



DESIGNING A NEW LOOK FOR XPRESS TELLER

SAMPLE DESIGNS WE'RE CONSIDERING

SEPTEMBER 4, 2020

ALL DESIGNS ARE PROTOTYPES AND SUBJECT TO CHANGE.

INITIAL SEARCH SCREEN

Xpress Teller

FX 1234 00/00/0000 | Drawer Balance: \$000,000.00 | Shelly Teller

Account # 0000000000

Go

Search Memberships ?

LASTNAME

Search

Advanced

Shared Branch Network

Additional Mmbr Services

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These are placeholders for 4 CU-defined/uploaded marketing graphic images (size/shape TBD)

INITIAL SEARCH SCREEN

Xpress Teller

FX 1234 00/00/0000 | Drawer Balance: \$000,000.00 | Shelly Teller

Account #0000000000Go

Search Memberships?LASTNAMESearchAdvanced

This Person		Has This Relationship			With This Mbrshp		Which Is Owned By
Last Name	First Name	MI	SSN/TIN	Relationship	Acct #	Type	Primary Name
MAX15CHARACTERS	MAX15CHARACTERS	A	*****1234	IRA Beneficiary (Roth)	123456	900	1234_1234_1234_1234_1234_12
MEMBER	JOHN	Q	*****0987	IRA Beneficiary (Roth)	1234	900	LASTNAME, FIRSTNAME I
MAX15CHARACTERS	MAX15CHARACTERS	A	*****1234	IRA Beneficiary (Roth)	123456	900	LASTNAME, FIRSTNAME I
MEMBER	JOHN	Q	*****0987	IRA Beneficiary (Roth)	1234	900	LASTNAME, FIRSTNAME I
MAX15CHARACTERS	MAX15CHARACTERS	A	*****1234	IRA Beneficiary (Roth)	123456	900	LASTNAME, FIRSTNAME I
MEMBER	JOHN	Q	*****0987	IRA Beneficiary (Roth)	1234	900	LASTNAME, FIRSTNAME I
MAX15CHARACTERS	MAX15CHARACTERS	A	*****1234	IRA Beneficiary (Roth)	123456	900	LASTNAME, FIRSTNAME I
MEMBER	JOHN	Q	*****0987	IRA Beneficiary (Roth)	1234	900	LASTNAME, FIRSTNAME I
MAX15CHARACTERS	MAX15CHARACTERS	A	*****1234	IRA Beneficiary (Roth)	123456	900	LASTNAME, FIRSTNAME I
MEMBER	JOHN	Q	*****0987	IRA Beneficiary (Roth)	1234	900	LASTNAME, FIRSTNAME I
MAX15CHARACTERS	MAX15CHARACTERS	A	*****1234	IRA Beneficiary (Roth)	123456	900	LASTNAME, FIRSTNAME I
MEMBER	JOHN	Q	*****0987	IRA Beneficiary (Roth)	1234	900	LASTNAME, FIRSTNAME I
MAX15CHARACTERS	MAX15CHARACTERS	A	*****1234	IRA Beneficiary (Roth)	123456	900	LASTNAME, FIRSTNAME I
MEMBER	JOHN	Q	*****0987	IRA Beneficiary (Roth)	1234	900	LASTNAME, FIRSTNAME I
MAX15CHARACTERS	MAX15CHARACTERS	A	*****1234	IRA Beneficiary (Roth)	123456	900	LASTNAME, FIRSTNAME I
MEMBER	JOHN	Q	*****0987	IRA Beneficiary (Roth)	1234	900	LASTNAME, FIRSTNAME I
MAX15CHARACTERS	MAX15CHARACTERS	A	*****1234	IRA Beneficiary (Roth)	123456	900	LASTNAME, FIRSTNAME I
MEMBER	JOHN	Q	*****0987	IRA Beneficiary (Roth)	1234	900	LASTNAME, FIRSTNAME I

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Show Only Accts for the SSN/TIN | Show Only Accts with this SSN/TIN as Primary | Select

