

XpressTeller

Drawer Balance:

\$5,649.25

PROGRAMMER/XPRESS TELLER TEST

Account #

Go

Search membership ?

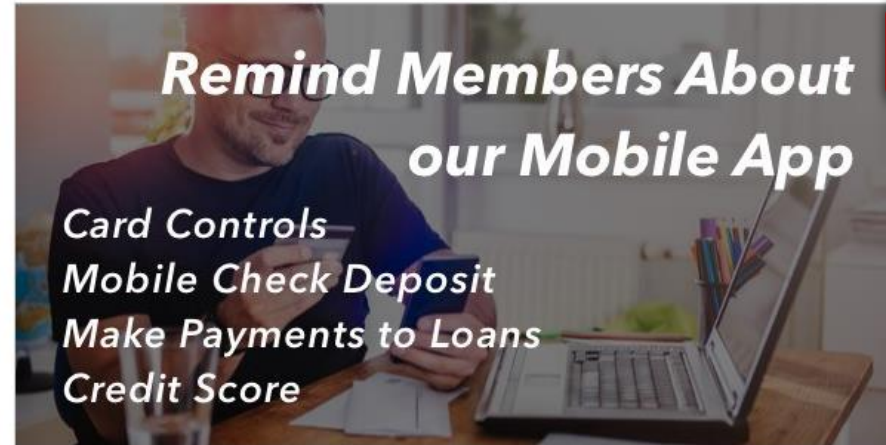
Search

Advanced



CREDIT & ATM SUPPORT

Card Activation: 866-493-9499
General Support: 800-994-6222
Lost Or Stolen: 549-994-4871



Integrated drawer activation

Your optional marketing images here

HELPING OUR COMMUNITIES

\$557,959
Interest Dividends Earned in 2020 by Members with Benefits Checking

\$449,881
Donated In Support of 422 Community Organizations in 2020

\$366,949
Fees Waived Through COVID-19 Success Financial Relief Package

Success Credit Union ...LET MEMBERS KNOW

REFINANCE SPECIAL

\$300 Cash Back & 90 Days No Payments when you refinance an auto loan from another financial institution

Shared Branch Network

Additional Member Services ▾

Return to the account just served?

Return to Last Account

Account #

Go

Search membership ?

SAND MEMBER

Search

Advanced



This Person	Has This Relationship		With This Mbrsh		by
Name	SSN/TIN	Relationship	Account #	T	Account
	****4013	Co-borrower (Co-Applicant)	15062	000	SANDRA L MEMBER
SANDRA L MEMBER	****9295	Member (Individual)	15062	000	
SANDY A MEMBER	****4502	Member (Individual)	850	000	
TINA M SOMEBODY	****3288	Joint (Individual)	15062	000	SANDRA L MEMBER

New search engine



Shared Branch Network

Additional Member Services

Return to the account just served?

Return to Last Account

Account #

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Search membership ? SAND MEMBER

Search

Advanced

This Person

Name

SANDRA L MEMBER

SANDY A MEMBER

TINA M SOMEBODY

Which Is Owned By

Primary Name on Account

SANDRA L MEMBER

SANDRA L MEMBER

Session 1 CU*BASE GOLD - Advanced Search

Advanced Search

Search for

Search Locations ... Check All / Uncheck All

<input checked="" type="checkbox"/> Account #	<input checked="" type="checkbox"/> ATM/Debit/Credit card #	<input checked="" type="checkbox"/> DBA name
<input checked="" type="checkbox"/> Driver's license	<input checked="" type="checkbox"/> Email address	<input checked="" type="checkbox"/> Employee #
<input checked="" type="checkbox"/> First name	<input checked="" type="checkbox"/> Last name	<input checked="" type="checkbox"/> OLB username
<input checked="" type="checkbox"/> OTB account #	<input checked="" type="checkbox"/> Phone #	<input checked="" type="checkbox"/> Reference
<input checked="" type="checkbox"/> SSN/TIN		

Navigation icons: back, forward, up, print, link, info, help, search, @

SH (7098) 11/10/20

You control what is searched by default

Teller can adjust for this session



Shared Branch Network

Additional Member Services

Return to the account just served?

Account #

Go

Search membership ?

