Suffix Ranges

The Suffix Ranges selection is used to setup the share suffixes and suffixes ranges that are used by the credit union and select the account types that can be selected. This will reduce the possibility of opening a suffix with the incorrect account type.

Each suffix (and suffix range) used by the credit union **must** be setup on this window before any new share suffixes can be opened. Otherwise, no suffixes will be available to be selected when using the Add Share Wizard.

The following is for example purposes only. Each credit union will setup the suffixes used by their credit union for the account types offered to the members.

System Settings - Suffix Ranges

TYPE	FROM	TO
CD	80	89
Christmas Club	2	2
Coverdell CD-IRA	55	59
Coverdell CD-IRA	90	95
Coverdell IRA	51	54 ←
HSA Family	98	99
HSA Family CD	96	97
HSA Single	98	99
HSA Single CD	96	97
Roth CD-IRA	55	59
Roth CD-IRA	90	95
Roth IRA	51	54 ←
Secondary Share	45	49
Secondary Share	50	50
Secondary Share	1	1
SEP CD-IRA	55	59
SEP CD-IRA	90	95
SEP IRA	51	54 ←
Share Draft	70	74
Traditional CD-IRA	55	59
Traditional CD-IRA	90	95
Traditional IRA	3	3
Traditional IRA	51	54 ←
Vacation Club	4	4

Figure 1

**Note: In the example above, since suffixes 51-54 can be opened as a Coverdell (ESA), Roth IRA, SEP IRA or Traditional IRA, the suffix range needs to be setup four times. This is once for each account type. Suffix 4 can only be opened as a Vacation Club, therefore, 4 is entered in both the from and to fields.

Add Suffix Range

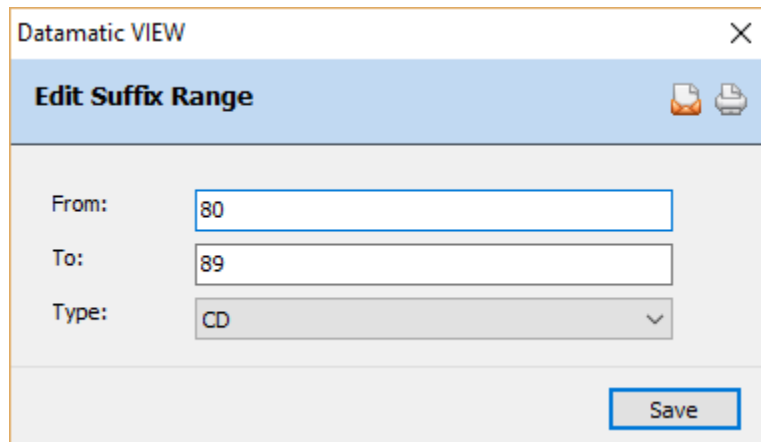To add a new suffix range, click on the Add icon on the ribbon.

Figure 2

Enter the "From" and "To" suffix in the space provided. Next select the appropriate "Type" that can be chosen by the staff when opening this suffix for a member. Here is a list of the account types that can be selected:

- ⇨ Secondary Share
- ⇨ Share Draft
- ⇨ CD
- ⇨ CD-IRA
- ⇨ Christmas Club
- ⇨ Vacation Club
- ⇨ Traditional IRA
- ⇨ Roth IRA
- ⇨ Coverdell IRA
- ⇨ SEP RA
- ⇨ HSA Single
- ⇨ HSA Family
- ⇨ Roth CD-IRA
- ⇨ Coverdell CD-IRA
- ⇨ SEP CD-IRA
- ⇨ HSA Single CD
- ⇨ HSA Family CD

Select the "Save" button to add the new suffix or suffix range.

Edit Suffix Range

To edit a suffix range, double click on the suffix range.
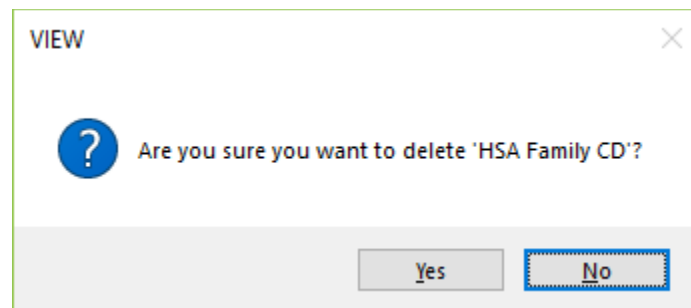
Figure 3

Select the Save button, after making any needed changes.

Delete Suffix Range

To delete a suffix range, click on the delete icon on the ribbon.

To proceed with deleting the suffix range, select yes. Otherwise, select no.