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# Private Contacts

## Communicating with Members via It's Me 247

### INTRODUCTION

Members can use the new Contact Us window in **It's Me 247** to enter free-form message in the Private Contacts window.

Private Contacts allow members to send messages that contain private information about their accounts, and your credit union (if configured) can then respond to the member via **It's Me 247**. This is not email, but a way for you to communicate back and forth with your members using tools they already use every day.

You can even elect to record both the conversation and your reply in a Tracker note so your credit union can save the conversation for additional follow-up or simply to retain a permanent record of the contact.

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For an updated copy of this booklet, check out the Reference Materials page of our website:  
<https://www.cuanswers.com/resources/doc/cubase-reference/>  
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## IN A NUTSHELL

This section covers a basic outline of what you can do with the Private Contacts feature if you activate all its features.

- **This scenario covers features that must be activated.** The ability to reply and create a Tracker record must be activated. See page 9 for information on configuration options.

ABC Credit Union has set up the Contact Us feature to allow for replies and for the conversations to be copied to a Tracker. Here is an outline of how the feature works.

1. Mary Member logs in to **It's Me 247** and has a question about her signature loan. She clicks *Contact Us* and enters a subject line and a question, checks a box to direct her inquiry to the loan department, and provides a phone number at which to be contacted.
2. Sarah Employee is working the online banking requests queue and sees Mary's request appear. She opens it and reads the message.
  - She notices that Mary has provided a new phone number and saves that number to Mary's contact list. *See page 39 for more information about saving a phone number to CU\*BASE.*
3. Sarah then composes a reply to Mary's message, telling her that John in the loan department will be contacting her about her question on the loan, calling her at the number that she designated.
4. Sarah sends the reply, copying the conversation to a Tracker note that she flags for follow-up by John's employee ID. At the same time Mary's request is deleted from the queue since she has completed the initial response.
5. The next time Mary logs in to **It's Me 247**, he sees Sarah's reply.
  - If Mary has another question or wants to clarify, he can initiate another message by clicking a Reply button which starts the entire process back at step 1, using the same subject line. ("RE:" is appended to the subject line, indicating that it is a reply.)
6. The Tracker follow-up alerts John in the loan department that he needs to contact Mary. He reads a copy of both Mary's request and Sarah's reply in the Tracker note and follows up as instructed, marking the Tracker complete (or creating another follow-up, if needed).



This process can be repeated as often as needed but each message and response are their own separate request/reply set, and each set is copied to a separate Tracker conversation string. However, because these will all be recorded under the same Tracker Type, all conversations with the member via this channel are easily viewable via the Tracker review screen.

- NOTE: If your credit union wants these interactions to be viewable all together, configure a special Tracker Type specifically for these interactions.

## **SPECIAL CHARACTERS AND PRIVATE CONTACTS**

In member messages using the Contact Us feature the following special characters are not allowed:

- Double quotation mark “ (a single quote is allowed)
- Square brackets [ ] (the curly brackets are allowed)
- Backward slash \ (a forward slash is allowed)
- Vertical bar |
- Tilde ~
- Caret ^

The following special characters are allowed: `!@#\$\$%&\*()-\_+=+{}/?.>,<

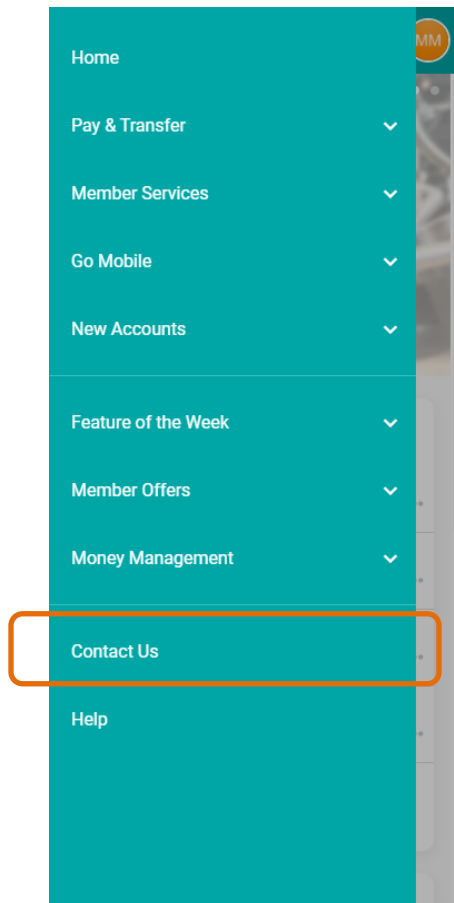
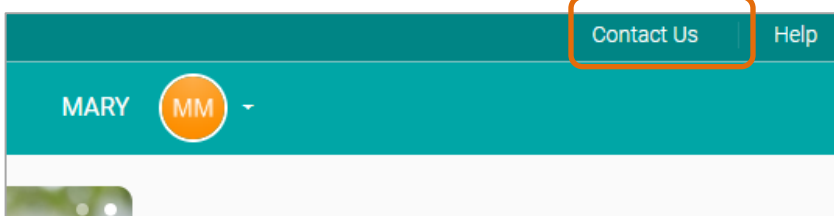
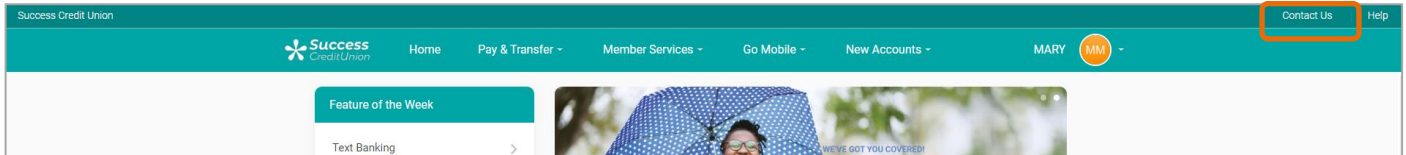


# MEMBER SENDS PRIVATE MESSAGE

At the heart of Private Contacts is the ability of the member to send messages, which can contain private information, to the credit union. Following is what the member sees in **It's Me 247**.

To initiate the private message the member clicks **Contact Us** from the top of **It's Me 247** or from the bottom of the menu on a mobile device.

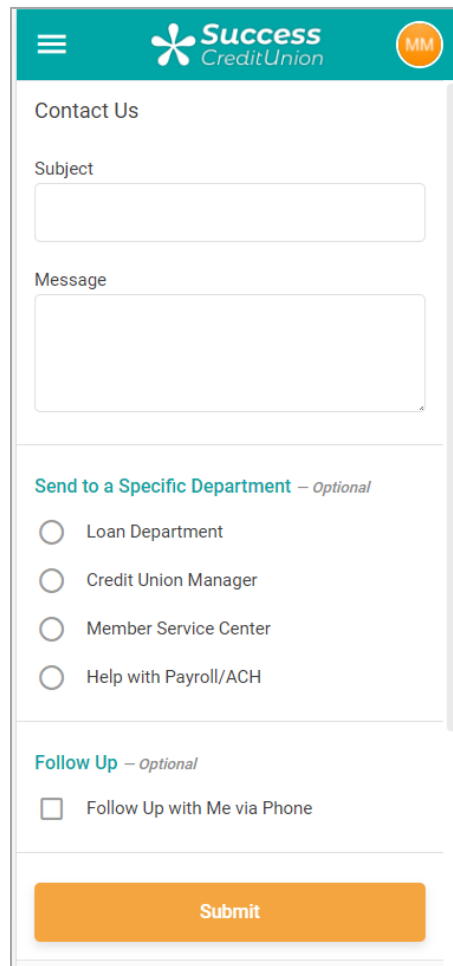
## Member Clicks "Contact Us" to Initiate Private Message





The member views the private message window.

### Empty Private Message Window



The image shows a mobile application interface for a private message window. At the top is a teal header bar with a white hamburger menu icon on the left, the 'Success Credit Union' logo in the center, and a circular orange icon with 'MM' on the right. Below the header, the text 'Contact Us' is displayed. There are two input fields: 'Subject' and 'Message'. Below these fields, there is a section titled 'Send to a Specific Department - Optional' with four radio button options: 'Loan Department', 'Credit Union Manager', 'Member Service Center', and 'Help with Payroll/ACH'. Below this is another section titled 'Follow Up - Optional' with a checkbox option 'Follow Up with Me via Phone'. At the bottom of the form is a large orange 'Submit' button.

Success Credit Union MM

Contact Us

Subject

Message

Send to a Specific Department – Optional

☐ Loan Department

☐ Credit Union Manager

☐ Member Service Center

☐ Help with Payroll/ACH

Follow Up – Optional

☐ Follow Up with Me via Phone

Submit



### Completed Privates Message Window (All Options Selected)

The image displays two side-by-side screenshots of the Success Credit Union Private Message window. Both screenshots show the Success Credit Union logo at the top. The left screenshot shows the initial form with the following fields: "Contact Us" header, "Subject" (filled with "Signature Loan Information"), "Message" (filled with "I am interested in obtaining a signature loan for \$10,000 what do I have to do to apply"), "Send to a Specific Department – Optional" (with "Loan Department" selected), "Follow Up – Optional" (with "Follow Up with Me via Phone" selected), and "Phone Number" (filled with "(666) 555-1212"). The right screenshot shows the same form after completion, with a large orange "Submit" button and a "Page will timeout in 11:19" warning at the bottom.