Shared Branch Network

Additional Mmbr Services

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CHOOSE AN OWNER TO SERVE

Xpress Teller

FX 1234 00/00/0000 | Drawer Balance: \$000,000.00 | Shelly Teller

Account # 0000000000Go

Search Memberships ? LASTNAMESearchAdvanced

This Person

Has This Relationship

With This Mbrshp

Which Is Owned By

Last Name	First	Relationship	Account	Membership Designation	Owner
MAX15CHARACTERS	MAX1				
MEMBER	JOHN		79031 JOHN Q MEMBER	MI Individual	
MAX15CHARACTERS	MAX1				
MEMBER	JOHN				
MAX15CHARACTERS	MAX1				
MEMBER	JOHN				
MAX15CHARACTERS	MAX1				
MEMBER	JOHN				
MAX15CHARACTERS	MAX1				
MEMBER	JOHN				
MAX15CHARACTERS	MAX1				
MEMBER	JOHN				
MAX15CHARACTERS	MAX1				
MEMBER	JOHN				
MAX15CHARACTERS	MAX1				
MEMBER	JOHN				
MAX15CHARACTERS	MAX1				
MEMBER	JOHN				
MAX15CHARACTERS	MAX1				
MEMBER	JOHN				
MAX15CHARACTERS	MAX1				
MEMBER	JOHN				

Who Are Your Serving?

FX 1234 00/00/0000

Account

Membership Designation

79031 JOHN Q MEMBERMI Individual

Name	Age	Gender
JOHN Q MEMBER	048	M
JANE Q MEMBER	047	F
JULIE D MEMBER	025	F

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Verify ID

Funds In

Account List for Dep/Withdrawal

Serving a Non-Owner

Secondary Names Inq

Label changing to simply "Deposits/Withdrawals"

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Shared Branch Network

Additional Mmbr Services

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Xpress Teller

FX 1234 00/00/0000 | Drawer Balance: \$000,000.00 | Shelly Teller

Acct # 79031 / Verify Identity

Serving: JANE A MEMBER (Joint Owner)

Name

JANE A MEMBER

Age

49

Birthdate

February 10, 1971

Gender

F

Drivers License

T 123123123123

Member Code Word

"Spiderman"


Member address is wrong

Phone is wrong

Additional Error

MICHIGAN MI USA

DRIVER LICENSE



S 100 100 100 100

ISS 04-01-2018

DOB 05-01-1984

EXP 05-01-2022

050184

JUNE MARIE SAMPLE

123 NORTH STATE ST.

LANSING, MI 48918-0000

Sex F

Hgt 504

Eyes BRO

Lic Type 0

End NONE

Restrictions NONE

Enhance

DD 0130002456789

Account Notes

Type	Comment	ID	Date
000	O E C P 09/28/07 IND. SCL ONLY	55	Sep 28, 2007
000	**TAKE FROM OVERDRAFT BEFORE SAVINGS**	99	Sep 09, 2002
000	***-037 Frannie escrow is for taxes only***	32	Oct 12, 2010
000	**TAKE FROM OVERDRAFT BEFORE SAVINGS**	99	May 24, 2013

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View Account Balances

Checks/Money Orders

Funds In

Account List for Dep/Withdrawal

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Red tells you something; click to take action (another screen appears)

On-screen pop of ID image via a API to your eDOC vault

Label changing to simply "Deposits/Withdrawals"

Xpress Teller

FX 1234 00/00/0000 | Drawer Balance: \$000,000.00 | Shelly Teller

Acct # 79031 / Funds In

Serving: JANE A MEMBER (Joint Owner)

Cash In

Cash In Amount\$ 000,000,000.00

Outside Checks

Check Amount	Hold Days ⓘ	Type
\$ 000,000,000.00	00	000
\$ 000,000,000.00	00	000
\$ 000,000,000.00	00	000
\$ 000,000,000.00	00	000
\$ 000,000,000.00	00	000
\$ 000,000,000.00	00	000

3 Additional Check(s) Added

Add Additional

No. of Items8

Total Checks1,882.89

In-house Checks

Chk #	Check Amount	Account #
1234567	\$ 0,000,000,000.00	123456789 123
1234567	\$ 0,000,000,000.00	123456789 123

