



# Welcome to the Tinker Federal Credit Union Amazon Alexa Skill

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## About

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The Tinker Federal Credit Union skill can provide financial information and process transactions from your Amazon Echo device. Using the Tinker Federal Credit Union skill, you can do things like:

- Transfer funds from one linked account to another.
- Request an account balance.
- Make a payment to a linked TFCU loan.
- Get an account history for a linked account.

**Note:** You must be enrolled in Home Branch online account access, to use the Tinker Federal Credit Union skill. If you are not yet enrolled, you can enroll at [TinkerFCU.org](https://www.tinkerfcu.org) or by contacting our Member Service Center at 405-732-0324, ext. 2255 or 1-800-456-4828, ext. 2255.

## Terminology

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These terms are used throughout the user guide.

**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's mobile device application that allows you to set up and maintain skills for your specific Echo devices.

**Skill:** A skill is the set of tasks added for use with Alexa devices. This is similar to a computer program or mobile device app. In this case, the Tinker Federal Credit Union skill allows you to manage aspects of your financial accounts.

**Account Linking:** The process during Alexa skill setup that handles authentication to TFCU Home Branch and pulls in your accounts.

**Invocation Name:** A phrase which lets Alexa know with which skill you want to perform a task. This is similar to opening a program on your computer. In this case, the invocation name is "*TinkerFCU*."

## Adding the Skill

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The Tinker Federal Credit Union skill requires setup. During this, we will:

- **Authenticate that you are an authorized user of your account.** Once we've made sure you are who you say you are, you will be able to access your account for use with the Tinker Federal Credit Union skill.
- **Allow you to link which accounts to use with the Tinker Federal Credit Union skill and assign nicknames.** You'll select which accounts or loans you want to link to Alexa and choose a nickname for each from a list of options. You will use 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 Tinker Federal Credit Union skill to SMS text message or email 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).** We may send a numerical code from time to time to authenticate you when using the Tinker Federal Credit Union skill.

## Getting Started & Setup

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You must complete the setup process within 5 minutes or the skill will not link your account.

**Step 1:** On your mobile device, open the Amazon Alexa app.

**Step 2:** From the home screen, click the hamburger menu ☰ at the top left of screen and select *Skills & Games*.

**Step 3:** Search for and select *Tinker Federal Credit Union* from the Alexa Skills Store and tap *Get Started*.

**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 you need to edit any information, such as accounts or contact information, you will need to go here to disable the skill and re-enable it.

**Step 4:** On the welcome screen, review Terms and Conditions, then tap *Accept and Continue*.

**Step 5:** Enter your *Home Branch user ID* and *password*. Tap *Verify*.

**Step 6:** Link the accounts and loans you want to use with the Tinker Federal Credit Union skill. Select nicknames from the left column for each account.

**Note:** When referring to accounts or loans using Alexa, you will use the nickname shown in the column on the left.

**Step 7:** Tap *Link Accounts* to confirm the accounts and nicknames.

**Step 8:** Enter a 4-digit PIN to verify your identity on the Tinker Federal Credit Union skill. Tap *Submit*.

**Note:** You will be saying this PIN aloud, it should be different from a PIN you use for other sensitive items (like ATM transactions.)

**Step 9:** Enter your *email address* and *mobile phone number* for SMS text messages. Tap *Submit*.

**Note:** This information is used only for the Tinker Federal Credit Union skill and does not affect the information on file for you at the credit union.

