**Teller 3P**

**Developing Three New Platforms for CU\*BASE Teller Processing**

**Summary List of Functions for Brainstorming KISS Only**

Revised: Thursday, August 30, 2018

This document provides a list of key functions that can be processed directly via CU\*BASE Tool #1 Teller Line Posting, for use with brainstorming about potential functionality for new teller platforms.

## Key Teller Functions (listed alphabetically)

Legend: **K**=Keep feature as is, **M**=Modify feature for this platform, **O**=Obsolete/remove feature from this platform

Items in orange text are controlled by settings in Teller/Member Service Workflow Controls (Tool #1005).

| Function | KISS | *KISS Platform Notes* |
| --- | --- | --- |
| 1. Account Comments (create/modify)
 |  |  |
| 1. Auto-pop the Photo ID window
 |  |  |
| 1. Auto-pop Verify Member ID/Comments window
 |  |  |
| 1. Auto-pop warning window for wrong email address
 |  |  |
| 1. Balance Forward (This Member/Other Member)
 |  |  |
| 1. Cash Checks
 |  |  |
| 1. Cash-back Calculator
 |  |  |
| 1. Close Memberships/Accounts
 |  |  |
| 1. Cross Sales
 |  |  |
| 1. CTR processing
 |  |  |
| 1. Default funds-in Proc Code (“currently serving”)
 |  |  |
| 1. Deposit calculator (to reach desired cashback amount)
 |  |  |
| 1. Deposit funds
 |  |  |
| 1. Deposit items (enter count)
 |  |  |
| 1. Device/Workstation Config (incl. TCD/TCR on/off, printer IDs)
 |  |  |
| 1. Display credit card # in place of account desc
 |  |  |
| 1. Display nicknames in place of account desc
 |  |  |
| 1. Drawer Control/Audit (my drawer)
 |  |  |
| 1. e-Document – scan
 |  |  |
| 1. e-Document – view
 |  |  |
| 1. Follow-Ups button for outstanding Tracker follow-ups (per Tracker type config)
 |  |  |
| 1. Funds In – cash
 |  |  |
| 1. Funds In – in-house (counter-kill) checks
 |  |  |
| 1. Funds In – outside checks (multiple checks w/holds)
 |  |  |
| 1. Funds In – outside checks (single check w/hold)
 |  |  |
| 1. Generate email to member (mailto: via default user’s email tool)
 |  |  |
| 1. Global Search
 |  |  |
| 1. Highlight base share below par
 |  |  |
| 1. Highlight share accounts with negative balance
 |  |  |
| 1. Holds on outside checks by check amount
 |  |  |
| 1. Holds on outside checks by member Electronic Deposit Hold Group
 |  |  |
| 1. Holds on outside checks by R&T
 |  |  |
| 1. Membership Designation Procedures
 |  |  |
| 1. Misc. Advances
 |  |  |
| 1. Misc. Receipts
 |  |  |
| 1. Name ID verification
 |  |  |
| 1. Negative balance teller override
 |  |  |
| 1. Next Suggested Product
 |  |  |
| 1. Non-Member Services (per Tool #336) – check cashing, misc. receipts, misc. advances
 |  |  |
| 1. Online Banking (p/w resets, info window)
 |  |  |
| 1. Open Memberships/Accounts
 |  |  |
| 1. Over-the-Counter Fees – cashed checks
 |  |  |
| 1. Over-the-Counter Fees – deposited items
 |  |  |
| 1. Over-the-Counter Fees – printed checks
 |  |  |
| 1. Over-the-Counter Fees – printed money orders
 |  |  |
| 1. **Phone Op & Member Inquiry (60+ features)**
 |  |  |
| 1. Phone/contact #s inquiry
 |  |  |
| 1. Post Deposits/Payments
 |  |  |
| 1. Post Withdrawals/Disbursements
 |  |  |
| 1. Print Check
 |  |  |
| 1. Print Money Order
 |  |  |
| 1. Print joint owner name on receipt (“currently serving”)
 |  |  |
| 1. Print teller audit reports when closing drawer
 |  |  |
| 1. Privacy controls – masking (per Tool #272)
 |  |  |
| 1. Privacy controls – wallet questions (per Tool #272)
 |  |  |
| 1. Rate Inquiry
 |  |  |
| 1. Red Flag Alert (address info changed recently)
 |  |  |
| 1. **Sales Tools (10+ features)**
 |  |  |
| 1. Search for account by card #
 |  |  |
| 1. Search for account by DBA name
 |  |  |
| 1. Search for account by employee #
 |  |  |
| 1. Search for account by name
 |  |  |
| 1. Search for account by reference
 |  |  |
| 1. Search for account by SSN/TIN
 |  |  |
| 1. Search for names by account number
 |  |  |
| 1. Secondary Names Inquiry
 |  |  |
| 1. Serve Another Member (“currently serving”)
 |  |  |
| 1. Shared Branching (CUSC)
 |  |  |
| 1. Suppress balances on receipt
 |  |  |
| 1. Suppress receipt print
 |  |  |
| 1. Suspicious Activity and Fraud Alert/Inquiry
 |  |  |
| 1. TCR/TCD Deposits/Withdrawals
 |  |  |
| 1. Tiered Points (info window)
 |  |  |
| 1. Tracker Review
 |  |  |
| 1. Transaction Activity Comparison
 |  |  |
| 1. Transaction Override
 |  |  |
| 1. Transfers – via Proc Code T
 |  |  |
| 1. Transfers – via standalone transfer feature
 |  |  |
| 1. Update Trans Desc & IRA/HSA Post Codes
 |  |  |
| 1. View account balances
 |  |  |
| 1. View loan payment / amount due
 |  |  |
| 1. Withdraw funds
 |  |  |