SAND MEMBER

Search

Advanced



This Person	Has This Relationship		With This Mbrshp		Which Is Owned By
Name	SSN/TIN	Relationship	Account #	Type	Primary Name on Account
SANDRA L MEMBER	****4013	Co-borrower (Co-Applicant)	15062	000	SANDRA L MEMBER
SANDY A MEMBER	****9295	Member (Individual)	15062	000	
TINA M SOMEBODY					

Session 1 CU*BASE GOLD - Verify Member Code Word

Verify Member Code Word

Account # 15062 SANDRA L MEMBER

Code word for this account (not case-sensitive)

Optional code word confirmation

SH (7099)L 11/10/20



Shared Branch Network

Additional Member Services

Return to the account just served?

Return to Last Account

Account #

This Person

Name

SANDRA L MEMBER

SANDY A MEMBER

TINA M SOMEBODY

Session 1 CU*BASE GOLD - Who are you serving today?

Who are You Serving?

Account

15062

SANDRA L MEMBER

Membership designation

MI Individual

Name	Age	Gender
SANDRA L MEMBER	73	F
TINA M SOMEBODY	54	F
GARY S TESTPERSON	78	M

Verify ID

Funds in

Dep/WD

Serving a Non-Owner

Secondary Names Inq

Shared Branch Network

Additional Member Services

Return to the account just served?

Return to Last Account

You can hide the Funds In and Dep/WD options to force ID verification

XpressTeller

Acct # 15062 / Verify Identity

Serving: SANDRA L MEMBER

Name

SANDRA L MEMBER

Birthdate

Apr 02, 1947

Gender

F

Age

73

Code word

"SECRET"

Verify ID and take care of special warnings



Enlarge

Email address is wrong Member has delinquent loan

Optional maintenance for wrong address, phone, or email

Account Notes			
Type	Comment	ID	Date
852	DELINQUENT LOAN	*1	Apr 08, 2020

- View Account Balances
- Checks/Money Orders
- Funds In
- Deposits/Withdrawals

XpressTeller

Acct # 15062 / Funds In

Serving: SANDRA L MEMBER

Cash In

Cash In Amount

Outside Checks

Check Amount	Hold Days i	Type
<input type="text" value="1,500.00"/>	<input type="text" value="2"/>	<input type="text" value="000"/>
<input type="text" value="0.00"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="0.00"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="0.00"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="0.00"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="0.00"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="0.00"/>	<input type="text"/>	<input type="text"/>

[Add Additional](#)

Additional Checks

of items

Total Checks

In-house Checks

Check #	Check Amount	Account #
<input type="text"/>	<input type="text" value="0.00"/>	<input type="text"/>
<input type="text"/>	<input type="text" value="0.00"/>	<input type="text"/>

[Add Additional](#)

of Items

Total Checks

Misc. Advances

Amount	Post Code	Member Receipt Desc
<input type="text" value="150.00"/>	<input type="text" value="ADV"/>	<input type="text" value="VISA CASH ADVANCE"/>
<input type="text" value="0.00"/>	<input type="text"/>	<input type="text"/>

[Add Additional](#)

Additional Misc Advances

Total Advances

Max of 20 outside checks

Max of 5 in-house checks

Max of 10 misc. advances

TOTALS

Total Funds In	<input type="text" value="1,750.00"/>
Check Cash Fee	<input type="text" value="0.00"/>
Transaction Net Total	<input type="text" value="1,750.00"/>

[Post Cash Back](#)

[Deposits/Withdrawals](#)

XpressTeller

Acct # 15062 / SANDRA L MEMBER

Loan Payoff or Current Balance	Loan Payment or Net Available	Description		Account Type	Deposit Amount	IRA HSA	Withdrawal Amount	IRA HSA	Principal-Only Pmt?
4,855.92	1,350.92	REGULAR SHARE		000	0.00		0.00		
6,963.10	6,963.10	TRADITIONAL IRA		125	0.00	<input type="checkbox"/>	0.00		
1,021.64	400.00	VISA PLATINUM		852	0.00		0.00		<input type="checkbox"/>

TOTALS

Total Funds In	1,750.00
Check Cash Fee	0.00
Misc. Receipt Total	.00
Transaction Net Total	.00
Cash Back	1,750.00






