



Documentation: Tricks of the Trade

April Top Picks—Featuring Show Me the Steps

Issue #17

Be sure to attend our upcoming Tricks of the Trade webinar on April 23 From 2-2:30 PM ET. Watch for an invitation via email. During the training we will cover in detail how you can use Show Me the Steps to answer many common questions, including the ones listed below.

Pick #1: [What should I do to maintain a member's account when they file for bankruptcy?](#)

We've worked directly with the Management Services Collections team to provide easy step-by-step instructions for handing members' accounts when they apply for bankruptcy. Check out the [Bankruptcy page](#) for more details.



Pick #2: [Why did my member get charged an NSF Fee \(or any fee\)?](#)

We've worked directly with the Client Services department to develop directions for researching why a member was charged an NSF fee. Check out the [Determine Why NSF \(or any Fee\) Was Charged to Member page](#) for more details.



Pick #3: [How can I quickly send an email to members who are using \(or not using\) services?](#)

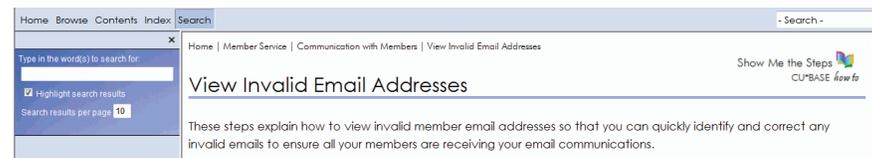
Want to send an email or online banking message to members using a specific service such as online banking, eStatements, ATM/debit cards, ACH, payroll, bill pay, overdraft protection?



First use the [View Accounts With or Without Certain Services page](#) to create a database file of members who are using (or not using) certain services. Then use the [Send Mass Communications to Members With or Without Certain Services page](#) for directions on sending emails or online banking messages to these members.

Pick #4: [How do I view members with invalid email addresses?](#)

Want to view a list of members who have Tracker conversations indicating that their address is marked as invalid? Check out the [View Invalid Email Addresses page](#) for directions.



Pick #5: [How do I reverse a transaction for the same day?](#)

Check out the Account Adjustment/Reversals page for step-by-step directions for many account adjustment tasks, including [Reverse Transaction the Same Day](#).



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