The Private Contact message allows members to include personal data, such as their account number and phone number. (Your credit union can also easily access the member's Verify ID window in CU\*BASE when reviewing the private message. There you can also view the member's account number, phone number, etc.)

The member must type a subject on this window. The *contact by a specific department* is optional and does not require the entry of a phone number. If the member requests to be contacted (by a call or by text), they must type a phone number.

- NOTE: If members ask to be contacted by text message, this does not enroll them in text banking. Your credit union will need to have a procedure in place to respond to these requests.
- Refer to the Appendix for error messages that the member might see while on this screen.



Next the member clicks **Submit** to send the message to the credit union and receives a confirmation message.

**Member Clicks “Submit” and Receives Confirmation Message**

Success  
CreditUnion

MM

Send to a Specific Department – Optional

☒ Loan Department

☐ Credit Union Manager

☐ Member Service Center

☐ Help with Payroll/ACH

Follow Up – Optional

☒ Follow Up with Me via Phone

Phone Number

(666) 555-1212

☒ Call me at this number.

☐ Text me at this number.

Submit

Page will timeout in 11:19

Success  
CreditUnion

MM

Sent!

A credit union representative will reply to your message as soon as possible. If this is an emergency, please call the credit union and we can address your need as soon as possible.

Page will timeout in 14:53

Success Credit Union

This site contains links to other sites on the internet. We, and your credit union, cannot be responsible for the



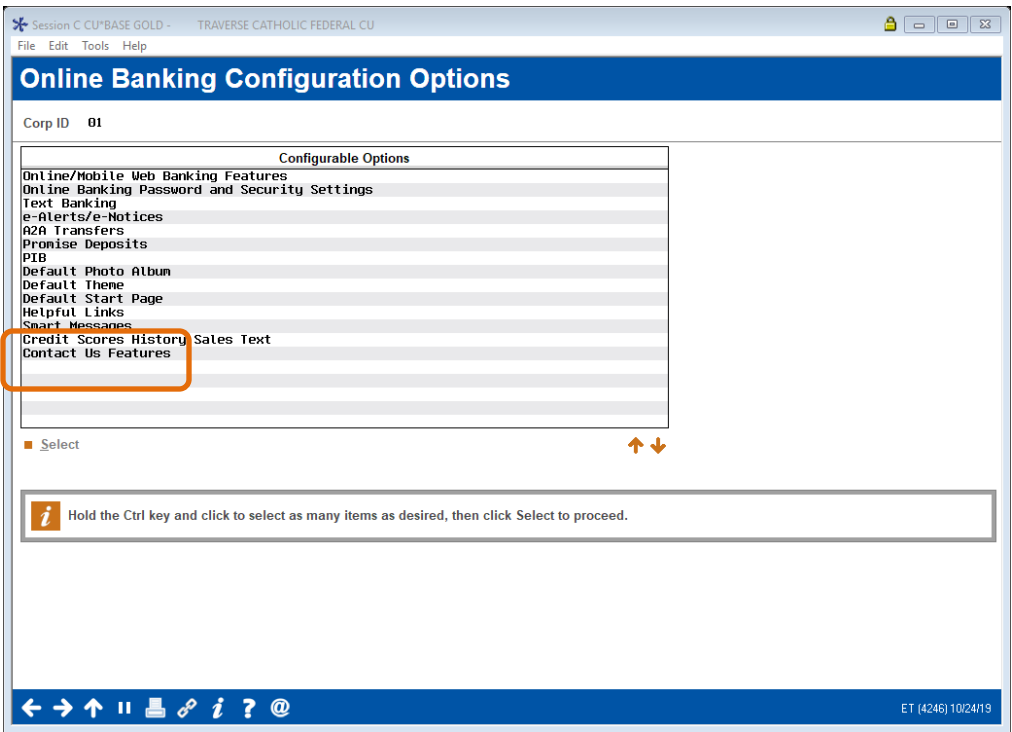
# CONFIGURATION OPTIONS

This section discusses the different options your credit union has when configuring Private Contacts.

## ACCESS TO THE CONFIGURATION SCREEN

On **Tool #569 Online/Mobile/Text Banking VMS Config**, your credit union selects *Contact Us Features* from the listing.

### Tool #569 Online/Mobile/Text Banking VMS Config





Upon entry, the configuration screen is blank, with only the Standard activation option selected. This section covers your options when configuring the Private Message feature.

Following is a close up of the configuration of ABC Credit Union, which is used in this booklet.

### Online/Mobile/Text Banking VMS Config (Tool #569), then “Contact Us” (Using All Features)

Session 6 CU\*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

## Contact Us Features Configuration UPDATE

Activate contact us feature ☒ Standard ☐ Custom ☐ None

☒ Allow a reply via the secure message center

☒ Require replies to be copied to a tracker note

Default tracker type SM Memo type SM

Instructions to the member (will appear after the message is submitted)

Your request has been sent. A credit union representative will reply to your message as soon as possible during business hours. If this is an emergency, please call the credit union at 1-800-327-3478 and we will address your need as quickly as possible. Thank you

Update

← → ↑ || ? @ FR (6916) 1/29/20

### Field Descriptions

Field Name	Description
Activate contact us feature	<p>This section determines if the “Contact Us” button appears. (default setting)</p> <p>Select “Standard” (default) to have the button appear.</p> <p>Select “None” and the button will not appear.</p> <p>“Custom” is currently not available.</p> <p><i>See page 12 for more details.</i></p>
Allow a reply via the secure message center	<p>(Optional.) This box determines if your credit union employees can respond to private messages sent to your credit union.</p> <p>Leave this box unchecked to allow employees to read messages only.</p>



<i>Field Name</i>	<i>Description</i>
	<p>Check this box to allow employees to read messages and reply to them.</p> <p><i>See page 13 for more information.</i></p>
Require replies to be copied to a tracker note	<p>(Optional.) This section of the screen contains directions on how Trackers are handled for the responses by the credit union (if allowed by your credit union).</p> <p>To elect to require that every conversation to a member is recorded in a Tracker conversation check this box. (The member message is copied along with the reply in the Tracker.)</p> <ul style="list-style-type: none"> <li>Tracker Type and Memo Type are entered in the corresponding field but are not required. If they are entered, they are prefilled in the reply screen.</li> </ul> <p><i>See page 15 for more information on the options below.</i></p>
Default Tracker Type Memo Type	<p>(Optional.) Used in conjunction with “Require replies to be copied to a tracker note” above, when checked. This allows the credit union to prefill Tracker and Memo Types for the Tracker conversation.</p> <p><i>See page 15 for examples of the options covered below.</i></p> <p><b>Important note: This does not stop the employee from changing them when responding to the member’s private message.</b></p> <p><b>Helpful Tip:</b> Your credit union may elect to create specific Tracker Type and Memo Type to allow for easier access to these Trackers once they are created. This can, for example, assist with reporting.</p> <p><i>See the reporting section of this booklet on page 44.</i></p> <p><b>Option 1: Enter Tracker Type and Memo Type</b> Credit unions can elect to enter a Tracker Type and Memo Type. These will be prefilled when the employee answers the private message. The employee can change the Tracker Type and/or Memo Type when writing their response.</p> <p><b>Option 2: Enter Tracker Type Only</b> Credit unions can elect to enter only a Tracker Type and leave it up to the credit union employee to supply the Memo Type when responding.</p>



Field Name	Description
	<b>Option 3: Leave Both Fields Blank</b> Credit unions can elect to leave both fields blank. This will require the employee to enter a Tracker and Memo Type when responding.
Instructions to the member (will appear after the message is submitted)	This allows the credit union to configure a customized message that the member will read when they send the message. This message will appear under the words "Sent." This message can include helpful tips about your response strategy, including how quickly your member can expect to receive a reply.  Otherwise, a default message will appear which reads, "A credit union representative will reply to your message as soon as possible. If this is an emergency, please call the credit union and will can address your need as soon as possible."

Following are examples of the configuration options covered previously in the table format.

## DOES YOUR CREDIT UNION WANT TO USE PRIVATE CONTACTS?

The top of the configuration allows your credit unions to choose whether to activate the Contact Us feature or turn it off altogether. *At this time, "Custom" is not available.*

### Top of Screen (Detail)



The setting of **Standard** the default. This means your credit union wants to have the *Contact Us* button appear in **It's Me 247**.



Selecting **None** will deactivate this feature.



This turns on the *Contact Us* button in **It's Me 247**. If your credit union selects this option, you are electing to not use the Private Contacts feature.



## Do You Allow Employees to Reply to the Messages?

If your credit union wants to allow employees to respond to Private Contact messages but not to reply to them, leave **Allow a reply via secure message center** unchecked.

- Below is the default. To allow credit union employees to respond see the following example.

### Leaving “Allow a reply...” Unchecked

☐ Allow a reply via the secure message center

Your employee will be able to read Private Contact messages sent to your credit union by members but will not be able to send replies to them using the feature, as shown following.

