





Product:	Version #:	To be released to:	On date:
CU*BASE® GOLD	<b>20.04</b>	Online CUs	<b>April 26, 2020</b>
		Self-Processors	<b>June 7, 2020</b>








Updated booklets will be posted on our website no later than:

**April 24, 2020**

Key to the symbols:

-  You'll see it immediately
-  You'll need to activate it
-  You'll need to work with a CSR to set it up
-  There may be related fees; contact a CSR

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## Member Facing

### Members Have Questions They Want Answered? Have Them Use Private Contacts (The New “Contact Us” Window)...and You Can Respond Privately, Too!

[Learn more: Private Contacts and online help](#)

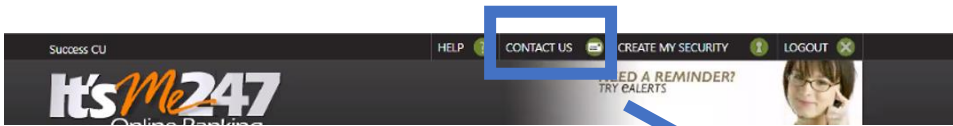
*Thanks to TruChoice Credit Union for their assistance with this enhancement*

We have a couple of goodies in this release! Check out this improvement to the Contact Us window that we feel is particularly timely given how many more members across our network are using online banking and not being able to visit their credit union.

Now members will now use the new Contact Us window in **It’s Me 247** desktop and mobile banking to enter free-form message in the new Private Contacts window. (Shown on next page.)

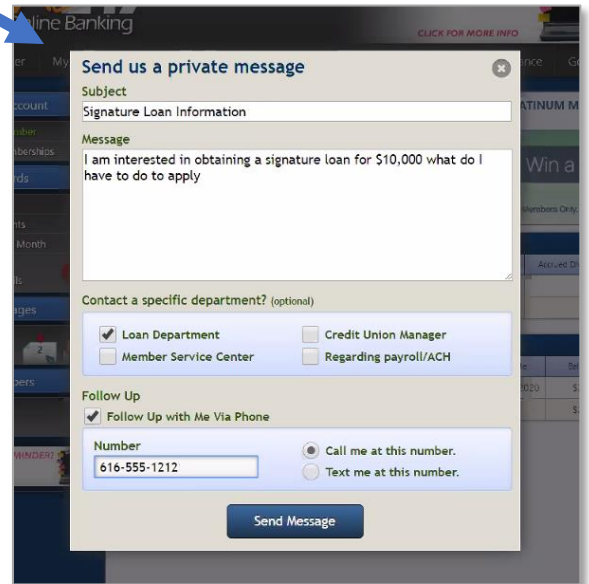
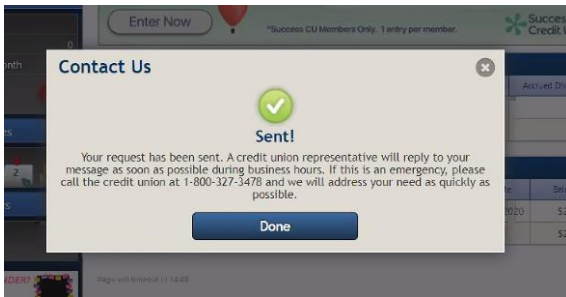
Private Contacts allow members to send messages that contain private information about their accounts, and your credit union (if configured) can then respond to the member via **It’s Me 247** online or mobile banking. This is not email, but a way for you to communicate back and forth with your members using tools they already use every day. You may already have been moving away to chat or other third-party solution, but this native communications solution might take out some of the member confusion and bring it all back to your online banking and mobile channels.

The new “Send us a private message” window and confirmation window will be implemented automatically for everyone with the release.



Optionally, you can also activate the ability to reply to these messages in CU\*BASE using **Tool #569 Online/Mobile/Text Banking VMS Config**. You can even elect to record both the conversation and your reply in a Tracker note so your credit union can save the conversation for additional follow-up or simply to retain a permanent record of the contact.

