CU*BASE e-Receipts Quick Reference Guide

Generating an e-Receipt

1. Post a CU*BASE member transaction.
2. A ProDOC Signature Capture window will then appear displaying the transaction receipt. Ask the member to sign the electronic signature pad at your teller window. Their signature will appear on the receipt in the Signature Capture window.
3. Click Print to print the receipt.
4. Click Save to retain a copy of the receipt for your records.

Reprinting a Receipt via Phone Operator

(For teller receipts created in the last 90 days.)

1. On the initial Teller Posting Screen, select Phone Inquiry.
   a. Or you can access Phone Operator from the home page, input the account base, and use Enter.
2. Double-click the account that the receipt was processed in.
3. Select the transaction and select Retrieve e-Receipt.

Reprinting a Receipt via ProDOC

(For teller receipts created in the last seven days.)

1. Right-click the ProDOC icon in your taskbar.
2. Click Saved Documents.
3. Select your username from the drop-down menu.
4. Select the date of the receipt.
5. Select the receipt from the list and click View.
6. Click Print, select a non-receipt printer, and click Print again. The receipt will print with a signature.

Reprinting a Receipt via idocVAULT

(For all receipts.)

1. Double-click your idocVAULT icon.
2. Enter your idocVAULT username and password. (They are the same as your ProDOC username and password.) Click Login.
3. Click Documents, then Receipts.
4. Check the Current Receipts box.
5. Enter your search criteria.
6. Click Search.
7. From the list of search results, click the desired receipt.
8. From the receipt viewport, click the Adobe printer icon.
9. Select your printer and settings.
10. Click Print. The receipt will print to a non-receipt printer on full-size paper with a signature.

Reprinting a Receipt via Teller Control

(For teller receipts created in the last 90 days.)

1. Launch **Tool #33** *Teller Drawer Control/Inquiry*.
2. Enter your employee ID and vault ID.
3. Click the forward arrow.
4. Click Audit from the Teller Control window.
5. Select the transaction for which you'd like to reprint the receipt.
   a. Select Prior for the processing date to view receipts from the past.
6. Click Print receipt. This will reprint the receipt without the member's signature.
   a. If you'd like to reprint the receipt with the member's signature, click Retrieve e-Receipt image instead.
7. Click Print.

CU*BASE Photo ID Capture Quick Reference Guide

Scanning a Photo ID

1. From the member's account inquiry screen, click No ID on File.
   a. Or you can right-click the ProDOC icon on your taskbar and click Scan.
2. Click the Form Name drop-down menu and select PhotoID.
3. Click Scan Page.
4. Select the scanner.
5. Click the Scan Size drop-down menu and select Business Card.
6. Click Scan.
7. Click OK.
8. Insert the photo ID into the scanner (all the way to the right, top first, and face down).
9. Enter the member's SSN, first name, and last name in the appropriate fields.
10. Click Save.

Changing your ProDOC Password

1. Double-click your idocVAULT icon.
2. Enter your idocVAULT username and password. (They are the same as your ProDOC username and password.) Click Login.
3. Click Settings, then My Profile.
4. Click Profile Information.
5. Enter your new password.
6. Enter it again to confirm.
7. Click Save.

Viewing an Electronic ID Once the ID Has Been Scanned

1. From the member's account inquiry screen, click Verify My ID.
2. A browser window will open showing the photo ID.

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.

Activating ProDOC Auto-Launch

After activating ProDOC auto-launch, you will automatically be logged into ProDOC when you sign into CU*BASE.

1. Click the Favorites (star) button on your CU*BASE home page.
2. Check the box that reads Launch ProDOC when logging in.
3. Click the forward arrow.

Logging out of ProDOC

1. Right-click the ProDOC icon on your taskbar.
2. Click Exit.