



# November 2020 Monthly Recap

The Owner's View Monthly 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 Owner's View Monthly Recap covers programming changes implemented during the month of November.

## EFT Modifications

- 54310 Correct the length of the WorldPay message when responding to a status message.
- 55152 Adjusted FIServ Recon processing to reduce exceptions.

## Enhancements

- 53955 Created a monthly automated purge process for the check processing summary statistics table.
- 49726 Enhancement to Card Expiration Processing.
- 50309 & 52736 Adjustments and Addition of filters to Where Members Pay Bills.
- 50559 Nav 2.0 (CU\*BASE Optics Project): Expanded Home Page Favorites and User Preferences Options.
- 50748 Implemented Imaging form creation and API for "On-Demand" Instant loans initiated in **ItsMe247**.
- 50855 Created a process to update the Operations Timezone clock in real time.
- 50856 Enhancement to the DEX process.
- 50898 Fraud Block Lists: New Tools for Maintaining Block Lists, Stopping Activity Based on Block Lists.
- 50926 New Process to Open CD Secured Loans in Online Banking.
- 51010 Adjustments to the Bill Pay Subscribers Dashboard.
- 51414 Expanded fields included in nightly import to ProDoc.
- 51570 Shared Branch Phone Transfers - an Xtend Call Center project.
- 51592 Update to allow e-statement notification to process by time zone.
- 51789 Enhancements to the ACH Distribution Maintenance screens.
- 51795 Added additional signer information to notice trackers.
- 51821 Interface with Sync1 for automated decision models.
- 52292 New CLR Path Decision Advisor.
- 52377 A/P enhancement to configure remitter information.

- 52387 Added misc. fee input capable field to 365 payoff screen.
- 52427 GOLD interface for MVI teller check capture.
- 52475 Added CLTV to loan app summary screen.
- 52559 Added Option to Save Settings to the Loan Queue (Tool #2).
- 52610 Added activation date of birth to ATM/Dr/Cr ordering screens.
- 52638 Made "ID check" button conditional on multiple screens based on Oper setting.
- 52664 New Fraud Block List: Plastics Orders.
- 52689 Modified Misc. account form config to accommodate for new phone database.
- 52703 Changed vault transfer receipts to report format.
- 52855 Increased size of UDM list values.
- 53137 Added branch totals to the indirect loan reserve report.
- 53138 Added ability to create tracker from ATM/Debit and CC maintenance.
- 53179 Added the ability for CUs to initiate Counteroffer Exchange messages to dealers for Ready-to-Look integrations.
- 53580 XL screens for the Loan Queue.
- 53759 Enhancements to OTB sweeps.
- 53889 New tool to Switch products for non-earning checking accounts.
- 54446 OLB Optics Lite Dashboard.
- 54802 Online Banking Optics Daily Data Capture from the Core to feed Analytics Booth.

## GOLD Screen Modifications

- 54464 Rotating ads on GOLD home screen.
- 54573 Advertisement for alternate panel sizes.
- 54641 Product Name is no longer missing on last line of Product Code Lookup Panel 6997 (WINLNPRD-01).
- 54653 Added GOLD screen tip to the Maintain Current/Closed Reason Codes window.
- 54681 GOLD visibility controls on the Deny Membership feature on Mbr Info/Closed Mbr Info Update screens.
- 54710 Changed screen to Oper styling for help.
- 54724 GOLD adjustment for 5300 Call Report Ratio Description Screen.

## Modifications

- 52982 Create reload and re-transmit programs to resend archived Magic Wrighter files via new re-transmit vendor/processor file dashboard.

