CU*BASE 20.07 Release Resource Companion
July 2020

CU*ANSWERS
The Writing Team

This edition of the Release Resource Companion covers new and updated materials related to the 20.07 Release of CU*BASE. Take a look at the topics below to view updates to the CU*BASE software, booklets and additional resources, all collected in one convenient document for your staff!

New Videos!

1Click Offers

Learn how to offer pre-approved, guaranteed credit card accounts to your credit union members via **It's Me 247** desktop and mobile banking. Watch the video!

Flex Loans

Learn how to complete configurations and allow members to adjust the term and payment of an existing loan via **It's Me 247** desktop banking using Flex Loans. Watch the video!

New Booklets!

1Click Offers (My Loans/My Way)

The new 1Click Offers feature allows your credit union to offer pre-approved credit card offers that members can open "with just a click." For more details, including an FAQ, click here.

Flex Loans (My Loans/My Way)

The new Flex Loans feature allows your members to request a different loan payment on term via **It's Me 247**, which your credit union can then either auto approve or work in the LOS loan queue. For more details, including an FAQ, click here.

Configuring Tools for Accounts Payable

In this version for Accounts Payable staff, this booklet covers two features that are activated on the Accounts Payable Workflow Controls screen, making payments to vendors via ACH and accounts payable approvals. Click here for more information.

Positive Pay

Positive Pay, a new **It's My Biz 247** business banking feature championed by the BizLink focus group, allows business members to control the posting of checks to their account. Learn more.

ACH Pending Deposits Balancing

Includes directions on creating an ACH Early Post Query to be used with the ACH Early Post

feature. This feature can be configured so that members can post their incoming pending ACH payments themselves. Learn more.

New Overview Help Topics!

Overview: Flex Loans

This help topic provides a comprehensive overview of the Flex Loans feature, which allows members to request a change in payment or term on their loan in **It's Me 247**. Read more.

Overview: 1Click Offers

The new 1Click Offers feature allows credit unions to offer pre-approved credit cards that members can open "with a click" in **It's Me 247** and Mobile Banking. Click here to read in-depth overview of all the pieces of using the feature.

Overview: Paying Vendor Invoices via ACH

Includes information on the Payment Advice email, as well as a comprehensive overview of all the pieces of configuring and paying vendor payments via ACH. Learn more.

Updated Booklets

CPI Force Placed Insurance

QuieTrack is not a supported CPI Force Placed Insurance vendor with the 20.07 release. Click here for more information.

Automated Non-Returns

The new Negative Balance (ANR) calculator feature allows you to see the negative balance of a member, as well as what contributed to this calculation based on your ANR configuration. Check out the booklet!

Bank Secrecy Act (BSA) Monitoring Tools

Fields have been added to allow for additional address information to be added to CTR Contact Information when accessed from the BSA configuration screen. This supports credit unions that have a different address for the contact person for BSA than the one entered in the chart of accounts. Learn more.

Configuring Tools for Collections

Screen messaging on the Delinquent Notice configuration screen has been updated to better explain non-responsive members. Click here for more information.

Wire Transfers in CU*BASE

Wire transfers can now be made to international accounts. Learn more!

Using the CU*BASE Data Match System for OFAC Compliance

In addition to wire transfers available for international accounts, a notation was made in this booklet that these addresses are not running through OFAC. Click here for more information.

Additional New Resources

Overview: Accounts Payable Approvals

A comprehensive overview of all pieces of Accounts Payable Approvals, including configuring and setting up the approver, sending invoices to be approved, approving vendor payments, and monitoring if invoices are approved. Learn more!