



Documentation: Tricks of the Trade

June Top Picks—Lending and Collections Features

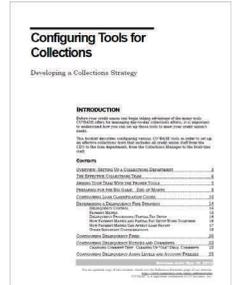
Issue #19

Be sure to attend our upcoming Tricks of the Trade webinar on June 18th from 2-2:30 PM ET. Watch for an invitation via email. During the training we will give you an in-depth look at two booklets designed to teach lending and collections managers about tools for their teams.

Pick #1: Where can I learn about the new collections feature Promise-to-Pay Trackers?

Promise-to-Pay Trackers is a new feature from the CU*BASE 13.0 release and is something that every collections manager should investigate! By using this feature, your team can focus on the members who fail to meet their obligations rather than the ones who meet them.

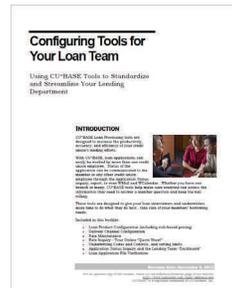
For more information on configuring Promise-to-Pay Trackers and other collections features, refer to the [Configuring Tools for Collections booklet](#).



Pick #2: How can I learn more about configuring loan underwriter limits for my loan department?

Have you considered using loan underwriter limits in your loan department? This programming was initiated from the Lending Top 10 initiative and is designed to assist you with configuring different limits that your loan underwriters can approve.

For more information on configuring loan underwriter limits and other tools for lending managers, refer to the [Configuring Tools for Your Loan Team booklet](#).



Pick #2: How do you configure and use permanent underwriter comments?

Regular underwriter comments are not permanent allowing loan officers to edit and adjust them. To protect certain underwriter comments from being changed, such as a maximum approval limit, we have designed the permanent underwriter comments feature. This feature uses Trackers to ensure these comments are not accidentally or purposefully changed.

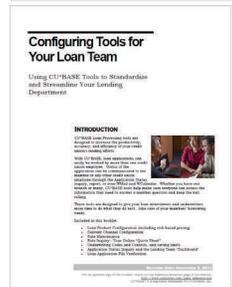
For more information on configuring permanent underwriting comments and other tools for lending managers, refer to the [Configuring Tools for Your Loan Team booklet](#).



Pick #4: How do I learn more about using App Check to train my new lending officers?

App Check gives the application a “final check” so that you can be sure your new loan officer does not forget anything needed to complete the application. Because App Check is activated at the employee level, you can use this as a training tool, and implement it only with your new lending officers.

For more information on configuring App Check and other tools for lending managers, refer to the [Configuring Tools for Your Loan Team booklet](#).



Pick #5: Where is there a listing of the CU*BASE dashboards?

Check out the listing of CU*BASE dashboards our trainers use when they offer classes on them. Each dashboard includes a brief description to help you determine which dashboards you want to explore first.

This five-page brochure is grouped by menu to make it easy to find the dashboards related to collections and lending.

Check out the [Leadership Dashboards brochure](#) for more details.



Refer to the Tricks of the Trade Newsletter Series page for all issues: http://www.cuanswers.com/tricks_of_trade.php