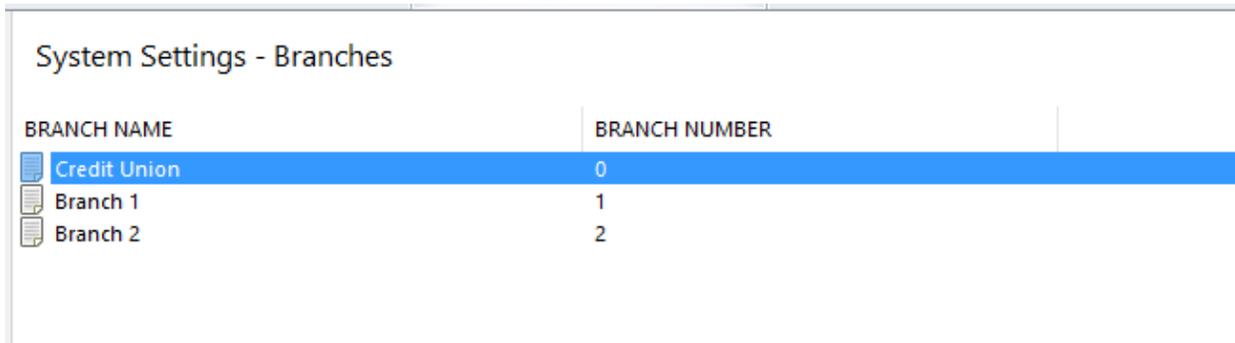


## Branches

The Branches selection is used to setup the Credit Union, Main Office and Branch Offices, if applicable. **IMPORTANT:** Even credit unions that do not have branch offices will need to setup the Credit Union on this window.



BRANCH NAME	BRANCH NUMBER
Credit Union	0
Branch 1	1
Branch 2	2

**Figure 1**

This window determines the locations that can be selected for branch balancing under Teller Tasks.

In the example above, the “Credit Union - Branch 0” setup will allow the user to display branch balancing totals for the entire credit union. The “Branch 1” setup will allow the user to display branch balancing totals for teller’s setup with branch 1. The “Branch 2” setup will allow the user to display branch balancing totals for teller’s setup with branch 2.

To add a new location (or establish the credit union), click on the Add icon on the ribbon.

The **Add Branch** window is displayed. The Add Branch window is used to add a branch quickly and easily.

### General tab

The screenshot shows the 'Add Branch' window in the 'General' tab. The form includes the following fields and controls:

- Branch Number:
- Name:
- Address 1:
- Address 2:
- City:  State:  Zip:
- Phone:
- Internet Banking:
- Internet Banking Text:
- Latitude:  Longitude:
- Next CD Number:  Next CD-IRA Number:
- Next Member:  Receipt Background:

A 'Save' button is located at the bottom right of the window.

**Figure 2**

All credit unions will need to setup Branch 0 for the credit union. Only Credit unions with branch offices will need to setup each branch using this window.

**Branch Number:** Enter the branch number being setup.

**Name:** Enter the name of the credit union or branch location.

**Address 1:** Enter the address for the credit union or branch location.

**Address 2:** Enter the address for the credit union or branch location.

**City, State and Zip:** Enter the city, state and zip for the credit union or branch location.

**Phone:** Enter the phone number for the credit union or branch location.

**Internet Banking:** Select the desired option as to whether or not Mobile Banking will display the Branch, a line of descriptive text and information on when the branch is open (see Hours tab). The options are:

- Show (default)
- Hide

**Internet Banking Text:** If desired, enter the message to be displayed in Mobile Banking in the Menu screen under **“Locations”**. The text entered here will display on the Branch screen under the credit union address. The maximum positions are 40.

**Latitude:** This is for a future enhancement to Internet Banking to provide a Map Location.

**Longitude:** This is for a future enhancement to Internet Banking to provide a Map Location.

**Next CD Number:** This can be used by credit unions that issue a certificate number for certificates of deposit (CD's). The next certificate number can be entered here and will automatically be filled in using the Add Share Wizard when a Share Type of CD is chosen. The next certificate number will be automatically incremented. If the Add Share Wizard is closed prior to finishing, or the certificate number is changed, the next certificate number will still be incremented. The starting number will need to be set back in Branches.

