

Bank Customer Service Manager

You are responsible for maintaining a good relationship between the bank and the customer. If a customer has a question or problem pertaining to their checking or savings account, it is your job to determine what may be the problem. You will also help as a Teller today. The reputation of the Bank depends on you being pleasant and courteous.

1. Get iPad From the Cart



Your job requires you to use an iPad today. Go to the iPad cart to pick up **iPad #3**. A teacher will be at the cart if you need assistance. Log into your iPad, **following the login directions on the last page of your manual.**

2. Open the Safe. Take out the Teller Station Boxes and Money Bags

Give each teller a money box and the money bags from the safe behind the CEO's desk. Ask them to place 100 quarters and 25 - \$1 dollar bills in their money box.

3. Deliver Bank Bags

After the Pledge, and once your business supplies have been delivered, please deliver **3** of the bank bags to the Restaurant CFO and **1** to the City Hall CFO. Tell these CFO's to use these bags for bringing their cash deposits to the Bank later in the day.

4. Teller Training for Lunch Breaks



If help is needed as a Teller, fill in to help so that the lines can move faster. (Customers do not like to wait in long lines.) Accept each customer's paycheck and deposit ticket. Follow the directions below to enter the deposits into the computer.

- a. On the left column of your computer, click on **Personal Banking**. Follow the directions on the screen.
- b. Put in the account number of the student, click on the **Submit** button.
- c. Verify the student's name and click **Yes** if it is correct.
- d. Click on **Checking Deposit** in the lower left-hand corner of your screen.
- e. Enter the **amount of the paycheck** in the required field.
- f. Enter **\$2.00 cash back** in the **Cash Back** field.
- g. Make sure for the type of deposit that "**Payroll Checks**" is highlighted. Click on **Deposit**.
- h. Give the customer **\$2.00** cash back (one dollar bill & 4 quarters).
- i. **Keep the Payroll Check and Deposit Ticket and have the student give the \$1.50 Savings Check to the Savings Officer.**

- j. To go to your next customer, go to the top of the page and click on “**Exit Transaction**”
- k. After putting the information into the computer, place the deposit ticket **on top** of the payroll check and staple them together. Put them in the small box at your work station.

5. iPad Training



A *JA BizTown* staff member will assist with your Customer Service iPad training during start-up time. Please do not use the iPad until a staff shows you what to do.

6. Teller Training for Shopping Breaks



If you are helping as a teller, during the second break, all paychecks will be Direct Deposited. Some customers will come to see you if they want to deposit unused cash or get more cash out (**\$2.00 maximum**). Follow these instructions on a teller computer for this:

- a. Click on **Exit Transaction** at the top of your screen.
- b. Put in the students account number and click on **Submit**. Confirm the student’s name and click on **Yes**.
- c. **For Depositing Cash:** If they want to deposit cash, they **must have a Deposit Ticket filled out properly**. Keep their deposit ticket and cash and click on **Checking Deposit**.
- d. Put in the amount that they are depositing. **For type of deposit, highlight “Cash.”** Click on **Deposit** and keep the deposit ticket cash that they are depositing.
- e. **For Withdrawing Cash:** Click **Checking Withdrawal** and enter the amount that they are withdrawing (**\$2.00 maximum**).
- f. Click on **Verify** to make sure they have enough cash to withdrawal. If they have enough, click on **Withdrawal** and give them their cash.

7. Customer Service



After Lunch breaks have started, this is when customers may have problems with their accounts. If you are helping as a Teller and a customer has a problem, stop what you are doing, ask another Teller to help you complete the remaining citizen deposits, and you help the customer with their problem on your iPad. A staff person will instruct you on how to do this.

- a. To help with customer account issues, go to the “**Kiosk ATM**” tab on the top left column on your iPad, click on the **START** button.
- b. Enter the students’ account number and their account history will show up on the screen.

8. Clean Up

Assist with business clean up at the end of the day.