Direct Pass-Through of Data to the Main Street Website—No Rekeying Needed!

MAIN STREET CHECK ORDERING DIRECTLY VIA CU*BASE AND IT'S ME 247

CU*Answers has teamed up with Main Street to automate ordering of checks—right from within CU*BASE and **It's Me 247**.

Order Checks Directly from CU*BASE—With No Rekeying of Data Needed

Currently, whenever your employees need to order checks, they need to access the Main Street website and manually key in the member data for the order.

However, once Main Street Check Ordering is activated in CU*BASE, your employees no longer need to manually enter the check order information on the Main Street website.

CU*BASE will automatically launch the Main Street website with the member's information displayed, ready for the order to be placed. No rekeying of data means less work for your employees and reduces the errors made when placing an order.

Allow Members to Order Checks for Accounts Opened Online

Your credit union can choose to also activate Main Street Check Ordering through online banking. Once the feature is activated, **It's Me 247** will provide members opening new checking accounts with a link to the Main Street website.

As with the CU*BASE process, the member's data is securely transmitted to the Main Street website for a completely self-service feature. The member just needs to place the check order.

Handling of Joint-Owner Names on Checks

CU*BASE sends joint-owner information to the Main Street website. If a member wants an additional name to appear on their checks, such as a spouse's name, the employee can select this in CU*BASE when they order the checks. See Page 2 for more details.

When members order checks through online banking, their order will only include their name. If they want additional names to appear on their checks, they will need to contact your credit union for assistance. Your employee can then order the checks through CU*BASE.

Check out the Frequently Asked Questions section on Page 3.

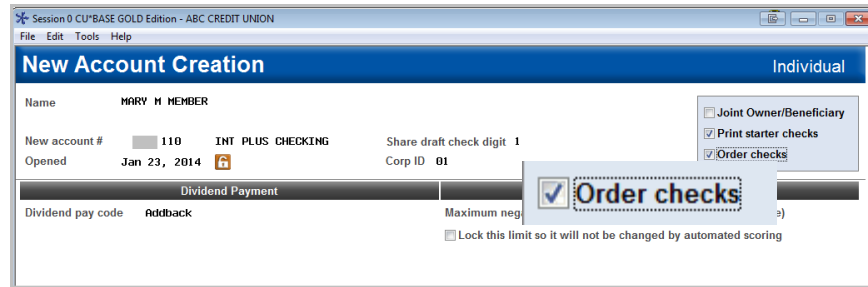# How Does it Work?

Employees Order Checks Directly from CU*BASE

Your employees will not need to receive additional training on opening new checking accounts or ordering and reordering checks in CU*BASE. These processes remain the same. What is new is that at the end of the process, the Main Street website is automatically launched and the member's data is securely transmitted and displayed. All your employee needs to do is place the order. They will not need to separately open this website and key in the order.

Ordering Checks During New Checking Account Opening

When a member is opening a new checking account, your employee still checks *Order checks* on the final screen. When they press Enter, the Main Street website is automatically launched and the member's information is securely transmitted, ready for the employee to place the order.
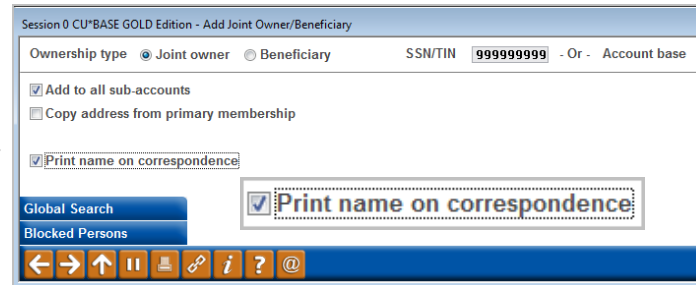
Reordering of Checks

Employees continue to reorder checks with the same process as usual using *Order Checks* when updating the membership information on an account. Once your employee selects the checking account, the Main Street website is launched and the member's information is securely transmitted so the employee can place the order.
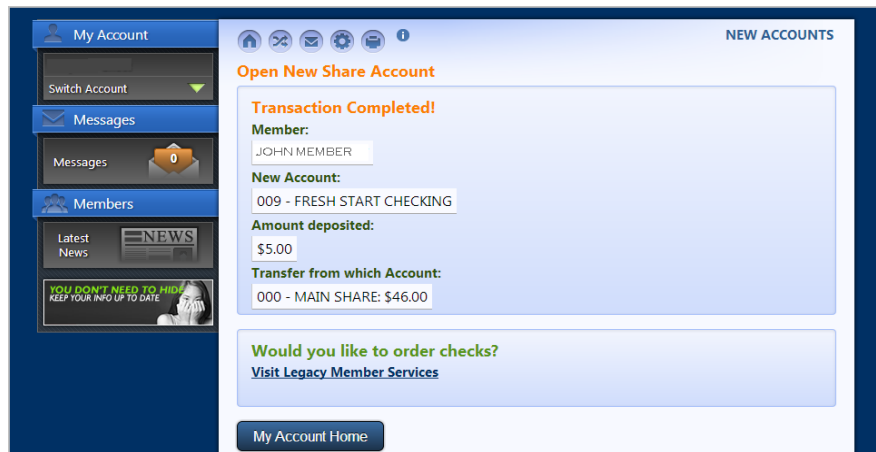
Adding Joint-Owner Information