If the credit union uses the same set of numbers for regular CD's and CD-IRA's (Roth CD-IRA's, etc.), enter the next CD number in the **“Next CD Number”** field and leave the **“Next CD-IRA Number”** field blank. The system will use this number for all types of CD's and CD-IRA's. The same concept applies if the credit union has branch offices, but uses the same set of numbers credit union wide. Enter the next CD number in only the **“Next CD Number”** field (and **“Next CD-IRA Number”** field, if applicable) in the Branches window for the Credit Union.

**\*\*Note:** In order to skip the Branch setup window(s) under Branches and use only the Credit Union setup values, both the CD and CD-IRA fields need to be blank on the Branch setup window(s).

**Next CD-IRA Number:** This can be used by credit unions that issue a certificate number for CD-IRA's. The next certificate number can be entered here and will automatically be filled in using the Add Share Wizard when a Share Type of CD-IRA, Roth CD-IRA, etc. is chosen. The next certificate number will be automatically incremented. If the Add Share Wizard is closed prior to finishing, or the certificate number is changed, the next certificate number will still be incremented. The starting number will need to be set back in Branches.

**Next Member:** This field can be used to have the system **“auto-assign”** the next available member number (Account Base only) when adding a new member. The number may be assigned credit union wide or by branch. This number will be advanced each time a new member is added. Using this feature is not mandatory, however, it is recommended. **\*\*Note:** If the **“Next Member”** number will be used credit union wide (including branch offices, if applicable), only enter a number in the **“Next Member”** field in the window used for the main credit union and leave the Branch 1, Branch 2, etc. window(s) blank for this field.

After the Add Member Wizard is completed and the new member added to the system, if the member number and names associated are purged, the Member Number cannot be

automatically assigned. The Member Number cannot be entered on the Branches window as the next member number and be reused. It is possible, if desired, to input the account that was purged in the Add Member Wizard overriding what is automatically assigned by the system. However, if the add Member Wizard is not completed; the Member Number will remain as the next member number.

**Receipt Background:** If laser receipts are being used and a background(s) has been designed to be printed on the receipts, select the background to be used for the location being added.

**\*\*Note:** Prior to making a selection on this window or printing a background on a laser receipt, the background must be designed and added to the system. This is located under [\[Main Ribbon > System Settings > Pages\]](#).

**Hours tab**

Datamatic VIEW

**Add Branch**

General **Hours**

	Lobby Hours	Drive Up Hours
Monday:	<input type="text"/>	<input type="text"/>
Tuesday:	<input type="text"/>	<input type="text"/>
Wednesday:	<input type="text"/>	<input type="text"/>
Thursday:	<input type="text"/>	<input type="text"/>
Friday:	<input type="text"/>	<input type="text"/>
Saturday:	<input type="text"/>	<input type="text"/>

Save

**Figure 3**

**Lobby Hours and Drive Up Hours:** If desired, enter the Lobby and Drive Up Hours to be displayed in Mobile Banking in the Menu screen under **Locations**. The hours entered here will display on the Branch screen. The maximum space is 20 in each field.

After making any necessary changes, select Save.

Right click on the branch to display the **Edit Branch** window.

Datamatic VIEW

**Edit Branch**

General Hours

Branch Number: 1

Name: Branch 1

Address 1: 125 South Cedar Street

Address 2:

City: Lansing State: MI Zip: 48842-0000

Phone: 555-555-5555

Internet Banking: Show

Internet Banking Text: Best Branch

Latitude: Longitude:

Next CD Number: 101 Next CD-IRA Number: 1001

Next Member: 1006 Receipt Background: (none)

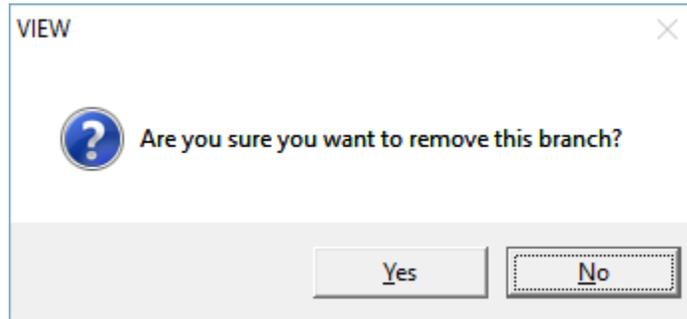
Save

**Figure 4**

After making any changes, select save.

The **Receipt Background** field is used to select a background to be used for laser receipts, if applicable. The background must be designed and added to the system prior to making the selection on this window. See [\[Main Ribbon > System Settings > Pages\]](#).

Select the **delete** icon on the ribbon to delete a branch.



To proceed with deleting the branch, select yes. Otherwise, select no.