Certificate Forms

Defining Your Own Customized Forms for Member Certificate Accounts

INTRODUCTION

NOTE: This is an older-style form with limited configuration options. For more flexibility in creating certificate forms, use Misc. Member Account forms (Tool #261).

Forms, forms, and more forms. Where do you store them? How do you fill them out? Who was responsible for the last order? How can one generic form fit 22 types of certificate programs?

With CU*BASE user-defined certificate forms, the old standby form can be interactive, certificate-type sensitive, and printed on your preferred paper.

With a little thought and time, your credit union can configure multiple form types to match your certificate program. This CU*BASE feature can give your credit union a customized look without a customized programming price tag. Check it out.

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SAMPLE PRINTED FORM

Default margins are 0.75" on all sides.

CU name and address are taken from Chart of Accounts configuration.

Placement of the heading and the CU address is configurable.

CU*BASE inserts this information from the member's account record automatically.

If desired, the member's SSN/TIN can print in this space below the name and address (determined at the time the certificate form is printed).

Up to 12 lines of optional free-form text can be defined.

The Signature lines are optional, and you may choose to display lines for up to two optional authorization signatures.

CU*BASE TEST CREDIT UNION
6000 28TH STREET SE
STE 100
GRAND RAPIDS MI 49546

6 MONTH CERTIFICATE

Account Number: 4122-330

Account Owner(s):   MARY A MEMBER
THOMAS A MEMBER
1234 ANYSTREET
ANYCITY MI 49111

Certificate Amount: 5,297.28
Date Issued: 04/24/2001
Maturity Date: 10/24/2001
Description: 6 MONTH CERTIFICATE
Dividend Rate: 5.800 %
Annual Percentage Yield: 5.96 %
Dividend Payment Method: Add to Certificate
Dividend Payment Freq.:   Monthly
Early Withdrawal Penalty: Equal to 90 days interest

This Certificate of Deposit may not be pledged, transferred or assigned, except to this Credit Union. Issuance in the name of two or more owners indicates joint ownership with full rights of survivorship.

If this Certificate of Deposit is not presented for payment on its intial or any subsequent renewal maturity date, it will be automatically renewed, from its last maturity date, unless the Credit Union shall, prior to maturity, give written notice to the Owner(s) that it will not be renewed. The interest rate to be paid upon renewal shall be determined by the Credit Union at or before maturity, and that information will be available upon maturity. On or after that date, you may call the Credit Union at (616) 555-6357 to find out the interest rate and APY that will apply to this Certificate of Deposit. Upon death of the owner, or the last surviving owner if there is more than one, the funds covered by this Certificate of Deposit shall become the property of the beneficiary(ies) listed below who are alive at that time. In addition, each beneficiary shall have the power to withdraw only his or her equal share of the funds represented by this Certificate of Deposit. No beneficiary shall have any right under any circumstances to change the terms or conditions of this Certificate of Deposit.

_____   _____   _____   _____

_____   _____   _____   _____
Owner Signature   Owner Signature   Authorized Signature   Authorized Signature

CONSIDERATIONS

- Both the certificate heading and up to 12 free-form lines of descriptive text can be custom configured by the credit union. You can even choose exactly where the credit union name, address, and certificate name are placed at the top of the form. The rest of the certificate, including information from the member's account files, is placed automatically.

- The text is laid out to fit within a 0.75" margin on all sides. Therefore, order any paper stock you like—something simple like plain white bond, or go all out with a fancy pre-printed border.

- Configure as many forms as you need (one for each certificate product you offer); change the free form text and heading information as often as you like. If your credit union address or phone number changes, you can update the information on the forms easily yourself!

- Each certificate type configured in CU*BASE can have a different form "attached" to it, so the system automatically knows which form to use when a certificate is created.

CONFIGURING A CERTIFICATE FORM

NOTE: This is an older-style form with limited configuration options. For more flexibility in creating certificate forms, use [Misc. Member Account forms](#) (Tool #261).

STEP 1: SETTING UP THE FORM

In this step, you will enter the free-form text that makes up the center portion of the CD form.

Configure Laser Certificate Forms (Tool #257), Screen 1

Use the *CD Form Type* field at the top of the screen to enter a four-digit code name for the CD form and use Enter to proceed to the second screen.