### Default Configuration (No Replies Allowed)

Session 6 CU\*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

### Online Banking Contact Request

UPDATE

Member: MARY MEMBER Request #: 01092 Request received: 01/14/2020 09:46:58

#### Contact Request

Contact request

Directed to: Credit Union Manager

Subject: Investment Adviser

Message

I would like to talk to your Investment Adviser about Savings alternatives- would you please forward my information to them. Thanks

Reply via Secure Message Center

↑ ↓

*i* Press Ctrl plus Enter for a new line.

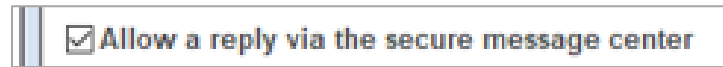
Verify Member Send/Delete Request Review Tracker

← → ↑ || 🖨 🔗 *i* ? @ FR (6917) 1/29/20



If your credit union wants to allow employees to respond to Private Contact messages, check **Allow a reply via secure message center**.

### Checking “Allow a reply” to Allow Replies in CU\*BASE

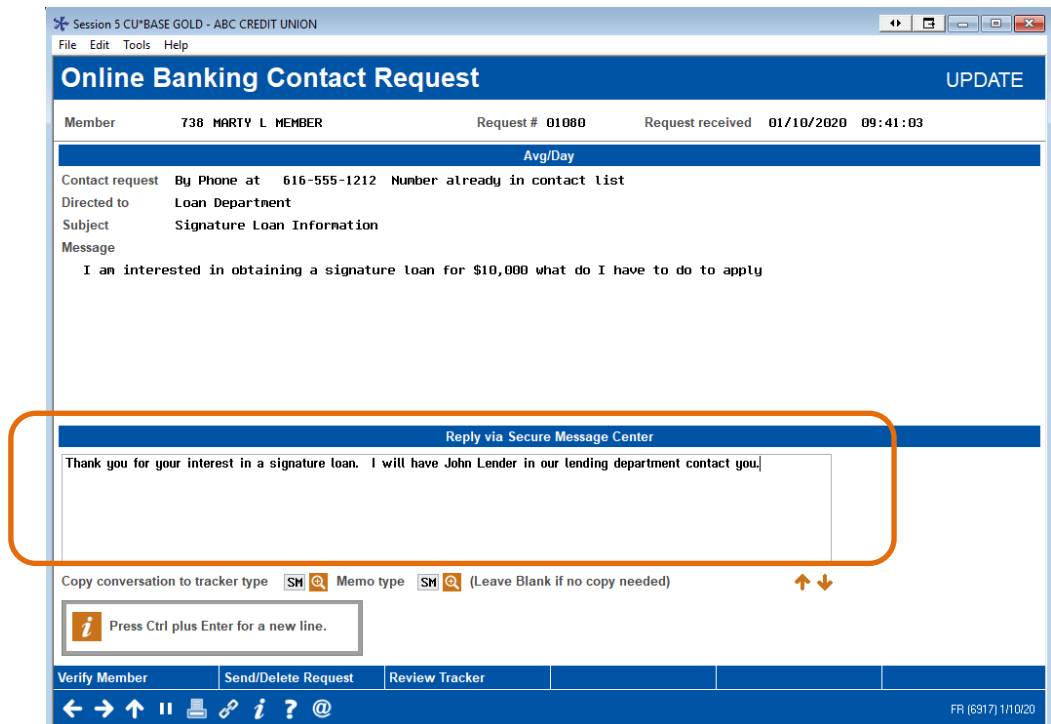


☒ Allow a reply via the secure message center

Your employee will be able to read Private Contact messages sent to your credit union by members and will be able to send replies to them as shown below.

- If this box is left unchecked, employees will not be able to reply using the Private Contacts feature. (See previous example.)

### Allow Replies using Private Contacts to Secure Message Center



Session 5 CU\*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

**Online Banking Contact Request** UPDATE

Member 738 MARTY L MEMBER Request # 01000 Request received 01/10/2020 09:41:03

Avg/Day

Contact request By Phone at 616-555-1212 Number already in contact list

Directed to Loan Department

Subject Signature Loan Information

Message

I am interested in obtaining a signature loan for \$10,000 what do I have to do to apply

Reply via Secure Message Center

Thank you for your interest in a signature loan. I will have John Lender in our lending department contact you.

Copy conversation to tracker type SM Memo type SM (Leave Blank if no copy needed)

Press Ctrl plus Enter for a new line.

Verify Member Send/Delete Request Review Tracker

FR (6917) 1/10/20

See page 17 to see an example of an employee responding to a member's private message.



## DO YOU REQUIRE TRACKERS TO SAVE RESPONSES (AND MESSAGES)?

When an employee replies to a private message, your employee can save their response (and the member's message) to a Tracker. This allows you to keep a record of every response sent. (Employees can always delete a member's message. In this case no Tracker is created by the system.)

In order to require the responses are saved to a Tracker, check **Require replies to be copied to a tracker note**. It is recommended that you create specific Tracker types and Memo types for this recording. To assist your employees, you might add a default Tracker/memo type combination. (These can always be adjusted.)

This special Tracker Type and Memo Type also can assist with later research and auditing. *See page 44 for information on how you might audit your private messages.*

If you have several different Memo Types to choose from, you might leave the *Memo Type* blank. In this case, the employee has to choose a Memo Type before sending the reply.

### Make Trackers Required and Present Default Tracker and Memo Type

This section shows an example of where the credit union elects to require that every conversation to a member is recorded in a Tracker conversation and checks **Require replies to be copied to a tracker note**. (The member message is copied along with the reply in the Tracker.) With this selection, the credit union can elect to also include a default Tracker Type and Memo Type for the Tracker.

#### Middle of Screen – Require Trackers and Supply Default Tracker and Memo Type

<input checked="" type="checkbox"/> Require replies to be copied to a tracker note	Default tracker type	SM		Memo type	SM	
------------------------------------------------------------------------------------	----------------------	----	--	-----------	----	--

### Make Trackers Optional and Not Required

Or if you want, you can leave the **Require replies...** unchecked. Then the employee could choose to delete the Tracker/Memo Type at the time they are entering a reply and skip the copy on a case-by-case basis.

In this case you can optionally enter Tracker and Memo Types to default in to assist the employee. (This can be removed at the time the response is made if no Tracker is required.)

#### Middle of Screen – Trackers are Optional (Default Both)

<input type="checkbox"/> Require replies to be copied to a tracker note	Default tracker type	SM		Memo type	SM	
-------------------------------------------------------------------------	----------------------	----	--	-----------	----	--

Or you can just enter a Tracker Type and leave the Memo Type up to the employee.

#### Middle of Screen – Trackers are Optional (Default Only Tracker Type)

<input type="checkbox"/> Require replies to be copied to a tracker note	Default tracker type	SM		Memo type		
-------------------------------------------------------------------------	----------------------	----	--	-----------	--	--



Following is the area of the screen where Tracker and Memo Types are entered.

### Entering Tracker and Memo Type

Session 5 CU\*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

## Online Banking Contact Request UPDATE

Member	738 MARTY L MEMBER	Request #	01080	Request received	01/10/2020 09:41:03
--------	--------------------	-----------	-------	------------------	---------------------

Avg/Day

Contact request By Phone at 616-555-1212 Number already in contact list

Directed to Loan Department

Subject Signature Loan Information

Message

I am interested in obtaining a signature loan for \$10,000 what do I have to do to apply

---

Reply via Secure Message Center

Thank you for your interest in a signature loan. I will have John Lender in our lending department contact you.

Copy conversation to tracker type ☐ Memo type ☐ (Leave Blank if no copy needed)

*i* Press Ctrl plus Enter for a new line.

Verify Member Send/Delete Request Review Tracker

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## DO YOU WANT TO ADD A RESPONSE ON THE SUBMIT WINDOW?

At the bottom of the screen your credit union can type the message the member will see in the confirmation window after they submit their private message. (This will appear on the "Sent!" window.) This allows your credit union to explain your procedure and how long the member can expect before they receive a reply.

- This can be left blank.
- NOTE: It is recommended that URLs NOT be included in this message as they will not appear clickable in online banking.

### Bottom of Screen – Message to Member

Instructions to the member (will appear after the message is submitted)

Your request has been sent. A credit union representative will contact you as soon as possible during normal business hours. If this is an urgent matter please call the credit union and talk with a representative to address your needs and



# CREDIT UNION EMPLOYEE WORKS

## PRIVATE MESSAGE

This section follows the procedures that **ABC Credit Union** would follow when receiving a message from **Mary Member**. This is covered at the front of the booklet.

### EMPLOYEE READS PRIVATE MESSAGE AND RESPONDS

Private Contacts messages appear with other messages from members, including Personal Information Change requests and Membership Applications (or MAP), not shown.

**Sarah Employee** at **ABC Credit Union** sees **Mary Member's** message as she is working online banking requests in **Tool #13 Work Online Banking Requests**.

She selects the Private Contact request from the listing and then *Work*.

