Welcome to Numerica Credit Union's Amazon Alexa* Skill

The Numerica Skill can provide financial information and process transactions from your Amazon Echo device. Using the Numerica Skill, you can do things like:

- Transfer funds from one mapped account to another.
- Request an account balance.
- Cancel a lost or stolen credit or debit card.

Note: You must be enrolled in Online Banking to use the Numerica Skill. If you are not yet enrolled, please contact the credit union for assistance.

Terminology

The terminology below is used throughout the document:

- **Account Linking –** Alexa skill setup process that handles authentication to another system (like Online Banking) and also sets any preferences, such as email address or phone number.
- **Alexa –** Amazon's voice control system. This is what allows you to speak to your Echo device and enables it to understand and respond.
- **Alexa Application (App) –** Amazon mobile application that allows you to set up and maintain skills for your specific Echo devices.
- **Dot –** Amazon's smaller hands-free, voice-controlled Alexa device.
- **Echo –** Amazon's hands-free, voice-controlled Alexa device.
- **Invocation name –** A phrase which lets Alexa know that you want to perform a task in a particular skill. This is similar to opening the program on your computer.
- **Tap –** Amazon's wireless Alexa device. The Tap requires you to press a button to make a request.
- **Skill –** A skill is a specific group of tasks that have been added for use with an Alexa device. It's a little like installing a program on your computer.

Adding the Skill to Your Mobile Device

The Numerica skill requires enrollment. During this step, we will:

- **Authenticate that you are an authorized user of your account.** Once we've done that, we will link your account for use with the Numerica skill.
- **Allow you to map nicknames for use with the Numerica skill.** You'll specify a nickname for each share or loan you want to use with Numerica and you will refer to those nicknames (rather than the description from your statement) when using the skill.
- **Specify a mobile number and email address.** These will only be used within the Numerica Skill to send security codes and provide information to you about your activity within the skill.
- **Select how you'd like to receive security codes** (text or email) that we may send from time to time to authenticate you when using Numerica.

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Adding the Skill to Your Mobile Device (continued.)

1. On your mobile device, open the Amazon Alexa app.
2. From the Home Screen, click the hamburger menu at the top left of screen
3. Select Skills.
4. Search for and select Numerica from the Alexa Skills Store.

> **Tip:** Once you've added the skill, it will show up under Your Skills inside the Alexa app. This menu is available in the top right corner of the Alexa app. If Numerica has not been linked, an 'Account linking required' note will appear on the Your Skills page. You must complete the account linking process within five minutes or it will time out.

5. Tap the Enable button.
6. On the Welcome screen, tap Accept and Continue.
7. Enter your online banking User Name.
8. Enter your online banking Password.
9. Tap Verify to confirm your online banking credentials.
10. Map the Numerica account names to your existing shares or accounts.

> **Note:** When referring to shares or accounts using Numerica, you will use the Nickname shown in the column on the left.

11. Tap Map Accounts to confirm the mappings.
12. Enter a 4-digit PIN that will be used to authenticate you only for Numerica.
13. Tap Submit.
14. Enter your Email.

> **Note:** This email address is used only for the Numerica Skill and does not affect the email addresses on file for you at the credit union.

