

CU*BASE[®] and “It’s Me 247” Software Enhancement Summary - 2012

*This is a summary of major enhancements to the CU*BASE and It’s Me 247 software that were released during the first part of 2012:*

Teller Member Service

- Roving Tellers
- Teller Currently Serving
- Teller/Member Service Workflow Controls
- “Photo on File” via Secondary Names Screen
- Improved Global Search
- More Club Membership Information on Inquiry and Phone Operator
- Access to Teller Drawer, Audit and Device Configuration from Teller
- Enhanced Account and Membership Close Process
- Qualifile by ChexSystems Risk Assessment for Opening Accounts
- Inquiry and Phone Operator Now Follow Auto Security
- Global Search – Search for Matches for ATM, Debit or Credit Cards
- Highlight the Base Shares below Par Value and Negative Balance Accounts
- Notices Not Print When Member Has Wrong Address – New Tracker Record

Member Facing

- See/Jump Controls for **It’s Me 247**
- Member Transfer Controls
- Direct Pass Through from **It’s Me 247** to PSCU (OTB Credit Cards)
- Members View IRA Plan Types in **It’s Me 247**

Lending

- Credit Report Analytics
- Redesigned and Improved Loan Application Screens
- Selective Loan Trial Balance Enhancements
- Separate Add and Edit Functions on the OTB Maintenance Screen
- VIN Lookup for Closed Collateral
- Wait Times on Loan Dashboard Now Look at Underwriter Codes
- Catch Up Calculator on the Account Inquiry Screen for Delinquent Loans
- Updates to Participation Lending Reports

EFT

- Credit CARD Act – Interest Change Management
- Fee for Batch Card Reissue and Update

Auditing

- New Audit Report Shows Interest Greater Than Scheduled Payment Amount
- Mandate Use of Employee ID in Inquiry
- FinCEN Report Updates

- Payments to Loans at Your Credit Union No Longer Count Toward Reg D

Back Office/Accounting

- Journal Entry Posting Improvements
- Import Data to Post to the G/L
- New Customizable Closing Paragraph for Escrow Analysis Statements
- New Configuration Screen Included in ACH Configuration Processing

Marketing

- Multiple Select Added to Cross Sales Report

Management

- Learn from a Peer – Share Rate Analysis
- Select Any End-of-Month File for Raddon Download
- Mobile Text Usage Statistics Available
- Disbursement Limits and Totals Now Available for 5300 Call Report
- Participation Loan Report Now Breaks Out Investor Totals

Shared Branch Enhancements

- FSCC Shared Branch Enhancements
- CUSC Shared Branch Enhancements

Introducing CU*BASE SE

- Hide the 000 Membership Share Account