Documentation: Tricks of the Trade

March Top Picks—Featuring Online Banking

Issue #16

Be sure to attend our upcoming Tricks of the Trade Webinar on March 13 from 2-2:30 PM ET. Watch for an invitation via email. During this training we will cover in more detail how you can use documentation to assist you with the implementation of See/Jump and Smart Messages.

Pick #1: The Smart Message (Smart Message manual)

Smart Messages are a very sophisticated way to present graphical advertisements of selected services in **It's Me 247** (such as eStatements or bill pay) to members who are currently not enrolled in or using a certain feature.

Check out The Smart Message manual (shown to the right) for information about setting up online promotions at your credit union. Also check out Activate Smart Messages in the Show Me the Steps online help.
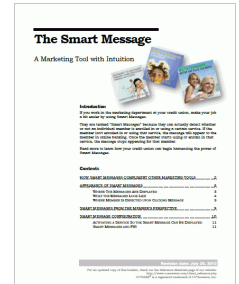
Pick #2: See/Jump Controls (Including It's Me 247 Screens)

It's important to understand that Internet-savvy members may have multiple memberships, such as a spouse's that they want to log into on a frequent basis. Using "See" a member can see balance amounts and details of other memberships, while "Jump" allows the member to access the account without the need to log into the second account. Use this booklet to learn more about security features, implementation, and **It's Me 247** screens used.

Check out the See/Jump Controls booklet (shown to the right). Also check out the directions to Set Up See/Jump Access in the Show Me the Steps online help.
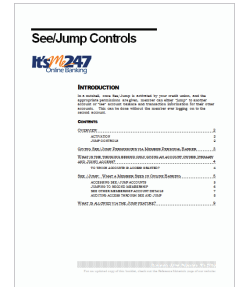
Pick #3: Statement Processing & Verification Tasks for Self Processors

We're excited to present a new reference booklet we think self processors will find very useful. The Statement Processing & Verification Tasks handbook is a compilation of all the procedures, tips, and "in someone's head" knowledge about what we do each month to ensure member statements go off without a hitch. Specifically, the Verification worksheet described on Pages 30 to 43 should be a standard part of self processors' monthly statement-processing routine.

Self processors can learn more in the Statement Processing &Verification Tasks manual
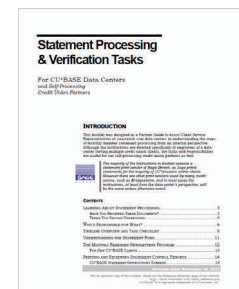
Pick #4: Members Love the Convenience of Paying Bills by Phone (Mobile Web Banking bill pay screens)

Now with the December release, members of credit unions using both EasyPay by Fiserv and Easy pay by iPay can pay bills on their phone. This full-color brochure shows pictures of the Mobile Banking bill pay screens designed for both vendors.

Check out the Members Love the Convenience of Paying Bills by Phone brochure for details.
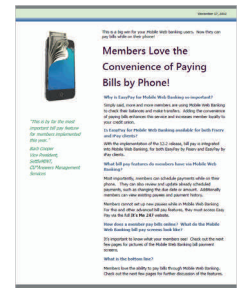
Pick #5: "It's Me 247" Color Brochure

Check out the new look of **It's Me 247** in the recently updated **It's Me 247** color brochure. This twenty page brochure covers all the major features in online banking and is designed to market the website to new credit unions. But with the recent look change, it is helpful to existing clients for an overview of the fresh new look of online banking.

Check out the recently updated It's Me 247 color brochure for a look at the new look of **It's Me 247** Online Banking

Refer to the Tricks of the Trade Newsletter Series page for all issues: http://www.cuanswers.com/tricks_of_trade.php