



PHONE BANKING CALL FLOW

CALL FLOW

Welcome
Language
Main Menu

1. Account Balance
2. Account History
3. Funds Transfers or Make a payment Menu
 1. Funds Transfers
 - Transfers Funds Immediately
 - Schedule a Funds Transfers
 2. Payments
 - Payment Immediately
 - Payments Scheduled
 3. List Scheduled Funds Transfers
 4. Cancel a Scheduled Funds

Transfers

4. Share and Loan withdrawal
5. Card Services Menu
 1. Activate a card
 2. Deactivate a card
 3. Reorder a card
6. Merchant Check Verification
7. Interest Rates
8. More options
 1. Change PIN
 2. Stop Payments
 - Stop Payment
 - Stop Payment Inquiry
 3. Future Dated Transactions
 4. Get Credit Union Information

MENU SUBCATEGORIES

1. Checking
2. Savings
3. Credit Cards
4. Loans
5. CD's and IRA's