#### Work Online Banking Requests (Tool #13)

Session 5 CU\*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

### Work with Online Banking Requests

Corp ID 01

Request # 000000 Last name starting Request date starting 00000000 [MMDDYYYY] Display only

Req #	Request Name	Req Date / Req Time	Request Code - Request Type	Other Notes
1080	MARTY L MEMBER	Jan 10, 2020 09.41.03	SM - Secure Message Center Requests	
1076	ANNE BODY	Jan 03, 2020 15.03.15	SM - Secure Message Center Requests	
1077	ANNE BODY	Jan 03, 2020 14.57.55	SM - Secure Message Center Requests	
1076	NOAH BODY	Jan 03, 2020 14.47.04	SM - Secure Message Center Requests	
1062	MARY MEMBER	Oct 11, 2019 08.28.22	SM - Secure Message Center Requests	
1060	MARY MEMBER	Sep 24, 2019 11.32.15	SM - Secure Message Center Requests	

Work Delete

Import Member Apps

Click on any column header to sort.

FR (5032) 1/10/20



- NOTE: CU\*BASE is designed so that only one employee can work this kind of request. If one employee is responding to a private message, all other employees will not see it in their listing.

[illegible]

## 18 Private Contacts



## Employee Views Detail of Message

Session 5 CU\*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

**Online Banking Contact Request** UPDATE

Member 738 MARTY L MEMBER Request # 01080 Request received 01/10/2020 09:41:03

Avg/Day

Contact request By Phone at 616-555-1212 Number already in contact list

Directed to Loan Department

Subject Signature Loan Information

Message

I am interested in obtaining a signature loan for \$10,000 what do I have to do to apply

Reply via Secure Message Center

Copy conversation to tracker type SM Memo type SM (Leave Blank if no copy needed)

Press Ctrl plus Enter for a new line.

Verify Member Send/Delete Request Review Tracker

FR (6317) 1/10/20

**Sarah Employee** writes a response to **Mary Member's** request.

## Employee Writes Response

Session 5 CU\*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

**Online Banking Contact Request** UPDATE

Member 738 MARTY L MEMBER Request # 01080 Request received 01/10/2020 09:41:03

Avg/Day

Contact request By Phone at 616-555-1212 Number already in contact list

Directed to Loan Department

Subject Signature Loan Information

Message

I am interested in obtaining a signature loan for \$10,000 what do I have to do to apply

Reply via Secure Message Center

Thank you for your interest in a signature loan. I will have John Lender in our lending department contact you.

Copy conversation to tracker type SM Memo type SM (Leave Blank if no copy needed)

Press Ctrl plus Enter for a new line.

Verify Member Send/Delete Request Review Tracker

FR (6317) 1/10/20

In its configuration **ABC Credit Union** has elected to record the response to of the conversation in a Tracker and has supplied the Tracker Type and Memo Types by default.

- For other configuration options, see page 9.



## Tracker and Memo Type Defaulted

Session 5 CU\*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

### Online Banking Contact Request

UPDATE

Member 738 MARTY L MEMBER Request # 01000 Request received 01/10/2020 09:41:03

Avg/Day

Contact request By Phone at 616-555-1212 Number already in contact list

Directed to Loan Department

Subject Signature Loan Information

Message

I am interested in obtaining a signature loan for \$10,000 what do I have to do to apply

Reply via Secure Message Center

Thank you for your interest in a signature loan. I will have John Lender in our lending department contact you.

Copy conversation to tracker type ☒ SM ☒ Memo type ☒ SM ☒ (Leave Blank if no copy needed)

Press Ctrl plus Enter for a new line.

Verify Member Send/Delete Request Review Tracker

← → ↑ ||

FR (6317) 1/10/20

**Sarah Employee** sends the response by selecting **Send/Delete Request**.

## Employee Sends Message to Member

Session 5 CU\*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

### Online Banking Contact Request

UPDATE

Member 738 MARTY L MEMBER Request # 01000 Request received 01/10/2020 09:41:03

Avg/Day

Contact request By Phone at 616-555-1212 Number already in contact list

Directed to Loan Department

Subject Signature Loan Information

Message

I am interested in obtaining a signature loan for \$10,000 what do I have to do to apply

Reply via Secure Message Center

Thank you for your interest in a signature loan. I will have John Lender in our lending department contact you.

Copy conversation to tracker type ☒ SM ☒ Memo type ☒ SM ☒ (Leave Blank if no copy needed)

Press Ctrl plus Enter for a new line.

Verify Member **Send/Delete Request** Review Tracker

← → ↑ ||

FR (6317) 1/10/20

**Sarah Employee** then sees the confirmation window and clicks **Continue**.



## Confirmation Window

Session 5 CU\*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

### Online Banking Contact Request

UPDATE

Member 738 MARTY L. MEMBER Request # 01000 Request received 01/10/2020 09:41:03

Avg/Day

Contact request By Phone at 616-555-1212 Number already in contact list

Directed to Loan Department

Subject Signature Loan Information

Message Session 5 - Confirm Continue

Reply will be sent; request will be deleted

Continue

Copy conversation to tracker type SM Memo type SM (Leave Blank if no copy needed)

Press Ctrl plus Enter for a new line.

Verify Member Send/Delete Request Review Tracker

FR (3520)

The message is automatically deleted from the queue. Since **Sally Employee** entered Tracker information, she will next create a Tracker to record the conversation.

- If she does not create a Tracker, there will not be a record of the conversation. She can manually create a Tracker conversation. (This is covered later in the booklet.)



## EMPLOYEE SETS TRACKER FOR FOLLOW UP ON PRIVATE MESSAGE

Now **Sarah Employee** moves to the Tracker window. She can review **Mary's** message and her response as the last conversation.

### Tracker Message on Tracker Screen

Session 5 - ABC CREDIT UNION

File Edit Tools Help

### Member Tracker Entry

Account # 738-000 MARTY L MEMBER

Memo type SM Reply Message

Speaking to MARTY L MEMBER Conversations 1

Save/Continue Page Up/Down ↑ ↓

Phone Inquiry	Date Jan 10, 2020	<div>Response center message from Member Request #: 01080 Received: January 10, 2020 Directed to: Loan Department By Phone at 616-555-1212 Subject: Signature Loan Information I am interested in obtaining a signature loan for \$10,000 what do I have to do to apply Response Sent: January 10, 2020 By: ALYCIAM Thank you for your interest in a signature loan. I will have John Lender i</div>
Save/Continue	Time 09:48:18	
Contact	Memo type SM Reply Message	
Previous	Created by ;V	
Filter	Need group	
First	Task	
Last	Assigned	
Next	Contact	
Household	Follow up	
Additional Signers	Complete	

Shift + Page Up/Down ↑ ↓

Conversations are ordered newest (First) to oldest (Last).

FR (4580) 1/10/20



In this case, **Mary Member** had requested that he get a follow up from a member of the lending department at **ABC Credit Union**.

**Sarah Employee** writes **John Lender** a message he will see in his follow up. **Mary Member** supplied her phone number in the contact request, so it is part of the Tracker.

### Employee Writes Message to Team Member

The screenshot shows the 'Member Tracker Entry' window for 'Session 5 - ABC CREDIT UNION'. The window has a menu bar with 'File', 'Edit', 'Tools', and 'Help'. The main area is titled 'Member Tracker Entry' and contains the following fields:

- Account #: 738-000, MARTY L. MEMBER
- Memo type: SM Reply Message
- Speaking to: MARTY L. MEMBER, Conversations: 1

A text box contains the message: 'John please reach out to Marty by phone. He is interested in a signature loan.' This text box is highlighted with an orange border. Below the text box are buttons for 'Save/Continue' and 'Page Up/Down' with up and down arrows.

On the left side, there is a vertical list of navigation buttons: Phone Inquiry, Save/Continue, Contact, Previous, Filter, First, Last, Next, Household, Additional Signers, Conversations, and Print Notice.

In the center, there is a table with the following data:

Date	Jan 10, 2020
Time	09:48:18
Memo type	SM Reply Message
Created by	;V
Need group	
Task	
Assigned	
Contact	
Follow up	
Complete	

On the right side, there is a text area containing the following information:

Response center message from Member  
Request #: 01080 Received: January 10, 2020  
Directed to: Loan Department By Phone at 616-555-1212  
Subject: Signature Loan Information  
I am interested in obtaining a signature loan for \$10,000  
what do I have to  
do to apply  
Response Sent: January 10, 2020 By: ALYCIAM  
Thank you for your interest in a signature loan. I will  
have John Lender i

Below the text area are buttons for 'Shift + Page Up/Down' with up and down arrows, and a status bar that reads 'Conversations are ordered newest (First) to oldest (Last)'.

The bottom of the window features a navigation bar with icons for back, forward, up, down, and other functions, along with a status bar on the right that reads 'FR (4580) 1/10/20'.



**Sarah Employee** saves the Tracker using the standard **Save/Continue**. This will advance her to the final Tracker screen.

### Employee Saves Tracker

Session 5 - ABC CREDIT UNION

File Edit Tools Help

## Member Tracker Entry

Account # 738-000 MARTY L MEMBER

Memo type SM Reply Message

Speaking to MARTY L MEMBER Conversations 1

John please reach out to Marty by phone. He is interested in a signature loan.