Add Additional

No. of Items2

Total Checks1,882.89

Misc. Advances

Post Code	Amount	Member Receipt Desc
000 ⓘ	\$ 000,000,000.00	1234_1234_1234_1234_
000 ⓘ	\$ 000,000,000.00	1234_1234_1234_1234_

1 Additional Misc. Advance(s) Added

Add Additional

Total Advances0.00

TOTALS

Total Funds In500.00

Check Cash Fee- \$ 0.00

Transaction Net Total0.00

Post Cash Back

Account List for Dep/Withdrawal

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Add 6 here, or use the "Add Additional" button to pop a window for up to 20 outside checks

Add 2 here, or use button for up to 10 in-house (counter-kill) checks

Add 2 here, or use button for up to 5 advances (3rd-party credit cards, etc.)

Label changing to simply "Deposits/Withdrawals"

Xpress Teller

FX 1234 00/00/0000 | Drawer Balance: \$000,000.00 | Shelly Teller

Acct # 79031 / JOHN Q MEMBER ⓘ

Serving: JANE A MEMBER (Joint Owner)

Loan Payoff or Current Balance	Loan Payment or Net Available	Description	Acct Type	Deposit Amount	IRA HSA	Withdrawal Amount	IRA HSA	Principal-Only Pmt?
000,000,000.00	000,000,000.00	ACCTDESCRIPTION ⓘ	000	\$ 000,000,000.00 ⓘ	0 ⓘ	\$ 000,000,000.00 ⓘ	0 ⓘ	<input type="checkbox"/>
5,884.29	5,874.29	MONEY MARKET IN ⓘ	000	\$ 000,000,000.00		\$ 000,000,000.00		
23,058.84		MONEY MARKET IN ⓘ	019	\$ 000,000,000.00		\$ 000,000,000.00		
	100.66	VACATION SAVING ⓘ	050	\$ 000,000,000.00		\$ 000,000,000.00		
297.20-	297.20-	CHECKING ⓘ	112 ⓘ	\$ 000,000,000.00				
1,1078.43	28.17	CERTIFICATE	300			\$ 000,000,000.00		
511.26	0.00	CERTIFICATE	307			\$ 000,000,000.00		
29,452.24	628.04	USED VEHICLES	611					<input type="checkbox"/>
28,115.36	320.15	REC VEHICLES ⓘ	615					<input type="checkbox"/>
1,362.62	25.00	*****3904 ⓘ	900					<input type="checkbox"/>
000,000,000.00	000,000,000.00	ACCTDESCRIPTION ⓘ	000	\$ 000,000,000.00 ⓘ	0 ⓘ	\$ 000,000,000.00 ⓘ	0 ⓘ	<input type="checkbox"/>
000,000,000.00	000,000,000.00	ACCTDESCRIPTION ⓘ	000	\$ 000,000,000.00 ⓘ	0 ⓘ	\$ 000,000,000.00 ⓘ	0 ⓘ	<input type="checkbox"/>

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TOTALS

Refresh

Total Funds In	50.00
Check Cash Fee	\$ 0.00
Misc. Receipt Total	0.00
Transaction Net Total	0.00
Cash back	0.00

Misc. Receipt

Post

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Shows last 10 transactions posted to this sub-account

LAST 10 TRANSACTIONS INQUIRY

Xpress Teller

FX 1234 00/00/0000 | Drawer Balance: \$000,000.00 | Shelly Teller

Acct # 79031 / JOHN Q MEMBER

Serving: JANE A MEMBER (Joint Owner)

