



# P1FCU

## AMAZON ALEXA

### USER GUIDE

P1FCU can provide financial information and process transactions from your Amazon Alexa-enabled devices. Using the P1FCU skills and features, you can do things like:

- **Transfer funds from one mapped account to another.**
- **Request an account balance.**
- **Get information about your loans.**
- **Ask for information about P1FCU.**

**NOTE** You must be enrolled in Online Banking to use the P1FCU skill. If you are not yet enrolled, please contact us for assistance.

#### ADDING ALEXA P1FCU TO YOUR MOBILE DEVICE

- **Authenticate that you are an authorized user of your account.** Once you have been authenticated, we will link your account for use with the P1FCU skill.
- **Allow you to map nicknames for use with the P1FCU skill.** You'll specify a nickname for each account or loan you want to connect with the P1FCU skill, and you will refer to those nicknames rather than the description from your statement.
- **Specify a mobile number and email address.** These will only be used within the P1FCU skill to send security codes and provide information 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 the P1FCU skill.

# Adding Alexa P1FCU to Your Mobile Device

## Enrollment Steps

1. On your mobile device, open the **Amazon Alexa app**. You may need to download the app from your app store.
2. From the **Home Screen**, click the **☰ menu** at the top left of the screen.
3. Select **Skills**.
4. Choose **P1FCU** 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 P1FCU has not been linked, an **'Account linking required'** note will appear on the Your Skills page. You must **complete the account linking process within 5 minutes** or it will time out.

5. Tap the **Enable** button.
6. On the **Welcome** screen, select **Accept and Continue**.
7. Enter your **online banking username and password**.
8. Tap **Verify** to confirm your online banking credentials.
9. Map the P1FCU account nicknames to your existing loans or accounts.

**NOTE** When referring to your **P1FCU accounts**, you will use the **Nickname** shown in the column on the left.

10. Select **Map Accounts** to confirm the mappings.
11. Enter a **4-digit PIN** to authenticate your P1FCU.
12. Tap **Submit**.
13. Enter your **email**.
14. Enter your mobile **phone number** for SMS text messages.

**NOTE** This mobile phone number and email address are used **only** for the P1FCU skill and do not affect the phone numbers on file for you at the credit union.

15. Tap **Submit**.
16. Select **Text – SMS** or **email** as the delivery method for authentication codes and submit.
17. Select **Exit Enrollment** to complete the account linking process.

# Using Echo Devices

When working with Alexa-enabled devices, each task 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 P1FCU: what is my savings balance?"*

*"First, I need to verify your 4-digit security PIN."*

*"1234."*

*"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 send 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 savings balance before moving on to a new task. You can begin a conversation with Alexa in two different ways:

- Say **"Alexa, open P1FCU"**. This opens the skill and begins a general conversation. Alexa will welcome you and then you can begin a task like **"What is my savings 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 P1FCU what is my savings 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 she needs information from you to complete the task. Listen carefully to her questions, as she will provide guidance if she needs the answers stated in a specific way.

If you wish to stop the current conversation at any time, you can say **"Cancel"** and then restart the conversation.

# The Lights and Their Indications

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

## AMAZON ECHO AND DOT

**Solid blue with spinning cyan lights** – Device is starting up.

**All lights off** – Device is waiting for a request.

**Solid blue with cyan pointing in direction of the person speaking** – Device is processing a request.

**Solid red light** – Microphone is muted.

## AMAZON TAP

**Pulsing blue light over cyan lights from left to right** – Device is starting up after the power button is pressed.

**Cyan lights fill the light ring** – Device is waiting for a request after the microphone button is pressed.

**All cyan lights pulse quickly** – Device is processing a request.

# Using the P1FCU Skill

Using the P1FCU 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 debit to savings, you can either say:

- **“Alexa, open P1FCU.”** 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 debit to savings.”**

- **“Alexa, tell P1FCU to transfer \$10 from checking to savings.”** This skips the open step and welcome message.

**3.** Alexa may prompt you for your **4-digit security PIN** (you set this up during Account Linking). If she does, say the PIN to authenticate.

**4.** Alexa will prompt you for any information that she needs to complete the task. **Listen carefully to her questions** as she will provide guidance if she needs the answers stated in 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 or 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 10 minutes of inactivity.