There you can also configure an optional message the member will see on the confirmation window (shown to the left). (It is not recommended that you enter URLs in the message.)



Would you rather turn off the Contact Us feature entirely? With this release you have the option to deactivate the feature, such as if you have your own chat service. Use **Tool #569 Online/Mobile/Text Banking VMS Config**.

## ☑ CFS Investments Now Show Real-Time Account Balances in the “It’s Me 247” Account Summary Page (with More Mobile Features, Too!)

*Learn more: “It’s Me 247” Investments User Guide*

Credit Cards					
Account	Name	Regular Payment	Amount Due	Due Date	Balance
747	VISA PLATINUM	\$25.00	\$25.00	6/28/2010	\$45.25
**2395	MASTERCARD CLAS	\$0.00	\$0.00	9/28/2011	\$0.00
ACCOUNT TOTALS		\$25.00	\$25.00		\$45.25

Investments (Show Details)		
Balance	# Of Investments	
\$32,008.14	4	<a href="#">Manage Accounts</a>

Did you know that CU\*Answers supports the presentation of investments data online in **It’s Me 247** in the Investments Center section of the Account Summary page?

Now Summary adds it all up for the quick view, and a “Show Details” give the investment package some product by product details for the more granular view.

Also, the members will now see *real-time balances*, made possible through a direct connection to the vendor. (Currently we can show only balances as of the most recent download date.)

From there members can also still click “Manage Account” to access the SSO link to the CFS vendor website for additional details on their accounts.

Investments (Show Summary)					
Account	Description	Holding Company	As Of Date	Balance	
**0187	Down Payment	Pershing LLC	4/8/2020	\$982.31	<a href="#">Manage Account</a>
**6569	Retirement Fund	Putnam Investments	2/14/2020	\$0.00	<a href="#">Manage Account</a>
**0790	Boat Fund	Standard Insurance Co	3/10/2020	\$5,299.16	<a href="#">Manage Account</a>
**HSUY	Building Wealth	Pershing LLC	8/5/2019	\$1,500.00	<a href="#">Manage Account</a>
ACCOUNT TOTALS				\$7,781.47	

This release adds more options to mobile users, too! Not only will they now see the real-time account balances, but they can also the access direct SSO link that was previously available only in **It’s Me 247** desktop banking.

For CFS clients, no activation is required. Contact Earnings Edge to talk about your options with downloading data.

Credit unions interested in displaying CFS investments to members should check out the CU\*Answers store at <https://store.cuanswers.com/product/cfs-investments-orcas-net/>