Loan Payoff or Current Balance	Loan Payment or Net A	Description	Acct	Deposit	IRA	Withdrawal	IRA HSA	Principal-Only Pmt?
000,000,000.00	000,000,000.00						<input type="checkbox"/>	<input type="checkbox"/>
5,884.29							<input type="checkbox"/>	<input type="checkbox"/>
297.2							<input type="checkbox"/>	<input type="checkbox"/>
1,1078.43							<input type="checkbox"/>	<input type="checkbox"/>
511.26							<input type="checkbox"/>	<input type="checkbox"/>
29,452.24							<input type="checkbox"/>	<input type="checkbox"/>
28,115.36							<input type="checkbox"/>	<input type="checkbox"/>
1,362.62							<input type="checkbox"/>	<input type="checkbox"/>
000,000,000.00	000,000,000.00						<input type="checkbox"/>	<input type="checkbox"/>
000,000,000.00	000,000,000.00						<input type="checkbox"/>	<input type="checkbox"/>

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TOTALS

Total Funds In

Check Cash Fee

Misc. Receipt Total

Transaction Net Total

Cash back

Last 10 Transactions

FX 1234 00/00/0000

Acct # 79031 / JOHN Q MEMBER

Serving: JANE A MEMBER

Account Type
123 ACCTDESCxxxxxxxxxx

Current Balance
000,000,000.00

Available Balance
000,000,000.00

Date	Trans. Amount	Description	Check Number	Transfer Acct
00/00/0000	000,000,000.00 -	00000000000000000000	1234567890123	1234567890123
144	250.00 -	CHECKING CASH W/D	1234567890123	1234567890123
178	75.00 -	CHECK 00003393701	1234567890123	1234567890123
133	75.00 -	CHECK 00003377016	1234567890123	1234567890123
128	1,447.98 -	ACH/KROGER CR CD PYM	1234567890123	1234567890123
030	200.00 -	CHECKING CASH W/D	1234567890123	1234567890123
122	2.00 -	ID Protection	1234567890123	1234567890123
231	1,418.00	ACH/SSA TREAS 310	1234567890123	1234567890123
169	872.04	ACH/USPBGCSBC HOLDT	1234567890123	1234567890123
141	75.00 -	CHECK 00003364958	1234567890123	1234567890123

Toggle Description

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Shows last 10 transactions posted to this sub-account

Xpress Teller

FX 1234 00/00/0000 | Drawer Balance: \$000,000.00 | Shelly Teller

Acct # 79031 / JOHN Q MEMBER ⓘ

Serving: JANE A MEMBER (Joint Owner)

Loan Payoff or Current Balance	Loan Payment or Net Available	Description	Acct Type	Deposit Amount	IRA HSA	Withdrawal Amount	IRA HSA	Principal-Only Pmt?
000,000,000.00	000,000,000.00	ACCTDESCRIPTION ⓘ	000	\$ 000,000,000.00 ⓘ	0 ⓘ	\$ 000,000,000.00 ⓘ	0 ⓘ	<input type="checkbox"/>
5,884.29	5,874.29	MOM'S PIN MONEY ⓘ	000	\$ 000,000,000.00		\$ 000,000,000.00		
23,058.84	23,058.84	MONEY MARKET IN ⓘ	019	\$ 000,000,000.00		\$ 000,000,000.00		
100.66	100.66	VACATION SAVING ⓘ	050	\$ 000,000,000.00		\$ 000,000,000.00		
297.20-	297.20-	CHECKING ⓘ	112 ⓘ	\$ 000,000,000.00				
1,1078.43	28.17	CERTIFICATE	300			\$ 000,000,000.00		
511.26	0.00	CERTIFICATE	307					
29,452.24	628.04	USED VEHICLES	611					<input type="checkbox"/>
28,115.36	320.15	REC VEHICLES ⓘ	615					<input type="checkbox"/>
1,362.62	25.00	*****3904 ⓘ	900					<input type="checkbox"/>
000,000,000.00	000,000,000.00	ACCTDESCRIPTION ⓘ	000	\$ 000,000,000.00 ⓘ	0 ⓘ	\$ 000,000,000.00 ⓘ	0 ⓘ	<input type="checkbox"/>
000,000,000.00	000,000,000.00	ACCTDESCRIPTION ⓘ	000	\$ 000,000,000.00 ⓘ	0 ⓘ	\$ 000,000,000.00 ⓘ	0 ⓘ	<input type="checkbox"/>

