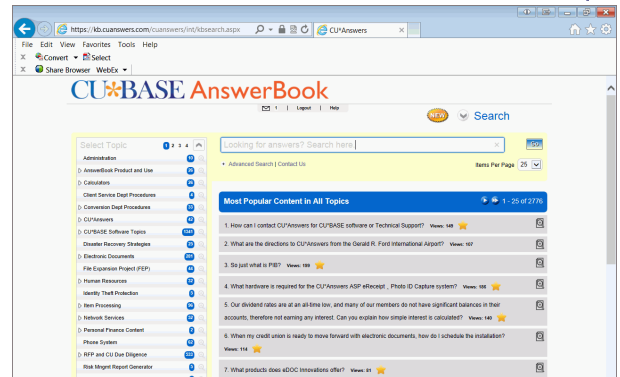


# Answer Book

Revised: February 3, 2017

The CU\*Answers **Answer Book** is designed to help you get quick answers to your questions, anytime, anywhere via the web. It is designed to make your employees more productive and to shorten the learning curve for new employees.

This comprehensive Q&A database, or “knowledge base,” is part of our effort to make sure that every credit union employee has direct access to the information they need to serve your members. Not only can you scan multiple categories for the most commonly-asked and answered questions, you can also submit your own questions to be answered by a CU\*Answers expert.



The Answer Book contains hundreds of your most commonly-asked questions, and the knowledge in this database grows and changes every day. Client Service Reps also enter all of your questions into the Answer Book as they work with you over the phone.

## Opening the Answer Book

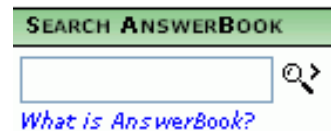
The next time you have a question, before you pick up the phone, take a look at the Answer Book first:

- ◆ On any CU\*BASE menu, click the Answer Book button at the bottom on the lower left corner the screen to look at all items related to that menu.



OR

- ◆ Use the “Search AnswerBook” feature available on our web site (www.cuanswers.com).



OR

- ◆ “I am a Client,” then “Docs & Information,” then “Answer Book” which is available on our web site (www.cuanswers.com).

Continued

OPENING THE ANSWER BOOK

FINDING ANSWERS

ASKING QUESTIONS

REVIEWING YOUR PAST QUESTIONS

GETTING ALERTS

TRACKING HELP DESK ACTIVITY

**Find Answers**

Enter a key word, phrase, or even a complete question...

...then click Go!

TIP: Click *Advanced Search* to accessed additional search features

TIP: If you want to limit your search to a specific category, (such as "CU\*BASE" or "Technical Support," select that grouping from the left hand panel.

## Finding Answers

After opening the Answer Book, use the Search features to locate an existing answer fast.

After you click Go, Answer Book will display all items that have that word or phrase in either the question or the answer. If you entered a full question, Answer Book will interpret the key words and phrases in the question and display answers that are relevant.

**Ask Questions**

## Asking Questions

If you can't find your answer among the existing Knowledge Base items, you can submit a question of your own via the Answer Book. In fact, we encourage you to use the Answer Book for *any* question you need to ask of a Client Service Representative.

The Answer Book uses encrypted email to communicate questions to our Client Service staff. That means you can include any details you like — even member account numbers or other private details you would normally *never* include in a regular, unsecured email (of course you wouldn't!) — and the data will be secure and remain private.

In order to use that secure channel, you must be registered as an Answer Book user, with an email address and a password.



## Why are you required to register?

*Registering and logging in with a password keeps all communications between you and our Client Service staff secure and private!*

## Registering

If you have not registered before, click “Ask Questions” and then “Register.”

You will be required to fill in some basic contact information so that we can get back to you with an answer and track your other questions in the future. The most important piece of information that we need is a unique email address.

## Logging In

If you have already registered, you will be required to log when you wish to ask a question. Enter the email address and password you used to register.

## Asking a Question

Asking a question is easy. First you will select a category from the drop-down list provided. Then you will enter your question into the box provided. You will see a notation that the information will be encrypted, so you can include any details you need to relay to us, including private information, if necessary.

After you click Submit, your question will be routed to the proper “expert” here at CU\*Answers, and you will receive a direct answer via email. The question will then be added to the database so that others can benefit from that same knowledge.

