

CU*BASE e-Receipts Quick Reference Guide



Creating a Receipt for the First Time

1. Post a CU*BASE® transaction.
2. Have the member sign the electronic signature pad.
3. Click the *Print* button to print as many receipts as are needed.
4. Click the *Save* button. The receipt is now archived.

Reprinting a Receipt Using Phone Operator

(For teller receipts created in the last 90 days)

1. On the Initial Teller Posting Screen select *Phone Inquiry* (Proc Code P).
 2. Press Enter.
 3. Select the account that the receipt was processed in.
 3. Select the transaction.
- ◆ Click the blue dot in the Print Receipt column next to the transaction and click Print. Then click *Print* on the ProDOC™ screen. Click *Cancel* and then *OK*. The receipt will print to the receipt printer without a signature.

OR

- ◆ Click *Retrieve Receipt Image*, select a non-receipt printer, such as the one you use for reports, and click *Print*. The receipt will print to the non-receipt printer with a signature.

Reprinting a Receipt Using Teller Audit in CU*BASE

(For teller receipts created in the last 90 days)

1. From the Teller Drawer Control, click *Audit* (F3).
- ◆ Use *Print Receipt*, then click *Print* on the ProDOC screen. Click *Cancel* and then *OK*. The receipt will print to the receipt printer without a signature.

OR

- ◆ Click *Retrieve Receipt Image*, select a non-receipt printer, such as the one you use for reports, and click *Print*. The receipt will print to the non-receipt printer with a signature.

Using ProDOC to Reprint Your Receipt

(For teller receipts created in the last seven days)



1. Right click on the ProDOC icon in the System Tray and select *Saved Documents*.
 2. Select your user name from the drop-down menu.
 3. Select the date of the receipt from the Date choices.
 4. Select your receipt.
 5. Click *View*.
 6. Click *Print*.
 7. Select a non-receipt printer, such as the one you use for reports, and click *Print*.
- ◆ A receipt will print to the non-receipt printer, with a signature.

Using idocVault to Reprint your Receipt

(For all receipts)

1. Double click the idocVAULT icon on your computer desktop to launch the browser.
 2. Type in your ProDOC login and password, then click the *Login* button.
 3. Click *Images*.
 4. Check the *Current Receipts* check-box.
 5. Click the *Search* button.
 6. Type in your specific search criteria.
 7. Click the *Search* button on the right.
 8. The first receipt matching the criteria appears on the right. Click on the blue icons on the left to view other receipts.
 9. Print the receipt using the Adobe printer icon.
- ◆ A receipt will print to a non-receipt printer, such as you use for reports, with a signature.

CU*BASE Photo ID Capture Quick Reference Guide

Scanning and Saving the Electronic Photo ID

1. Go to the Teller Processing screen and select the member or other person associated with the account.
2. Press Enter to advance to the Verify Member screen.
3. Click the *No ID on File* button.
 - The “No ID on File” button can also be found on the Inquiry and Phone Operator screens.
4. Place your photo ID on the scanner.
 - Always scan adult licenses face down, head first. Align the identification with the right hand side of the scanner.
5. Confirm that Photo ID is selected.
6. Click *Scan Page*.
7. Click *Scan*.
8. Click *Save*.

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.

Viewing and Printing an Electronic Photo ID once the ID has been Scanned


1. Go to the Teller Processing screen and select the member or other person associated with the account.
2. Press Enter to advance to the Verify Member screen.
3. Click on the *Verify My ID* button.
 - The “Verify My ID” button can also be found on the Inquiry and Phone Operator screens.
4. A browser window will open showing the photo ID.



Setting Up Auto-Launch for ProDOC

If you select the *ProDOC auto-launch* box in your Workstation Favorites in CU*BASE, you will automatically be logged into ProDOC when you sign into CU*BASE in the morning.

The following steps will need to be done one time.

1. Click  **Preferences**
2. Check the ProDOC auto-launch box.
3. Press Enter.
4. Once you have logged in a ProDOC icon will appear in your System Tray.

The next time (and any other time) you log into CU*BASE, you will automatically also be logged into ProDOC.

Logging Out of ProDOC

1. Right click on the ProDOC icon and select *Exit*.

Changing your ProDOC/ idocVAULT Password

1. Double click on the idocVAULT icon on your desktop to launch the browser.
2. Click *Admin*.
3. Type in your old password.
4. Type in your new password.
5. Verify the new password.
6. Click *Save*.