

Adding Users to a Membership

For Company Admins Only

Adding Users to a Membership

This process is for individuals already in the CUES System. This will trigger a welcome email from CUES to everyone added to the membership.

PROCESS

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1. Once you are logged into cues.org, you'll be in the myCUES Dashboard. From here, click "Manage My Account".

| Hi, Dennis. | | | Manage My Account | |
|--|--------------------------------|----------------------|-------------------|--|
| Dennis Clark Member Engagement Specialist CUES Staff | Membership Level Unlimited+ | Member ID 1139444 | | |

 Scroll down to the "Manage Membership Access" section and click "Add/Remove Membership Access".

| | Manage Membership Access |
|---|---|
| | This section is for Company Administrators Only! |
| - | In this section you may add, update, or remove staff from our database and grant them access to membership. The person must be added to the database before they can be granted access to membership. We recommend that admins review and update this information annually to ensure that only current employees and board members are receiving CUES access through your organization. This section is for company administrators only! |
| | Company Profile Management |
| | Add/Remove/Update Database |
| | Check here to ensure that your staff/board contact is in the database. You must add them to the database before you grant them membership. You can also download your current roster of staff/board contacts in this section. This section does not grant or verify access to the membership. |
| | Add/Remove Membership Access |
| | there you may addremore access to methobership for your staff and board. This option only available to organizations with U or U+ memberships. You must enter the contact i the database before granting access. Only company administrators can use this function. Contact us at cues@cues.org for assistance. |

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PROCESS (cont.)

3. This page will list all current members included in your membership. To add someone who is not yet a member, click the plus sign (+) under 'Add/Remove'. *This first section is for staff, if you need to add a board member scroll down to CU Board/Volunteer section and follow the same steps.

| Membership : CUES Relationship : CU Staff | | Included with Membership : Unlimited Maximum Slots Allowed : Unlimited | | |
|--|-------------------------------|---|--|--|
| dd/Remove | Member †= | Start Date | | |
| Θ | - empty included slot - | | | |
| 0 | Adam Smith | 01/04/2024 | | |
| 0 | Alyssa Hulka | 08/18/2021 | | |
| • | Art Chamberlain | 10/22/2020 | | |
| • | Brendan Armstrong | 09/11/2023 | | |
| 0 | Brian Cacic, CEM | 10/09/2018 | | |
| 0 | Carla Trager, CEM | 01/10/2019 | | |
| 0 | Carolyn L Cereghino, CCD ACCD | 10/08/2018 | | |

4. A new list will appear with everyone on file at CUES for your credit union. The last column, 'Already a Member?' will indicate who current members are. To add a new member, click the check box next to their Customer ID, you may select multiple at a time (please only do staff at one time, and board at another).

| ct New M | ember | | | | | |
|-----------|-------------|-------------------|---------|-------|-------------|--------------------|
| elect New | Members | | | | | |
| ow 100 🗸 | entries | | | | Search: | |
| Pelected | Customer ID | Name | ≑ City | State | Postal Code | Already Member? |
| | 1000159 | Dawn Abely, CUDE | Greer | SC | 29651-1441 | Yes |
| | 1091608 | Temp Account | Madison | WI | 53708-0167 | Yes |
| | 1175905 | Julia Alejandre | Madison | WI | 53708-0167 | Yes |
| | 1078471 | Lynn D Anderson | Madison | WI | 53708-0167 | Yes |
| | 1151002 | Brendan Armstrong | Madison | WI | 53708-0167 | Yes |
| | 1078553 | Worker Bee | Madison | WI | 53708-0167 | Yes |

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5. Once you have selected everyone to add to the membership, select the correct Relationship Type (CU Staff for staff members and CU Board/Volunteers for board members). Then, click Add to Membership.

