



County-City CU Chooses Sharetec System

County-City Credit Union in Jefferson, WI, has selected Sharetec System as their new core system. Converting off data processing system CU*Answers. County-City Credit Union took the time to search numerous vendors to find the right system for them.

Tom Pinnow, President of County-City Credit Union, remarks, "After reviewing several systems, we decided to partner with Sharetec because they stood out from the rest. They offer our credit union a service bureau system that can be customized to our needs, especially in the area of lending and online. We also needed to have confidence in the support our core vendor provides and Sharetec has it all."

"County-City Credit Union knew exactly what they wanted and took the time to look at every detail to make sure they were going to get the best data processor for their credit union. After seeing all Sharetec can offer, we came out on top. We are excited to have such a dedicated credit union on our team and look forward to working with County-City Credit Union for many years to come," said Keane Kulak, Regional Director for Bradford-Scott Data Corporation, an owner/distributor of the Sharetec System.



Harvester Financial CU Converts to Sharetec

Harvester Financial Credit Union in Indianapolis, IN, has converted successfully to the Sharetec System.

"Core conversions can be a challenge, but everyone involved handled it with superior professionalism. The Sharetec team was instrumental for making our conversion such a success. We couldn't have been better prepared than we were," comments John Bergeson, President of Harvester Financial CU.

Audra Schoenauer, Sharetec's lead project manager for the Harvester Financial CU conversion, comments, "Harvester's dedication and commitment to this conversion was a huge part in making it a great success."

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Our goal is to provide exceptional training to you and your staff within the comforts of your own office.

contact us...

1001 Chestnut Hills Pkwy . Suite 1 . Fort Wayne, IN 46814

Phone (260) 625-5107 Fax (260) 625-6248

www.bradfordscott.com . support@bradfordscott.com

Can You Better **Protect** Yourself from Fraud?

Financial fraud is growing and there is no single solution to protect your credit union and your members from fraud. Consider attacking from multiple angles, using tools, such as **Sharetec's Sophos Astaro** that helps detect fraud quickly and accurately. Fighting fraud in today's world takes commitment and constant attention. Below are a few ways you can protect your credit union with **Sharetec's Sophos Astaro**.

- Filter web traffic based on website content, such as weapons and drugs.
- Block by location, web traffic from outside of the US.
- Unblock any website that would be required by only one employee and not the others, like social media sites.
- Block specific websites you don't want your employees visiting.
- Detect port scans with built in Intrusion Detectin/Prevention Service, alerting you via email.



If you're ready to stay ahead of the battle against fraudulent activities and protect your members, contact us today for more information.

Automated Update For Regulatory/Compliance Requirements by: Wei Chen

The Credit Union industry frequently has regulatory/compliance requirements that need implemented by a mandated date. This has been a challenge for Bradford-Scott: how can we best apply these updates to many impacted credit unions in a timely manner, while minimizing interruption to their business and also maintaining the same level of customer service?

After exploring various alternatives, we determined an **Automated Update** approach is the most efficient way. At last year end, we packaged a few mandates into a "mass update" and provided it to all our customers. You should have received an email with details, but here is a re-cap:



1. In **Accounting WorkSpace**, we added a message to 5300 Call Report that states "no changes are required for December 2013" from NCUA. We also added exclusion of totals fields not included in June 2013.
2. In **Back Office WorkSpace**, we modified programs based on changes received in IRS Publication 1220 and instructions for individual forms. Form 1042-S was also added to report deposit interest greater than \$10.00 paid to non-resident aliens.
3. In **Reports WorkSpace**, we made a change to the NCUA Share Analysis report for reporting the uninsured amount of Revocable Trust accounts.

We are proud to announce that the **Automated Update** process completed successfully with minimal interruption to our loyal customers' business. We plan to continue enhancing this process from several aspects, including packaging more changes, running it more frequently to mitigate risks, and requiring less interaction from the end users. Stay tuned for more updates. As always, we love to hear from you on suggestions that can help us improve the overall user experience.



Check out our Conference website packed with information about what is to come this year at the **2014 Annual Sharetec Users Conference**.

<http://www.bradfordscott.com/conf/generalinfo.html>

Below is a summary of what you get with each click on the website:

Speakers Matt Davis, a highly-rated speaker and credit union expert will be performing two energetic, innovative, and thought-provoking sessions, and Thom Ewen, CEO at one of our more progressive credit unions will be speaking about the multitude of growing pains small credit unions face as they grow.

Events Read up on our entertainment plans - Tincaps Baseball Fireworks Game and Bradford-Scott's very own Spy School.