**Step 10:** Select *Text - SMS* or *Email* as the delivery method for authentication codes. Tap *Submit*.

**Step 11:** Tap *Enable* to complete the setup and account linking process.

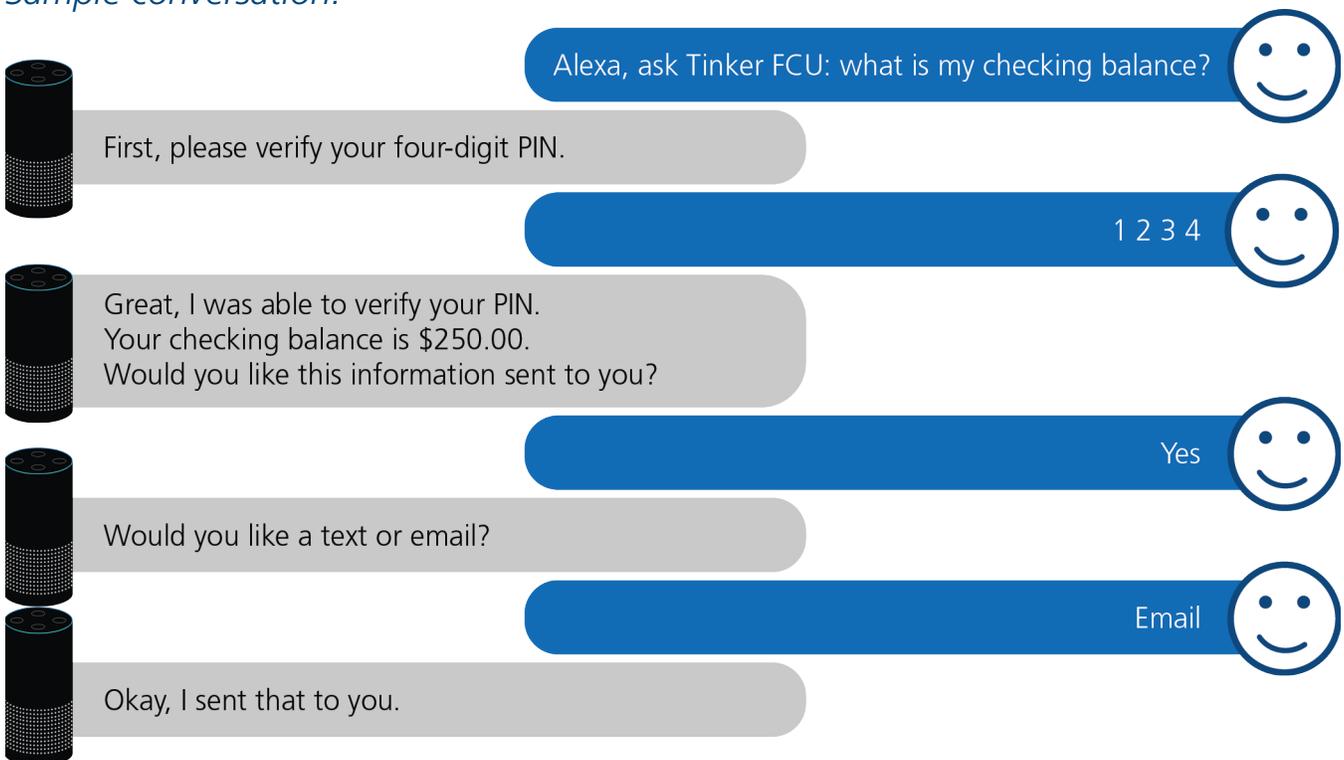
## Using Amazon Alexa-Enabled Devices

When working with Alexa-enabled devices, each task (ex: 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.

In the example below, you would not be able to 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.

*Sample conversation:*



### Beginning a Conversation

You can begin a conversation with Alexa in two ways:

- Say "Alexa, open TinkerFCU." This opens the skill, Alexa will welcome you and you can begin a task like, "what is my checking balance?"
- Skip the open step and start a task. For example: "Alexa, ask TinkerFCU what is my checking balance?"

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 a specific way.

## Ending a Conversation

If at any time you wish to stop the current conversation, you receive an error like *"There was a problem with the requested skill's response,"* or Alexa is repeatedly prompting you for information, you can say, *"Alexa, tell TinkerFCU to cancel."* From here, you can try again or start a new conversation.

## Using the Tinker Federal Credit Union Skill

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As discussed in the *Using Alexa-Enabled Devices* section, using the Tinker Federal Credit Union skill involves having a conversation about a specific task that you want to perform.

