
CU*BASE Branding

Brand and Customize Your CU*BASE Experience

INTRODUCTION

Do you want a way to remind your lending team that “May is Auto Month” and that you are running an employee incentive promotion? Or maybe it is December and you want your front line staff to ask members if they would like to take advantage of your skip-a-pay offering. Now you can use CU*BASE Branding and customize commonly used screens in CU*BASE to do just that! With CU*BASE Branding you can select what graphics your employees see in the upper right hand corner of these selected screens, giving you an additional way to communicate with your staff the marketing promotions offered by your credit union.

CU*BASE Branding also allows you to promote pride and unity in your organization. Another feature of CU*BASE Branding is that it allows you to brand the login page and the logo at the top of the menu screens in CU*BASE. This way, each time your employees log in or during their daily work, they are presented a uniform customized look for your credit union.

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For an updated copy of this booklet, check out the Reference Materials page of our website:
http://www.cuanswers.com/client_reference.php
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FREQUENTLY ASKED QUESTIONS

Following are some frequently asked questions about CU*BASE Branding:

Do I need a GUAPPLE for CU*BASE Branding?

Yes, you will need a GUAPPLE device at each credit union where you want to implement CU*BASE Branding. The graphics are both accessed and saved on the GUAPPLE device

Why would I use CU*BASE Branding?

Do you want a way to remind your lending team that “May is Auto Month” and that you are running an employee incentive promotion? Or maybe it is December and you want your front line staff to ask members if they would like to take advantage of your skip-a-pay offering. Now you can use CU*BASE Branding and customize commonly used screens in CU*BASE to do just that! With CU*BASE Branding you can select what graphics your employees see in the upper right hand corner of these selected screens, giving you an additional way to communicate with your staff the marketing promotions offered by your credit union.

CU*BASE Branding also allows you to promote pride and unity in your organization. Another feature of CU*BASE Branding is that it allows you to brand the login page and the logo at the top of the menu screens in CU*BASE. This way, each time your employees log in or during their daily work, they are presented a uniform customized look for your credit union.

What can I brand in CU*BASE? Can all screens in CU*BASE be branded?

Your credit union can brand three areas of CU*BASE. You can brand the logo on the login page, the logo in the top corner of the menu screens and the upper left graphic on selected commonly used screens. In the last group, the screens are grouped into three categories: lending screens, collections screens and screens associated with member service. There are three available categories for the commonly used screens: Lending, Collections and Member Service. For example, selected screens commonly used by the lending department have been included in the Lending category.

What is involved in branding my CU*BASE screens?

You will need access to your credit union GUAPPLE, and all workstations within your organization will need a small adjustment to put CU*BASE Branding in place. Additionally you will need to create the graphics you will use for the CU*BASE Branding (following sizing and format requirements). The process of putting CU*BASE branding in place is a very easy process. We have written some easy-to-follow directions included in this booklet to help you with the process. Once you have followed these steps, the screens will be branded with your credit union’s own look and feel.

Can my credit union have its own brand?

Yes, your graphics will only be used by your credit union, allowing you to personalize your brand for your credit union.

Can different branches have different screen customizations?

The determination of what graphics are displayed is determined by the GUAPPLE device so if the branch uses a separate GUAPPLE device, then separate graphics can be deployed to the separate branches (or credit unions.) If different branches have different promotions, it could be possible to change the customization of the screens for each branch.

What about if I support multiple credit unions? Can each credit union have its own brand?

As mentioned above, the graphics are by GUAPPLE device so as long as the credit unions use different GUAPPLES, then different graphics can be used for customizing the screens. With the logo branding, the actual graphic includes the CUID, so CU*BASE automatically differentiates credit unions, simply by the name of the graphic.

Do I need to have anything turned on to use CU*BASE Branding?

No activation is required. Simply follow the directions included in this booklet.

What is next for CU*BASE Branding?

Current groups CU*BASE Branding categories available including Lending, Collections, Management, and Member Service. Coming Soon: Accounting and Marketing.