Education Topics Choose from a collection of topics and enjoy hearing speakers and meeting business partners sure to enlighten you with ideas!

Make a Payment Guides you through payment options.

Hotel & Directions Links to the Marriott by Courtyard and driving directions from Indy and Chicago Airports.

For more information, email Carrie at check@bradfordscott.com or visit our conference website and click on the CU Registration tab to register.

Customer Center Download training videos, best practice guides, procedures, or other documents from our Customer Center website. Hands-on users are jumping on this site on a daily basis to get the information they need to drive their Sharetec System in the most efficient way.

Customer Center can be accessed at www.bradfordscott.com/login_cu.php. A non-disclosure agreement must be completed in advance of receiving the login information for this "customer only" site. If you are interested, please contact Jason Pesetski at jpesetski@bradfordscott.com or call (260) 625-5107 for the sign-up form.

Improving Automated Scripts by: Kris Letz

Bradford-Scott has fervently been working on improving our Automated scripts including share draft downloads, share draft returns, ACH downloads, ACH returns, iPay downloads, and Corporate share drafts. The benefit for these updates is to help eliminate problems when a vendor is late in making a file available. Each of these scripts have been updated and standardized to work more efficiently and effectively.



New functions have been added that will allow the scripts to make multiple attempts when either downloading or uploading a file from a vendor, and providing an email update with each attempt to the credit union. In fact the download scripts will make attempts (if necessary) for up to 2 hours. Upload scripts will make attempts for up to 1 hour and send email updates as well. That way, if someone at the credit union forgets to produce a share draft or ACH return file, they have time to get it done and still have the script upload it for them. These standardizations also help Bradford-Scott make any necessary updates in the future quickly and efficiently for you, such as a vendors making URL, encryption, or file naming changes. Our automated script users are amazed at the time efficiency and process improvement this has brought to their daily routine.

If you are interested in acquiring improved workload efficiency for your own credit union, please contact your sales representative.

Tips & Suggestions To Follow by: Sean McMillen

Have you recently converted over to Sharetec? Or maybe you have been with us for some time and have become very comfortable with the system? Either way, with the stress of a new conversion or the stress from a normal day, it's very easy to get away from some daily and monthly routines that are very important for your credit union. So here are some tips and suggestions to make sure you are reviewing all the time.

Daily

- **Verify the Subledger Report every morning** – Do you have a variance or is everything in balance as it should be? This report runs with your end of day and is extremely important to review daily. It's always easier to find a variance when you know when it started. Don't forget to log onto Customer Center for our "Troubleshooting Tips for Finding a Variance" document.
- **Balance your corporate every day** – Are you getting credit for your Share Draft and ACH returns? If you are out of balance it is so much easier to find it if you look at this daily.
- **Look at the Report Queue** – Are there any reports stuck in an RU status or maybe an important report failed to run properly?
- **Review the Transfer Report** – Were there exceptions from Transfer Posting?



Monthly

- **Monthly Fee Posting** – Are your fees all posting as they should? Are you maximizing your fee income?
- **Verify Accrued Interest** – Are you looking at this to make sure all loan interest is being accrued properly?
- **Dividend Posting** – Are your members getting dividends correctly?

These are just a few questions to ask yourself after each end of day and end of month that will help in the long run. As always if you ever need tips for looking at any of these reports make sure you call us!

PowerUsers Around 50% of our Sharetec customers participate in daily discussions using our free e-mail list serve, PowerUsers@bradfordscott.com. To be a part of PowerUsers@bradfordscott.com, please e-mail Jason Pesetski at jpesetski@bradfordscott.com to sign up today.

New Software Support Manager

After an almost 6 month search for a Software Support Manager, Bradford-Scott couldn't be more excited for Kris Letz to join our team and manage our Software Support department.



Kris comes to us with management experience at a local credit union who has 750M in assets. At this credit union, Kris served in various roles where she was responsible for member service, problem resolution, supervision of teams, compliance, and procedure development. In the last few years there, Kris was responsible for overseeing the operations of 9 branches and was responsible for strategic planning, goal setting, and staff development. Also important to us is the experience that she gained at this credit union while serving on a conversion team that integrated 7 systems into one core processing system. Kris lives in Fort Wayne and has a Bachelor of Science degree from Indiana University in Business Management.

Kris begin employment with Bradford-Scott on April 7th and has hit the ground running to serve you in the software support area. Please join us in welcoming her!

all about Customer Center

Whether you are in the most recent release of Sharetec or still waiting to schedule your next upgrade - the Bradford-Scott **Customer Center** website is the central location for any credit union's Training and System document needs.

