System Settings | Add Member Default Setup
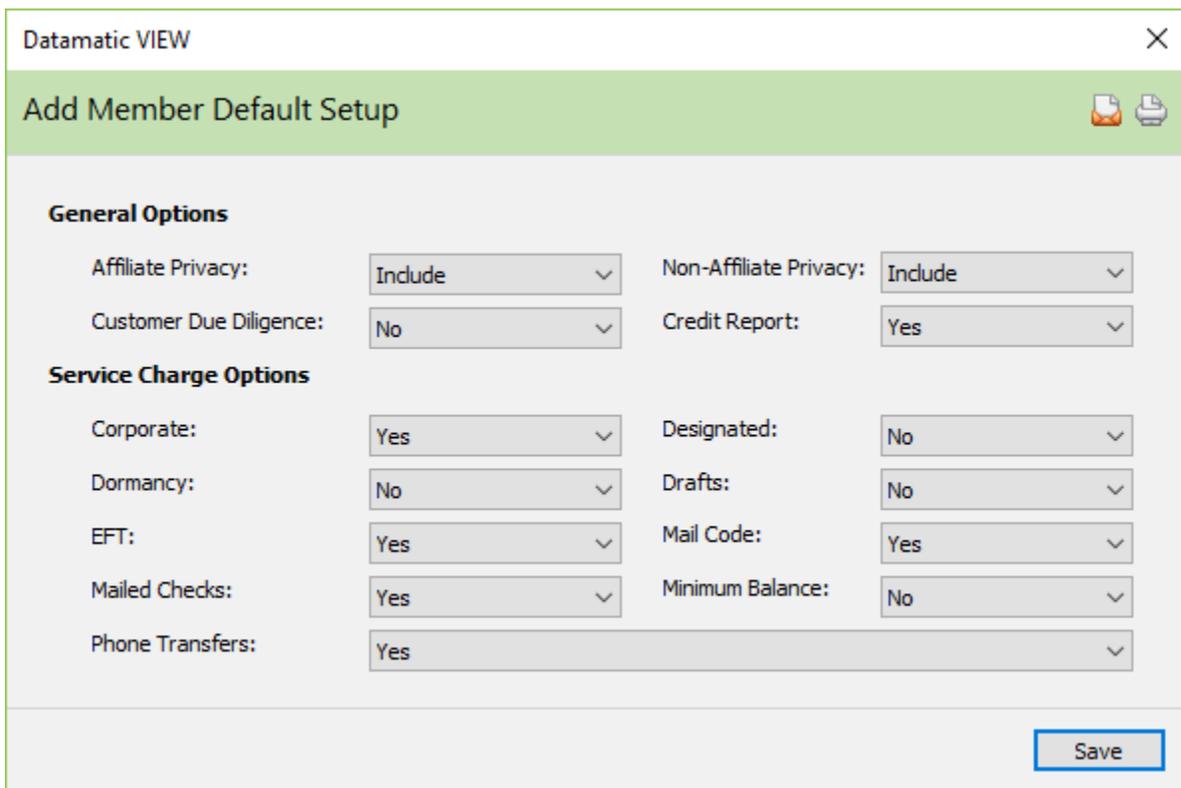
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ADD MEMBER DEFAULT SETUP

Overview

Add Member Default Setup defines the default options for Add Member, Add Share, and addling a member from Loan Application.

The Add Member Default Setup parameters are located in [Main Ribbon > System Settings > Add Member Default Setup].

Field	Comments	
Affiliate Privacy	Determines default Affiliate Privacy Option	
	Exclude	
	Include	
Non-Affiliate Privacy	Determines default Non-Affiliate Privacy Option	
	Exclude	
	Include	
Customer Due Diligence	Determines whether the Customer Due Diligence (CDD) information is required at account opening.	
	No	Do not collect CDD information at account opening
	Business Only	Collect CDD information for Business accounts only
	All	Collect CDD information for all accounts
Credit Report	Displays option to pull credit report in Add Member Wizard	
	No	

Field	Comments	
		Yes
Corporate	Determines default Corporate Service Charge option	
		No
		Yes
Designated	Determines default Designated Service Charge option	
		No
		Yes
Dormancy	Determines default Dormancy Service Charge option	
		No
		Yes
Drafts	Determines default Draft Service Charge option	
		No
		Yes
EFT	Determines default EFT Service Charge option	
		No
		Yes
Mail Code	Determines default Mail Code Service Charge option	
		No
		Yes
Mailed Checks	Determines default Mailed Checks Service Charge option	
		No
		Yes
Minimum Balance	Determines default Minimum Balance Service Charge option	
		No
		Yes
Phone Transfers	Determines default Phone Transfers Service Charge option	
		No
		Yes