CU*BASE BRANDING – STEP BY STEP

It is easy to use CU*BASE Branding! Following are step-by-step directions:

LOGO -- LOGIN PAGE

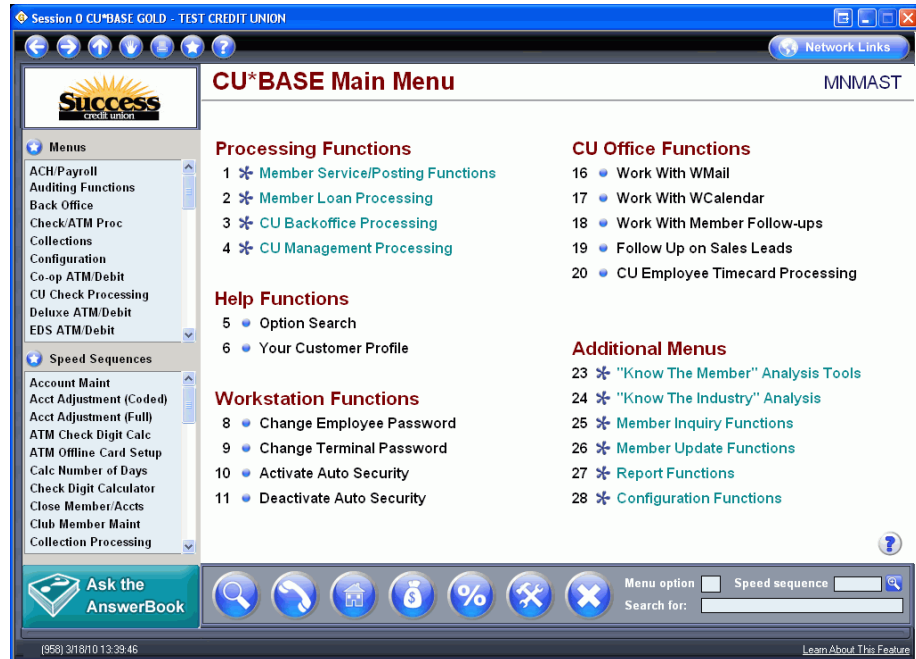


1. Format your credit union logo to be a graphic with the maximum dimensions of 330 pixels wide by 250 pixels tall. The graphic must be in JPG (JPEG) or BMP (BITMAP) format.
2. Name the graphic **logonlogo_CUID**, where CUID refers to the credit union's CUID.
 - A Credit Union ID (CUID) is a two-character identifier that is used many places, but primarily for naming the membership File and Query libraries (FILExx and QUERYxx, where xx is the CUID).

For example, if your credit union's CUID is **AB**, name your graphic: **logonlogo_ab.jpg** or **logonlogo_ab.bmp**. (NOTE: The entire graphic name must be in lower case, including the CUID and graphic extension. Examples of what **not** to use include: logonlogo_AB.jpg or logonlogo_ab.BMP.)

3. Place this graphic in the "cu\branding" folder on your credit union's GUAPPLE device. If your credit union has multiple GUAPPLE devices, the graphic will need to be added to each GUAPPLE device.