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TOTALS

Refresh

Total Funds In	50.00
Check Cash Fee	\$ 0.00
Misc. Receipt Total	0.00
Transaction Net Total	0.00
Cash back	0.00

Misc. Receipt

Post

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Tally is refreshed each time Enter or → is used

Lookup for valid posting codes

On delinquent loans only; navigates to delinquency info

Check to apply loan payment to principal only

Jumps out to a screen to designate some or all of cash-back total to misc. purchases or fees (comes back here to finish posting)

BACK TO THE INITIAL SEARCH

Xpress Teller

FX 1234 00/00/0000 | Drawer Balance: \$000,000.00 | Shelly Teller

Account # 0000000000

Go

Search Memberships ? LASTNAME

Search

Advanced

Transaction successful! Return to this account?

Return to Last Account

Dismiss

Shared Branch Network

Additional Mmbr Services

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One-click path back into the same person served, to post more transactions, check account balances, etc.

RETURNING TO A PREVIOUSLY-SERVED MEMBER

Xpress Teller

FX 1234 00/00/0000 | Drawer Balance: \$000,000.00 | Shelly Teller

Acct # 79031 / Verify Identity

Serving: JANE A MEMBER (Joint Owner)

Name

JANE A MEMBER

Age

49

Birthdate

February 10, 1971

Gender

F

Drivers License

T 123123123123

Member Code Word

"Spiderman"


Member address is wrong

Phone is wrong

Additional Error

MICHIGAN MI USA

DRIVER LICENSE



S 100 100 100 100

DOB 05-01-1984

ISS 04-01-2018

EXP 05-01-2022

050184

JUNE MARIE SAMPLE

123 NORTH STATE ST.

LANSING, MI 48918-0000

Sex F

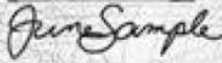
Hgt 504

Eyes BRO

Lic Type 0

End NONE

Restrictions NONE



DD 0130002456789

Rev 01-01-2018

Enhance

Account Notes

Type	Comment	ID	Date
000	O E C P 09/28/07 IND. SCL ONLY	55	Sep 28, 2007
000	**TAKE FROM OVERDRAFT BEFORE SAVINGS**	99	Sep 09, 2002
000	***-037 Frannie escrow is for taxes only***	32	Oct 12, 2010
000	**TAKE FROM OVERDRAFT BEFORE SAVINGS**	99	May 24, 2013

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View Account Balances

Checks/Money Orders

Funds In

Account List for Dep/Withdrawal

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Easy access to the member's balances after posting

VIEWING ACCOUNT BALANCES

Xpress Teller

FX 1234 00/00/0000

Drawer Balance: \$000,000.00

Shelly Teller

Acct # 79031 / Verify Identity

Serving: JANE A MEMBER (Joint Owner)

Name

JANE A MEMBER

Birthdate

February 10, 1971

Drivers License

T 123123123123

Member address is wrong

Additional Error

Account Notes

Type	Comment
000	O E C P 09
000	**TAKE FRO
000	***-037 Fr
000	**TAKE FRO

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View Account Balances

FX 1234 00/00/0000

Acct # 79031 / JOHN Q MEMBER

Serving: JANE A MEMBER

Type	Description	Current Balance	Available Balance	Frozen
000	12345678901234567890	000,000,000.00 -	000,000,000.00 -	123456
000	REGULAR SAVINGS	33,158.10	33,158.10	
178	REGULAR CHECKING	888.45	888.45	
133	SPECIAL ACCOUNT	3432.08	0.00	3 ALL
128	NEW VEHICLES	0.00	646.46	
030	FANNIE MORTGAGE	38,033.24	652.41	
122	MC CLASSIC	0.00	0.00	

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New Account Balances

Checks/Money Orders

Funds In

nt List for Dep/Withdrawal

Easy access to the member's balances after posting

PRINTING MEMBER CHECKS/MONEY ORDERS

Xpress Teller

FX 1234 00/00/0000 | Drawer Balance: \$000,000.00 | Shelly Teller

Acct # 79031 / Verify Identity

Serving: JANE A MEMBER (Joint Owner)