**Save/Continue** Page Up/Down ↑ ↓

Phone Inquiry  
Save/Continue  
Contact  
Previous  
Filter  
First  
Last  
Next  
Household  
Additional Signers  
Conversations  
Print Notice

Date Jan 10, 2020  
Time 09:48:18  
Memo type SM Reply Message  
Created by ;V  
Need group  
Task  
Assigned  
Contact  
Follow up  
Complete

Response center message from Member  
Request #: 01080 Received: January 10, 2020  
Directed to: Loan Department By Phone at 616-555-1212  
Subject: Signature Loan Information  
I am interested in obtaining a signature loan for \$10,000 what do I have to do to apply  
Response Sent: January 10, 2020 By: ALYCIAM  
Thank you for your interest in a signature loan. I will have John Lender 1

Shift + Page Up/Down ↑ ↓

Conversations are ordered newest (First) to oldest (Last).

← → ↑ || 🖨️ 🔗 ⓘ ? @ FR (4580) 1/10/20

On the final Tracker screen, **Sarah Employee** selects the calendar lookup to set the date for the follow up. This is because she is forwarding **Mary Member's** request that he be contacted by someone in the **Loan Department**.

### Calendar Used to Set Follow Up Date

Session 5 - ABC CREDIT UNION

File Edit Tools Help

## Member Tracker Entry

Member account # 738 MARTY L MEMBER

Speaking with MARTY L MEMBER on Jan 10, 2020 at 09:50:00

☒ Update last contact date for this account  
☒ Entry just made requires a follow-up

Follow-up date

Person to call back ;V  
Contact person MARTY L MEMBER

Calendar

January 2020

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	29	30	31	1	2	3	4
2	5	6	7	8	9	10	11
3	12	13	14	15	16	17	18
4	19	20	21	22	23	24	25
5	26	27	28	29	30	31	1
6	2	3	4	5	6	7	8

Days from today 0

OK Cancel Today

← → ↑ || 🖨️ 🔗 ⓘ ? @ FR (3014) 1/10/20



**Sarah Employee** assigns the follow up to **John Lender**.

### Tracker Follow Up Contact Person Selected

The screenshot shows the 'Member Tracker Entry' form in a software application. The form contains the following fields and values:

- Member account # 738 MARTY L MEMBER
- Speaking with MARTY L MEMBER on Jan 10, 2020 at 09:50:00
- ☒ Update last contact date for this account
- ☒ Entry just made requires a follow-up
- Follow-up date Jan 10, 2020 [MMDDYYYY]
- Person to call back LN LOAN OFFICER (highlighted with an orange box)
- Contact person MARTY L MEMBER

The bottom of the form features a navigation bar with icons for back, forward, up, down, print, and other functions. The text 'FR (3014) 1/10/20' is visible in the bottom right corner.

**Sarah Employee** completes the saving of the follow up by clicking the forward button.

### Employee Saves Follow Up

This screenshot shows the same 'Member Tracker Entry' form as the previous one, but with the 'Person to call back' field now set to 'LN LOAN OFFICER'. The 'Contact person' field remains 'MARTY L MEMBER'. The 'forward' button (represented by a right-pointing arrow) in the bottom navigation bar is highlighted with an orange box, indicating the next step in the process.



## EMPLOYEE SEES THAT PRIVATE MESSAGE IS DELETED

Now that **Sarah Employee** has worked **Mary Member's** private message, it is deleted from the listing.

Session 5 - ABC CREDIT UNION

File Edit Tools Help

### Work/View Online Banking Requests

Request #  Account  Last name starting  Request date starting  [MMDDYYYY]

Code	Date	Account	Account	To	Message

☐ Edit/work request
 ☐ Delete
 ☐ Membership inquiry

If a member calls and says he made some changes but still doesn't see them in online banking, check here to see if a pending change is still waiting to be activated. Have the member check his email for the activation key and instructions.

Navigation icons: back, forward, up, down, print, search, help, etc.

FR (4446) 1/10/20

When **Sarah Employee** moves back to the main listing to be worked, **Mary Member's** message about the signature loan is no longer in the listing.

## Employee Moves Back to Work Next Private Message

Session 5 CU\*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

### Work with Online Banking Requests

Corp ID

Request #  Last name starting  Request date starting  [MMDDYYYY] Display only ☐

Req #	Request Name	Req Date / Req Time	Request Code - Request Type	Other Notes
1078	ANNIE BODY	Jan 03, 2020 15.07.16	SM - Secure Message Center Requests	
1077	ANNIE BODY	Jan 03, 2020 14.57.55	SM - Secure Message Center Requests	
1076	NOAH BODY	Jan 03, 2020 14.47.04	SM - Secure Message Center Requests	
1062	MARY MEMBER	Oct 11, 2019 08.28.22	SM - Secure Message Center Requests	
1060	MARY MEMBER	Sep 24, 2019 11.32.15	SM - Secure Message Center Requests	

☐ Work
 ☐ Delete

Click on any column header to sort.

Import Member Apps

Navigation icons: back, forward, up, down, print, search, help, etc.

FR (5032) 1/10/20



## MEMBER RECEIVES RESPONSE FROM EMPLOYEE DIRECTLY UPON LOGIN

Directly after logging in to online banking **Mary Member** sees the **Sarah Employee's** response and her private message request.

### Member Receives Response from Employee Directly Upon Login

The screenshot displays the Success Credit Union mobile app interface. At the top, there is a teal header with the Success Credit Union logo and a user icon labeled 'MM'. Below the header is a promotional banner for 'SKIP-A-PAY' featuring a woman holding an umbrella. A message notification is highlighted with an orange border, showing a speech bubble icon and the text: 'Thanks for reaching out, MARY'. Below the notification, it states: 'You have a reply waiting for you in the Message Center to view at your convenience.' and provides two buttons: 'Not Now' and 'View'. Below the notification, there is a section titled 'Favorite Accounts' with a gear icon. It lists three accounts: '000 SAVINGS' with an available balance of \$3,919.03, '018 CHECKING' with an available balance of \$3,000.46, and '030 VISA SECUR...' with an available balance of -\$9,125.00. A second, larger view of the message notification is shown below, also highlighted with an orange border, showing the same text and buttons.

Success Credit Union

WE'VE GOT YOU COVERED!  
**SKIP-A-PAY**

The Skip-A-Pay program allows you to have extra funds to shop, catch up on your bills, plan a vacation or anything else you need

Thanks for reaching out, MARY

You have a reply waiting for you in the Message Center to view at your convenience.

Not Now View

Favorite Accounts

000 SAVINGS  
Available Balance \$3,919.03 \*\*\*

018 CHECKING  
Available Balance \$3,000.46 \*\*\*

030 VISA SECUR...  
Available Balance -\$9,125.00 \*\*\*

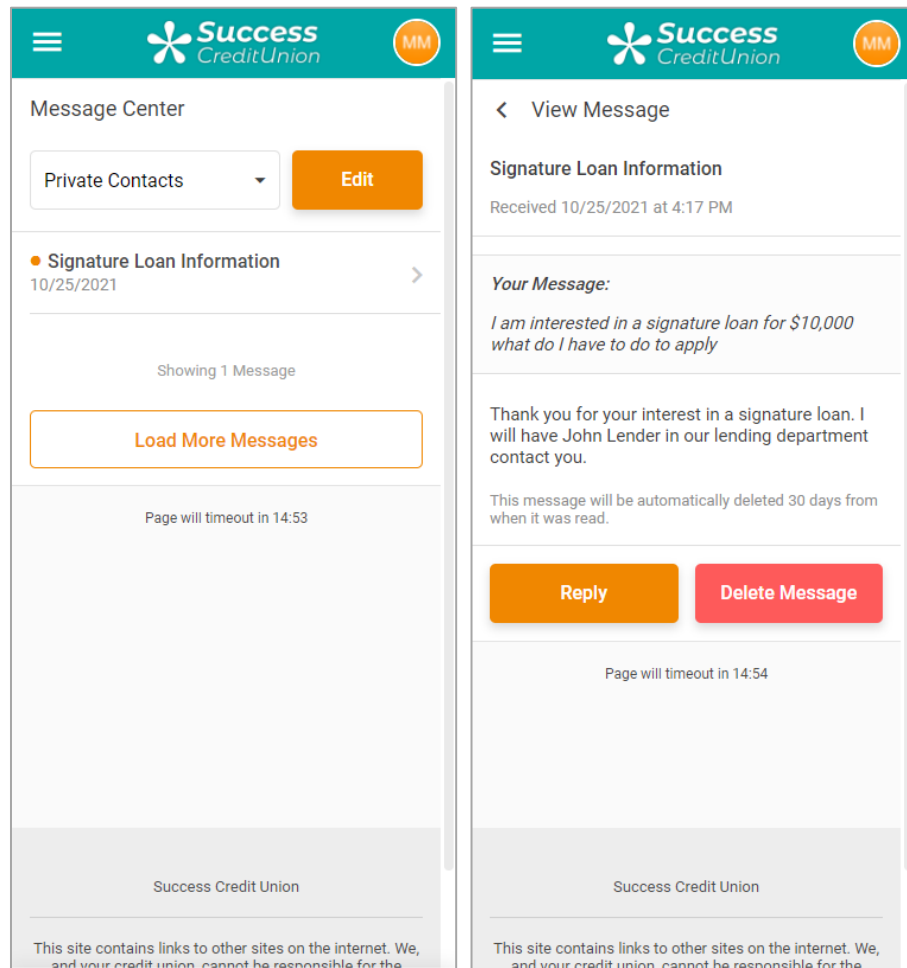
Thanks for reaching out, MARY

You have a reply waiting for you in the Message Center to view at your convenience.