If you are looking for a system document, browsing to the Credit Union Documents to any of the Sharetec Version folders is a perfect source for training or resource documentation.

Under the Regulatory Tab, you can easily log on and download a pdf copy of the most current version of the SSAE Type16.

Other Tabs offer Hardware, Sharetec Troubleshooting Documents, User Conference updates, or an archive of Past Tips of the Week.

With the 8.2 release, we introduced our Computer Based Training Program, or CBT videos. (CBT). These videos offer training by job role and allow training by the individual department. It also allows training at each credit union's convenience in a streaming format 24-hours a day.

Most recently we also added instructional streaming video links for the Add on Custom Videos: Results, Results Scheduling, Quick Query, and eNotices.

You can utilize the search option or simply browse the directories, but in either case – the Bradford-Scott Customer Center website is an invaluable resource for your credit union as you expand your knowledge and resources on the Sharetec system and process your daily work.





IL Annual Convention Money Jar

During the IL Annual Convention in April, Bradford-Scott held a drawing to see who could come closest to guessing how much money was in the money jar. Leah Jett from First IL Credit Union in Danville, IL, won! Congratulations Leah! (Also in picture is Matt Isger, Regional Director for Bradford-Scott.)

Bradford-Scott Office Source is a one-stop shop for all your credit union's paper and supply needs!



- Laser Check Stock
- Continuous Check Stock
- Coupon Paper
- Blank Envelopes
- Custom Envelopes
- Full Color Online Services Brochure
- Receipt Rolls
- Continuous Vouchers
- Printer Toner
- Backup Media
- Statement Paper
- Full Color ART Brochure
- Wallet Sized ART Cards
- And much more...

Bradford-Scott Office Source offers backup tapes, toner cartridges, statement forms, receipt rolls, laser checks, and envelopes. We can also give you a free quote on any custom order you may have. We have competitive pricing and quick turnaround time on all orders and as always, your satisfaction is our top priority.

Don't forget that Bradford-Scott Office Source offers fully customizable Home Banking Brochures and Audio Response Cards! They are a great way to give your customers a quick reference guide to your Home Banking options and action codes for your ART system.

First time customers get **10% off** your first order (Expires 7/30/2014)! Call **Michelle Beaman** today for a free quote! **Phone** (317) 713-2065 **Email** thesource@bradfordscott.com.

Bradford-Scott Social Media

Connect with us on Facebook, Twitter, LinkedIn, and Wordpress for news and product updates.

Your input is always important to us and we'd love to know what you think of our social media pages, products, tips or questions. So please check us out and leave a comment at one or more of our social media sites.

Facebook: Bradford-Scott Data Corporation

Twitter: @bradfordscott_1

LinkedIn: Bradford-Scott Data Corporation, a Sharetec provider

Blog: creditunioncoresystem.wordpress.com

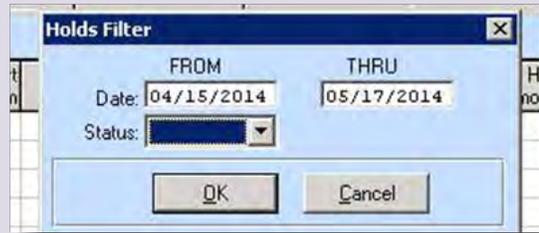


tip of the week

These TIPS are great for tellers, loan officers, or any Sharetec user! These helpful tips include hints, procedures, best practices, and miscellaneous items. To sign-up to get this weekly e-mail, please e-mail **Megan Johnson** at **mjohnson@bradfordscott.com** with your name and e-mail address or like us on Facebook by searching for **Bradford-Scott Data Corporation, a Sharetec provider**.

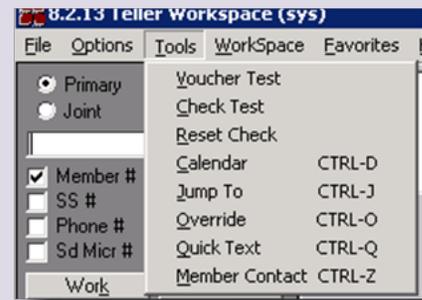
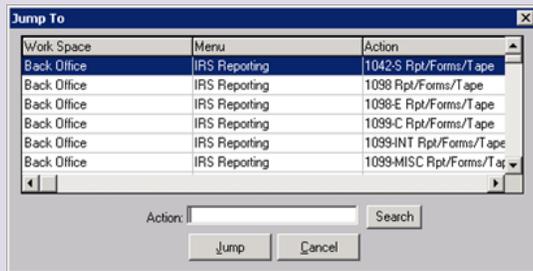
Listed below is a sample of tips e-mailed or posted in the past that are still useful today! (If you would like to see previous tips, they are stored in Customer Center.)

