

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 the Retrieve Receipt Image option, 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 the Print Receipt option, 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 the Retrieve Receipt Image option, 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 2020iDOC to Reprint your Receipt

(For all receipts)

1. Double click the 2020iDOC™ 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. Right click on the ProDOC icon  in your System Tray and select Scan.
2. Select Photo ID from the drop-down menu next to Form Name.
3. Place your photo ID on the scanner.
 - ◆ For most photo IDs, place the ID face down, head first, and aligned to the right hand side of the scanner.
4. Click Scan Page.
5. Select the settings of Grayscale, 100 dpi, and a Scan Size of Business Card.
6. Click Scan.
7. Enter the member's social security number, first name, and last name.
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 Funds in, Member Inquiry, or Phone Operator screens.
2. Click on either the Verify My ID or Secondary Names button.
3. Click on the icon in front of name  of the member, joint member or beneficiary.
4. A new browser window will open displaying the photo ID.
5. To print the photo ID, click the Printer icon.
6. Select a non-receipt printer, such as one that you use for reports.
7. Click Print.

Logging In to ProDOC

1. A login screen will appear when you log on to your computer.
2. Enter your login information and click Login.
3. Also log in to CU*BASE and your thermal printer session.
 - ◆ Once you have logged in a ProDOC icon will appear in your System Tray.
 - ◆ If you need to log into ProDOC after you have logged into your computer, you can use the icon on your desktop.

Logging Out of ProDOC

- ◆ During the day, right click on the ProDOC icon in your System Tray and select Logoff. This will leave a login screen for the next user to remind him or her to log in.
- ◆ At the end of the day, right click on the ProDOC icon and select Exit.

Changing your ProDOC™/ 2020iDOC™ Password

1. Double click on the 2020iDOC 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.