LOGO -- TOP LEFT CORNER OF THE CU*BASE MENU SCREENS

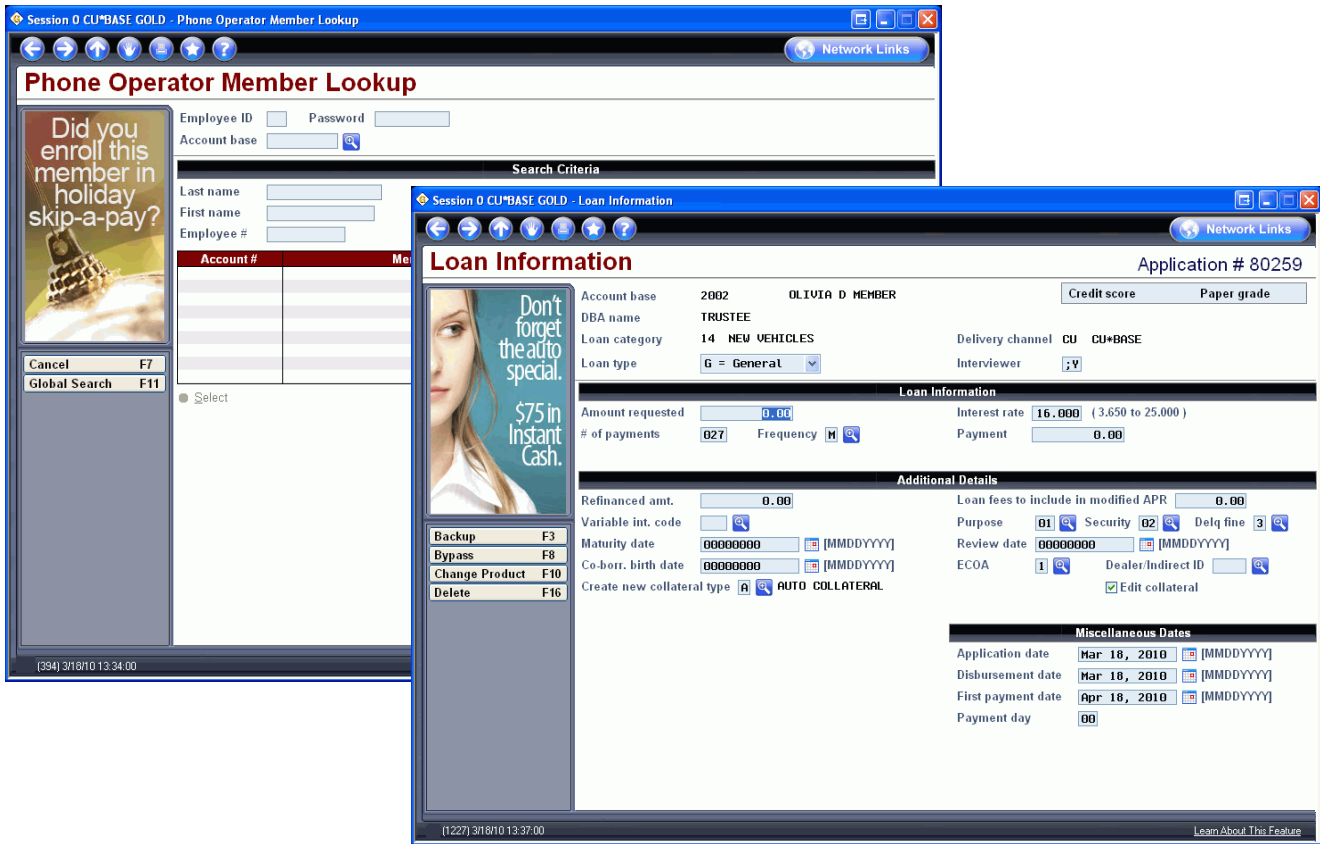


1. Format your credit union logo to be a graphic with the maximum dimensions of 185 pixels wide by 58 pixels tall. The graphic must be in JPG (JPEG) or BMP (BITMAP) format.
2. Name the graphic **menulogo_CUID**, where CUID refers to the credit union's two letter combination that identifies it. (Your credit union CUID is found in the lower left hand corner of any CU*BASE screen.)

For example, if your credit union's CUID is **AB**, name your graphic: **menulogo_ab.jpg** or **menulogo_ab.bmp**. (NOTE: The entire graphic name must be in lower case, including the CUID and graphic extension. Examples of what **not** to use include: logonlogo_AB.jpg or logonlogo_ab.BMP.)

3. Place this graphic in the "cu\branding" folder on your credit union's GUAPPLE device. If your credit union has multiple GUAPPLE devices, the graphic will need to be added to each GUAPPLE device.

CUSTOMIZATION -- TOP LEFT CORNER OF SELECTED CU*BASE SCREENS





This customization of CU*BASE screens allows you to determine which graphic appear on selected commonly used screens. There are three groups of screens; all affected screens are either in the Lending, Member Service or Collections categories. (The affected screens are listed at the end of this document.) At this time only the Lending, Collections and Member Service categories are available. The Marketing, Management and Accounting categories are currently in development and are not available at this time.

Method 1: All screens in a category have same graphic

One option is to show the same graphic on all screens associated with a category. For example, all of the Lending category screens could have a picture of the lending team.

To use this method:

1. Left-corner screen graphics must be JPG (JPEG) or BMP (BITMAP) graphics with a maximum size of 152 pixels wide by 251 pixels tall.
2. Name the graphic according to the category with the following naming convention: **lending anything**, **memberservice anything**, or **collections anything**. For example, the lending category graphic might be **lending_promotion.jpg** (or .bmp)
 - IMPORTANT: Do not use spaces or upper case characters in the graphic name (including the extension of the graphic).

