Software Upgrade

Product:	Version #:	To be released to:	On date:
CU*BASE® GOLD	**21.12**	Online CUs	**December 5, 2021**
		Self-Processors	**December 12, 2021**

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

December 3, 2021

This release includes changes to key database tables (files). **You must update your automated Queries** prior to their next scheduled run date!

See the separate Database Changes announcement for instructions.

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.
- 👁 Post release validation (PRV).

INCLUDED IN THIS RELEASE

All Users

### ☑ Member Name Search Enhancements in Xpress Teller and Inquiry

Learn more: online help

As part of our ongoing efforts to improve and fine-tune the new search methods within Xpress Teller and Member Inquiry, as well as work out some issues that users experience while searching for member names, this release will change how the search works for both Xpress Teller and Member Inquiry. The key change is that **the screen now has two search input fields** instead of just one: one for use when searching for a member name, and a second one when searching for anything else. That way we can greatly simplify the technique for finding names, but keep the flexibility (and smaller screen footprint) for other search criteria.
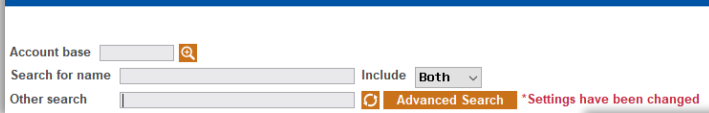
For the name search, we've added a drop-down on the search screen for including individuals, organizations, or both. So if you're looking for an individual person's name, you can exclude organizations with similar words, further reducing the number of hits.
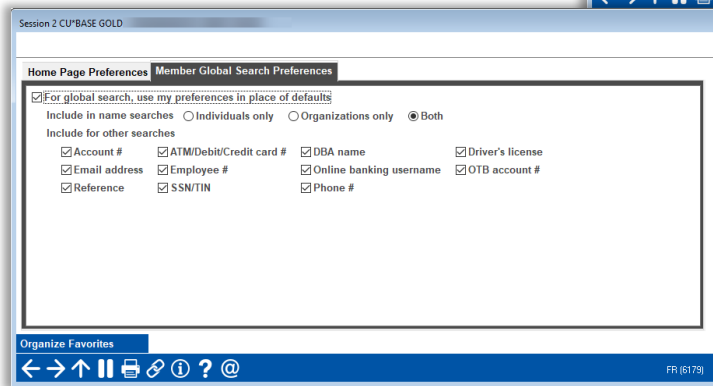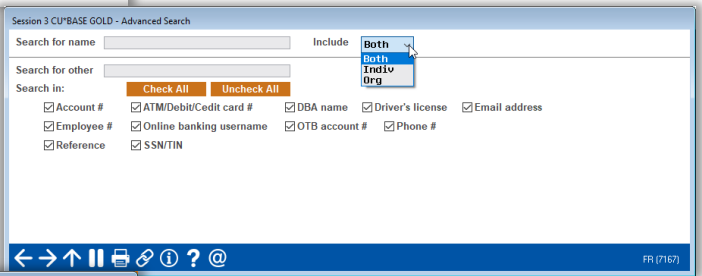
We've also expanded the existing Preferences feature available on the CU*BASE home page to allow each employee to define how they'd like their default searches to behave, reducing the need to use the Advanced Search button for every search.

We have high hopes for this new technique, that it will give us the best of both worlds – a flexible engine that can expand and adapt in the future, while still making it easy for your employees to find members quickly and effectively.

Your feedback has been invaluable for helping us refine and enhance this new engine, so please keep it up! Use the "Leave a Comment" feature on the Kitchen page (https://www.cuanswers.com/resources/kitchen/building-a-new-search-engine/) and let us know what you think.

Lending

👁 ☑ 1Click Loan Offers via "It's Me 247" for Unsecured Loans and LOCs (*and Include an Optional Online Form Too*)!

Learn more: 1Click Offers: My Loans/My Way booklet, and Overview: 1Click Offers in online help

ZOEY, You've been approved!

Not just pre-approved... you can borrow up to $500.00 right now based on your membership status!

Not Now   View

Looking for new ways to expand your loan portfolio? With this release we are expanding the **1Click Offers** feature to include other types of unsecured loans, for example a $500 holiday loan or pay day alternative. And, as icing on the cake, we're also adding the ability to optionally attach a form to the offer for the member to e-sign. Are you using this new approach that ties your lending team, smart analytics, and computer-closed-loans (no employee needed) into your lending solutions?

Instead of waiting for your member to apply, you can offer pre-approved, guaranteed loan accounts to targeted members via **It's Me 247**. Take away your member's doubts about borrowing success and start guaranteeing funding with this smart Internet Retailer approach. All the member needs to do is click to accept the offer in order for the account to be opened and funds to be available.

There is no application, no credit report pull, and no underwriting. You just make the offer to members you've already qualified. Then after clicking "Accept Offer" members will see a new loan in their account list and can start using the funds instantly! (If a form is attached, they will first sign the form electronically without leaving online banking.)

Offers that are accepted by members will appear on the CU*BASE LOS lending queue (Tool #2) on the 1Click tab so that your team can follow up with paperwork, or any other necessary follow-up tasks.