**The Invocation Name for this skill is "TinkerFCU."** This is how you will refer to the skill when talking to Alexa.

- Ensure the Amazon Alexa device is turned on and ready to begin a conversation.
- Start the conversation with Alexa. For example, to transfer from checking to savings, you can either say:
  - *"Alexa, open TinkerFCU."* This opens the skill and begins a general conversation. Alexa will welcome you and you can begin a specific task like, *"transfer \$10 from checking to savings."*
  - *"Alexa, tell TinkerFCU to transfer \$10 from checking to savings."* This skips the open step and welcome message.
- Alexa may prompt you for your 4-digit security PIN (you set this up during Setup). If she does, say the PIN to authenticate.
- Alexa will prompt you, as needed, for any information required to complete the task. Listen carefully to her questions, as she will provide guidance if she needs the answers stated a specific way.
- Alexa may ask if you'd like to receive a receipt or information by text or email.
- When you're done with this conversation, you can start a new conversation, perhaps to ask your savings balance.

**Tip:** The skill will log out after 10 minutes of inactivity. To start a new conversation after this, you'll be required to speak your security PIN again.

## What Can I Do?

Next, we'll show you some tasks you can do with the Tinker Federal Credit Union skill. In these examples, please 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 linked nicknames. Replace bold text with a different nickname to use a specific account or loan with that task.

To do this...	Say this...
Get information about a specific loan. <ul style="list-style-type: none"> <li>• Balance</li> <li>• Payment amount due</li> <li>• Payment due date</li> <li>• Payoff amount</li> </ul>	Alexa, ask TinkerFCU... <ul style="list-style-type: none"> <li>• to tell me about my <b>car loan</b>.</li> <li>• to text me information about my <b>car loan</b>.</li> <li>• to email me information about my <b>car loan</b>.</li> </ul>
Get information about all of your loans.	Alexa, ask TinkerFCU... <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>
Get information about all of your accounts.	Alexa, ask TinkerFCU... <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>
Transfer funds from one linked account to another.	Alexa, transfer \$100 from <b>checking</b> to <b>savings</b> .
Get information about your credit union. <ul style="list-style-type: none"> <li>• Name</li> <li>• Phone number</li> <li>• Mailing address</li> <li>• Routing number</li> <li>• Founding date</li> </ul>	Alexa, ask TinkerFCU what is... <ul style="list-style-type: none"> <li>• the name of my credit union?</li> <li>• phone number of my credit union?</li> <li>• address of my credit union?</li> <li>• the routing number?</li> <li>• the founding date of my credit union?</li> </ul>
Get the balance for an account.	Alexa, ask TinkerFCU what is my <b>savings</b> balance?  Alexa, ask TinkerFCU... <ul style="list-style-type: none"> <li>• to text me my <b>savings</b> balance.</li> <li>• to email me my <b>savings</b> balance.</li> </ul>
Get your account history.	Alexa, ask TinkerFCU... <ul style="list-style-type: none"> <li>• to tell me about my <b>savings</b> account history.</li> <li>• to email me my <b>savings</b> account balance.</li> </ul>
Help	Alexa, ask TinkerFCU to help me.
Get a list of your linked accounts and their nicknames.	Alexa, ask TinkerFCU what are my linked accounts?
Set a preference for how the skill provides receipts and information and bypass prompts.  You can set your preference to: <ul style="list-style-type: none"> <li>• Text all of your receipts/information</li> <li>• Email all of your receipts/information</li> <li>• Always ask</li> </ul>	Alexa, ask TinkerFCU to... <ul style="list-style-type: none"> <li>• always ask for all receipts/information.</li> <li>• text all receipts/information.</li> <li>• email all receipts/information.</li> </ul>

## Troubleshooting

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

**Then:** Speak "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 Tinker Federal Credit Union 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 TinkerFCU" or, "Ask TinkerFCU 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 linked for an account.

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

**If:** You want to change your linked 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 linked 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 again. You will be prompted to set up your security PIN again.

## Troubleshooting (con't.)

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**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.

**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.

**If:** You want to unlink/disable your account from Alexa.

**Then:** You can disable the skill by going to your Amazon Alexa app.

**Note:** Changing your email address or mobile phone number in the skill only affects the email address or phone number used by the Tinker Federal Credit Union skill. It does not update the email address or phone number on file for you at the credit union.