Name

JANE A MEMBER

Age

49

Birthdate

February 10, 1971

Gender

F

Drivers License

T 123123123123

Member Code Word

"Spiderman"


Member address is wrong

Phone is wrong

Additional Error

MICHIGAN MI USA

DRIVER LICENSE



S 100 100 100 100

DOB 05-01-1984

ISS 04-01-2018

EXP 05-01-2022

050184

JUNE MARIE SAMPLE

123 NORTH STATE ST.

LANSING, MI 48918-0000

Sex F

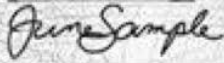
Hgt 504

Eyes BRO

Lic Type 0

End NONE

Restrictions NONE



DD 0130002456789

Enhance

Account Notes

Type	Comment	ID	Date
000	O E C P 09/28/07 IND. SCL ONLY	55	Sep 28, 2007
000	**TAKE FROM OVERDRAFT BEFORE SAVINGS**	99	Sep 09, 2002
000	***-037 Frannie escrow is for taxes only***	32	Oct 12, 2010
000	**TAKE FROM OVERDRAFT BEFORE SAVINGS**	99	May 24, 2013

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View Account Balances

Checks/Money Orders

Funds In

Account List for Dep/Withdrawal

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A brand-new way to print checks and money orders

PRINTING MEMBER CHECKS/MONEY ORDERS

Xpress Teller

FX 1234 00/00/0000 | Drawer Balance: \$000,000.00 | Shelly Teller

Acct # 79031 / Checks/Money Orders

Serving: JANE A MEMBER (Joint Owner)

Account000 ACCOUNTTITLE123 ▾

New Check

New Money Order

Choose an account where the funds will be withdrawn

Choose check or money order

Checks Generated So Far	
# of Checks	0
Total funds disbursed	0.00
Total fees charged	0.00

Money Orders Generated So Far	
# of money orders	0
Total funds disbursed	0.00
Total fees charged	0.00

Refresh

Print & Add Another

Print & Complete

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PRINTING MEMBER CHECKS/MONEY ORDERS

Xpress Teller

FX 1234 00/00/0000 | Drawer Balance: \$000,000.00 | Shelly Teller

Acct # 79031 / Checks/Money Orders

Serving: JANE A MEMBER (Joint Owner)

Account000 ACCOUNTTITLE123

New Check

New Money Order

Withdrawal Account000 ACCOUNTTITLE123

Current Balance\$123,456,789.01

Available Balance\$123,456,789.01

New Check

Check Amount\$ 0,000,000,000.00

Pay to the Order Of1234567890123456789012345678901234567890

Address Line 11234567890123456789012345

Address Line 21234567890123456789012345

City/State/ZIP12345678901234567890XX123451234

Remitter123456789012345678901234567890

Fee Amount\$ 000.00

Checks Generated So Far

# of Checks	1234
Total funds disbursed	1,234,567,899.12
Total fees charged	1,234.56

Money Orders Generated So Far

# of money orders	1234
Total funds disbursed	1,234,567,899.12
Total fees charged	1,234.56

Refresh

Print & Add Another

Print & Complete

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Fill in the pay-to info

Can generate multiple items, one after the other

PRINTING MEMBER CHECKS/MONEY ORDERS

Xpress Teller

FX 1234 00/00/0000 | Drawer Balance: \$000,000.00 | Shelly Teller

Acct # 79031 / Checks/Money Orders

Serving: JANE A MEMBER (Joint Owner)

Account000 ACCOUNTTITLE123

New CheckNew Money Order

Withdrawal Account000 ACCOUNTTITLE123

Current Balance\$123,456,789.01

Available Balance\$123,456,789.01

Updated tally of items already printed

Checks Generated So Far

of Checks1

Total funds disbursed5,000.00

Total fees charged5.00-

Money Orders Generated So Far

of money orders

Total funds disbursed

Total fees charged0-

Refresh

Print & Add Another

Print & Complete

Button label will change to "Done" to exit back to the Verify ID screen

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