

Spotlight on...

## **A New Future for Member Forms**

Introducing **CU\*Forms**

# Introducing CU\*Forms

## Our goals

- ▶ Make forms programming more efficient
- ▶ Integrate with the CU\*BASE browser presentation
- ▶ Install less software on the workstation
- ▶ Address an aging software in ProDOC
- ▶ Make it easier to work remotely with members
- ▶ Let CUs create their own forms
- ▶ (Eventually) eliminate print sessions!

# Introducing CU\*Forms

## In a nutshell

Check out links  
to how-to videos  
in the conference  
app!

- ▶ New browser-based tool for building and using forms in CU\*BASE
  - No ProDOC, no iSweeps, no print sessions!
- ▶ Build your own forms
  - Use your existing PDF or Word documents
  - Map membership data directly from CU\*BASE
- ▶ Generate forms from anywhere in CU\*BASE

Join the Beta! [store.cuanswers.com/product/cuforms](https://store.cuanswers.com/product/cuforms)



# CU\*Forms

This is just the beginning!

- ▶ This is a foundational project
  - To eliminate print sessions, must also address reports, checks, etc.
- ▶ Starting on membership side of the business
  - Convenience features are not integrated yet
  - No auto printing when opening a membership yet
  - Not all indexes are available
  - Staff may need to use ProDOC and CU\*Forms with each other for a while

# CU\*Forms

## Our long-term plan

**June 2023**

- Build foundation
- CU generated membership documents
- E-signature

**Phase 1**

**Phase 2**

**Fall 2024**

- Packages
- Expand integration
- Add support for CU\*BASE to send account & suffix

**Spring 2025**

- Custom forms
- Focus on lending documents\process

**Phase 3**

**Phase 4**

**Long-term**

- Client migrations
- Removal of ProDOC