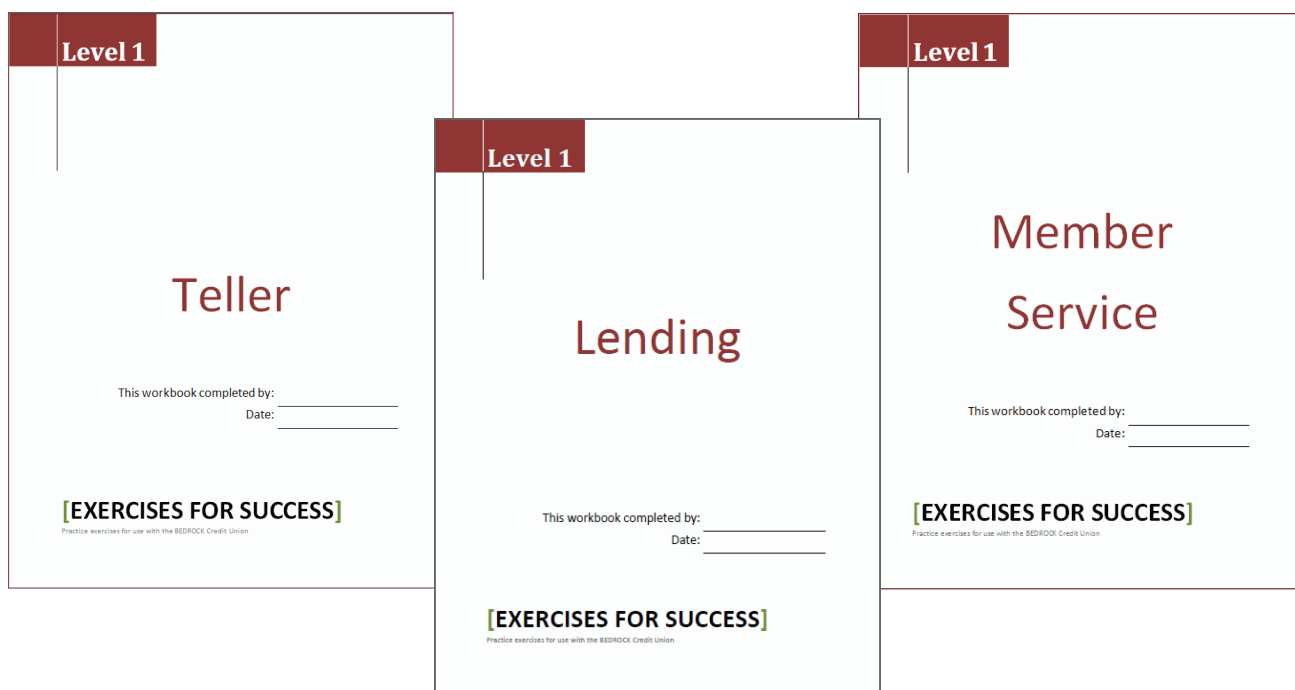# Exercises for Success

Practice Workbooks for Bedrock

Have a New Employee at Your Credit Union? Exercises for Success Provides Helpful Scenarios!

Do you have a new employee or are you taking on new responsibilities at your credit union? *Exercises for Success* provides helpful exercises to practice Teller, Member Service and Lending tasks. These workbooks are designed to be used with Bedrock Credit Union after the Online University courses for Teller, Member Service, and Lending are completed.

Exercises for Success helps your employees learn on their own at their own pace. Use this in conjunction with Show Me the Steps! Online Help.

Level 1

Teller

This workbook completed by:
Date: _____

[EXERCISES FOR SUCCESS]
Practice exercises for use with the BEDROCK Credit Union

Level 1

Lending

This workbook completed by:
Date: _____

[EXERCISES FOR SUCCESS]
Practice exercises for use with the BEDROCK Credit Union

Level 1

Member Service

This workbook completed by:
Date: _____

[EXERCISES FOR SUCCESS]
Practice exercises for use with the BEDROCK Credit Union

Interested in Using Exercises for Success at Your Credit Union?

Contact the Client Services and Education team at education @cuanswers.com for more information.

A Three Step Program

Exercises for Success First Provides Exercises—Then Provides Two Self-Evaluation Tools

Exercises for Success is broken down into separate lessons, each covering an activity. Each lesson provides scenarios for practice (Activities) and a review to ensure that the procedures of that lesson were mastered (Flex Your Muscle!). The entire workbook ends with a final review of the teachings of the entire workbook (Check Your Knowledge).

5 — Activity 5: Adding, Changing and Deleting Comments

THE GOAL: ADDING, CHANGING AND DELETING COMMENTS

In these exercises you will practice adding, changing, and removing comment union employees will see when assisting a member.

Activity:	Notes:
1. Your first member has lost her purse and wants to be sure that employees assisting her ask for her license. Enter a comment that other employee will see when they assist this member.	
2. When you return to the Inquiry screen, what color is the text on the F1-Comments button? Once you have noted this change, exit this membership.	
3. The same member returns to the credit union and says that she has found her purse. Re-enter the account and remove the comment. When you return to the Inquiry screen, what color is the text on the F1-Comments button?	

Activity 5: Flex Your Muscles!

You have completed the exercises. Now test yourself (without notes) on what you just le

Question:	Answer:
1. At what point, when entering a member's account, do you view the comment text?	
2. How do you add a comment for other employees to view when they assist a member? Which option or function key do you use?	
3. How do you update the comment's text when more information is available?	
4. When does the F1-Comments button text color change? What do the different color indicate?	
5. How do you add a comment so that it is permanently retained by the system?	
6. How do you add a comment to a membership when the membership already has a comment?	

Check Your Knowledge!

So have you learned the material in the *Exercises for Success - Level 1: Member Service*?

Answer the following eleven questions on the material you just learned – and try to answer *without using your notes*. (You may use CU*BASE.)

This is your opportunity to check and make sure you are now skilled at all the material covered in this workbook.

Good Luck!

Can You Do Answer the Following?	Able to Answer (Yes/No)
1. Why would you use F1-Verify Member when transferring funds between two memberships? What information can you view using this function key?	
2. How do you print a Transaction History report for the last month for a member's checking account? What option or function key do you use?	
3. How do you transfer $45.00 from your one member's savings account to the same member's checking account using Phone Operator? What option or function key do you use?	
4. How can you tell if the member you are assisting has an email address and license number recorded in the system? Where do you look for the email address? How do you add one if one is not recorded in the system?	

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A Credit Union Service Organization

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