

PHONE OPTICS: TRACKING ACTION ITEMS

What clickable action items are tracked from the Phone Operator tool within Phone Optics?

- Verify My ID
- Secondary Names
- J/O – Viewing Additional Signers
- J/O – Viewing Joint Owners
- Go! Next to More #
- Account History
- Other Accounts
- Transfer
- Check
- Inquiry
- Average
- Nicknames
- ARU/HB Transfers
- Stop Pay
- Go! In ACH Column
- List – Account Status Print Tool
- Names/Address
- (Click for more info) in Member’s Current Points
- Go! In AFT Column – AFT Information
- Online Banking Information
- Statements – View Member Statements
- Wire Transfer
- Bump CD Rate
- Payoff
- Sales Tools
- Name/Address; Alternate Mailing Address
- View/Answer Member Survey
- Cross Sales Tracking List
- Loan Quoter
- Marketing Club Config Inquiry
- Rate Inquiry
- Sales Tracker Leads & Follow Ups
- Credit Union Product Procedures
- Print Envelope
- Comments
- Tiered Services Config. Inquiry
- Tiered Service Scores/Misc. Maintenance
- Skip Payment Configuration Inquiry
- Misc Rcpts
- Cross Sales
- Go! in Box Column - Search for Safety Deposit Box
- Tax File Inquiry
- Pre-Approvals
- Go! In ATM Column; View Cards and OTB Products
- Household Stats
- Check Digit – MICR Line Information
- Add Cmt/Message
- CC Inquiry
- Tracker Follow-Ups
- Transaction Activity
- Entering a member’s account
- Exiting an account, back into the Phone Operator Tool
- Exiting the Phone Operator Tool