CU*BASE e-Receipts Quick Reference Guide

Creating a Receipt for the First Time

- 1. Post a CU*BASE® transaction.
- 2. Have the member sign the electronic signature pad.
- 3. Click the *Print* button to print as many receipts as are needed.
- 4. Click the *Save* button. The receipt is now archived.

Reprinting a Receipt Using Phone Operator

(For teller receipts created in the last 90 days)

- 1. On the Initial Teller Posting Screen select *Phone Inquiry* (Proc Code P).
- 2. Press Enter.
- 3. Select the account that the receipt was processed in
- 3. Select the transaction.
- ◆ Click the blue dot in the Print Receipt column next to the transaction and click Print. Then click *Print* on the ProDOC[™] screen. Click *Cancel* and then *OK*. The receipt will print to the receipt printer without a signature.

OR

 Click Retrieve Receipt Image, select a non-receipt printer, such as the one you use for reports, and click Print. The receipt will print to the nonreceipt printer with a signature.

Reprinting a Receipt Using Teller Audit in CU*BASE

(For teller receipts created in the last 90 days)

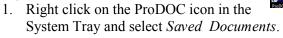
- 1. From the Teller Drawer Control, click *Audit* (F3).
- ◆ Use *Print Receipt*, then click *Print* on the ProDOC screen. Click *Cancel* and then *OK*. The receipt will print to the receipt printer without a signature.

OR

 Click Retrieve Receipt Image, select a non-receipt printer, such as the one you use for reports, and click Print. The receipt will print to the nonreceipt printer with a signature.

Using ProDOC to Reprint Your Receipt

(For teller receipts created in the last seven days)



- 2. Select your user name from the drop-down menu.
- 3. Select the date of the receipt from the Date choices.
- 4. Select your receipt.
- 5. Click View.
- 6. Click Print.
- 7. Select a non-receipt printer, such as the one your use for reports, and click *Print*.
- A receipt will print to the non-receipt printer, with a signature.

Using idocVault to Reprint your Receipt

(For all receipts)

- 1. Double click the idocVAULT icon on your computer desktop to launch the browser.
- 2. Type in your ProDOC login and password, then click the *Login* button.
- 3. Click *Images*.
- 4. Check the Current Receipts check-box.
- 5. Click the *Search* button.
- 6. Type in your specific search criteria.
- 7. Click the *Search* button on the right.
- 8. The first receipt matching the criteria appears on the right. Click on the blue icons on the left to view other receipts.
- 9. Print the receipt using the Adobe printer icon.
- ◆ A receipt will print to a non-receipt printer, such as you use for reports, with a signature.



CU*BASE Photo ID Capture Quick Reference Guide

Scanning and Saving the Electronic Photo ID

- 1. Go to the Teller Processing screen and select the member or other person associated with the account.
- 2. Press Enter to advance to the Verify Member screen
- 3. Click the *No ID on File* button.
- The "No ID on File" button can also be found on the Inquiry and Phone Operator screens.
- 4. Place your photo ID on the scanner.
- Always scan adult licenses face down, head first.
 Align the identification with the right hand side of the scanner.
- 5. Confirm that Photo ID is selected.
- 6. Click Scan Page.
- 7. Click Scan.
- 8. Click Save.

Printing a Receipt after a Photo ID has been Scanned

- 1. Post a transaction in the normal manner.
- 2. Select the Form Name of *Receipt* so that the signature field appears.
- 3. Continue to process the receipt in the normal manner.

Viewing and Printing an Electronic Photo ID once the ID has been Scanned

- 1. Go to the Teller Processing screen and select the member or other person associated with the account.
- 2. Press Enter to advance to the Verify Member screen.
- 3. Click on the *Verify My ID* button.
- The "Verify My ID" button can also be found on the Inquiry and Phone Operator screens.
- 4. A browser window will open showing the photo ID.



Setting Up Auto-Launch for ProDOC

If you select the *ProDOC auto-launch* box in your Workstation Favorites in CU*BASE, you will automatically be logged into ProDOC when you sign into CU*BASE in the morning.

The following steps will need to be done one time

- 1. Click Preferences
- 2. Check the ProDOC auto-launch box.
- 3. Press Enter.
- 4. Once you have logged in a ProDOC icon will appear in your System Tray.

The next time (and any other time) you log into CU*BASE, you will automatically also be logged into ProDOC.

Logging Out of ProDOC

1. Right click on the ProDOC icon and select *Exit*.

Changing your ProDOC/idocVAULT Password

- 1. Double click on the idocVAULT icon on your desktop to launch the browser.
- 2. Click Admin.
- 3. Type in your old password.
- 4. Type in your new password.
- 5. Verify the new password.
- 6. Click Save.