3. Place this graphic in the “cu\personalization” folder on your credit union’s GUAPPLE device. If your credit union has multiple GUAPPLE devices, the graphic will need to be added to each GUAPPLE device.
 - You may place different graphics on different devices if you wish to show different graphics at different locations. The GUAPPLE device determines which graphics will be shown.
4. Then on each workstation at your credit union, navigate to the CU*BASE Favorites screen in CU*BASE. (Access this screen by clicking on the  button at the top of all menu screens.)
 - Check the “Use custom panel graphics” checkbox.
 - Check the box in front of the category.
 - Select Single next to the appropriate category (Collections, Lending and Member Service are currently available).
 - Type the complete file name in the space provided, including the file extension. For example, you might type **lending_1.jpg**.
 - Click the  button to view the graphic.

- Check “Use common panel graphics”
- Check the box in front of the category
- Select Single
- Enter the full name of the graphic in the space provided
- Click Preview to view the graphic






Method 2: Screens within a category can have multiple graphics

The other option is to show a randomly selected graphic from a set group of graphics. The random selection is arranged by category. Using this method, when you access a screen associated with a category, for example Lending, you might see one of several different images that are branded for the lending category.

1. Left-corner screen graphics must be JPG (JPEG) or BMP (BITMAP) graphics with a maximum size of 152 pixels wide by 251 pixels tall.
2. Name each graphic according to the category with the following naming convention: **lending_anything, memberservice_anything**,

or **collections_anything**. For example, one lending category graphic might be **lending_promotion1.jpg** (or .bmp) and another might be **lending_promotion2.jpg** (or .bmp) while two collections category graphics might be **collections_teamphoto.jpg** (or .bmp) and **collections_collectionsoperator.jpg** (or .bmp)

- IMPORTANT: Do not use spaces in the title of the graphic. There is no limit to the number of images that can be included in a category.
3. Place all graphics in the “cu\personalization” folder on your credit union’s GUAPPLE device. If your credit union has multiple GUAPPLE devices, the graphic will need to be added to each GUAPPLE device.
 - You may place different graphics on different devices if you wish to show different graphics at different locations.
 4. Then on each workstation at your credit union, navigate to the CU*BASE Favorites screen in CU*BASE. (Access this screen by clicking on the  button at the top of all menu screens.)
 - Check the “Use custom panel graphic” checkbox.
 - Check the box in front of the category.
 - Select Random next to the appropriate category (Collections, Lending and Member Service are currently available).
 - You do not need to enter a file name in the space provided.
 - Click the  button next to a category to view the graphics in that category.
 - Repeatedly clicking  will show all of the graphics.

Check “Use common panel graphics”

Check the box in front of the category

Select Random

Do not enter anything in the space provided

Click Preview repeatedly to view the graphics



SCREENS AFFECTED IN EACH AVAILABLE CATEGORY

Below is a list of the screens that will show the branding graphics, separated by category. At this time only three categories are configured: Lending, Collections, Management and Member Service. Coming Soon: Marketing and Accounting.

<i>Collections</i>	
<i>Title of Screen</i>	<i>How to Access</i>
Collections Summary Inquiry	MNCOLL #1, F15-Summary
Collections Loan Classification Inquiry	MNCOLL #3
Collections Member Selection	MNCOLL #1
Collections Member Inquiry	MNCOLL #1, Enter
Classification Loan Report	MNCOLL #21
Collections File Print	MNCOLL #1, Enter, F16-Collection Rpts
Loan Delinquency Report	MNCOLL #18
Loan Delinquency Analysis Method B Report	MNCOLL #23
Loan Delinquency Analysis Report	MNRPTD #8 MNCOLL #19
Loan Risk Score Analysis Report	MNCOLL #22
Loan Write Off Process	MNCOLL #14
Loan Write-Off Process	MNCOLL #14, select account
Update Member Classification Code	MNUPDA #13
Employee Responsibility Assignments	MNUPDT #9, Assign employees
Charge-Off Savings/Checking Acct	MNCOLL #13
Charge-Off Savings/Checking Acct	MNCOLL #13, select account