# What Can I Do?

Here are some tasks that you can perform through the P1FCU 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 account nicknames.**

TASK	TO START, SAY
<b>Request this User Help document.</b>	<b>"Alexa, ask P1FCU..."</b> <ul style="list-style-type: none"> <li>• "What commands can I use?"</li> <li>• "To send user commands."</li> </ul>
<b>Perform an immediate transfer.</b> <ul style="list-style-type: none"> <li>• From account to account.</li> <li>• From account to loan payment.</li> </ul>	<b>"Alexa, tell P1FCU..."</b> <ul style="list-style-type: none"> <li>• "To transfer \$10 from savings to debit account."</li> <li>• "To pay my auto loan."</li> </ul>
<b>Get Information about a specific loan.</b> <ul style="list-style-type: none"> <li>• Balance.</li> <li>• Payment amount due.</li> <li>• Payment amount due date.</li> </ul>	<b>"Alexa, ask P1FCU..."</b> <ul style="list-style-type: none"> <li>• "To tell me about my auto loan."</li> <li>• "To text me information about my auto loan."</li> <li>• "To email me information about my auto loan."</li> </ul>
<b>Get Information about all your loans.</b>	<b>"Alexa, ask P1FCU..."</b> <ul style="list-style-type: none"> <li>• "What are my loans?"</li> <li>• "To text me a summary of my loans."</li> <li>• "To email me a summary of my loans."</li> </ul>
<b>Get Information about all your accounts.</b>	<b>"Alexa, ask P1FCU..."</b> <ul style="list-style-type: none"> <li>• "What are my accounts?"</li> <li>• "To text me a summary of my accounts."</li> <li>• "To email me a summary of my accounts."</li> </ul>
<b>Get information about P1FCU.</b>	<b>"Alexa, ask P1FCU what is the..."</b> <ul style="list-style-type: none"> <li>• "Name of my credit union?"</li> <li>• "Phone number of my credit union?"</li> <li>• "Address of my credit union?"</li> <li>• "Mailing address of my credit union?"</li> </ul>
<b>Check balance for an account.</b>	<b>"Alexa, ask P1FCU what is my savings balance?"</b> <b>"Alexa, tell P1FCU..."</b> <ul style="list-style-type: none"> <li>• "To text me my savings balance."</li> <li>• "To email me my savings balance."</li> </ul>
<b>Ask for Help.</b>	<b>"Alexa, ask P1FCU to help me."</b>
<b>Set a preference for how the P1FCU skill responds.</b>	<b>"Alexa, tell P1FCU..."</b> <ul style="list-style-type: none"> <li>• "To always ask for receipts."</li> <li>• "To text for all receipts."</li> <li>• "To email for all receipts."</li> </ul>
<b>Get a list of your mapped nicknames.</b>	<b>"Alexa, ask P1FCU what are my mapped accounts?"</b>
<b>Hear or request information on any current promotions available.</b>	<b>"Alexa, ask P1FCU if there are any promotions."</b>
<b>Get general information about finance or security.</b>	<b>"Alexa, ask P1FCU to educate me."</b>



## Troubleshooting

**IF Alexa doesn't understand a request or has an unanticipated response.**

**THEN** Say *"Cancel"* 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 P1FCU.**

**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 P1FCU"* or *"Ask P1FCU 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 above again. You will be prompted to set up your mapped nicknames again.

**IF You want to change your 4-digit security PIN.**

**THEN** You will need to **disable the skill** in the Alexa app, **re-enable it**, and complete the **Account Linking** process above 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 above again. You will be prompted to set up your email address again. This only affects the email address used by the P1FCU 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 above again. You will be prompted to set up your mobile phone number again. This only affects the mobile phone number used by the P1FCU skill. It does not update the mobile phone number on file for you at the credit union.

# Glossary

- **Account Linking** – Setup process that handles authentication to another system, like Online Banking, and 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 Alexa device and enables it to understand and respond.
- **Alexa** – 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 that lets Alexa know that you want to perform a task in a particular skill. This is similar to opening the program on your computer.
- **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.
- **Tap** – Amazon’s wireless Alexa device. The Tap requires you to press a button to make a request.