Writing Team: Tricks of the Trade
August Top Picks: 14.1 Release Documentation
Issue 33

Be sure to attend the upcoming Tricks of the Trade webinar on August 19 from 3:30-4:00 PM ET. Watch for an invitation via email. During the training, we will highlight materials related to the 14.1 FEP-only release.

Pick #1: "Jump" is new with mobile web banking. What controls are on this feature and what does it look like to the member?

The "Jump" feature allows a member to move from one of their memberships to another without the need to log into the second account. Find out about controls of this feature in the "Jump controls" section of the See/Jump Controls booklet.

Both this booklet and the Mobile Web Banking booklet have pictures of what the member sees in mobile web banking.

Pick #2: How does the new Timeout notification work and what other security controls are there in "It's Me 247" online banking?

If a member does not make an action on an online banking page for fifteen minutes, they will be logged out of online banking. With the 14.1 release, the Timeout notification appears and counts down the last three minutes.

Learn more about this and other security features for online banking in the Strategies for Securing and Controlling Member Access booklet on the **It's Me 247** Reference page.

Pick #3: What is new with Promise Deposits and how does this make implementing this feature even easier?

Promise Deposits is a free remote-deposit strategy that you can activate. It allows members to enter check information into an online banking screen (for faster credit). The member then mails the check to your credit union for reconciliation.

Now an automatic auditing trail is created as the auditing report that records outstanding checks is automatically generated and saved to CU*Spy during end-of-day processing, creating Learn more in the Promise Deposits booklet.

Pick #4: What is new with mortgage statements with this release?

A new check box in the loan category screens allows you to easily select for mortgage statements to be sent by loan category. Learn more in the Periodic Mortgage Statements booklet, which is posted under "S" (for statement) on the CU*BASE Reference page.

Pick #5: What things are included in the 14.1 release that I might not have heard about yet?

There are a lot of new features with the 14.1 release that are not covered in this issue.   Learn more about the other features, including new patronage dividend features and a stand-alone employee ID reset feature in the 14.1 release summary.

Refer to the Tricks of the Trade Newsletter Series page for all issues:

http://www.cuanswers.com/tricks_of_trade.php