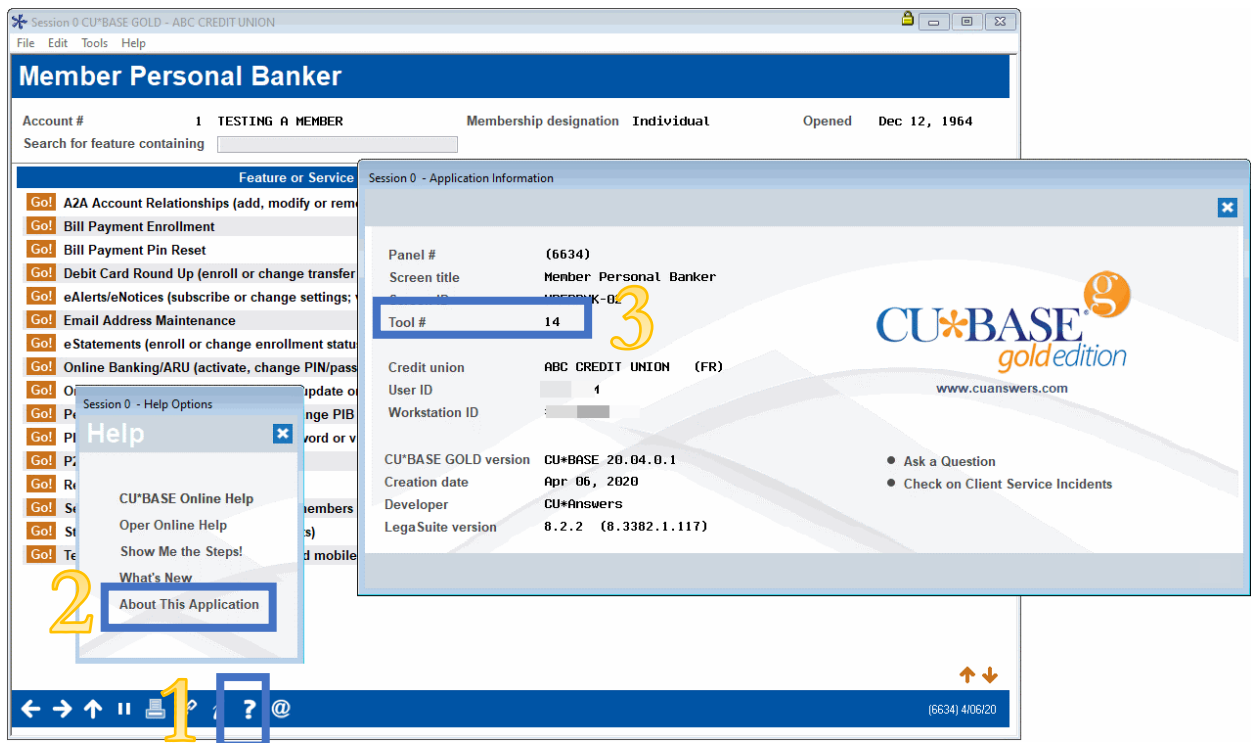
## All Users

### What Tool # is This? Get Your Questions Answered in the “About This Application” Window

Learn more: [online help](#)

Now it is easy as 1-2-3 to see what tool you are using! And that’s true no matter how deep into a tool you happen to be...if you can’t remember how you got to the screen you’re on, try cool this new feature!

On any screen, select the question mark (?) button at the bottom of the screen **1** and then About this Application **2**. From the Application Information window **3** you will see the tool number you have accessed. With two clicks you can identify right where you are in CU\*BASE!



Note: This only applies to tools you accessed via a Tool #, not Member Inquiry, Phone Operator, or any of the other tools accessed via buttons on the top-right edge of the CU\*BASE home page.

## Lending

### \$ Allied “IQQ” Miscellaneous Coverage Pricing Now Integrated into CU\*BASE LOS

*Learn more: [Allied IQQ Reference Guide and online help](#)*

This release proves to your lending leaders that CU\*A is one of the most integrated LOS platforms around. For some time now, CU\*Answers has SSO integrations with both CUNA Mutual Group’s Protection Advisor and Frost’s VisualGAP products. With this release, we are adding another SSO with Allied IQQ which covers mechanical breakdown coverage, Guaranteed Asset Protections (GAP), etc. Now lenders can streamline the process of quoting miscellaneous coverage with yet another product.

Interested in learning more? Check out the CU\*Answers store at <https://store.cuanswers.com/product/allied-iqq-integration/>

## Previously Implemented

### ☑ Enhancements to Credit Card Cash Back Reporting

*This enhancement was implemented on April 7, 2020.*

Both the Cash Back Credit Card Program Transaction Posting and Exception reports have been enhanced to more clearly display when a cash back amount is forfeited; these amounts will be

summarized now on the posting report. We’ve also updated labels on the report for clarity and ease of use. These enhancements highlight key data points to help you better manage the program and your members concerns.

**Credit Card**  
**Ca\$h Back**

### ☑ “It’s Me 247” Bill Pay Fiserv Mobile Allows Enrollment of Payees and More

*Learn more: [It's Me 247 Bill Pay \(Fiserv\)](#)*

*This enhancement was implemented on February 24, 2020.*

Additional features are now available in Mobile Banking for **It’s Me 247** Bill Pay (Fiserv) clients, including the ability to enroll in bill pay in Mobile, add bill payees, add payee groups and more!

*Check out the Store for more details. <https://store.cuanswers.com/product/itsme247-bill-pay-fiserv-mobile-enhancements/>*