Lending

Title of Screen	How To Access
Electronic Checklist	MNLOAN #12
Electronic Checklist	MNLOAN #12, select a task
Amortization Inquiry	MNLOAN #1, loan request, payment selection, recap, F14-View/Print Amort
Credit Report - Summary	MNUPDT #9, Credit Bureau, F20-View Cr Rpt, Select MNLOAN #1, Action Code VC, Select
Credit Report – Profile	MNUPDT #9, Credit Bureau, F20-View Cr Rpt, Select, F8-Profile MNLOAN #1, Action Code VC, Select F8-Profile
Credit Report	MNUPDT #9, Credit Bureau, F20-View Cr Rpt, Select, F9-Detail MNLOAN #1, Action Code VC, Select, F9-Detail
Credit Report - Decision	MNUPDT #9, Credit Bureau, F20-View Cr Rpt, Select, F10-Decision MNLOAN #1, Action Code VC, Select, F10-Decision
Credit Report - Decision	MNUPDT #9, Credit Bureau, F20-View Cr Rpt, Select, F10-Decision, F18-Dcsn Codes MNLOAN #1, Action Code VC, Select, F10-Decision, F16-Dcsn Model
247 Lender Results	MNUPDT #9, Credit Bureau, F20-View Cr Rpt, Select, F10-Decision, F18-Dcsn Codes MNLOAN #1, Action Code VC, Select, F10-Decision, F16-Dcsn Model
View Stored Credit Reports	MNLOAN #1, Action Code VC Also accessed via F20-Credit Report from various screens
Loan Payment Coupon Printing	MNLOAN #21
Print Loan Payment Coupons	MNLOAN #21, Enter
Social Security/TIN Selection	MNLOAN #1, F14-Pre-Member Lending
Online Credit Card Status Maintenance	MNLOAN #5, Credit card maintenance, Card status
Activity Tracking – All Codes	MNLOAN #8, F18-Show All Codes
Application by Status	MNLOAN #8, F17-Activity Tracking
Application by Status	MNLOAN #8, F1-Today
Application by Status	MNLOAN #8, Show Graphs
Work/View Application Status	MNLOAN #8
Print Loan Forms	MNLOAN #20
Denied Loan Recap/Inquiry	Denied Application Inquiry Action Code when processing a member application
Loan Request Maintenance	MNLOAN #8, Work with Loan Request option
Loan Request Payment Selection	MNLOAN # 8, fill out payment information (including collateral, if any)
Outstanding Loan Recap/Inquiry	MNLOAN #8, Open Loans Inquiry action code
Account Base Selection	MNLOAN #8
Loan Information	MNLOAN #8, Loan Request action code
Pre-Membership Loan Request Recap	MNLOAN #8, Loan Request Recap

Lending (con't)

Title of Screen	How To Access
Student Loan Add-On Processing	MNEXLN #16
Denied Loan Request	MNLOAN #8, Denied Application Inquiry Action Code, View
Loan /Open Credit Refinance	MNLOAN #3
Loan /Open Credit Refinance	MNLOAN #3, enter closed end loan
Loan Disbursement	MNLOAN #2
Loan Disbursement	MNLOAN #2, select acct
Additional Signer Maintenance	MNUPDT #9, Additional Signer, select co-signer
Additional Signer	MNLOAN #5, Additional Signers
Link On-Line Credit Report to Loan	MNLOAN #5, Credit Bureau Link
Loan Insurance Share Account Selection	MNLOAN #5, Insurance Payment Account
Link Dealers to Member Accounts	MNLOAN #5, Link to Dealer
Loan Application – Select Co-Signers	Complete Loan Application button first time from Loan Recap screen or F15-Chg Co-App after co-singer information is entered
Loan Application – Address Information	MNLOAN #8, Complete Loan Application button
Loan Application - Employment Information	MNLOAN #8, Complete Loan Application button, Employment Tab
Loan Application – Income Information	MNLOAN #8, Complete Loan Application button, Income Tab
Loan Application – Reference Information	MNLOAN #8, Complete Loan Application button, References Tab
Loan Application – Summary Information	MNLOAN #8, Complete Loan Application button, Summary Tab
Loan Application – Other Assets	MNLOAN #8, Complete Loan Application button, Assets Tab
Loan Application – Other Loans/LOCs	MNLOAN #8, Complete Loan Application button, Loans/LOCs Tab
Loan Application Credit Cards / Other Debts	MNLOAN #8, Complete Loan Application button, Credit Cards/Debts Tab
Loan Information Override	MNLOAN #8, loan recap, F13
Collateral Identification	MNLOAN #5, Collateral, Select
Collateral Selection	MNLOAN #5, Collateral, Update existing
Loan Creation	MNLOAN #8 – Complete Loan Account button
Additional Loan Information Selection	MNLOAN #5, Select account
Payment Matrix Update	MNLOAN #5, Payment Matrix
Underwriting Comments	MNLOAN #8, loan recap, F5
Consumer Mortgage Loan	MNLOAN #20, F9, Consumer Mortgage Forms
Consumer Mortgage Loan	MNLOAN #20, F9, Consumer Mortgage Forms, Enter
Consumer Mortgage Loan	MNLOAN #20, F9, Consumer Mortgage Forms, Enter twice