- 53539 Adjusted Loan Classification report to display and calculate credit balances correctly for Credit Cards.
- 54958 Additional file checks were added to the ACH on demand online banking function to avoid errors with temporary file deletes.
- 52717 Migrated programmatic data fetching from static to dynamic SQL to prevent excessive DB2 access plan rebuilds.
- 53694 Updated the host screen for Summary of Members Scored to show formatting and allow GOLD to work properly.
- 53945 Changed text of confirmation window in 1962 Build Card Compromised File tool.
- 54118 Added day of the week to Ops ACH screen for verification purposes.
- 54171 Added Ops resend option for Verafin and Patriot.
- 54241 Retired the Classic Blue 3D theme and changed to Classic Blue.
- 54243 Fiserv Only - Allow multiple card class codes per bin.
- 54299 Menu changes for Data Warehouse.
- 54967 Eliminated Member Record Lock in RDC Transactions.
- 55034 Changed the IRA required minimum distribution report to report members over the age of 72 instead of 70.5.
- 55094 Correct suffix position in upload file from monthly text file for iPay.
- 53862 Changed NSF fee Secondary Description so Available Balance shows in parentheses when negative to avoid user confusion with a "-".
- 53904 Changed the Qualifile scan on non-members to write to non-member notes so it can transition to a tracker if configured when membership is opened.
- 55033 Changed the programming for catch up limits to eliminate the 70.5 high age limit.
- 55035 Altered Payroll receive to send report to the correct output queue.
- 55216 1Click Program Adjustment to handle large volumes of records.

## Warranty Modification/Adjustment

- 48040 Removed IRA type code from Escrow ACH transaction when loan payment followed an IRA deposit.
- 53726 Corrected APY on Miscellaneous CD Truth-In-Savings Form.
- 54003 In the configuration screen for subsidiary G/L codes, the Asset/Liability G/L account and Accumulated depreciation G/L account are no longer being transposed.
- 54456 Corrected the balance used in Stand-in processing when there

are two or more transactions for the same member waiting to post.

- 54617 Restored Conditional logic for F23 function key to display 'External loan App' or 'Complete App' on Loan Recap Screen.
- 54670 Updated CU\*BASE Program to Correct the Handling of Credit Bureau Codes during R2B and R2L Loan Submissions.
- 55031 Updated the "Post Incoming Credit Transactions Early (Effective Date Override)" Feature to exclude debit transaction when posting.
- 55154 Update to allow more than one user into the vault transfer option.
- 55156 Corrected credit pull program so no longer passing invalid data in Sync 1.
- 54750 Added security check to stop members from attempting to use the online banking enrollment process when disabled at the front end.
- 55127 Corrected issue in Lending Scorecard data build when calculating the age of a member and no birthdate is available.
- 55185 ACH Distribution Maintenance will now display records with tran code 42/47 properly.
- 55191 Correction project to handle null values and quotes when building and sending the member list file to inhouse imaging servers.
- 55221 Update to ATM/Debit card maintenance program to write the Card Stock Code to the PANCARD file when applicable.
- 55227 Removed OLB data build from Analytics Booth data build process.
- 55212 Removed system ID check in program.
- 55244 Corrected the compile options on OLB Optics so that CU users can see the data in the dashboard.
- 55252 Reverted the changes to Qualifile tracker records so they write directly to trackers rather than non-member notes.

## Web Enhancements

- 45158 Created an API for changing Personal Information.

## Web Modifications

- 53117 **It's Me 247** Desktop and Mobile Web: Update User-Agreement to include iPay disclosures.
- 53863 Updated the service alert function to contain the proper CUID in

the URL in order to prevent incorrect branding from being presented.

- 54343 Update to use Correct Descriptions in Payveris bill pay and P2P.
- 54661 Updated **It's Me 247** to allow configuration for the logging utility to be able to create its own logs for diagnostic purposes.
- 54861 **It's Me 247** Desktop and Mobile Web: Updated logging configurations to isolate Optics from other loggers.
- 55048 **It's Me 247** Mobile: Provide the option to pay credit cards in full during a scheduled transfer.
- 55102 **It's Me 247** Desktop: Helpful Links: Ensure all are displayed.