



May 2021 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 May.

EFT Modifications

- 56012 Mandate: vendor Star is obsoleting response code 56 which we currently use when a transaction comes in on a closed card.
- 56232 Update COOP credit card batch maintenance to only send secondary phone indicators when the secondary phone number is not blank.
- 55465 Migrate ISO Vendor TCP/IP message logging process from static to dynamic SQL to prevent excessive DB2 access plan rebuilds.

Enhancements

- 55014 Enhance Site-Four tax programs for tax merge and tax handling.
- 47003 New Database for Tracking Night Processing Incidents for Operations Dept.
- 48316 RDC Enrollment via CU*BASE (Part 1): Enrollment Controls, Auto-Enrollment, EULA, and Deposit Limits.
- 50245 New Subsidiaries Dashboard - Re-vamped Process for Adding/Maintaining Subsidiary Items.
- 50246 Update Subsidiary (Fixed Assets, etc.) Reports.
- 51543 Improve Monthly Subsidiary Processing.
- 51757 Credit Card Cash Back (CCCB) Program Enhancements - new Payout frequencies/methods, new history inquiry.
- 51946 Xpress Teller Project 1 - Express Teller Search Module.
- 51947 Xpress Teller Project 2 - Graphics on Express Teller Home Screen.
- 51948 Xpress Teller Project 3 - API for Express Teller Photo ID Display.
- 51949 Xpress Teller Project 4 - Express Teller Workflow Controls.
- 51950 Xpress Teller Project 5 - Express Teller Screens and Posting Workflow.
- 51951 Xpress Teller Project 6 - Express Teller Vertical eReceipts.
- 52222 Enhancements to New and Refinanced Loan History Report.
- 52297 VAT: Design and build feature that sets % threshold to qualify

- 52299 data results for charting into existing Pie and Column charts.
VAT: Add trend line on total loan counts by year within 476 Write-off Charge-off Dashboard?s BANKRUPTCY and BOARD APPROVAL screen.
- 52300 VAT: Add charts to Tool 817 Skip-a-Pay Dashboard?s analysis screen.
- 52827 Enhance Query/Report Automation for additional frequencies and end date.
- 53105 Abnormal Activity Monitoring Enhancements: Monitoring for Transaction Patterns.
- 53392 Create New Dashboard for "Downloads/Uploads Authorized Users."
- 53491 Enhance Batch Credit Card Skip-a-Pay Program to allow multiple loan categories.
- 53790 Add Lookup Buttons to the Offset G/L Account # Entries on the Member Account Adjustment Screen.
- 53793 Allow Different Stop Payment Fee for Member Initiated via OLB vs. CU Initiated in CU*BASE.
- 53843 Create New Configuration for Defining a Credit Unions MICR Line.
- 53940 Add the new Express Teller Search Engine to Member Inquiry.
- 54010 Enhanced Feature to Order Debit Card for Joint Owners.
- 54272 Retrofit RDC auto capture dashboard to include standard functions such as common bonds and analysis.
- 54325 Create new dashboard displaying eSignature information.
- 54333 Create a program that will launch a URL to the "What's New" topic in CU*BASE Online Help.
- 54636 Enhance Smartlinks to support HTTP POST parameters.
- 54672 Create an iPay Dashboard over the information they are sending us.
- 54901 Correct Receipt Smart Link Variable to properly pass Share Branching CU Number.

GOLD Screen Modifications

- 55540 Correct display of 5 digit tool numbers on the Home Page in the Large and X-Large screen size.
- 55541 Correct the display of the 'Math Used to Calculate Ratios' in the Summary Tab in view/change options in the household.
- 55592 Changed Text Banking Enrollment Flag to be displayed as checked properly when applicable.
- 55641 Adjust the column title to "Calculation Type" rather than "Calculation Apl Type" in the rate inquiry for shares.

- 55675 Changed a screen to Oper styling.
- 55744 Allow users to utilize tool #100 Report Builder after using View/Manage Custom reports (tool #98 and #99).
- 55892 Allow an option for zero in the safe deposit box level of tiered service instant benefits.
- 55941 Add a "not specified" radio button or a drop-down feature for the Marital Status option on the Member Misc Information Maintenance screen in the Loan Application process.
- 55958 Remove hard-coding for path to GOLD's "gf9api.dll" file.
- 55983 Replace Existing Menu Reference in Tool #619 CHECKS 3: Post Check NSF FEE.
- 56023 GOLD now being passed appropriate parameters to generate with 21.05.4.0 build.
- 56056 Removed VAT extract panel from Tool 536 Money Movement Analysis.
- 56093 Removed VAT Extract Panel from Tool 318 Credit Score Analysis.