> *CU*TIP: To make it easier to keep track of the form types being created, you could use a naming system that matches the CD Type codes for the actual product. For example, if a form is being created for CD Type 01, the form could be named CD01 or something similar.*

Screen 2

This screen is used to configure and enter text for the CD form. There are a total of 24 lines for entering text, which is the equivalent of 12 lines of text on the printed form. Every two lines on the screen is equivalent to one full line of print on the final form. For example, notice that on line 04 in the above example the word "give" is split between the lines. On the printed form, these two lines will be put back together as one long line of text.

In addition to specifying a title, signature information and free-form text, the **Adjust Headings (F15)** feature is available to specify the position of the CD title and credit union address information at the top of the form. (See Page 6 for details on using this feature.)

Roll keys can be used to display lines 07 through 12. When done with all free-form text, **be sure to use Enter one last time to update all changes**, then use the backup arrow (F3) to return to the previous screen.

Field Descriptions

Field Name	Description
CD form type	The four-character form name entered on the previous screen.
CD title	Enter the title that should print along the top edge of the certificate (see the sample shown on Page 2).
# of signatures	If you wish to print lines for "Authorized Signature" at the bottom of the CD form, choose the number of lines to be printed here (maximum of 2). If you do not wish to include these signature lines, choose zero or leave the field blank.
Member's signature	If you wish to print a line for "Owner Signature" at the bottom of the CD form, choose the number of lines to be printed here (maximum of 2). If you do not wish to include these signature lines, choose zero or leave the field blank.

Adjusting Heading Positions

Adjust Headings (F15)

This screen will appear when you use Adjust Headings (F15) *on the CD form maintenance screen (shown on Page 5).*

This screen is used to make minor adjustments to the placement of the CD Title, credit union name, and credit union address information at the top of the printed form.

The "**X**" position represents the **left** edge of each line of text, and the "**Y**" position represents the **top** edge of each line, relative to the edge of the paper. To adjust the headings to a different position, try entering a different number in the "X" or "Y" position. This is at best a trial and error process, so don't be afraid to experiment!

> *CU*TIP: The following settings were used for the sample shown on Page 2:*

When done, use Enter to record all changes and return to the previous screen. You will see a notation, "Record has been updated" referring to the heading changes. **Be sure to also use Enter again once you return to the previous maintenance screen so that any changes made to the free-form text are also saved.**

STEP 2: ATTACHING THE FORM TO THE CD PRODUCT

In this step you will tie the form you created directly to the CD Type code for the certificate product. Remember that you can tie the same form to multiple products if you like, or have a unique form for each product.
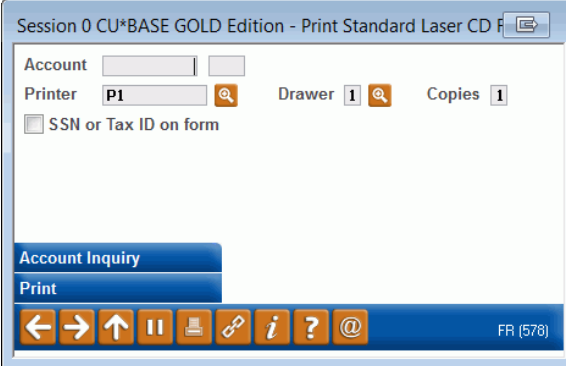
"Certificate Products" then Certificate Type ("C")

For each of your credit union's configured Certificate Type codes, use the *Laser certificate form* field to enter the CD form type you configured for this certificate product. When printing CD forms, the system will check the CD type recorded in the member's account information against this flag in order to determine which form to use.

PRINTING CERTIFICATE FORMS

Certificate forms can be printed at any time after a CD account has been created. Because the system checks the CD Type configuration to determine which form to use, all that is needed is to enter the member's account number and the correct form will automatically be printed using your workstation's configured laser printer.

Print Member Certificate Form (Tool #661)

Enter the member's account base and suffix and specify whether or not you wish the primary member's SSN/TIN to print on the form. Use Enter to print the form associated with that certificate type. When the form has been printed, the fields will clear and you may enter another account number or use the up arrow (F7) to exit.

> If it has been configured in **Tool #523 *Membership Designation Configuration***, the DBA label will appear above the address instead of the member's or organization's name.