Misc. Receipt

Post

XpressTeller

Acct # 15062 / SANDRA L MEMBER

New feature: see last 10 transactions

Loan Payoff or Current Balance	Loan Payment or Net Available	Description		Account Type	Deposit Amount	IRA HSA	Withdrawal Amount	IRA HSA	Principal-Only Pmt?
4,855.92	1,350.92	REGULAR SHARE		000	0.00		0.00		
6,963.10	6,963.10	TRADITIONAL IRA		125	0.00	<input type="checkbox"/> 	0.00		
1,021.64	400.00	VISA PLATINUM		852 	0.00		0.00		<input type="checkbox"/>

TOTALS	
Total Funds In	1,750.00
Check Cash Fee	0.00
Misc. Receipt Total	.00
Transaction Net Total	.00
Cash Back	1,750.00

Misc. Receipt

Post

XpressTeller

Acct # 15062 / SANDRA L

Loan Payoff or Current Balance

4,855.92

6,963.10

1,021.64

Loan Pay or Net Av

IRA HSA

Principal-Only Pmt?

TOTALS

Total Funds In

Check Cash Fee

Misc. Receipt Total

Transaction Net Total

Cash Back

Session 1 CU*BASE GOLD - Last 10 Transactions

New feature: see last 10 transactions

Last 10 Transactions

Acct # 15062

Account Type

000 REGULAR SHARE

Current Balance

4,855.92

Available Balance

1,350.92

Date	Trans. Amount	Description	Check #	Transfer Acct
11/06/20	850.00	REGULAR SH DEPOSIT		
10/31/20	.03	SHARE DIVIDEND		
10/28/20	2000.00	REGULAR SH DEPOSIT		
10/28/20	2000.00	REGULAR SH DEPOSIT		
1/31/20	.04	SHARE DIVIDEND		
1/21/20	735.00-	PHONE TRANSFER		15055-050
12/31/19	.06	SHARE DIVIDEND		
11/30/19	.06	SHARE DIVIDEND		
10/31/19	.06	SHARE DIVIDEND		

Toggle Description

Misc. Receipt

Post



SH (7094)L 11/10/20



0273-WARNING: Member has either a negative or delinquent account.

SH (7081)L 11/10/20

Account #

Go

Search membership ?

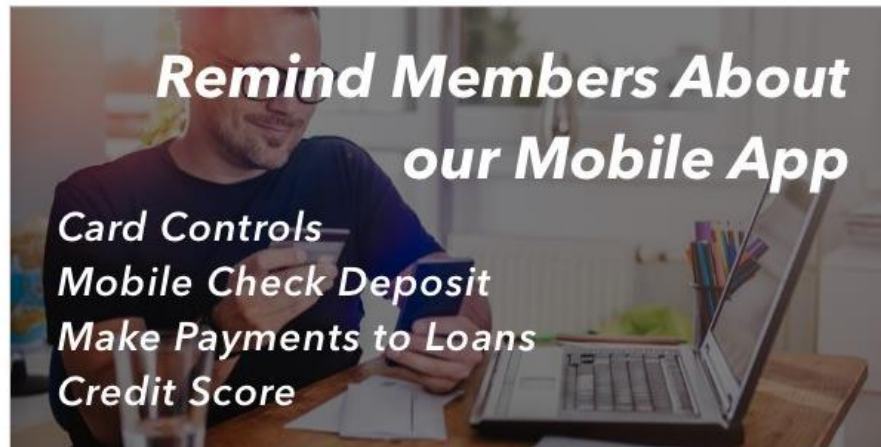
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After posting, jump back into the last person served, directly to the Verify ID screen

Shared Branch Network

Additional Member Services ▾

Return to the account just served?

Return to Last Account

XpressTeller

Acct # 15062 / Verify Identity

Serving: SANDRA L MEMBER

Name

SANDRA L MEMBER

Birthdate

Apr 02, 1947

Gender

F

Age

73

Code word

"SECRET"



Enlarge

Email address is wrong Member has delinquent loan

See balances for all accounts under this SSN/TIN (even joint accounts)

Account Notes				
Type	Comment	ID	Date	
852	DELINQUENT LOAN	*1		

Generate a check or money order using funds from any sub-account

- View Account Balances
- Checks/Money Orders
- Funds In
- Deposits/Withdrawals