



Announcing . . .

# CU\*BASE Software Upgrade

## Effective April 22, 2002\*

4/03/02

### SUPPLEMENT

Please note the following additional changes that will be implemented as part of the April 22, 2002, CU\*BASE upgrade:

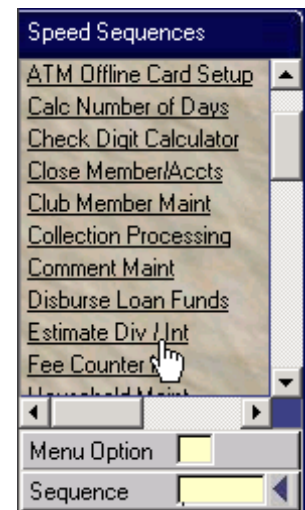
- ◆ A double-click on any account on the main **Phone Inquiry** screen will automatically select the “History” option instead of “Inquiry.”
- ◆ When using the **History feature in Phone Inquiry**, you will now be able to roll both up and down through all transaction records, without requiring the use of the date search field. In addition, the Teller ID will be displayed for each transaction.
- ◆ The F3=Backup key has been removed from both the **Checks/Money Orders** screen and the **Miscellaneous Receipts** screen available through Teller Posting. Using this key was causing numerous left-to-right errors. Once either of these screens appears, you must post the transaction. If you leave the screens blank (no check amount or M/R information), then using F5-Post will complete any other portions of the transaction that were entered on previous teller screens without producing either a check or a misc. receipt transaction.
- ◆ When using **Teller Proc Code “L”** for a principal-only payment on a loan account, the system will no longer record the payment amount in the *Partial Pay* field, and the payment will not advance the *Next Payment Date* on the loan account. This change should make it easier to post principal payments to 360-day mortgage and interest-only loan types at the teller line without causing problems with future payment dates.
- ◆ Two **new Speed Sequences** have been added to all CU\*BASE menus for your convenience. Remember that all speed sequences are listed on the left edge of every menu in CU\*BASE GOLD.

- **Calc Number of Days** - This will display the CU\*BASE Date Calculator, used to determine the number of days between two dates. This can be very helpful when estimating the number of days represented by an accrued dividend or interest amount, for example. This is the same calculator currently available via a command key in Teller posting screens for calculating check holds.

*(HINT: Select this item from the Speed Sequences box or type **DAYS** into the Sequence field.)*

- **Estimate Div / Int** - This will display the CU\*BASE Math Calculator, used to estimate dividend and interest amounts for a specified number of days. This is the same feature currently available via a command key in Member Account Adjustment.

*(HINT: Select this item from the Speed Sequences box or type **CALC** into the Sequence field.)*

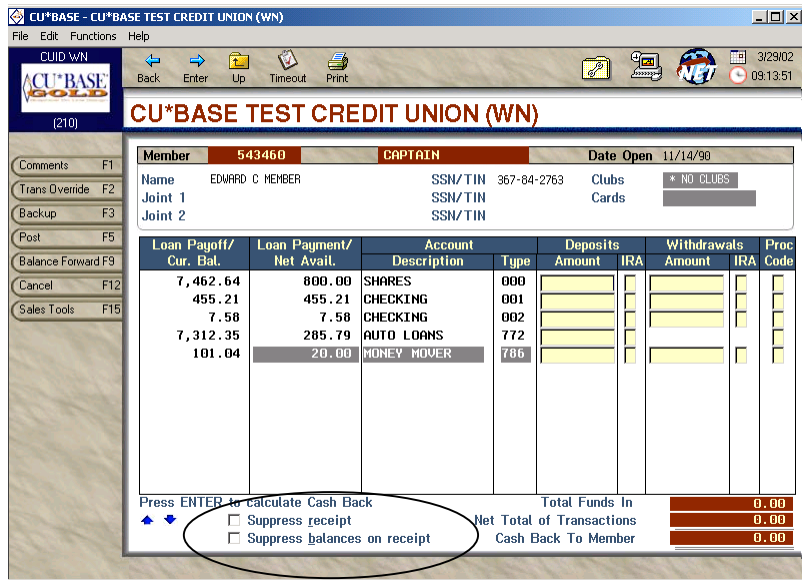


*(continued)*

◆ The **Teller Deposits/Withdrawals** screen now has two new options that will be helpful for certain types of member transactions:

- **Suppress receipt** - Check this option if you do not wish to print the normal receipt for this transaction. The change will affect this transaction *only*. Use this when posting a transaction received in the mail, or for any other situation where a receipt is not desired.

- **Suppress balances on receipt** - Check this option if you want a receipt to print as usual, but do not want the member's account balances to be printed. The change will affect this transaction *only*. This is helpful when someone else is performing a deposit on the member's behalf, and you do not want this individual to be able to see account balance information for the other member.



**IMPORTANT:** Keep in mind that CU\*BASE still uses your workstation configuration to determine whether a receipt should be produced at all. If you are working at a workstation that never produces receipts anyway, these options can be ignored.

- ◆ The **Output Queues** feature available via the CU\*BASE Time-Out Window has been expanded to display up to 85 of your credit union's configured OUTQs automatically. No more scrolling!
- ◆ The **Work with Writers** feature available via the CU\*BASE Time-Out Window has been changed to automatically display only your credit union's configured writers, with up to 34 writers visible on the screen at the same time.
- ◆ A new **Audio Response / PC Banking Statistical Report** is now available to let you perform extensive statistical analysis on your members' CU\*TALK and CU\*@HOME activity. This new report will be available from a new command on the MNMISC menu, and monthly stats will be available starting with December 2001 data.
- ◆ The **Teller Closing Transaction Audit Report (LTLAU2)** has been reorganized and condensed so that it will require far fewer pages. This is one of the longest daily reports produced by CU\*BASE, so this change should save time when printing the report (and quite a few trees, too!).
- ◆ The **Daily Accrued Dividend Exclusion Report (PDIVMR3)**, a very lengthy report which listed all share accounts whose balance was below the minimum required to pay dividends, will no longer be generated as part of daily processing.
- ◆ When printing laser **Money Orders**, the verbiage that appears in fine print on the stub will be changed so that the word "customer" will now read "member" instead.