

# 7

## Documentation: Tricks of the Trade

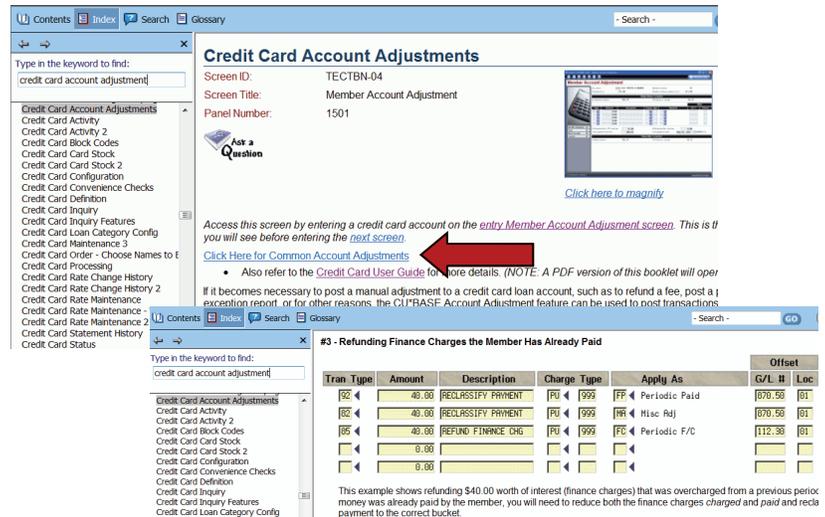
### EFT Documentation Tools

### TIP #1: Where Can I Find Examples of Credit Card Account Adjustments?

Look no further than the CU\*BASE Online Help for examples of credit card account adjustments. These examples have been copied directly from the “Credit Card User Guide” directly to the help topic of the screen you use when making the adjustments.

While making a credit card account adjustment, click on “Learn about this Feature” to access this topic.

Once you access the CU\*BASE Online Help topic, click the link “Click Here for Common Account Adjustments” to move down the page to view nine different examples of how to set up your screen.



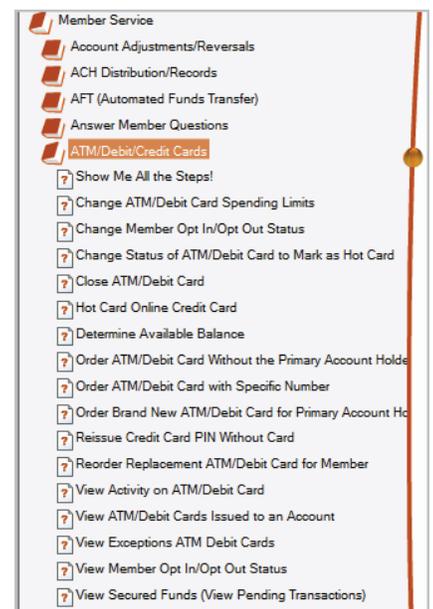
Examples of credit card adjustments are included right in help. Use Index keywords: credit card account adjustment.

Find screen help documentation now in CU\*BASE Online Help!

### TIP #2: Where Can I Find Step-by-Step Directions on Common EFT Tasks?

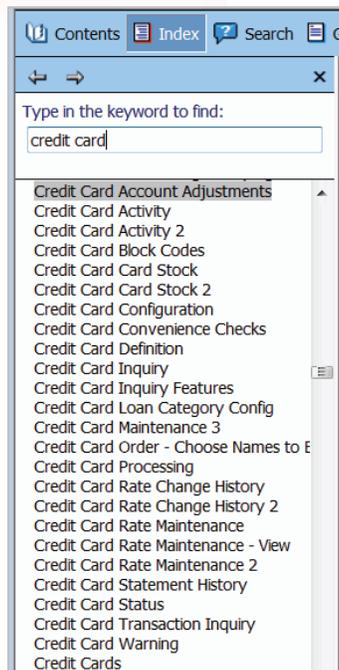
How do you reissue a credit card PIN without a card?  
 How do you change ATM/Debit card spending limits?  
 How do you determine a member's available balance?

