



## Welcome to University Credit Union's Google Home Action

The University Credit Union Action can provide financial information and process transactions from your Google device. Using the University Credit Union Action you can do things like:

- Request an account balance.

**Note: You must be enrolled in Online Banking to use the University Credit Union Action. If you are not yet enrolled, please contact the credit union for assistance.**

### Terminology

The terminology below is used throughout the document:

- **Account Linking** – Google action setup process that handles authentication to another system (like Online Banking) and sets any preferences, such as email address or phone number. This is where you will also set your PIN.
- **Google Assistant Application** – Google's voice control system. This is what allows you to speak to your device and enables it to understand and respond. The mobile application that allows you to set up and maintain actions for your specific devices.
- **Google Home (Application)** – Google Home is a brand of smart speakers developed by Google. Google Home speakers enable users to speak voice commands to interact with services through Google's personal assistant software called Google Assistant. The mobile application allows you to set up and maintain your specific devices.
- **Google Home Mini** – Google's smaller hands-free, voice-controlled Google device.
- **Google Home** – Google's hands-free, voice-controlled Google device.
- **Google Home Max** – Google's premium smart speaker that provides whole room audio.
- **Google Home Hub** – Google's smart display speaker.
- **Invocation name** – A phrase which lets Google know that you want to perform a task in a particular action. This is similar to opening the program on your computer.
- **Action** – An action is a specific group of tasks that have been added for use with a Google device. It's a little like installing a program on your computer.

### Adding the Action to Your Mobile Device

The University Credit Union Action 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 University Credit Union Action action.
  - **Allow you to map nicknames for use with the University Credit Union Action action.** You'll specify a nickname for each share or loan you want to use with University Credit Union Action and you will refer to those nicknames (rather than the description from your statement) when using the action.
  - **Specify a mobile number and email address.** These will only be used within the University Credit Union Action to send security codes and provide information to you about your activity within the action.
1. On your mobile device, make sure you are logged into the Google Assistant and Google Home apps.
  2. From the **Home Screen**, click the compass icon  at the bottom right of screen
  3. Search for and select University Credit Union Action from the Google Actions page.

**Tip: Once you've added the action, it will show up under Your Actions inside the Google Assistant app. This menu is available at the bottom of the Goolge Actions page. You will need to scroll all the way to the bottom of the page. If University Credit Union Action has not been linked, an 'Link Account' note will appear on the Actions page. You must complete the account linking process within 5 minutes or it will time out.**

4. Tap the **Link Account** button.
5. On the Welcome screen, tap **Accept and Continue**.
6. Enter your online banking **User Name**.
7. Enter your online banking **Password**.
8. Tap **Verify** to confirm your online banking credentials.
9. Map the University Credit Union account names to your existing shares or accounts.

**Note: When referring to shares or accounts using University Credit Union Action, you will use the Nickname shown in the column on the left.**

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

**Note: This email address is used only for the University Credit Union Action action and does not affect the email addresses on file for you at the credit union.**

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

**Note: This mobile phone number is used only for the University Credit Union action and does 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.
17. Tap **Submit**.
18. Tap **Exit Enrollment** to complete the account linking process.

## Using Google Home Devices

When working with Google-enabled devices, each task – for example requesting your checking balance - is a separate and distinct conversation. Each time you begin a task with Google, 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



Hey Google, ask University Credit Union: 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 send it via text or via email?*



Text

*Great, I texted that information to you.*



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

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

- Say “Hey Google, talk to University Credit Union”. This opens the action and begins a general conversation. Google 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: “OK Google, ask University Credit Union 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, Google will respond with questions when it needs information from you to complete the task. Listen carefully to the questions as it will provide guidance if it needs the answers stated a specific way.

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

## Using the University Credit Union Action

As discussed in the [Using Google Home Devices](#) section, using University Credit Union involves having a conversation about a specific task that you want to perform.