**Past Questions**

## Reviewing Your Past Questions

Every question you ask is saved and tracked according to the email address you entered when you submitted the question in the Answer Book. That’s another reason why it’s important that you register and login using that same email address and password for all future questions.

### Looking at Past Questions

Once you have registered, click the “Past Questions” button, log in, and look at list of questions you have asked in the past.

If the status reads “Closed,” you should already have received a response to your inquiry, either via email or phone, and no further action needs to be taken.

### Changing and Resubmitting a Question

Click the View Details button to read more about any item. Use the fields provided to change the text of the question if you want to clarify it further, then resubmit it for additional help. The status will be changed to “Open” and you will be contacted with additional information.

The screenshot shows the 'Past Questions' page in the CU\*BASE AnswerBook. The user is logged in as Whitney Williams. The page displays a list of 7 questions, all of which are marked as 'Closed'. The table below summarizes the data shown in the screenshot:

Message #	Date Submitted	Message Type	ID	Subject	Status
1	7/9/2013	Inquiry	568061	Inquiry regarding Help and Documentation Test	Closed
2	7/9/2013	Inquiry	568031	Inquiry regarding Help and Documentation Test	Closed
3	7/9/2013	Inquiry	567970	Inquiry regarding Help and Documentation Testing	Closed
4	7/9/2013	Inquiry	567968	Inquiry regarding Help and Documentation Testing	Closed
5	8/15/2013	Inquiry	572776	Inquiry regarding Help and Documentation TEST	Closed
6	2/20/2013	Inquiry	550962	Inquiry regarding Help and Documentation TEST	Closed
7	10/17/2012	Inquiry	535831	Inquiry regarding Help and Documentation TEST	Closed

*Continued*

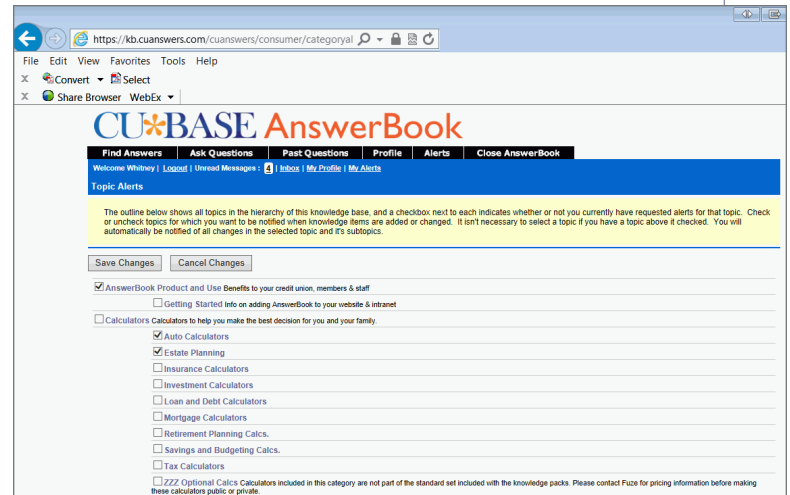
## Alerts

## Getting Alerts

One of the most exciting features available in the Answer Book is the ability to request an email alert whenever something of interest to you changes in the knowledge base. For example, if you are the lending manager, you might want to be notified any time a new item is posted or a change is made in the Loan-Related Processing category.

You'll just need to be registered using a valid email address to which the alerts can be sent. Click the Alerts button (you will need to log in) then click Modify Category Alerts. Place a checkmark on any category or sub-category that is of interest to you, then click Save Changes.

If changes are made to any items within your selected categories, a single email will be sent listing all of the items that were changed that day. The next time you access the Answer Book you will see any updated items for your review.



## Past Questions

## Tracking Credit Union Help Desk Activity

The Answer Book is even more than just a great Q&A tool. Because we can track who asks each question, we can also keep track of all of the inquiries entered by everyone at your credit union. This can be a very valuable tool for credit union managers, supervisors and training coordinators, to help pinpoint areas where your staff may need additional support or education.

Because the Answer Book is via the web, call activity is available for both online and self processing credit unions. Credit union leaders can get a complete picture of all of the contacts between your staff and CU\*Answers Client Services. Questions that are submitted via the Answer Book will be included, as well as all phone contacts added by our Client Service staff as they work with you over the phone.