

A+ Auto File/Report Notification

Report Vue – WebReports

To streamline reporting availability and notification, Advisors Plus posts all FI reports directly to ReportVue/WebReports. An auto-notification feature is available once the user profile is updated accordingly.

To access ReportVue/WebReports:

Web Reports - https://members.pscufs.com/ReportVue/Content/WebReports.aspx)

- MemberConnect > Data & Analytics > Member Insight > ReportVue > Web Reports
- If you do not have access to ReportVue please contact the MemberConnect Administrator at your Credit Union
- Or call Member Services at 844.367.7728 for assistance

When first registering for ReportVue, you will input your email address and enter the confirmation key code within your profile. Until this step is complete, you will not be able to navigate around ReportVue. Once you confirm your email address, you can set-up reports you wish to see in your profile. There is a list is of available Card System Reports and Web Reports from which you can select a few or all. You can add them to your profile by checking the box next to the report name under the My Report Columns.

You can set-up email alerts for reports by selecting the My Notification box (sample below).

- In ReportVue in the upper right there is a selection for "Profile"
- Under Profile ensure "Web Reports" is chosen for "Select Report Type"
- Check the box for "Advisors Plus Reports" under "My Notifications"

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Profile – Edi	t User Profile		
User Name		Last Login Date	
First Name	Jane	Last Name	Smith
Email	jsmith@pscu.com		
FI Name	PSCU		
Save			
Select Report Typ	Web Reports	~	
Web Report Nam	e		
Web Report		My Rep	orts
Access Point			
ACF			
Advisors Plus Reports			
ALP			
ALF			
	Profile – Edi User Name First Name Email FI Name Select Report Typ Web Report Nam Web Report Access Point ACF Advisors Plus Re	Web Report Access Point Access Point <	Home Excelle Profile - Edit User Profile User Name Last Login Date First Name Jane Last Name Last Name Email jsmith@pscu.com FI Name PSCU Save Cancel Select Report Type Web Report My Rep Access Point Acc Acc Acp

🔁 Advisors Plus 🏻 pscu🎙

Once Advisors Plus reports email alerts are setup, an auto email notification (sample below) is sent each time a new file or report is posted under Advisors Plus Reports.

Subject: Your Web Reports are ready.

From: no-reply@pscu.com <no-reply@pscu.com> Sent: Tuesday, April 6, 2021 8:26 AM To: Subject: Your Web Reports are ready.

Thank you for being a valued ReportVue user. Your web reports have completed processing, and are available for downloading at this time.

These reports include the following: - Advisors Plus Reports

To view the reports that have arrived, please click here.

If you no longer wish to receive notification for these reports, please visit your <u>"Profile"</u> area in ReportVue to turn this notification off.

Thank you.

ReportVue Team

NOTICE: This electronic mail message and any files transmitted with it are intended exclusively for the individual or entity to which it is addressed. The message, together with any attachment, may contain confidential and/or privileged information. Any unauthorized review, use, printing, saving, copying, disclosure or distribution is strictly prohibited. If you have received this message in error, please immediately advise the sender by reply email and delete all copies.