Not Now View



**Mary Member** clicks **View** to view the message in the Message Center, which is filtered to only show Private Contact messages. She selects the message to read the response from the credit union.





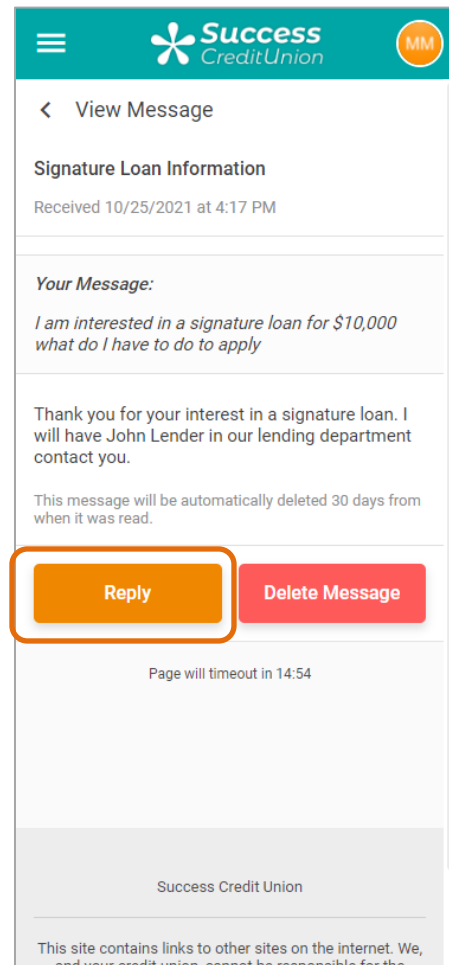
## ADDITIONAL ACTIONS (OPTIONAL)

This section covers additional actions the member and credit union can take using the Private Contacts feature.

### MEMBER REPLIES TO RESPONSE FROM CREDIT UNION

In this scenario, the **Mary Member** clicks **Reply** to send a second private message to **ABC Credit Union**.

#### Member Clicks “Reply” to Respond to Message



**Mary Member** feels like she is submitting a reply to Sarah Employee's message because the next message has “RE:” in front of it.

- In fact, he is submitting a second private message. The two are tied together for **ABC Credit Union** and the credit union knows it is tied to another message because the letters “RE:” are added to the subject line.



- Each time a reply is made by the member, an additional “RE:” is added to the Subject line.

**Previous Subject Copied to New Message with “Re:”**

Success Credit Union MM

Subject

RE: Signature Loan Information

Message

Thank you

Send to a Specific Department – Optional

☐ Loan Department

☐ Credit Union Manager

☐ Member Service Center

☐ Help with Payroll/ACH

Follow Up – Optional

☐ Follow Up with Me via Phone

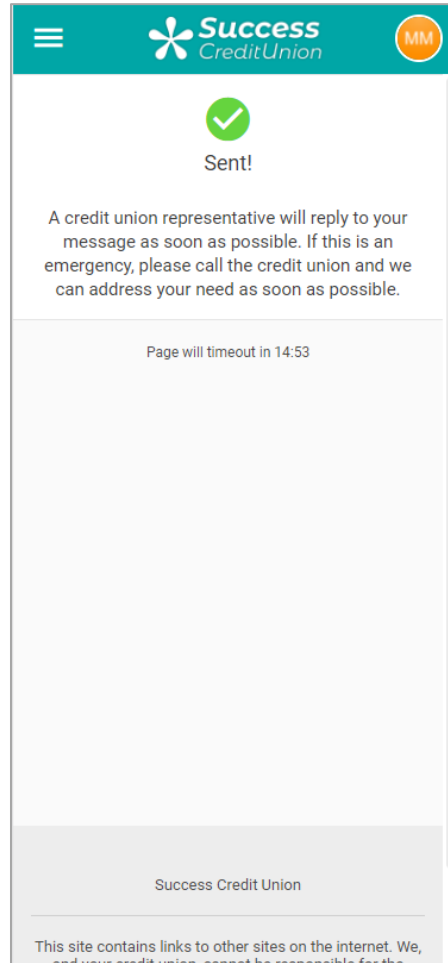
Submit

Just as with the first private message, **Mary Member** writes her text and clicks **Send**.



Again, **Mary Member** sees **ABC Credit Union's** configured response.

### Member Again Sees Confirmation Message with Credit Union Text





## EMPLOYEE RESPONDS TO MEMBER REPLY

At this point, **Jane Employee**, another employee of **ABC Credit Union** is working the online banking request queue. She sees **Mary Member's** message and selects to work it, just as **Sarah Employee** did previously.

### Employee Views Reply in Tool #13 and Selects it From the Listing

Session 5 CU\*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

### Work with Online Banking Requests

Corp ID 01

Request # 00000 Last name starting Request date starting 00000000 [MMDDYYYY] Display only

Req #	Request Name	Req Date / Req Time	Request Code - Request Type	Other Notes
1081	MARTY L MEMBER	Jan 10, 2020 09:58:41	SM - Secure Message Center Requests	
1078	ANNIE BODY	Jan 03, 2020 15:07:16	SM - Secure Message Center Requests	
1077	ANNIE BODY	Jan 03, 2020 14:57:55	SM - Secure Message Center Requests	
1076	NOAH BODY	Jan 03, 2020 14:47:04	SM - Secure Message Center Requests	
1062	MARY MEMBER	Oct 11, 2019 08:28:22	SM - Secure Message Center Requests	
1060	MARY MEMBER	Sep 24, 2019 11:32:15	SM - Secure Message Center Requests	

Work Delete

Import Member Apps

Click on any column header to sort.

FR (5032) 1/10/20

- Jane and Sarah cannot both be in the same Contact Request at the same time. Once a person begins working the request, the other employees no longer see it in their list.

Here the employee selects the private message from the listing and then **Edit/work request**.



## Select to Work the Private Message from the Listing

[illegible]

Here **Jane Employee** could reply to **Mary Member's** response. She would then use **Send/Delete Request** to send the message.

## Sending a Response

Session 0 CU\*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

Online Banking Contact Request

UPDATE

Member12401 MARTY L MEMBERRequest # 01589Request received04/07/2020 11:49:54

Contact Request

Contact request

Directed toNot specified

SubjectRE: Signature Loan Information

Message

Thank you

Reply via Secure Message Center

Copy conversation to tracker type Memo type (Leave Blank if no copy needed)

Press Ctrl plus Enter for a new line.

Verify Member

Send/Delete Request

Review Tracker

FR (6965) 4/07/20



## EMPLOYEE CHECKS TRACKER FOR PREVIOUS CONVERSATION DETAILS

**Jane Employee** realizes that this message is a continuation of a previous message, so she clicks **Tracker Review** to access the prior conversation.

### Employee Accesses Previous Conversation

The screenshot shows a web application window titled "Session 0 CU\*BASE GOLD - ABC CREDIT UNION". The main heading is "Online Banking Contact Request" with an "UPDATE" link. The interface displays member information: "Member 12401 MARTY L MEMBER", "Request # 01509", and "Request received 04/07/2020 11:49:54". A "Contact Request" section shows details: "Contact request", "Directed to Not specified", "Subject RE: Signature Loan Information", and "Message Thank you". Below this is a "Reply via Secure Message Center" section with a text input area. At the bottom, there are checkboxes for "Copy conversation to tracker type" and "Memo type", both set to "SM" with a magnifying glass icon, and a note "(Leave Blank if no copy needed)". A status bar at the bottom contains buttons: "Verify Member", "Send/Delete Request", and "Review Tracker" (which is highlighted with an orange box). The status bar also includes navigation icons (back, forward, up, down, print, search, help, etc.) and a footer "FR (6965) 4/07/20".



Jane selects the Tracker configured for secure messages.

Session 5 CU\*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

Member Tracker Review

CHANGE

Member

738 MARTY L MEMBER

Selection Options

Date

[MMDDYYYY]

Time

Account type

000

Tracker type

☐

Reference

Date	Time	Account Type	Message	Reference	Speaking With	Type	ID
Jan 10, 2020	9:51:56	000	Message	MARTY L MEMBER	MARTY L MEMBER	SMC	;V
Sat, 09, 2020	15:10:05	000	Add Ref	MARTY L MEMBER	MARTY L MEMBER	CUST	0