> Interested in assistance with activation? Check out the CU*Answers Store at store.cuanswers.com/product/one-click-loans/

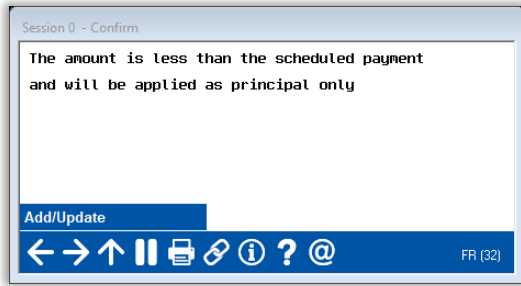## ☑ All Additional Signer Credit Bureau Codes Now Available

Learn more: online help

Now when linking credit bureau data to an additional signer using **Tool #51** *Miscellaneous Loan Maintenance*, all credit bureau codes will display as expected to better match to the primary borrower.

☑ New Confirmation Message for 360 Mortgage Transfers

Learn more: online help

This new confirmation screen has been added to the workflow when using Phone Operator to set up an incoming A2A transfer to a 360-type mortgage. This message will appear when the transfer amount is less than the scheduled payment to remind staff that the payment will be made as principal only. Because this payment will actually come in later as an ACH payment, this confirmation step should be used as the opportunity to inform the member or staff of what will happen when the payment actually arrives.

Back Office

☑ Accounts Payable Vendors Now Includes "Jump to Vendor #"

Learn more: online help

*Thank you to Notre Dame Federal Credit Union for submitting this idea!*
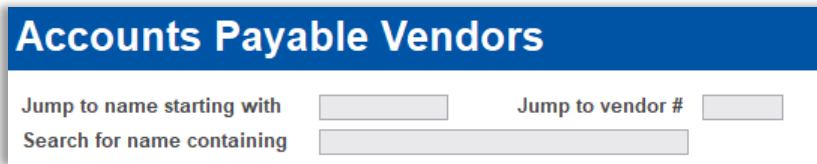
When using **Tool #990** *Work with Accounts Payable Vendors,* the *Jump to vendor #* search field has been updated to allow the input in that field to call a list of vendors, instead of *only* that vendor number in the results.

☑ Updated 5300 Call Report Account Code Online Help

Learn more: online help

As part of the ongoing efforts to transition our documentation to a new format, with this release the 5300 Call Report Account Code online help will be updated in design. The online help will work just the same, with each account code within the Call Report tools allowing an access point to read the associated help topic. However, after December 6, 2021, the URLs will be accessed via the updated address https://help.cubase.org/5300/content/home.htm, replacing "home" with each account code as you'll see in the web address bar. We look forward to announcing further online help updates in the coming weeks.
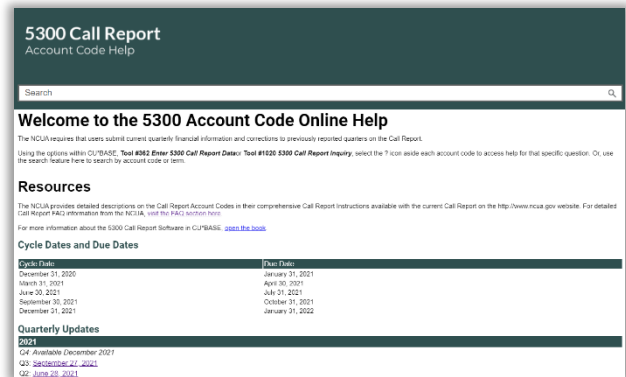
Data Analyst

☑ *Online Banking Optics: Lite* Version Updated for SLO/MLO

Learn more: online help
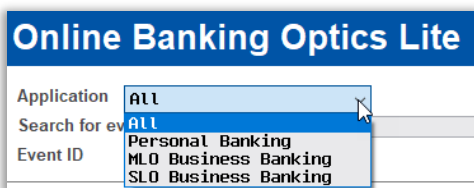
Tool #1100 *Online Banking Optics: Lite* has been updated to reflect the switch to the updated online banking approach, allowing users to choose their data points to analyze between personal banking, multi-logon or single-logon business banking, or all of the above. This change coincides with the updates that have occurred, and updates planned in the future, to the business banking product, **BizLink 247**, as well as the eventual introduction of **MyBIZ**, our newest single-login personal business banking product, coming next spring.

EFT

☑ Card Details Now Available in Additional Transaction Information

Learn more: [online help](#)

SettleMINT EFT

As previously discussed in the [21.10 release summary](#), beginning July 27, 2021, CU*BASE began storing details in the TRANS1 and TRANS2 tables for EFT (card) transactions. These details include the information regarding merchant category code, card present, last 4 digits of card #, ISO sequence #, Pinless PIN, Smart ATM cash-only deposit, and recurring card transaction notation. Moving these fields from the working, and not accessible to users, ISO files and beginning to track these fields in the transaction files means that this data became available and ready to analyze and act upon.

Session 3 - Additional Transaction Information					
Account					
Receipt available for reprint **No**		Seq # **0011609**			

Business Date	Activity Date	Activity Time	Amount	Check#	Balance
Jun 29, 2021	Jun 29, 2021	11:15:44	69.68-		1,048.51

Transaction description

OLD CHICGO PIZZA & T
OLD CHICGO PIZZA & T

Employee or Shared Branch CUID **99**

Origin	Description	Offset	Merch	Card Present	Last 4	ISO Seq #	Pinless PIN	ATM	Card
16	DEBIT CARD PROCESSING	810.50				000000000			

FR (395)

Now, in this release, the details will be displayed on screens for users! For both ATM/debit and credit card transactions, the pieces listed above will be available for view when selecting to view the additional transaction information. Additionally, the transaction origin code, description, and offset G/L account have been added to the transaction inquiry screens (the offset G/L account will appear for all transactions except for origin 01 teller posting).

END