

## CU\*BASE® Software Enhancement Summary 2008

*This is a summary of major enhancements to the CU\*BASE software that were released during 2008:*

- Contingent Liability Analysis Report Enhancements
- Additional reports with Export to File for Member Connect
- Enhancements to MNMGMA “Know Your Members”
  - Ability to analyze activity by channel
  - Relationship Analysis
- PIB Improvements
  - Flood changes from your default PIB profile to All Members
  - Allow access to the Online PIB tool only for certain members
- Rate Change History shows rate changes to loan products
- E-Statement Enhancement: Account Activity Analysis
- Introduction of **It’s Me 247**
  - Good bye CU\*@HOME, hello **It’s Me 247**
- New Themes for **It’s Me 247**
  - Four “Lite” Styles are introduced as well as High Contrast
- Changes to “Satellite” Online Loan Applications
  - 247 Lender Pre-Approvals Enhancements
  - Authentication for Members Required
- List Generator for making member files and labels
- Loan Funds Disbursal Restriction
  - Separation of duties between loan officers approving loan and disbursing loan
- Teller Processing Enhancements
  - Check Holds Configuration
  - New Teller screens streamline teller transactions
- New Tools for Auditors
  - New MNAUDT menu
  - Audit Tracker tracks automated activity
  - Disabled PIN Report monitors **It’s Me 247** activity
- Lending Enhancements
  - Miscellaneous Coverage now available
  - Changes to configuring loans-More Debt Protection choices
  - Posting Insurance/Debt Protection is automated
- Cross Sales is now tied to Sales Tracker and produces ongoing record of sales interactions with member
- Sales Tracker is also tied to a new Generate Leads tool and a new expanded search window
- Additional Tracker Enhancements
  - Trackers linked to external URLs
  - Separate Memo Codes by Tracker Types
  - Faster Data Entry for Tracker Notes
- Escrow Enhancements
- Member Personal Banker Enhancements
- Online Banking Tracking/Marketing Tools
  - PIN/Password Change History (Inquiry and Report)
  - Member Access to Online Report
- Additional screens with last ten accounts lookup
- Dividend/Interest Split Rate Forecast Tool Enhancement allows previous month inquiry
- Patronage Dividend Program
- Link ACH Payments to A/P Vendor History
- New Loan-to-Value Report
- Changes to Collections Parameters for Online Credit Cards
- **Complete conversion of the screens in CU\*BASE to updated new GOLD look**
- Account-to-Account (A2A) Transfers
- Changes to the Online Banking Use Agreement for Members
- E-Notices for Members (Including changes to **It’s Me 247**)
- E-Statement Enhancements
  - Require email address or not
  - e-Statement Analysis Report
- “Hide My Typing” for Security Questions in **It’s Me 247**
- Notice Tracker tracks both notices and e-Notices sent
- Teller Receipt Analysis for Members
- Tiered Services Points Inquiry in **It’s Me 247**
- Transfer Changes in CU\*BASE (combining of three transfer programs)
- Transfer “Wizard” in **It’s Me 247**
- Wrong Email Flag and Notification in **It’s Me 247**
- Dormancy Predictor Enhancement notifies of members about to go dormant
- Cross Sales Analysis Report for tracking member contacts
- Collections Dashboard tracks delinquent loans
- Contingent Liability Report Enhancements
- Sales Tracker Enhancements
  - More control when purging unwanted Tracker entries
  - Receive confirmation notification when creating Trackers
- Collateral Enhancements
  - URL Available on collateral screen
  - Sort Insurance Agents by Name
- Export to File or Member Connect from More Reports
- Position your Member Comments to a line you select

- Suppressed Transactions now show In blue text
- Tiered Service Points Inquiry for **It's Me 247**
- **It's Me 247** Downloads Available
- Force Monthly Statement Flag in Update Membership Information screen
- OFAC Scans added to Account to Account (A2A) transfers and Wire Transfers