March 26, 2011

Documentation: Tricks of the Trade

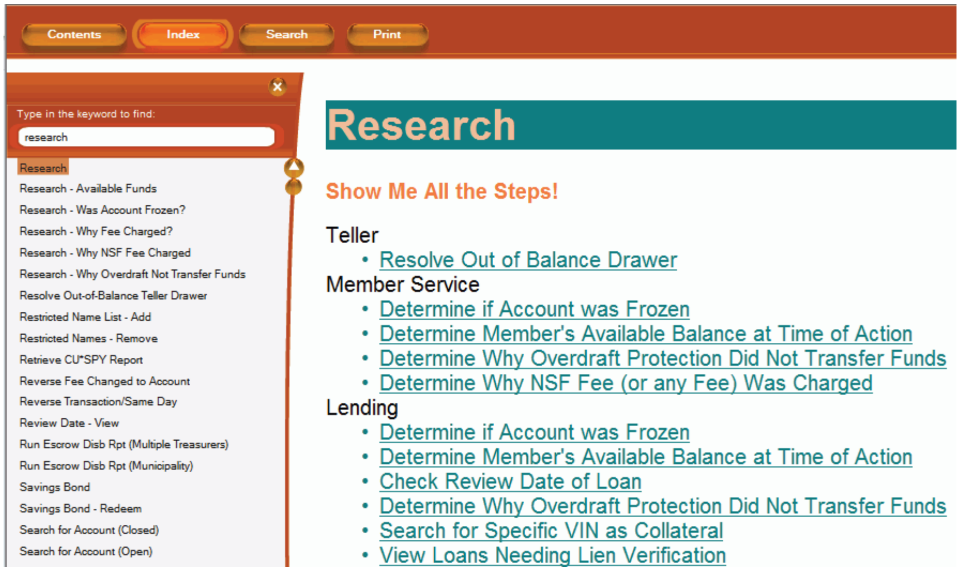
Show Me the Steps Research Tools

TIP #1: Where Can I Find Steps to Research Common Client Service Questions?

Are you interested in finding out why an NSF fee was charged to a member? Show Me the Steps Online Help has teamed up with the Client Services Department to provide you step-by-step directions to allow you to do the research.

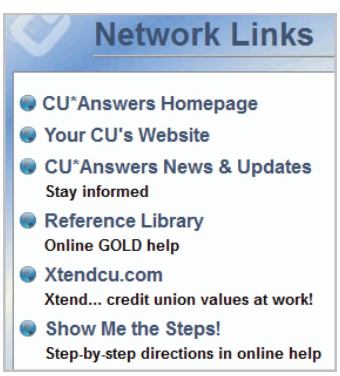
These directions match the exact process followed by Client Services staff when they assist you. If further research is needed, contact Client Services.

To find these directions, check out the new "Research" section in Show Me the Steps Online Help. To find this and other research related step-by-step directions, use Index Keyword "research."



Check out the "Research" section in Show Me the Steps Online Help for links to the help topics outlined in this publication.

Use the "Show Me the Steps!" link on the Network Links page to access the Show Me the Steps Online Help.

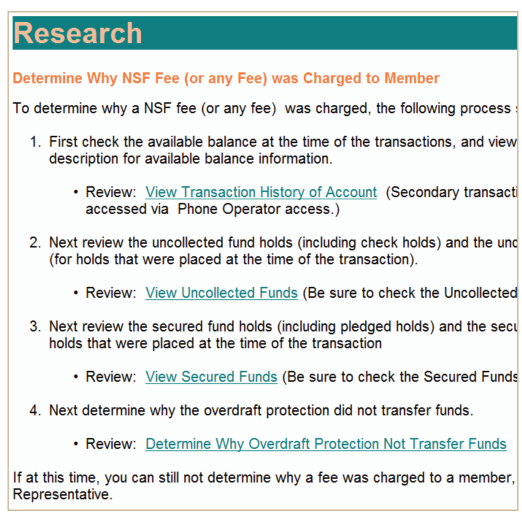


TIP #2: How Can I Determine Why an NSF Fee Was Charged to a Member?

Let's say your member calls to ask why a fee was charged to her account. The Show Me the Steps Online Help can help you answer this member's question.

To access the page shown to the right, use Index Keywords: "NSF fee – why charged."

This page breaks researching an NSF fee (or any fee for that matter) into four easy steps, each with its own step-by-step directions.



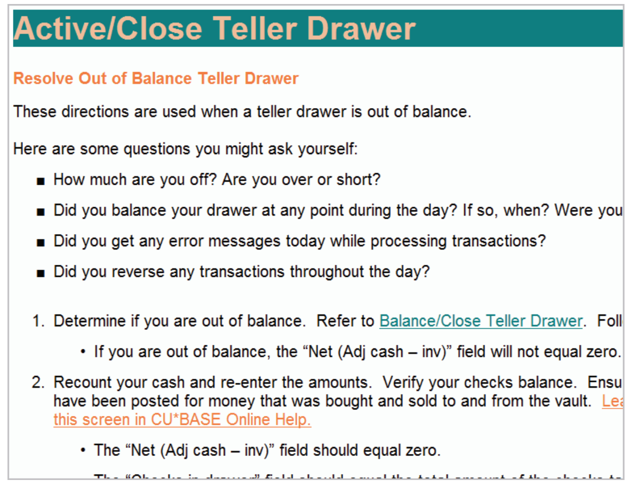
Check out the "NSF (or any other) fee" topic in Show Me the Steps Online Help

TIP #3: How Do I Resolve an Out-of-Balance Drawer?

Need assistance researching why your teller drawer is out of balance? Our Client Services experts have provided an initial list of questions to ask yourself when you find your self in just this situation. Check out the "Resolve Out of Balance Drawer" page in the Show Me the Steps Online Help.

Also included are easy-to-follow directions to bring your drawer in balance. There are also helpful links to directions for closing your drawer and reversing transactions from the current day. What a great tool for that new teller at your credit union!

Use Index keywords: "resolve out of balance drawer."



Check out "Resolve Out of Balance Teller Drawer."

TIPS #4-6: What Else Can I Research Using Show Me the Steps Online Help?

Show Me the Steps Online Help has even more pages to help you do your own research. Other research topics assist you with the following questions:

- **Was an account frozen at the time of a transaction?**

  Use Index Keywords: "research—was account frozen."

- **How can I determine a member's available balance at the time of a transaction?**

  Use Index Keywords: "research –available funds."

- **How can I determine why overdraft protection did not transfer funds?**

  Use Index Keywords: "research—why overdraft not transfer funds."

We Want to Hear from You! What Other Research Tools Would Be Helpful?

We want to increase this section! What other step-by-step directions would be helpful? Email your ideas to Client Services. Or maybe you have your own steps that you are willing to share with others. Show Me the Steps Online Help is a collaborative resource and we encourage you to take part in its development. Remember you can always submit directions using the "Submit to Show Me the Steps!" link on the Network Links page in CU*BASE.

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