Your member may want a second name, for example a spouse's name to appear on the checks. If one joint owner is configured to appear on credit union correspondence, then that name will be transmitted with the order. This name will appear in the Main Street website for review. If more than one name is configured or no name is configured in this manner, your employee simply enters the second name on the Main Street website before placing the order.

Members Open New Checking Accounts Online and Order Checks

Activate Main Street Check ordering in **It's Me 247** so that opening checking accounts online becomes a completely self-service process. When members open a new checking account, they will see a link to order checks. When they click this link, a browser with the Main Street website will appear (with the member's information securely transmitted).Then they just need to place the check order.

If your member wants any additional names on their checks, such as their spouse's name, they will need to contact your credit union for assistance. Your employee can use CU*BASE to order the checks.

FREQUENTLY ASKED QUESTIONS

Q: **What is the benefit of using Main Street Check Ordering?**

A: The most obvious benefit of activating Main Street Check Ordering in CU*BASE is that you will have fewer errors during check ordering since the member data will be pre-filled on the Main Street website.

Additionally, it will speed up your processes for both opening new checking accounts and ordering checks since access to the Main Street website is built right into the CU*BASE process. Your employees will not have to separately open the Main Street website.

If check ordering via online banking is activated, the obvious benefit to your credit union is that opening new checking accounts online can be an entirely self-service product.

Q: **What kind of training will I need for my staff?**

A: Your employees will continue to use the same steps to open new checking accounts and to order checks in CU*BASE. What will change is that at the end of the check order, CU*BASE will automatically launch the Main Street website on which the member's information will be displayed. Your employee will no longer need to open the site separately and key in the data manually.

Q: **Can members order checks through online banking?**

A: You can also allow members to order checks when they open new checking accounts online. These members will see on their confirmation page an additional section titled *Would you like to order checks?* If your member clicks the link, the Main Street website is opened in a separate browser window with the member's information displayed. All the member needs to do is place the order.

Q: **Are there separate controls for online banking?**

A Yes. Activation of check ordering in CU*BASE and online banking have separate controls. You can choose to activate the feature in CU*BASE but not in online banking.

Q: **How are joint owners handled? What if a member wants another name on their checks such as a spouse's name?**

A: CU*BASE sends the name of one joint owner who is configured to have his or her name printed on credit union correspondence. (See Page 2.) If two joint owners (or none) are configured this way, none are transmitted. Any changes can be made by the employee on the Main Street website before placing the order.

Members opening accounts online will not be able to enter any additional information into the Main Street website. They will need to contact the credit union for assistance. In this case, your employee can assist this member by ordering the checks within CU*BASE.

Q: **Are members' phone numbers transmitted to Main Street?**

A: Yes. If a member has a phone number recorded in CU*BASE, that number is sent with the order.

GETTING STARTED

Interested in activating Main Street Ordering directly from CU*BASE and/or online banking?   Follow this two-step process:

Step 1: Activate the Feature with Main Street

First contact your Main Street Client Services Representative to activate the feature on their end. They will provide you with vendor codes necessary to activate the feature in CU*BASE and **It's Me 247**.

Step 2: Activate the Feature in CU*BASE (and optionally in online banking)

Once you have activated the feature with Main Street and have their vendor codes, contact Earnings Edge to activate the feature in CU*BASE. Earnings Edge can also assist you with activating the feature for members in **It's Me 247**.

LET CU*ANSWERS MANAGEMENT "JUST TURN IT ON" FOR YOU!

Use "Just Turn it On" and have CU*Answers Management Services drive the implementation of this feature from start to finish. We'll even do the work to get your Board, your management team, and your staff on board and ready to take over once the switch has been flipped. Learn more in the "Just turn it on" brochure. Access this brochure directly at http://cuanswers.com/pdf/cms/Just_Turn_it_On.pdf.