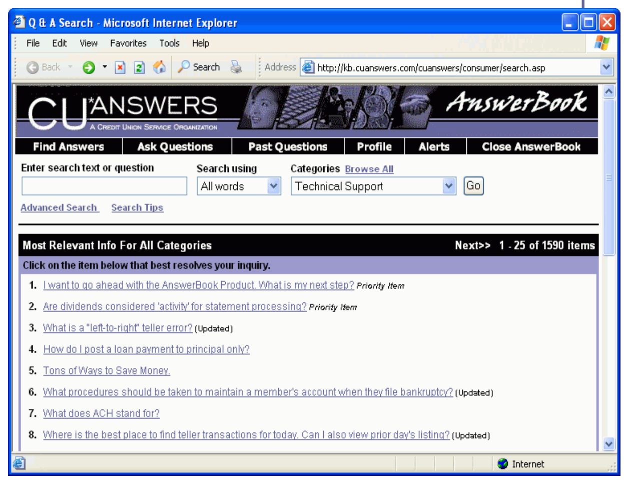
Using the CU*Answers

Answer Book

Revised May 21, 2009

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.

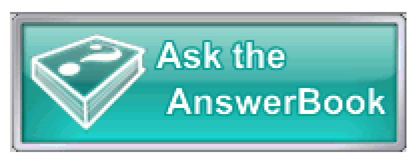


The Answer Book contains hundreds of your most commonly-asked questions, and the knowledge in this database grows and changes every day. Client Service Reps also enter all of your questions into the Answer Book as they work with you over the phone.

Opening the Answer Book

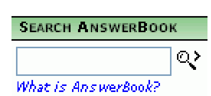
The next time you have a question, before you pick up the phone, take a look at the Answer Book first:

- 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).



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Find Answers

Finding Answers

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

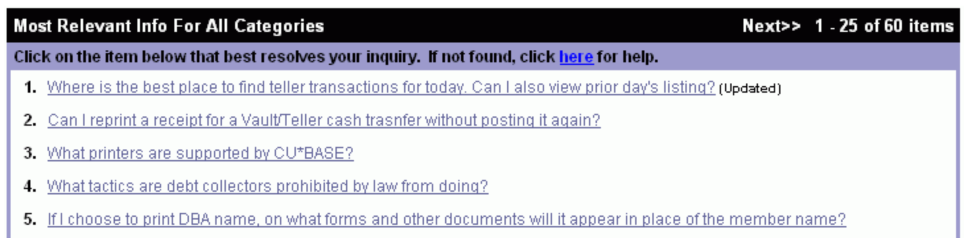
Enter a key word, phrase, or even a complete question...

...then click Go!

TIP: Click Search Tips to learn more about how to use the available search features.

TIP: If you want to limit your search to a specific category, either choose a main category (such as "CU*BASE" or "Technical Support") from the drop-down list, or click Browse All to choose from a list of all categories and sub-categories.

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. Here's how:

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, a link is available that you can use to register online. 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. **If you have your own email address, just enter that.**

However, if you do not have access to your own email, do <u>not</u> enter someone else's email address (such as a shared email your credit union uses for all incoming email). Instead, create a "pretend" email that is unique to you, using this format:

nameX@123.tmp

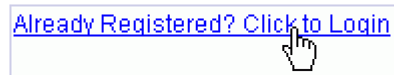
Substitute your first name, last name initial, and credit union number. For example, if your name is John Smith at credit union #200, your pretend email would be:

johns@200.tmp

Of course with a pretend email like this you won't be able to receive email responses, but we will be happy to give you a call!

Logging In

If you have already registered, you will be required to log when you wish to ask a question. To speed up the process, you can click the "Already Registered?" link and just 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. If you have logged in properly, 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.

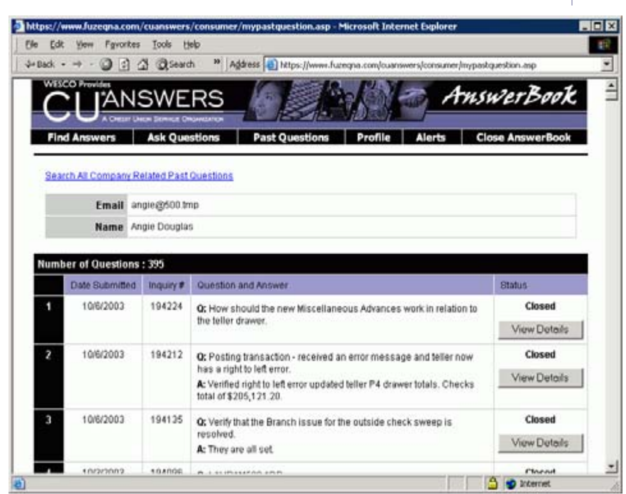
After you click Submit, your question will be routed to the proper "expert" here at CU*Answers, and you will receive a direct answer via email or phone (you can also ask for just a phone call if you like). The question will then be added to the database so that others can benefit from that same knowledge.

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.

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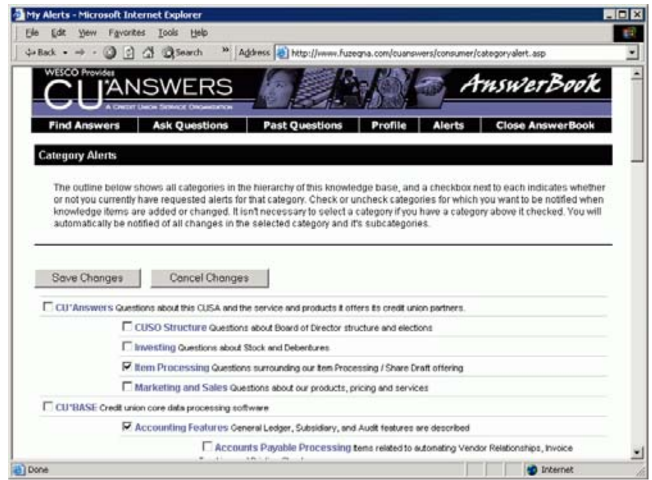
Alerts

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.

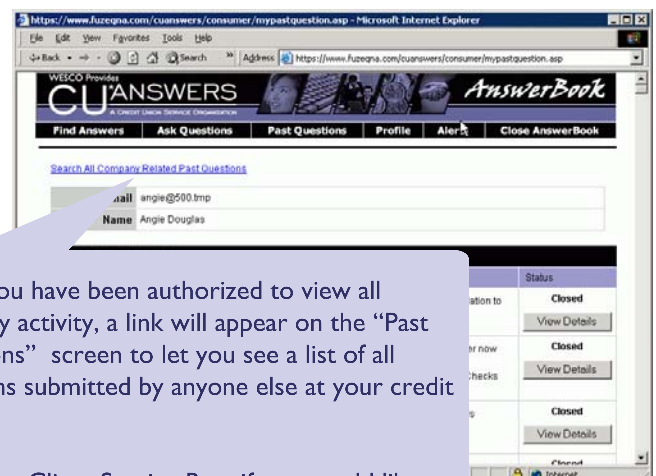
You'll just need to be registered using a valid email address to which the alerts can be sent. Click the Alerts button (you will need to log in) then click Modify Category Alerts. Place a checkmark on any category or sub-category that is of interest to you, then click Save Changes.

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.

TIP: If you have been authorized to view all company activity, a link will appear on the "Past Questions" screen to let you see a list of all questions submitted by anyone else at your credit union.

Contact a Client Service Rep. if you would like to view this information for your staff.

CU*ANSWERS
A Credit Union Service Organization
www.cuanswers.com