

The CU*BASE Monthly Monitor Recap is designed to keep you informed on an ongoing basis of feature improvements, vendor enhancements, and other miscellaneous changes to CU*BASE and our other core software products. This specific Monthly Monitor Recap covers programming changes implemented during the month of July.

Enhancements

- Modify CU*BASE version checking to capture PDF creator software version info.
- Create an option for credit unions to choose whether they would like to include certificate renewals in open/closed dashboard
- Added ability to change names of trackers
- Enhancements to settlement reports LPANTX2 and LPANTX3
- Add PDF and Excel to dashboards on MNAUDT menu
- Enhancements to the online and mobile loan application
- Create an analytical dashboard to determine how loan payments are flowing through the system
- Transaction Date Low/Transaction Date High need to be changed from MMDDYY to MMDDCCYY on investment report
- Expand sort capabilities for Misc. Secured Funds and Uncollected Funds History inquiries
- Loan App Infrastructure enhancements
- 5300 - Add Policy Limits for 5300 Ratios
- Add Dealer ID as a filter on the Loan Information Report
- Add Red Flag warning to outgoing wire transfers
- Update links to Loan Application.
- New Net Relationship Dashboard
- Coop Shared Branching Screen Updates for new functionality from recent mandates
- Change the HB loan underwriting email config to send the email when a new HB loan app is added to LNAP
- New Generic Form for Real Estate Note
- Updated screens in preparation for deploying denial fee enhancement
- Increased security of Check Image Retrieval via online banking by switching CU*A IP Item provider to use a MICR-based request
- Update Credit Card Maintenance Screen to display all cards
- Add PDF export to loan risk score analysis summary
- Added 5 new GOLD themes
- Added the day of the week to the front end screen which only displayed the date to use for posting ACH
- Added display of MICR and RTN to the phone operator history screen
- Added the credit union's default theme to the updated loan application

Internal Enhancements

- It's Me 247 Update - Downloads
- It's Me 247 Update - Message Center
- Add function to allow update to records when selecting multiple credit unions in the vendor database.
- GOLD's .NET programs to target .NET 4.0.
- It's Me 247: Update the third party javascript Libraries
- It's Me 247: Add an Intuit Endpoint that redirects to the Login pages
- Developed a Statement Count Dashboard for statement verification
- Expanded amount fields in month-end accumulation tables
- Allow Merge 5498SA File w/CU*BASE for reporting

Modifications

- Updated accounts with a freeze code of 1 to properly return loan balances in COOP shared branching
- Updated the regular statement file extract program to properly determine what loan categories should receive a mortgage statement instead of the loan categories mortgage statement flag
- Updated the universal flag statement control for quarterly, semi, and annual to only flag records for statement ID chosen
- Updated the SSO to MyVirtual Strongbox to pass the actual account number to identify the member that is signing in
- Eliminated error with member loan apps in Its Me 247 for non-member apps with comments if the member presses F5 on the confirmation screen
- Modified the About You page in the loan app so that when a member SSOs in from online banking, the loan office dropdown is populated correctly
- Updated the direct mail posting to properly show the account information in the 1st entry sequence
- Updated the Xtend Shared Branch Receipt to display as 'SB-xxx' to indicate that it is a shared branching transaction
- Updated the annual account service charge fee to not charge if the account was opened in the current year
- Notice trackers are now displaying notice titles properly, and eNotice trackers no longer have masked data
- Added correct key fields to record when adding new loan application in It's Me 247 to prevent duplicates
- Updated the drop down for accounts in the It's Me 247 download page to properly display all membership suffixes.
- Updated ACH to look the loan review date if configured before processing an ACH check transaction from an LOC loan
- Adjusted the timing in nightly batch maintenance timing to assure all records are accounted for
- Eliminated message waits for indirect loan applications with employment information.

- Create edit for "Credit Card Cycle Control" to lock dates in place once the loan category is configured
- It's Me 247 no longer displays error when a member tries to use less-than or greater-than sign
- Adjustment to Generic Program for Oak Tree Loan Est. & Closing Disclosure
- Include data from monthend files for Fee Income/Waivers/Refunds dashboard, waiver history by employee
- Corrected interest rate field at account level to accept valid input
- 5300 - GOLD issue with accessing the Account Code level help
- Eliminated Legasuite error in MNAUDT #27
- Adjusted online Help calls for screens with no screen ID
- Corrected display of field in GOLD for annual account service charge
- Adjusted CO-OP shared branching receipts to make column headers consistent with other teller receipts
- Corrected data writing to TRANS files from COOP transactions to accounts with suspended DIVAPLs37187
- Corrected the delinquency notice amount to avoid adding the escrow payment in error when partial escrow payment is used
- Corrected the password security check when user is forced to change their password in MNMAST #8
- Eliminated creation of unique data area when accessing the trial balance select information through MNRPTB #1 or MN5300, #22
- Eliminated bad data in the COOP Shared Branching Investment Only Inquiry screen
- Updated CUSC and FSCC log programs to use SQL to clear log files to prevent file lock errors when both programs are trying to file at the same time
- Mortgage Statement Clients Only - Corrected year to date totals for mortgage accounts with account adjustments in January and February

EFT Modifications

- Co-Op Mandate - Update to conform to industry standards and ensure correct passing of EMV data throughout payments system – this affects COOP clients only.
- Temporary adjusted vendor PIN Transactions to capture the Name and Address of the Merchant/ATM Location.
- Updated the service program to correctly calculate the surcharge on the US Dollar currency amount when posting transactions
- Updated the incremental authorization program to send authorization ID in reply