1. Ensure the Google device is turned on and ready to begin a conversation.
2. Start the conversation with Google. For example, to hear your checking account balance, you can say:
  - “Hey Google, talk to University Credit Union”. This opens the action and begins a general conversation. Google will welcome you and then you can begin a specific task like “what is my checking account balance?”
3. Google may prompt you for your 4-digit security PIN (you set this up during [Account Linking](#)). If it does, say the PIN to authenticate.
4. Google will prompt you as needed for any information that it needs to complete the task. Listen carefully to the questions as it will provide guidance if it needs the answers stated a specific way.
5. Google 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 action. This will end the conversation and close the action. 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 University Credit Union action.

Keep in mind that:

- **You do not have to say the exact text listed.** We’ve tried to train Google 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 ni

You Can Do This	To Start the Conversation, Just Say Something Like This
<b>Request this User Help document</b>	OK Google, ask University Credit Union .... <ul style="list-style-type: none"> <li>• What commands can I use?</li> <li>• To send user commands</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 due date</li> </ul>	OK Google, ask University Credit Union .... <ul style="list-style-type: none"> <li>• To Tell me about my <b>auto loan</b></li> <li>• To text me information about my <b>auto loan</b></li> <li>• To Email me information about my <b>auto loan</b></li> </ul>
<b>Get information about all of your loans</b>	Hey Google, ask University Credit Union .... <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 of your shares</b>	OK Google, ask University Credit Union .... <ul style="list-style-type: none"> <li>• What are my shares?</li> <li>• To text me a summary of my shares</li> <li>• To email me a summary of my shares</li> </ul>

You Can Do This	To Start the Conversation, Just Say Something Like This
<b>Get information about your credit union</b> <ul style="list-style-type: none"> <li>• Name</li> <li>• Phone number</li> <li>• Mailing address</li> <li>• Routing number</li> <li>• Hours</li> <li>• Year founded</li> </ul>	Hey Google, ask University Credit Union what is the.... <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>Get the balance for a share</b>	OK Google, ask University Credit Union what is my savings balance?  Hey Google, tell University Credit Union <ul style="list-style-type: none"> <li>• To Text me my <b>savings</b> balance</li> <li>• To Email me my savings balance</li> </ul>
<b>Get your share history</b>	OK Google, ask University Credit Union .... <ul style="list-style-type: none"> <li>• To Tell me about my <b>savings</b> account history</li> <li>• To Text me my <b>savings</b> account history</li> <li>• To Email me my <b>savings</b> account history</li> </ul>
<b>Help</b>	Hey Google, ask University Credit Union to help me.
<b>Set a preference for how the University Credit Union provides responses.</b>  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: <ul style="list-style-type: none"> <li>• Text for all receipts</li> <li>• Email for all receipts</li> <li>• Always ask or None (prompt each time a task is performed)</li> </ul>	OK Google, tell University Credit Union to.... <ul style="list-style-type: none"> <li>• Always ask for all receipts</li> <li>• Text for all receipts</li> <li>• Email for all receipts</li> <li>• Set to none/off</li> </ul>
<b>Get a list of your mapped nicknames</b>	Hey Google, ask University Credit Union what are my mapped accounts?
<b>Hear some general information about finance or security</b>	Hey Google, ask University Credit Union to educate me.
<b>Hear some general information about Home Loans</b>	Hey Google, ask University Credit Union ... <ul style="list-style-type: none"> <li>• Can I get a home loan</li> <li>• How do I get a home loan</li> <li>• Tell me about home Loans</li> </ul>
<b>Hear some general information about Auto Refinancing</b>	Hey Google, ask University Credit Union ... <ul style="list-style-type: none"> <li>• How do I refinance my car</li> <li>• Can I refinance my car</li> <li>• About Auto Refinancing</li> </ul>
<b>Hear some general information about applying for a Loan</b>	Hey Google, ask University Credit Union ... <ul style="list-style-type: none"> <li>• Can I get a loan</li> <li>• How do I apply for a loan</li> <li>• Where can I apply for a loan</li> </ul>
<b>Hear some general information about HELOC's</b>	Hey Google, ask University Credit Union ... <ul style="list-style-type: none"> <li>• Can I get a home equity loan</li> <li>• How do I get a home equity loan</li> <li>• Tell me about home equity loans</li> </ul>

