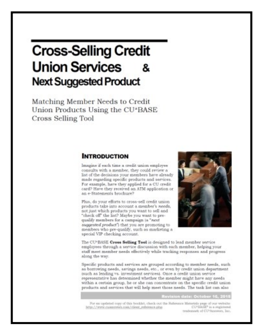
Find more about "Instant Reports" in the 15.2 CU*BASE release summary available on the Release Summaries page.



Pick #3: I hear the CU*BASE software tool used to write off loans captures much more data now. This will definitely help with our auditors!

In addition to streamlining and automating the write-off process, CU*BASE now also takes snapshot of the loan status at time of write-off. The new dashboard also allows for more detailed trend analysis of the data including the funds collected while the loan was at a write-off status.

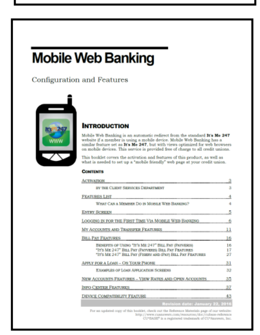
Find out more in the Write-Off/Charge-Off Tools booklet under "W" on the CU*BASE Reference page.



Pick #4: I don't have to create an incentive program for front-line staff from scratch? There are analysis tools too? I love low-cost solutions!

Configure standard incentive amounts for your memo types, need groups, or tasks and then analyze the impact in the Cross Sales Analysis dashboard. Once you activate these incentives have your staff monitor their status in an employee version of the dashboard that shows only one user's activity at a time.

Learn more in the Cross-Selling and Next Suggested Product booklet, located under "C" on the CU*BASE Reference page.



Pick #5: My members can change their online banking password before they leave my lobby? I love this security feature!

Members can log into online banking for the first time using Mobile Web Banking. See pictures in the Mobile Web Banking booklet under "M" on the **It's Me 247** Reference page.

Refer to the Tricks of the Trade Newsletter Series page to review previous Tricks of the Trade newsletters!