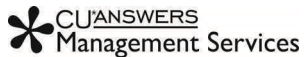


This is the place for CU*BASE Executives to ask analytical questions and have them answered by an expert.



<http://gividends.com/business-first/>

In a nutshell, what is the point of the *Business First* website?

The *Business First* website is designed so that credit union executives can ask big-picture questions about CU*BASE. The CMS team will respond with the focus on business first. We will work to understand your business wants, needs, and questions. Then we can talk solutions and tool approaches.

If the audience is credit union executives, how is the *Business First* website different from the *Of Course* website?

While the *Of Course!* website allows credit union CEOs to blog with each other on issues that are important to them, the *Business First* website provides credit union executives a portal to ask questions and receive expert advice from CU*Answer Management Services.



How can CU*Answers Management Services help build my credit union business?

The CU*Answers Management Services team will work with you and build a bridge between the technical applications and the business side. We won't just come from the perspective of looking at the tools and how they work. Instead we will take the outcomes you want and build procedures and processes to use the tools to meet your business needs.

How do I submit a question to the *Business First* website? What kind of response will I get?

To submit a question the *Business First* website go to the Gividends website and select Business First, or go directly to URL: <http://gividends.com/business-first/> From there enter your name email and credit union name. Then submit your question. You will receive an email from the appropriate CU*Answer Management Services team member either to answer your question, or to start a conversation to collect more information.

How does my involvement in the *Business First* website improve our network?

Questions submitted to the *Business First* website, as well as their answers, are posted for everyone to view. Your question may be someone else's. An answer to someone else's question may fill a gap on something you were thinking about. Everyone benefits.

What are some examples of questions already posted on the *Business First* website?

Since credit unions have different business needs, the questions vary, but here are some examples.

G How do I make non-member mining a real business winner for my credit union? Where can I find how many non-members I have at my credit union?

Regular review of your non-member database definitely should be built into your plan to increase your membership.

- Keep in mind that a non-member record for an individual simply means that they have some relationship with the credit union (additional signer, joint owner, IRA beneficiary, etc.) but they do not have their own primary

G How can I track Miscellaneous Receipts?

In order to track gift cards (or other miscellaneous items) that may be sold at the front line, you will first need to configure a miscellaneous receipt posting code using MNCNFC #8-Misc Posting Code Config. (Select Misc. Receipts from the drop-down menu.) On the third screen all that is required is a description (which should be a description that will ensure your staff understands what it is used for) and a GL account number. (See screen shot below).

G I want to assign my employees to a branch and also a department. How do I do this in CU*BASE?

Each employee ID is assigned a branch (or multiple branches) in Management Security (MNMGMT #1) using the Vault # and Other Authorized Vaults option, as shown in the screenshot below. You will also see the option for Job Category on this screen. This is a great opportunity to assign departments to employee id's and also assist in managing security.

G How many credit union in the system charge for teller phone transfers?

Also refer to the "Configuring Phone Transfer Fees" topic on cunswers.com.

Phone Transfer Configurations is one of our Learn from a Peer menu options from MNMGMB #6. Once you are in this menu option, you can choose F/10 Learn from a Peer to see 151 configurations of the Phone Transfer fee across the network. Of the 151 credit unions within the learn from a peer dashboard, 62 credit unions have