Modifications

- 55609 Lengthen the archive days for the Devenir Daily file to 90 days and send validation email.
- 55940 Obsolete index MNUMYAVX1 and all references to it.
- 56117 For Midwest Mortgage loan payment file, reverse change made to vendor file.
- 56271 Increase size of fields for delinquent days and months in POTBKASA to accommodate vendor data.
- 54577 Standardize output of Smart Operator entry for ANICO loan tracking.
- 53716 Created reload and retransmit programs to resend archived Velocity files via new re-transmit Vendor/Processor file dashboard.
- 54504 Changed A2A Loan Payment requests to honor payment controls.
- 54781 The insurance policy expiration date on the mortgage collateral screen now pulls from the PMI Expiration Date.
- 54825 Eliminate an error when clicking the orange Trades button in the green box for delinquent items when there is a value in the Past Due Amount field.
- 55516 Update ACH repost program to not create and use company specific ACH work files.
- 56145 1Click add a check after the SQL call and if it fails, update the process flag so that other 1Click offers can be processed.
- 53181 Corrected Input/Output error when adding a new collection card

- record to member account by stopping the use of hex characters when copying and pasting into a tracker.
- 53399 Create reload and retransmit programs to resend archived Visible Equity CECL files via new re-transmit vendor/processor file dashboard.
 - 53408 For AFG Loan extract build, retrieve open date from custom extract program instead of from file build program.
 - 53520 Locked Down Sensitive Settings on the DivApl Config Screen and added some new warnings.
 - 54072 Expanded field length so that Display Program Message does not appear when inquiring on some newly rolled over CDs.
 - 54683 Member name added to loan deal filters results screen.
 - 54819 Update tax reports for CU*Archives to utilize time zone processing.
 - 54898 Screen changes in Membership Designation Enhancements for future BizLink 247 Small Business Banking (the new single logon brand).
 - 54933 Create "Wrong Address" Flag for Non-Member Organization Records in Tool #997 Work With Non-Member Database.
 - 55165 Adjustment to expand notice tracker to include names of additional signers who also received notices.
 - 55482 Enhance IRS Tax Payer Header Information for new 1099-NEC.
 - 55581 Alter tax programs to include the new 1099-NEC tax form.
 - 55674 Change screen title on GOLD panel.
 - 55736 Screen changes for future Open Lending integration.
 - 55737 Screen changes for future LSC Pre-Paid integration.
 - 55870 Overlay Change to Risk-Based Pricing Forms.
 - 55881 Added a Generate PIN button to the Instant Card Issue Order Screen.
 - 56380 Adding new and updated views to the data base for mobile app for all credit unions.
 - 55498 Update the PROC date verification program to include CTE libraries.
 - 56476 Change CU*Answers job to add the new library FILExxNB into the library list on sign on.

Warranty Modification/Adjustment

- 53757 Prevent After Posting dates from incorrectly advancing to far in consumer loan skip payment screen.
- 54503 Prevent the General Last Maintenance field from updating the

time stamp when no changes were performed in Name/Address function selected from within Phone Operator.

- 54612 Update SSN used based on applicant selected from the View CU Loans option from the application summary.
- 56036 Adjust the tracker purge program to retain tracker information when a data warehouse exists but trackers are not archived.
- 54755 Eliminated duplicate accounts appearing on Participation Loan Delinquency Analysis report.
- 54830 Adjust due date on loan coupons to adapt for February or when day is adjusted for shorter month.
- 54841 Display correct payment method for A/P vendor when displayed from the view option when working with outstanding invoices.
- 55119 Research and eliminate error when the old next pay date is blank in the file DLQFIL.
- 55777 Updated 1099NEC program to include the second address line.
- 53515 Correct the 'Restrict Auto-Security for this employee' to ensure the option will not be available on the CU*BASE Home Page.
- 56484 Adjust the stop pay fee program to look for at the DIVPL for the fee instead of the application type.
- 56471 Corrected the flow when creating PE subsidiaries, so user not prompted with Fixed Asset Identification screen.
- 56499 Corrected "Export to File" when printing Subsidiary Trial balance.
- 56504 The Monthly Subsidiary Processing (tool 305) is now showing correct information in the subfile.