



## System Settings | Add Member Default Setup



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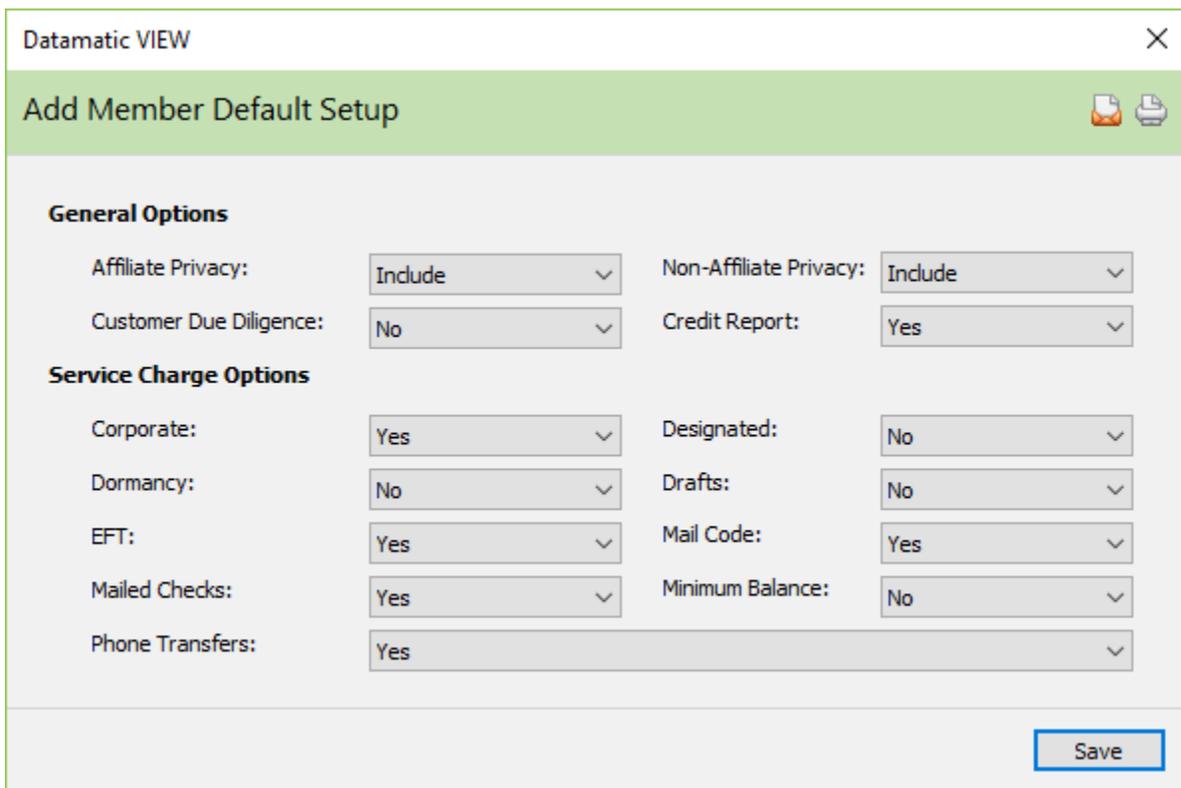
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## ADD MEMBER DEFAULT SETUP

### Overview

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

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



General Options	
Affiliate Privacy:	Include
Non-Affiliate Privacy:	Include
Customer Due Diligence:	No
Credit Report:	Yes
Service Charge Options	
Corporate:	Yes
Designated:	No
Dormancy:	No
Drafts:	No
EFT:	Yes
Mail Code:	Yes
Mailed Checks:	Yes
Minimum Balance:	No
Phone Transfers:	Yes

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
	<b>Yes</b>
<b>Corporate</b>	Determines default Corporate Service Charge option
	<b>No</b>
	<b>Yes</b>
<b>Designated</b>	Determines default Designated Service Charge option
	<b>No</b>
	<b>Yes</b>
<b>Dormancy</b>	Determines default Dormancy Service Charge option
	<b>No</b>
	<b>Yes</b>
<b>Drafts</b>	Determines default Draft Service Charge option
	<b>No</b>
	<b>Yes</b>
<b>EFT</b>	Determines default EFT Service Charge option
	<b>No</b>
	<b>Yes</b>
<b>Mail Code</b>	Determines default Mail Code Service Charge option
	<b>No</b>
	<b>Yes</b>
<b>Mailed Checks</b>	Determines default Mailed Checks Service Charge option
	<b>No</b>
	<b>Yes</b>
<b>Minimum Balance</b>	Determines default Minimum Balance Service Charge option
	<b>No</b>
	<b>Yes</b>
<b>Phone Transfers</b>	Determines default Phone Transfers Service Charge option
	<b>No</b>
	<b>Yes</b>