15. Enter your mobile phone number for SMS text messages.

> **Note:** This mobile phone number is used only for the Numerica Skill and does not affect the phone numbers on file for you at the credit union.
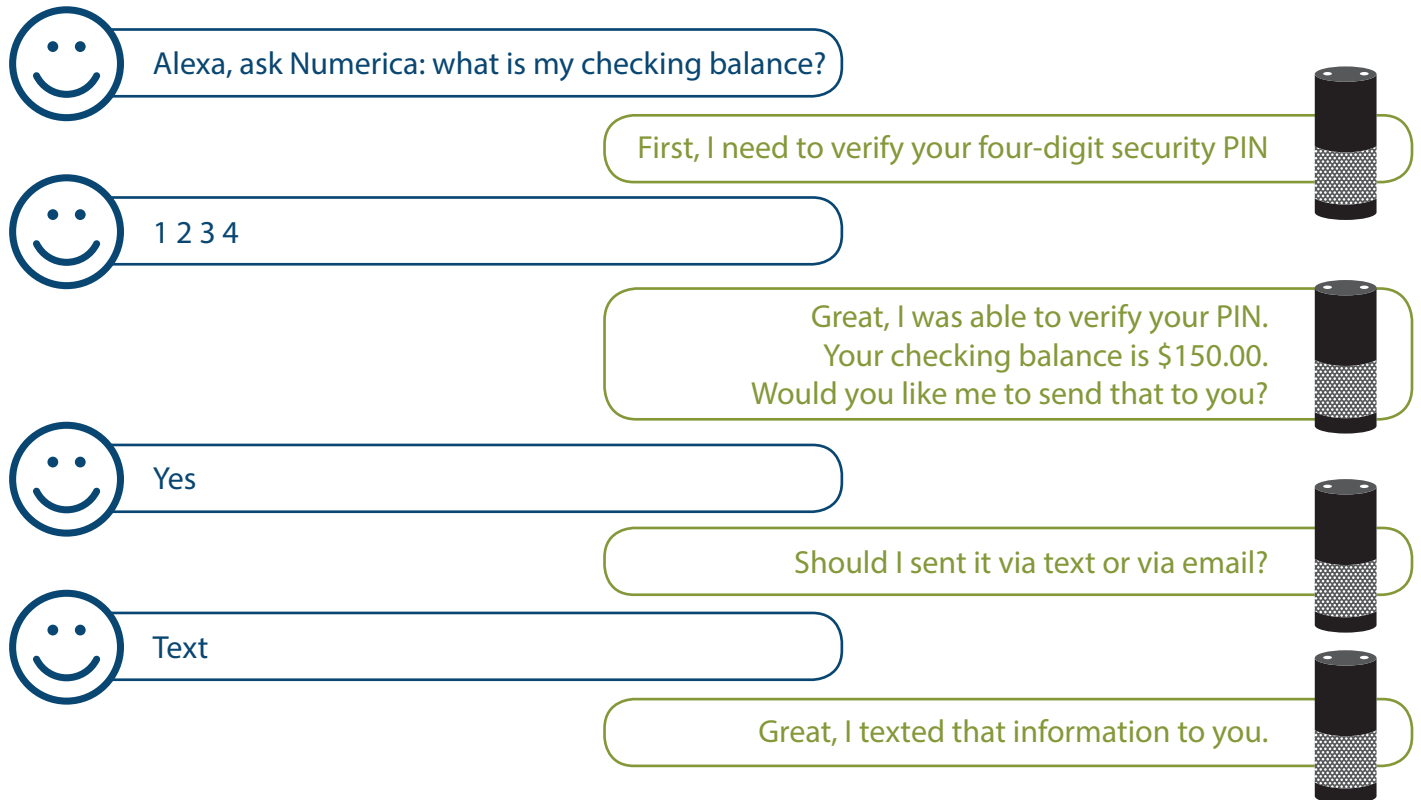
16. Tap Submit.
17. Select Text - SMS or Email as the delivery method for authentication codes.
18. Tap Submit.
19. Tap Exit Enrollment to complete the account linking process.

Using Echo Devices

When working with Alexa–enabled devices, each task (example: requesting your checking balance) is a separate and distinct conversation. Each time you begin a task with Alexa, a new conversation is started and will continue until the task is complete.

Tip: Introducing a new topic or starting a new task cannot be done until the current conversation is finished.

Sample Conversation

Alexa, ask Numerica: what is my checking balance?

First, I need to verify your four-digit security PIN

1 2 3 4

Great, I was able to verify your PIN.
Your checking balance is $150.00.
Would you like me to send that to you?

Yes

Should I sent it via text or via email?

Text

Great, I texted that information to you.

In the example above, you cannot ask Alexa to switch gears halfway through the conversation and do a transfer. You must complete the conversation about the checking balance before moving on to a new task.

You can begin a conversation with Alexa in two different ways:

- Say "Alexa, open Numerica." This opens the skill and begins a general conversation. Alexa will welcome you and then you can begin a task like, "What is my checking balance?" This method is a little longer, but may be easier for new users.

- You can also directly begin a task. For example: "Alexa, ask Numerica what is my checking balance?" This method skips the open step and welcome message. For this reason, it's preferred by most users.

Once you've started a conversation, Alexa will respond with questions when it needs information from you to complete the task. Listen carefully to the questions. Guidance will be provided by Alexa if the answers are not stated a specific way.

If at any time you wish to stop the current conversation or you receive an error like "There was a problem with the requested skill's response," you can say "Alexa, ask Numerica to cancel." Then restart the conversation.

Tip: If you find that Alexa is repeatedly prompting you for information you've already given, you can always say "Alexa, ask Numerica to cancel." This will end the current conversation and allow you to start a new conversation.

The Lights and How They Indicate What's Happening

Alexa-enabled devices offer visual cues for users through a light ring (Echo and Dot) or front-facing light bar (Tap) to display the current operation or status.

Amazon Echo and Dot

The light ring displays the status of the Echo.

Echo Ring	Echo Process
Solid blue with spinning light blue lights	Device is starting up
All lights off	Device is waiting for a request
Solid blue with light blue pointing in direction of person speaking	Device is processing a request
Solid red light	Microphone is muted

Amazon Tap

For the Amazon Tap, the lights on the front of the device indicate the status.

Tap Lights	Echo Process
Pulsing blue light over light blue lights from left to right	Device is starting up after the power button is pressed
All light blue lights fill the light strip	Device is waiting for a request after the microphone button is pressed
All light blue lights pulse quickly	Device is processing a request
Solid red light	Microphone is muted

Using the Numerica Skill

Using the Numerica Skill involves having a conversation about a specific task that you want to perform.

1. Ensure the Amazon Echo device is turned on and ready to begin a conversation. If using an Amazon Tap, press the microphone button.

2. Start the conversation with Alexa. For example, to transfer from checking to savings, you can either say:
   - "Alexa, open Numerica." This opens the skill and begins a general conversation. Alexa will welcome you and then you can begin a specific task like, "Transfer $10 from checking to savings."
   - "Alexa, ask Numerica to transfer $10 from checking to savings." This skips the open step and welcome message.