You Can Do This	To Start the Conversation, Just Say Something Like This
<b>Hear some general information about Holidays</b>	Hey Google, ask University Credit Union ... <ul style="list-style-type: none"> <li>• When Is University Credit Union closed for holidays</li> <li>• What are the University Credit Union holidays</li> <li>• What are the holiday hours for University Credit Union</li> </ul>
<b>Hear some general information about Shred Days</b>	Hey Google, ask University Credit Union ... <ul style="list-style-type: none"> <li>• Is there a shred day</li> <li>• When is shred day</li> <li>• Do you have shred days</li> </ul>
<b>Hear some general information about New Accounts</b>	Hey Google, ask University Credit Union ... <ul style="list-style-type: none"> <li>• How do I open an account</li> <li>• I want to open a new account</li> <li>• Can I open up a new account</li> </ul>
<b>Hear some general information about Lost/Stolen Credit Card, ATM, Debit, or Check-Card</b>	Hey Google, tell University Credit Union ... <ul style="list-style-type: none"> <li>• I lost my credit card</li> <li>• I lost my ATM card</li> <li>• My credit card was stolen</li> </ul>
<b>Hear some general information about Account Fraud &amp; Identity Theft</b>	Hey Google, ask University Credit Union ... <ul style="list-style-type: none"> <li>• How do I report fraud on my account</li> <li>• How can I report fraud</li> <li>• I suspect fraud on my account</li> </ul>
<b>Hear some general information about where to find your Account Number</b>	Hey Google, ask University Credit Union ... <ul style="list-style-type: none"> <li>• How do I find my account number</li> <li>• Where can I find my account number</li> <li>• Where is my account number located</li> </ul>
<b>Hear some general information about ordering checks</b>	Hey Google, ask University Credit Union ... <ul style="list-style-type: none"> <li>• How do I order checks</li> <li>• I need new checks</li> <li>• How can I order checks</li> </ul>
<b>Hear some general information about ATM's</b>	Hey Google, ask University Credit Union ... <ul style="list-style-type: none"> <li>• Where can I find an ATM</li> <li>• Does University Credit Union have free ATMs</li> <li>• Where is the nearest ATM</li> </ul>
<b>Hear some general information about our Member Services</b>	Hey Google, ask University Credit Union ... <ul style="list-style-type: none"> <li>• How do I call member service</li> <li>• How do I call customer service</li> <li>• What are the hours of customer service</li> </ul>
<b>Hear some general information about Direct Deposit</b>	Hey Google, ask University Credit Union ... <ul style="list-style-type: none"> <li>• How do I setup direct deposit</li> <li>• Do you offer direct deposit</li> <li>• Can I get direct deposit</li> </ul>
<b>Hear some general information about Phone Apps</b>	Hey Google, ask University Credit Union ... <ul style="list-style-type: none"> <li>• Does University Credit Union have a mobile app</li> <li>• Do you have a mobile app</li> <li>• Where do I download the mobile app</li> </ul>
<b>Hear some general information about Mobile Deposit</b>	Hey Google, ask University Credit Union ... <ul style="list-style-type: none"> <li>• Does University Credit Union offer mobile check deposit</li> <li>• Can I do mobile deposit</li> <li>• Can I do mobile check deposit</li> </ul>
<b>Hear some general information about how to Transfer Money Out</b>	Hey Google, ask University Credit Union ... <ul style="list-style-type: none"> <li>• Can I transfer money to my account at another institution</li> <li>• How do I transfer funds to my account at another institution</li> <li>• Send money from the credit union to my bank</li> </ul>
<b>Hear some general information about how to Transfer Money Within</b>	Hey Google, ask University Credit Union ... <ul style="list-style-type: none"> <li>• How do I transfer money to another member</li> <li>• Can I transfer money to another person</li> <li>• Can I transfer money to someone else's account</li> </ul>

## Troubleshooting

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

**Then:** Speak "cancel" into the device to exit the action. Google 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 action's response."**

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

**If: You have more than one task to complete in University Credit Union**

**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 "OK Google talk to University Credit Union" or "Hey Google ask University Credit Union to...". Depending on the length of time between conversations, you may or may not need to speak your PIN again.

**If: Google 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 action in the Google 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 action in the Google 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 action in the Google 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 University Credit Union action. 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 action in the Google 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 University Credit Union action. It does not update the mobile phone number on file for you at the credit union.