



Company Admin How-to Document

Creating a New Account

Purpose: To add a new individual into the CUES system. The process below is only to create a new account/for adding to the CUES system. This does not trigger the membership. To add someone to the membership, see the 'Adding Members to an Unlimited/Unlimited+ Membership in the [Member Help Center](#).

**This process is for company admins only.*

Process:

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

The screenshot shows the myCUES Dashboard for a user named Laura Gibbs. The dashboard includes a greeting 'Hi, Laura.', the user's name and role 'Laura Gibbs, Member Engagement Manager, CUES Staff', and membership details: 'Membership Level: Unlimited+', 'Member ID: 1081755'. A 'Manage My Account' button with a right-pointing arrow is highlighted with an orange box in the top right corner.

2. Now, scroll down to the 'Manage Membership Access' section and click 'Add/Remove/Update Database'.

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

Click 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

Here you may add/remove access to membership or magazine subscriptions for your staff and board. This option is only available to organizations with U or U+ memberships. You must enter the contact in the database before granting access. Only company administrators can use this function. Contact us at cues@cues.org for assistance.

3. Ensure the individual is not already included in the list on the left-hand side of the page. If they are not, click the plus sign (+) at the top-right of the page.

Manage All Employees
CUES Staff

EMPLOYEES [Export](#)

Dawn Abely CUDE [Remove] ID 1000159

Temp Account [Remove] ID 1091608

Lynn Anderson [Remove] ID 1078471

Karen Bankston [Remove] ID 1078493

Worker Bee [Remove] ID 1078553

Prefix
Please Select

First Name*

Middle Name

Last Name*

4. Now, enter the individual's information. Everything with a red asterisk is required. Click 'Save'.
 - Required fields: First, last and nickname, title, position level, department (choose the best fit), and email address.

**Note: Phone number and address are not required. If you do not add anything here, CUES will use the credit union's headquarters information.*

First Name*

Middle Name

Last Name*

Suffix
Please Select

Nickname*

Title*

Position Level*
Manager

Department*
Please Select

Email Address

Email:*

Department* is required.

Direct Phone Line

Phone: Ext:

PO Address

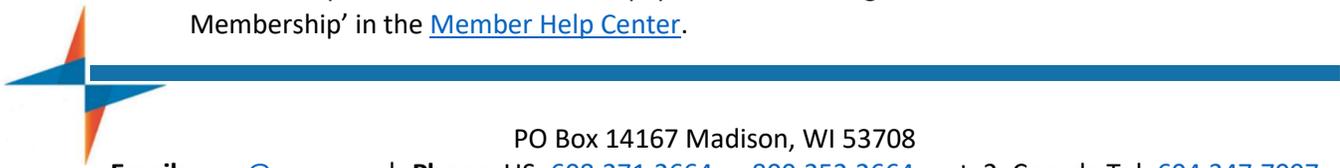
Street 1: Street 2: Street 3:

City: State/Province: Postal Code: Country:

United States of America

Save

5. The individual will now show on the list on the left-hand side of the page.
6. To add this person to the membership, please see 'Adding Members to an Unlimited/Unlimited+ Membership' in the [Member Help Center](#).



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