Lending (con't)

Title of Screen	How To Access
Loan Form Print	MNLOAN #1, work existing, F9
Mortgage Loan (Non-Consumer)	MNLOAN #20, F9, Mortgage Forms
Mortgage Loan (Non-Consumer)	MNLOAN #20, F9, Mortgage Forms, Enter
Real Estate Mortgage Loan Note (Non Consumer)	MNLOAN #20, F9, Real Estate Loans
Real Estate Mortgage Loan Note (Non Consumer)	MNLOAN #20, F9, Real Estate Loans, Enter
Loan Settlement Statement	MNLOAN #20, F9, Settlement Forms
Loan Settlement Statement	MNLOAN #20, F9, Settlement Forms, Enter
Loan Settlement Statement	MNLOAN #20, F9, Settlement Forms, Enter twice
Loan Settlement Statement	MNLOAN #20, F9, Settlement Forms, Enter three times
Loan Settlement Statement	MNLOAN #20, F9, Settlement Forms, Enter four times
Loan Settlement Statement	MNLOAN #20, F9, Settlement Forms, Enter five times
Loan Settlement Statement	MNLOAN #20, F9, Settlement Forms, Enter six times
Loan Application Comments	MNLOAN #8, Application Comments
Print Loan Application Forms	MNLOAN #1, Complete Loan Application button, Print tab
Payment Protection and Miscellaneous Coverage	MNLOAN # 1, Loan request, Payment selection, Misc Coverages button

Management

<i>Title of Screen</i>	<i>How to Access</i>
Know Your Member Analysis Tools/Dashboards (MNMGMA)	
Channel Activity Summary	MNMGMA #1, F11
Transaction Activity by Branch	MNMGMA #3
Member Transaction Label Analysis	MNMGMA #4
Money Movement Analysis	MNMGMA #16
Transaction Count by Delivery Status	MNMGMA #2
Relationship Analysis	MNMGMA #8
Employee Security Management Tools (MNMGMT)	
Configure Data Center Employees	MNMGMT #1, F10
Employee Security Maintenance	MNMGMT #1
Menu Security Maintenance	MNMGMT #1, F2
Menu Security Maintenance	MNMGMT #1, F2, Edit
Rate Maintenance Tools (MNMGMT)	
Dividend Rate Update	MNMGMT #2
Share Account Dividend Rate	MNMGMT #2, enter a Corp ID in Share Rate field, Enter
Share Account Dividend Rate	MNMGMT #2, enter a Corp ID in Share Rate field, Enter, F10
Certificate Dividend Rate Update	MNMGMT #2, enter a Corp ID in Certificate Rate field, Enter, F10
Certificate Dividend Rate Update	MNMGMT #2, enter a Corp ID in Certificate Rate field, Enter
Loan Product Interest Rate Update	MNMGMT #2, enter a Corp ID in Loan Rate field, Enter
Dividend/Interest/Repricing Forecasting Tools (MNMGMT)	
Average Balance Dividend Forecast – Split	MNMGMT #4, enter variables
Average Balance Dividend Forecast – Split	MNMGMT #4
Average Balance Dividend Forecast	MNMGMT #3, enter variables
Average Balance Dividend Forecast	MNMGMT #3
Certificate Repricing Forecast	MNMGMT #5
Loan/Share Trial Balance Review (MNMGMT)	
Average Daily Balance Calculator	MNMGMT #8, F9
Loan/Share Trial Balance Review	MNMGMT #8
General Ledger Detail by Branch	MNMGMT #8
Teller and Cash Activity Analysis Tools (MNHTLA)	
Cash Analysis – by Time of Day	MNHTLA #16
Teller Activity by Day of Month	MNHTLA #3
Teller Activity by Week	MNHTLA #2
Teller Activity by Time of Day	MNHTLA #1