Consolidate

Work Follow Ups

Tracker Entry

Cross Sales Tasks

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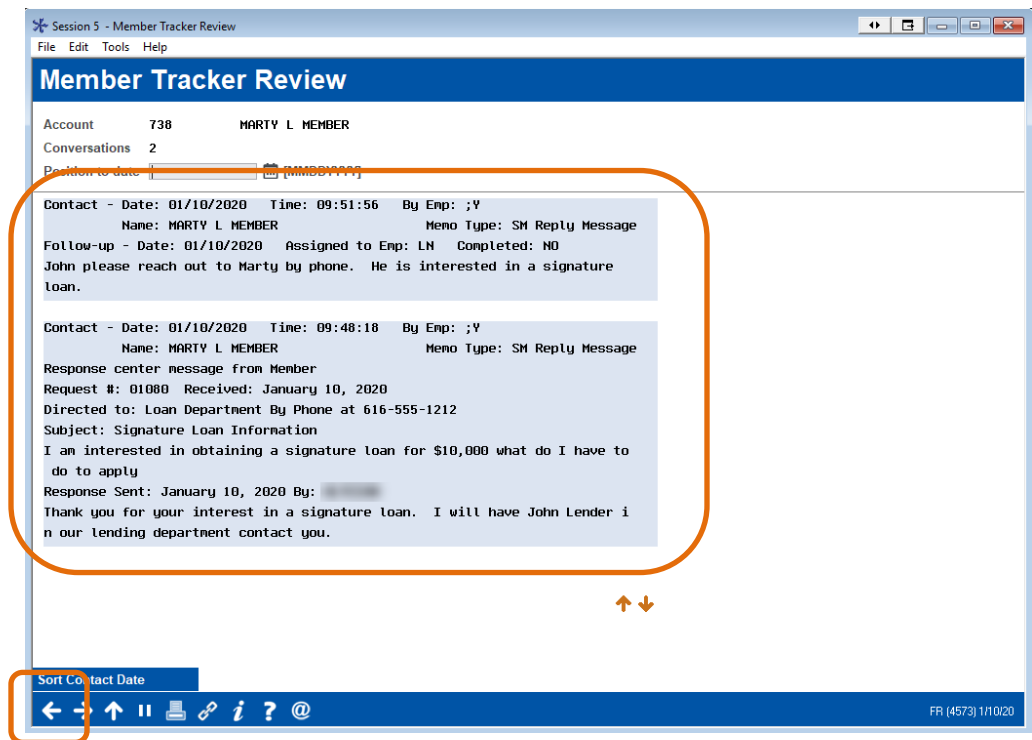
FR (5106) 1/10/20



Then she reads the Tracker to see what was said previously to the member. It has a special Tracker associated with it since the credit union configured one specifically for this purpose.

- NOTE: Messages without replies are not saved with a Tracker conversation. However, from this location, an employee can manually enter a Tracker by selecting “Update.”

### Employee Sees Private Message and Credit Union Response in Tracker





## EMPLOYEE VIEWS VERIFY MEMBER SCREEN

Jane wants to check another thing before completely deleting the conversation. She returns to the screen where Mary has written her reply and clicks **Verify Member** to view the *Verify Member* screen.

### Employee Accesses Personal Information on Member

Session 0 CU\*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

**Online Banking Contact Request** UPDATE

Member 12401 MARTY L MEMBER Request # 01589 Request received 04/07/2020 11:49:54

Contact Request

Contact request  
Directed to Not specified  
Subject RE: Signature Loan Information  
Message  
Thank you

Reply via Secure Message Center

Copy conversation to tracker type SM Memo type SM (Leave Blank if no copy needed)

Press Ctrl plus Enter for a new line.

Verify Member Send/Delete Request Review Tracker

FR (6955) 4/07/20

Here she views the *Verify Member* screen for **Marty Member**.

### Employee Views "Verify Member" Screen for Member

Session 5 CU\*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

**Online Banking Contact Request** UPDATE

Session 5 - ABC CREDIT UNION

SSN/TIN \*\*\*-\*\*-4443  
Birthdate: Dec 14, 1927

Individual MARTY L MEMBER  
Account # 738 Name ID 80 Corp ID 01

I'm a PLATINUM member! (click for more info)

Contact Info Member Data Products Status Flags

Address \*\*\*\*\*  
\*\*\*\*\*  
ROCKFORD, 00000

Phone #1 616-555-1212 HOME  
Phone #2 848-555-1212 MOBILE  
Email \*\*\*\*\*

Transaction Activity  
Secondary Names  
Cross Sales  
Online Banking

Type Comment ID Date  
000000

Verified Member  
Verify My ID  
Sales Tools  
Tracker Review  
Membership Designation

Scan e-Document View e-Document

Verify Member Send/Delete Request Review Tracker

FR (3767)

FR (6917) 1/10/20



## EMPLOYEE DELETES MESSAGE

**Jane Employee** decides **Mary Member's** message does not require a response, so she returns to the entry screen to delete it.

## Employee Deletes Message

[illegible]

On the confirmation window, **Jane** clicks **Delete**.

The screenshot shows a web browser window titled "Session 0 - ABC CREDIT UNION". The main heading is "Work/View Online Banking Requests". Below the heading are input fields for "Request #", "Account", "Last name starting", and "Request date starting".

Request #	Request Date	Account #	Member Name	To	Message
1589	4/07/2020	12401	MARTY L MEMBER	Loan	RE: Signature Loan Information

A modal dialog box is displayed over the table, containing the following text:

```

Session 0 CU*BASE GOLD - *** CONFIRM DELETE ***

1589 MARTY L MEMBER
Will be deleted at confirmation
    
```

Below the table, there are two buttons: "Edit/work request" and "Delete". The "Delete" button is highlighted with an orange rectangle.

At the bottom of the page, there is a footer area with navigation icons and a status bar showing "FR [5578]" and "FR (4446) 4/07/20".



# WHAT IF THE MEMBER PROVIDES A NEW NUMBER IN MESSAGE?

If a member asks to be contacted at a number your credit union does not have recorded in CU\*BASE for the membership, the number will appear with the indicator **This is a new phone number**.

This feature does not need to be activated by your credit union.

To save the phone number to the phone number database, your employee clicks **Save Phone#**.

## Employee Sees that Message Has New Phone Number

The screenshot shows the 'Online Banking Contact Request' window for member 12401 MARTY L MEMBER, request # 01590, received on 04/07/2020 at 12:05:12. The message details are as follows:

Contact Request	
Contact request	By Phone at 616-888-1212
Directed to	Credit Union Manager
Subject	Early Payoff
Message	My Loan has a few more years left is there any penalty for paying it off early

The phone number '616-888-1212' is highlighted with an orange box and labeled 'This is a new phone number'. Below the message is a 'Reply via Secure Message Center' text area. At the bottom, the 'Save Phone#' button is highlighted with an orange box. The interface also includes a 'Copy conversation to tracker type' section with 'SM' and 'Q' icons, and a 'Memo type' section with 'SM' and 'Q' icons. The bottom status bar shows 'Verify Member', 'Send/Delete Request', 'Save Phone#', 'Review Tracker', and a timestamp 'FR (6365) 4/07/20'.



Your employee will advance to the *Phone/Contact Numbers* screen. The new number will be included with a system-generated comment that notes that the phone number came from a contact request, along with the date it was entered.

- The label will be left with a question mark, which will cause it to prompt your employee for the label the next time you do maintenance on the screen.

### Phone Number is Saved to “Phone/Contact Numbers”

Session 0 CU\*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

## Phone/Contact Numbers

Member

Account # 12401 MARTY L MEMBER

Last maintained Apr 07, 2020 by -3

Seq #	Phone #	Ext	Label	Intl	Text	Wrong #	Mobile
1	616-555-1212		cell	N	N	N	N
2	800-327-5478		cell	N	N	N	N
3	616-888-1212		?	N	N	N	N

■ Edit ■ Delete ■ View

**i** The numbers stored here are separate from text banking.

Add

← → ↑ || 🖨 🔗 ? @

FFI (6662) 4/07/20

When your employee clicks the back arrow to return to the Contact Request, the screen will indicate that the phone number is now saved by removing the **Save Phone#** button.



Screen Indicates that Number is Saved

Session 0 CU\*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

Online Banking Contact Request

UPDATE

Member12401 MARTY L. MEMBERRequest # 01590Request received04/07/2020 12:05:12

Contact Request

Contact requestBy Phone at616-888-1212This is a new phone number

Directed toCredit Union Manager

SubjectEarly Payoff

Message

My Loan has a few more years left is there any penalty for paying it off early

Reply via Secure Message Center

Copy conversation to tracker typeSMMemo typeSM(Leave Blank if no copy needed)

Press Ctrl plus Enter for a new line.

Verify MemberSend/Delete RequestReview Tracker

FR (6965) 4/07/20

As shown above the **Save Phone#** button no longer appears.

