



New CU*BASE Workstation Configuration Request

Rev. May 9, 2014

To request the creation of a new workstation device in CU*BASE, please complete this worksheet and fax it to CU*Answers, Attn: Network Services, **fax# 616-285-7288**, or attach it to an email to helpdesk@cuanswers.com. A Support Specialist will contact you to verify authorization and assist you with completion of the new device configuration. If you have questions about the process or need assistance filling out the worksheet, please contact a Systems Associate at 800-327-3478, Option 3, Communications and Hardware. We will be happy to assist you.

Credit Union Name CU #

Requested date for completion

General Information

This CU uses a 5-character OR 7-character device naming scheme (must use one or the other; cannot combine)

If 5-character scheme:

Requested Device ID

The first two characters must be unique; the last three digits are your CU #. Ex:

If 7-character scheme:

Requested Device ID

The first two characters are your CUID, the second two are your branch #, and the last three characters must be unique
Ex:

For either scheme:

Device Description
(Such as "Jim's Terminal" or "Teller Station 2" etc.)

Cash Dispenser Yes No

Branch ID#

Default Printer IDs

Specify the default printers that should be used when printing from this workstation.

Examples: or

General Printer	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Checks/Money Orders	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Receipts	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Custom Loan Forms	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Loan Apps/Denial Notices	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Posting/Receipt Information

Name ID Verification Always Ask for Employee ID

Local Time Zone Eastern Central Mountain Pacific Daylight Saving Yes No

Receipt form type Half Full Maximum transactions per receipt

continued>>>

Generate receipts for the following transaction types (select all that apply):

- | | | |
|--|---|---|
| <input type="checkbox"/> Journal Transfer | <input type="checkbox"/> Loan Disbursement | <input type="checkbox"/> Create Share Certificate |
| <input type="checkbox"/> Error Correction | <input type="checkbox"/> SD/Ck Stop Payment | <input type="checkbox"/> Redeem Share Certificate |
| <input type="checkbox"/> Cash Back to Mbr | <input type="checkbox"/> Cash Transfers | <input type="checkbox"/> CD Dividend on Demand |
| <input type="checkbox"/> Misc. Receipts/Exp Chks | <input type="checkbox"/> Check Cashing | <input type="checkbox"/> Share Dividend on Demand |
| <input type="checkbox"/> Direct Deposit | <input type="checkbox"/> Funds-in | <input type="checkbox"/> Transaction Reversal |

Authorization

Authorized by

Date

FOR CU*ANSWERS USE ONLY: Configured by: _____ Date _____