Management (con't)

<i>Title of Screen</i>	<i>How to Access</i>
Misc. Analysis and Trending Dashboards (MNMGMT, MNMGMB)	
AIRES Download Inquiry	MNMGMT #18
AIRES Loan Product Summary	MNMGMT #18, F12
AIRES Share Summary	MNMGMT #18, F11
Financial Statement Inquiry	MNMGMT #11
Income Statement – Trial Balance	MNMGMT #11
Income Statement – Trial Balance	MNMGMT #11
Shared Branching Inquiry	MNMGMA #7
Shared Branching Inquiry	MNMGMA #7
Shared Branching Inquiry	MNMGMA #7
Contingent Liability Trend Summary	MNMGMT #14
Fee Analysis	MNCNFD #13
Summary of Member Scored (Tiered Service Summary)	MNMRKT #26 or MNMGMB #17

Member Service

<i>Title of Screen</i>	<i>How to Access</i>
Denied Application Processing	MNSERV #13, F10-Denied or MNLOAN #15, F10-Denied
Close Account Processing	MNSERV #14
Member Account Inquiry	Inquiry (F1), enter Transaction date, Enter
Member Account Inquiry	Inquiry (F1), select account, select savings suffix
Member Account Inquiry	Inquiry, (F1), select account, select credit card suffix
Individual (or other designation)	Inquiry(F1), F13-Closed
Share Accrual Calculator	Inquiry (F1), select, select suffix, F11-Dividend Calc
Statement History	Phone (F2) select a credit card account, history option
Global Search	Inquiry (F1), F11-Global Search
Search for Active Members	Inquiry (F1)
Phone Operator Member Lookup	Phone Operator (F2)
Records with Matching SSN	MNSERV #13, 2=Update, F11 or MNLOAN #15, 2=Update, F11
Print Member Starter/Replacement Checks	MNSERV #8, enter a checking account, Enter
Create/Open New Certificate	MNLOAN # 15, 3=Add Sub Account, F10, select or MNSERV #13, 3=Add Sub Account, F10, select
Create/Open New Certificate	MNSERV #13, 3=Add Sub Account, F10
Club Membership Maintenance	MNMRKT #2, F6
Bill Payment Member Enrollment	MNSERV #22, Bill Payment (enroll...)
E-Statement Member Enrollment	MNSERV #22, E-Statement (enroll...)
Household Members	House speed sequence, select
New Account Creation	MNLOAN #15, 3=Add Sub Account, select savings account or MNSERV #13, 3=Add Sub Account, select savings account
New Account Creation	MNLOAN # 15, 3=Add Sub Account, select checking account or MNSERV #13, 3=Add Sub Account, select checking account
New Account Creation	MNLOAN # 15, 3=Add Sub Account or MNSERV #13, 3=Add Sub Account
Membership Services	MNLOAN #15 or MNSERV #13
Open New Membership Selection	MNSERV #13, 1 Create New Membership or MNLOAN #15, 1 Create New Membership
Open New Membership	MNSERV #13, 1 Create New Membership or MNLOAN #15, 1 Create New Membership
Open New Membership	MNSERV #13, 1 Create New Membership or MNLOAN #15, 1 Create New Membership, also accessed via MNUPDA
Open (Update) New Membership	MNSERV #13, 1 Create New Membership or MNLOAN #15, 1 Create New Membership, also accessed via MNUPDA
Open (Update) New Membership	MNSERV #13, 1 Create New Membership or MNLOAN #15, 1 Create New Membership, also accessed via MNUPDA

Member Service (con't)

<i>Title of Screen</i>	<i>How to Access</i>
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Verify New Membership Creation	MNSERV #13, 1 Create New Membership or MNLOAN #15, 1 Create New Membership
Member Overdraft Protection Maintenance	MNUPDT #12, select, or MNSERV #13, 1 Create New Membership or MNLOAN # 15, 1 Create New Membership
Master Greeting	MNSERV #13, 1 Create New Membership or MNLOAN #15, 1 Create New Membership
Modify Joint Owner/Beneficiary Information	MNSERV #13, 1 Create New Membership or MNLOAN #15, 1 Create New Membership