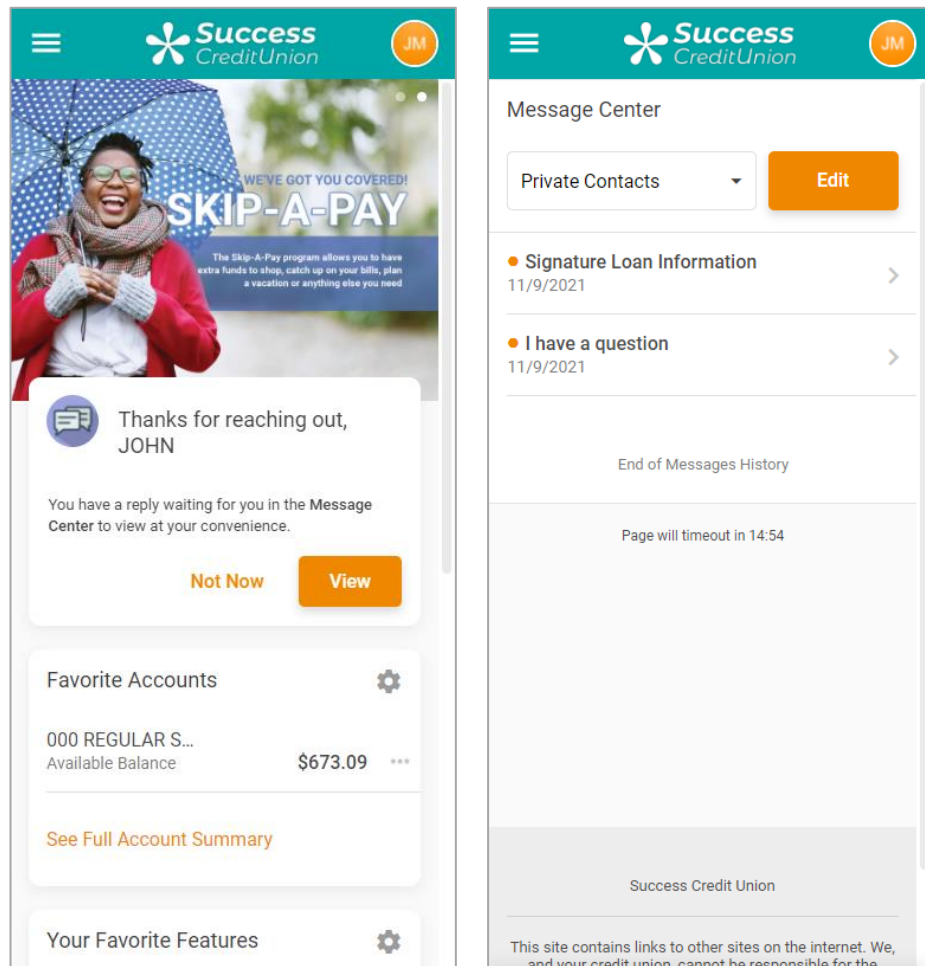


# OTHER WAYS MEMBER IS NOTIFIED OF RESPONSE FROM CREDIT UNION

## MEMBER WITH MULTIPLE RESPONSES AT LOGIN

If the credit union has sent more than one message, the member will instead still see a message directing him to go to the Message Center to read it.

When they click *View*, the member will advance to the Message Center with the messages filter for *Private Contact* messages.

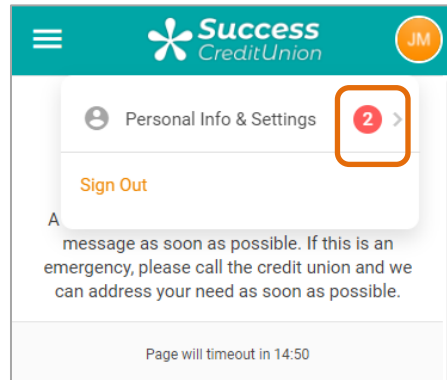




## MEMBER DOES NOT LOG OFF DURING CREDIT UNION CONVERSATION

If your credit union replies to the member before they log off, the way they will know they have received a message is by the Message Center indicator. They will access this in the Personal & Info Settings section.

### Message Indicator Alerts Member





# RESEARCH AND AUDITING

Your configuration and/or credit union policy can be configured to require that all private message responses be recorded in a Tracker conversation. In addition, the system records the original message by the member.

It is also recommended that your credit union configure specific Tracker Types and Memo Types to be used to record these Tracker conversations.

## MEMBERSHIP TRACKER

As covered earlier in this booklet, you can review Tracker conversations through viewing the Tracker on the base share (000) account.

### Selecting the Tracker Assigned to Private Contacts

Session 5 CU\*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

### Member Tracker Review

CHANGE

Member 738 MARTY L MEMBER

Selection Options

Date [MMDDYYYY] Time [HH:MM:SS]

Account type 000 Tracker type [G]

Reference [ ]

Date	Time	Account Type	Reference	Speaking With	Type	ID
Jan 10, 2020	9:51:56	000	Message	MARTY L MEMBER	SMD	Y
Jan 09, 2020	10:10:00	000	Address	MARTY L MEMBER	ADD	S

View Update Update Reference

Consolidate  
Work Follow Ups  
Tracker Entry  
Cross Sales Tasks

FR (5106) 1/10/20

By selecting a Tracker assigned to Private Contacts, the employee can view all messages that came through this system.



Here you can see the member message and the credit union response of one conversation.

### Tracker Conversation of a Private Contact Exchange

The screenshot shows a software window titled "Session 5 - Member Tracker Review". The window has a menu bar with "File", "Edit", "Tools", and "Help". Below the menu bar is a blue header bar with the text "Member Tracker Review".

The main content area displays the following information:

Account 738 MARTY L MEMBER  
Conversations 2  
Position to date [ ] [MMDDYYYY]

Two conversation entries are shown in a list:

Contact - Date: 01/10/2020 Time: 09:51:56 By Emp: ;Y  
Name: MARTY L MEMBER Memo Type: SM Reply Message  
Follow-up - Date: 01/10/2020 Assigned to Emp: LN Completed: NO  
John please reach out to Marty by phone. He is interested in a signature loan.

Contact - Date: 01/10/2020 Time: 09:48:18 By Emp: ;Y  
Name: MARTY L MEMBER Memo Type: SM Reply Message  
Response center message from Member  
Request #: 01080 Received: January 10, 2020  
Directed to: Loan Department By Phone at 616-555-1212  
Subject: Signature Loan Information  
I am interested in obtaining a signature loan for \$10,000 what do I have to do to apply  
Response Sent: January 10, 2020 By: [REDACTED]  
Thank you for your interest in a signature loan. I will have John Lender in our lending department contact you.

Below the conversation list, there is a "Sort Contact Date" button and a set of navigation icons (back, forward, up, down, print, link, info, help, search). In the bottom right corner, the text "FR (4573) 1/10/20" is displayed.

- NOTE: An employee could also manually add a Tracker conversation to this Tracker, for example if the member message was simply deleted.



## PRINT MEMBER TRACKERS REPORT

Additionally, you can audit specific employee's responses to members by using **Tool #664 Print Member Trackers**.

## Print Member Trackers (Tool #664)

Session 0 CU\*BASE GOLD Edition - ABC TESTING CREDIT UNION

File Edit Tools Help

## List Member Trackers

Report Options	Response
Member account base range from (blank for all)	<input type="text"/> to Optional <input type="text"/> Optional
Conversation date range from (blank for all)	<input type="text"/> to Optional <input type="text"/> [MMDDYYYY] Optional
Tracker type (blank for all)	<input type="checkbox"/> @ Optional
Memo type (blank for all)	<input type="checkbox"/> @ Optional
Type of Employee to select below	<input type="radio"/> Tracker created by <input checked="" type="radio"/> Conversion created by
Employee IDs (blank for all)	<input type="checkbox"/> @ Optional <input type="checkbox"/> @ Optional <input type="checkbox"/> @ Optional <input type="checkbox"/> @ Optional <input type="checkbox"/> @ Optional
Tracker selection	<input checked="" type="radio"/> Open trackers <input type="radio"/> Closed trackers <input type="radio"/> Both
<input type="checkbox"/> Print summary page only <input checked="" type="checkbox"/> Print conversation detail	

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In the report filters, select the Tracker Type, Memo Type, and employee ID(s) (not shown) and check *Print conversation detail*. The following report will print showing you the detail of the Tracker including member message and employee reply.

## Report Sample

3/18/20 12:11:37		CREDIT UNION				LTKLE1		Page	
RUN ON 4/07/20		Member Tracker Listing							
Call Date	Call Time	Account #	Follow Up Name	Memo type	Follow-up Date	Created By	Assigned To	User Completed By	Comple Da
04/07/2020	11:45:26	12401		Secured Mess		-3			
			Conversation: Response center message from Member						
			Request #: 01588 Received: April 07, 2020						
			Directed to: Loan Department By Phone at 616-555-1212						
			Subject: Signature Loan Information						
			I am interested in obtaining a signature loan for \$10,000 what do I have to do to apply						
			Response Sent: April 7, 2020 By:						
			Thank you for your interest in a signature loan. I will have John Lender i n our lending department contact you.						
04/07/2020	11:47:21	12401		Secured Mess		-3			
			Conversation: John please reach out to Marty by phone. He is interested in a signature loan.						
*** END OF REPORT ***									



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## APPENDIX: MISSING INFORMATION IN MESSAGE

If the member does not enter a subject, the message will still be sent.

If the member requests a contact via phone or text, the member will not be able to send the message.

If the member requests a contact via phone and does not enter a ten-digit number, he will see this error message.

### Warning Message – Private Message Requesting Follow Up by Phone Missing Ten-Digit Phone Number

The screenshot shows the Success Credit Union mobile app interface. At the top, there is a teal header with the Success Credit Union logo and a user icon labeled 'JM'. Below the header, there is a text input field containing the message: "I have a question about my signature loan." Below this, there is a section titled "Send to a Specific Department – Optional" with four radio button options: "Loan Department" (selected), "Credit Union Manager", "Member Service Center", and "Help with Payroll/ACH". Below this, there is a section titled "Follow Up – Optional" with a checked checkbox for "Follow Up with Me via Phone". Below this, there is a "Phone Number" input field containing "(555) 12". A red border and a red warning triangle icon highlight the input field. Below the input field, there is a red error message: "This phone number is invalid." Below the error message, there are two radio button options: "Call me at this number." (selected) and "Text me at this number." At the bottom of the form, there is an orange button.