Filtering Deposit Holds If research on deposit holds needs to be done and they no longer display on the Hold tab in Central Information, try using the filter. Just right click and choose filter to activate the Holds Filter Dialog Box. Enter the specified date range or add an additional status filter and click on OK. Sharetec will display the appropriate holds.



Using the Jump Feature If you need to locate something quickly, try using the Jump To menu option in the Tools menu of any workspace.

The Jump To menu will allow users to search for a specific screen using multiple different search criteria. Just click on the heading for the item that will be used for the search and type in the specific item.



Simply type in the search term and then click on the search button to view the results. Select the area you wish to jump to and click on the Jump button!



Member Contact Users can access the Member Contact to add events, follow ups, task list items, or other important information related to a specific member or user. Any Sharetec user can access the Member Contact from the Tools menu.

Once open, user can add individual task items to a member and assign them to a specific user or department.

Date and time stamps allow multiple users to add their own additional follow up notes to track the overall progress of the task.

Transaction Effective Date Users can change the effective date on a transaction for any date in the past by updating the date field in the Member Transactions screen before starting the transaction. This tool can be useful when applying past-dated loan payments, correcting multiple transactions, and adjustments.

Member Copy It is easy to assist members when their account has become compromised using Sharetec's Member Copy function. It is as simple as entering the current member number and then pressing a button to assign the next available member number. All account information for that member will be transferred to the new member number (including distribution records). The original member record status code, transferred member number and flag as well as the close date will all be updated during this process.

To do this go to the Admin Workspace -> Member Adjustments -> Member Copy. Enter the Current Member # and press the Assign button next to New Member #. Then run the report for the system to complete the process.

After Hours Pager Support

If pager support is needed during the pager hours listed below and one of the following situations applies, there will be no charge for the pager call:

1. Issue would prevent your credit union from opening for business and can be resolved remotely.
2. Issue occurs during normal credit union business hours and can be resolved remotely.



Normal Pager Support

Monday through Friday:

7:00 a.m. EST to 8:00 a.m. EST

5:00 p.m. EST to 9:00 p.m. EST (6-9 p.m. for Software)

Saturday:

9:00 a.m. EST to 1:00 p.m. EST

\$180/hr for normal pager hours, if billable.

Month-end Support

Weekday:

No pager. Office hours extended until 9:00 p.m. EST

Extended Saturday pager hours:

1:00 p.m. EST - 5:00 p.m. EST

\$240/hr for extended Saturday pager hours, if billable.

Calls placed outside pager hours will be returned at 7:00 a.m. EST on Monday through Friday or 9:00 a.m. EST on Saturday. If the page cannot be handled remotely, charges for travel and labor will apply. If page is deemed billable, it will be subject to a minimum 1-hour charge.



Office Processing

07/08/2014 @ 10:00 am EST

07/10/2014 @ 2:00 pm EST

Creating Labels with Quick Query and MS Word

07/22/2014 @ 10:00 am EST

07/24/2014 @ 2:00 pm EST

eNotices

08/05/2014 @ 10:00 am EST

08/07/2014 @ 2:00 pm EST

Teller Balancing

08/26/2014 @ 10:00 am EST

08/28/2014 @ 2:00 pm EST

Automated Scripting

09/09/2014 @ 10:00 am EST

09/11/2014 @ 2:00 pm EST

Understanding Month End

09/23/2014 @ 10:00 am EST

09/25/2014 @ 2:00 pm EST

Quarterly Webinar Schedule

Our goal is to provide exceptional training to you and your staff within the comforts of your own office. The process is quick and easy! Simply e-mail **Jason Pesetski** in the Training department at jpesetski@bradfordscott.com with each user name and e-mail address. He will send out a confirmation with complete instructions for joining each webinar, as well as a list of training materials that need to be downloaded prior to the webinar. Webinar classes are small and are on a first come/first serve basis. They will start at the time listed each day in Eastern Standard Time and will last approximately one hour. Classes fill up very quickly, so please e-mail Jason at jpesetski@bradfordscott.com to sign up! If you have questions, feel free to call Jason at 260-625-5107.

Please note If you sign up for a class and **CANNOT** attend, we ask that you notify us at least **24** hours in advance of the webinar start time so that we may give away that spot to someone else. There is a \$25.00 cancellation fee if you do not provide notification in advance and miss the webinar.