3. Alexa may prompt you for your four-digit security PIN (you set this up during Account Linking). If it does, say the PIN to authenticate.

4. Alexa will prompt you as needed for any information that it needs to complete the task. Listen carefully to the questions as they provide guidance if answers are not stated a specific way.

5. Alexa may ask you if you'd like to receive a receipt or additional information by text or email.

6. When you're done with this conversation, you can:
   - Start a new conversation, perhaps to ask your savings balance.
   - Log out of the skill. This will end the conversation and close the skill. To start a new conversation, you'll be required to speak your security PIN again.

Tip: If you forget to log out, don't worry. You'll be logged out automatically after 30 minutes of inactivity.

What Can I Do?

Here are some tasks that you can perform through the Numerica Skill.

Keep in mind that:

- You do not have to say the exact text listed. We've tried to train Alexa to get an idea of what you want no matter how you say it. If you have a suggestion for how you should ask for a specific task, please let us know!
- Many of these tasks use your mapped nicknames. Replace bold text with a different mapped nickname to use a specific share/loan with that task.

You Can Do This	To Start the Conversation, Just Say...
Request this User Help document	Alexa, ask Numerica... • What commands can I use? • To send user commands
Perform an immediate transfer • From share to share • From share to loan (payment)	Alexa, ask Numerica... • To transfer $10 from **savings** to **checking** • To pay my **auto loan**
Get information about a specific loan • Balance • Payment amount due • Payment due date • Payoff amount	Alexa, ask Numerica... • To tell me about my **auto loan** • To text me information about my **auto loan** • To Email me information about my **auto loan**
Get information about all of your loans	Alexa, ask Numerica... • What are my loans? • To text me a summary of my loans • To email me a summary of my loans
Get information about all of your shares	Alexa, ask Numerica... • What are my shares? • To text me a summary of my shares • To email me a summary of my shares
Get information about your credit union • Name • Phone number • Mailing address • Routing number • Hours • Year founded • CEO Name	Alexa, ask Numerica what is the... • Phone number of my credit union • Address of my credit union • Mailing address of my credit union • Routing number of my credit union

Get the balance for a share	Alexa, ask Numerica...
	    • What is my savings balance?
	 Alexa, ask Numerica...
	    • To text me my savings balance
	    • To email me my savings balance

Get your share history	Alexa, ask Numerica ....
	    • To tell me about my savings account history
	    • To text me my savings account history
	    • To email me my savings account history

Help	Alexa, ask Numerica to help me.
Cancel a debit or credit card	Alexa, tell Numerica that I lost my credit card. Alexa, ask Numerica to cancel my card.

Set a preference for how the Numerica Skill provides responses
 	
 Also referred to as "receipt preference," this task allows you to bypass any prompts to text or email you information (not just receipts). You can set the preference to:
    • Text for all receipts
    • Email for all receipts
    • Always ask or None (prompt each time a task is performed)
	Alexa, ask Numerica to....
	    • Always ask for all receipts
	    • Text for all receipts
	    • Email for all receipts

Get a list of your mapped nicknames	Alexa, ask Numerica what are my mapped accounts?
Hear and/or request information on any promotions available	Alexa, ask Numerica if there are any promotions
Hear some general information about finance or security	Alexa, ask Numerica to educate me.

Troubleshooting

If: Alexa doesn't understand a request or has an unanticipated response.

Then: Say "cancel" into the device to exit the skill. Alexa will confirm the process is canceled. You will need to restart the conversation.

If: You receive the error "There was a problem with the requested skill's response."

Then: Alexa has encountered a problem completing the task. Say "Alexa, cancel" and restart the conversation.

If: You have more than one task to complete in the Numerica Skill.

Then: Only one conversation can be conducted at a time. When the initial conversation is complete, you will need to start a new conversation by saying, "Open Numerica" or, "Ask Numerica to…" Depending on the length of time between conversations, you may or may not need to speak your PIN again.

If: Alexa doesn't recognize an account or gives an error that a nickname is not mapped for an account.

Then: You can request a list of your mapped accounts by saying, "What accounts do I have mapped?" This can also be emailed to you.

If: You want to change your mapped nicknames.

Then: You will need to disable the skill in the Alexa app, re-enable it, and complete the Account Linking process again. You will be prompted to set up your mapped nicknames again.

If: You want to change your four-digit security PIN.

Then: You will need to disable the skill in the Alexa app, re-enable it, and complete the Account Linking process again. You will be prompted to set up your security PIN again.

If: You want to change your email address.

Then: You will need to disable the skill in the Alexa app, re-enable it, and complete the Account Linking process again. You will be prompted to set up your email address again. This only affects the email address used by the Numerica Skill. It does not update the email addresses on file for you at the credit union.

If: You want to change your mobile phone number.

Then: You will need to disable the skill in the Alexa app, re-enable it, and complete the Account Linking process again. You will be prompted to set up your mobile phone number again. This only affects the mobile phone number used by the Numerica Skill. It does not update the mobile phone number on file for you at the credit union.