



# Documentation: Tricks of the Trade

## August Top Picks—"Re-Grand Opening" of 2012

Issue #21

Be sure to attend our upcoming Tricks of the Trade webinar on August 27th from 2:00-2:30 PM ET. Watch for an invitation via email. During the training, we will review all ten software enhancements of 2012 and where you can find documentation to learn more about them.

### Pick #1: What were the top 2012 enhancements of 2012?

With so much great programming last year, it was difficult to narrow our choices to the top stars for 2012. We had to pick from a large group of highly eligible candidates! This group of ten includes the best of the best according to our experts. Have you implemented all of them at your credit union?

See the list in the [Top 10 Enhancements of 2012 brochure](#).



### Pick #2: How does Automated Queries and Reports speed up the first week of the month?

With Report Scheduler, you can save the filters of commonly used reports and set these reports to be run automatically by our Operations staff on the first of the month; you can also run them manually at any time of the month. With Query Scheduler you can automate the running of Queries on the first of the month.

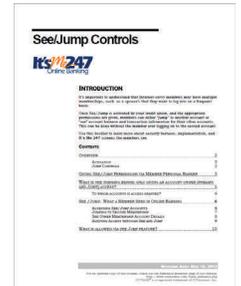
Check out the [Automated Reports and Queries booklet](#) for more in-depth documentation. In Show Me the Steps, check out quick directions on the [Statements/Reports help topic](#).



### Pick #3: How do See/Jump Controls for It's Me 247 help me aggregate members' multiple memberships?

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.

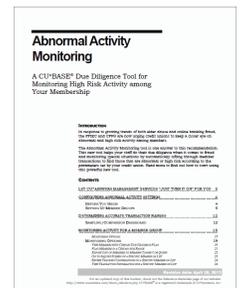
We've created the [See/Jump Controls booklet](#) to only feature See/Jump controls. Also check out the direction to [Set Up See/Jump Access](#) in Show Me the Steps online help.



### Pick #4: How does Abnormal Activity Monitoring help me monitor risky transactions at my credit union?

The Abnormal Activity Monitoring tool helps your staff do their due diligence when it comes to fraud by automatically sifting through member transactions to find those that are abnormal or high risk according to the parameters set by your credit union.

Check out the [Abnormal Activity Monitoring booklet](#) for more in depth documentation.



### Pick #5: How does Smart Message promos via It's Me 247 intensify my online selling?

Smart Messages are a very sophisticated way to present graphical images in online banking advertising such services as eStatements or bill pay to members who are currently not enrolled in or using the feature advertised.

Check out [The Smart Message manual](#) for information about setting up online promotions at your credit union. Also check out [Activate Smart Messages](#) in Show Me the Steps online help



Refer to the Tricks of the Trade Newsletter Series page for all issues:

[http://www.cuanswers.com/tricks\\_of\\_trade.php](http://www.cuanswers.com/tricks_of_trade.php)