Look no further than the Show Me the Steps Online Help! Check out the ATM/Debit/Credit Card section of the Table of Contents for step-by-step directions on these and other common EFT tasks. Or use the Index to search for a particular topic.



Check out the ATM/Debit/Credit Cards section in Show Me the Steps Online Help

We have moved our documentation from our booklets into the CU\*BASE Online Help! Just use index keywords: credit card. Or click on “Learn about this Feature” for directions on using a particular credit card screen.



## TIP #3: Where Can I Learn More About Ordering ATM/Debit Cards and PINs? What About Instant Issue?

Check out the **ATM/Debit Card User Guide** for help with ordering ATM or Debit cards and PINs. This booklet includes step-by-step directions for the tasks included in the Frequently Asked Questions (shown to the right).

You can also find directions for ordering cards using the Instant Card Issue feature. Check the back of the booklet for this information.

Look under “A” on the CU\*BASE Reference page to find this booklet.

### FREQUENTLY ASKED QUESTIONS

Before moving to the answers to these questions (beginning on page 7), be sure to review the introduction to the entry screens (beginning on the next page). Answers to the questions follow this overview.

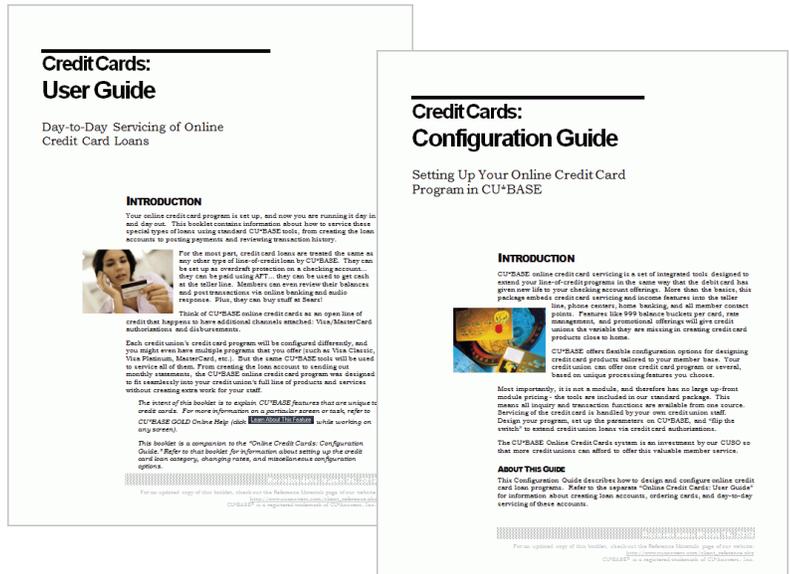
- **Question #1:** My member is the primary account holder and wants to get a brand new ATM/Debit Card. How do I order him or her a card? **See Page 7.**
- **Question #2:** My member's card is worn and I need to reorder him or her a replacement card. How do I do this? **See Page 12.**
- **Question #3:** My member's spouse or child needs an ATM/Debit card. How do I create a card that does not have the primary account holder's name on the card? **See Page 15.**
- **Question #4:** I need to issue the member a specific card number. How do I do this? **See Page 16.**
- **Question #5:** A cardholder has lost his or her card. How do I change the status of the card to mark it as a "hot" card? **See Page 17.**
- **Question #6:** I need to close a card that is no longer needed. How do I do this? **See Page 20.**
- **Question #7:** How do I see all of the cards issued to a member's account? **See Page 22.**
- **Question #8:** How do I view the activity on a specific card? **See Page 23.**

## TIPS #4-5: What Other EFT Related Booklets are on the CU\*BASE Reference Page?

There are many documentation resources available for EFT specialists at your credit union!

Remember that you can always review the comprehensive **Credit Card User Guide** and **Credit Card Configuration Guide** for complete details on credit card processing and configuration.

Both are available under “C” on the CU\*BASE Reference page



## TIP #6: What EFT Programming is Coming in the Next CU\*BASE Release?

We have started grouping the release summary by job description. Be sure to check out the EFT section for more information about EFT-related programming included in the next release.



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