



October 2023 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 October.

Architectural Changes

- 55713 Re-architect NT-Alerts to address IBM full-open recommendations. Will allow credit unions to set timeframe to hold sending alerts.

EFT Modifications

- 58684 Changed Transfund batch programs to only archive 7 days of maintenance files.
- 61771 Mandate CO-OP Visa Account Updater and Mastercard automatic billing updater card maintenance support enhancements.
- 62283 Adding South Bay to PSCU batch maintenance processes.

Enhancements

- 55258 ISO File Utilization - Allow Card Activity Rebates by MCC Group.
- 55260 ISO File Utilization - Credit Card Promotions Based on MCC Group.
- 55403 Enhancements to ACH Posting Controls to allow all credits to post Early.
- 56308 Updated maintenance option for flagging Vantage credit scores displayed to members in **It's Me 247**.
- 57640 Receipt Printing Controls Enhancements.
- 58021 Enhancement to Loan Modifications to Limit # of Flex Loans within Specified Period.
- 58118 Added Ability to Run Credit Report and Risk Assessment for Non-Members.
- 58121 1Click Offers Enhancements: e-Sign Forms for CC offers, More e-Sign Forms per offer.
- 58298 New Features to Run Membership or Batch of Accounts Through CLR Path Program.
- 58995 New Account Freeze Code to Dividend Application Configuration.
- 59009 Change to Display the Escrow Analysis amortized shortage

- 59016 amount on the Member Inquiry screen for tax escrow accounts. Updated Collections Summary Dashboard to match the NCUA's revised delinquency terms.
- 59110 Nostradamus Enhancements: Changes to Scoring Configuration and Results Viewer.
- 59111 Enhancements to Cash Inventory Features for Teller Drawer & Vault Control.
- 59276 Added Optional Two Factor Authentication to P2P Enrollment and Transactions in Online Banking.
- 59324 XT Enhancements - Option to Hide Cash Drawer Amount and Add Teller Vault Cash Transfer Features.
- 59405 Enhance Transaction Override Feature to Allow Multiple Overrides to Same Account.
- 59415 Added New Active Status Tracking Features to Marketing Clubs.
- 59692 Created a process to merge G/L data for two or more credit unions.
- 59705 Shared Branching Block for New Members - Expand to Include Xtend Shared Branching in logic.
- 59831 New FUEL Decision Performance Report.
- 59834 Enhanced Bank Secrecy Act (BSA) Dashboard.
- 60326 Updated Share Draft Exception Tool to Identify Members on Block List with highlight.
- 60334 New Balance Adjustment OPER Tool for CU*Answers Internal Use.
- 60363 New CU*BASE Tool to Reset a Printer Device.
- 60379 Added Sortable Columns to Debit and Credit Card Maintenance Screens.
- 60417 Created real time transaction processing for Payrailz P2P.
- 60648 Added Search Criteria to Fraud Maintenance Dashboard.
- 60707 Added Export Ability to Preview Escrow Analysis Dashboard.
- 60768 Updated Verbiage on Contract Variable Rate Notices to Clarify Payment Terms.
- 60769 Printer ID Window Added for Bulk Cash Transfers Report Generated from **Tool #32**.
- 59673 Created integration with ProPay/LenderPay for on-line payments.
- 61325 Create transfer APIs for use with CryptoFI.

GOLD Screen Modifications

- 61652 Updated system to allow for updates of all fields on the Online Banking product defaults even if the product is designated Informational only.
- 61775 Adjusted Check Disbursement Screen to Display Full Shared

Branch Text.

- 61881 Corrected spelling error on GOLD screen.
- 61898 GOLD script that reads config file needs to default URL for CU*Publisher to CU*NorthWest and CU*South.
- 61937 GOLD only changes to screen tips to discourage fake & invalid email addresses from being entered.
- 61968 Addressed GOLD screen dropping to emulator screen in Budget tool.
- 62023 Changes to URLs on the Network Links window.
- 62106 Added page up/down arrows to the GOLD panel for **Tool #428 *Learn From a Peer: Loan Rates***.
- 62142 Eliminated occasional GLD error in Loan Application Statistics Detail screen.
- 62196 Corrected the field label for "Title Holder" when viewing the Collateral Identification Screen for a Mortgage Collateral Type in **Tool#2 *Work/View Loan Application Status*** in large screen mode.
- 62210 Adjustment to Member Account Adjustment (Full) Warning message in GOLD.
- 62275 Updated GOLD homepage graphics for the 23.10 CU*BASE release.

Modifications

- 62014 Update Joint Customer number in the member joint file for Verafin.
- 56342 Enhanced generic posting program to process 360 mortgage payments.
- 58710 Update to send the old card number in field 95 when the credit union adds a new card in the CX batch maintenance add record.
- 59453 Expanded Contact Preferences Feature to be Configurable by CU.
- 59533 Mini contract variable rates are now changing to the max increase/decrease if set to hit the floor or ceiling.
- 59918 Updated Password Reset Feature to Allow CU to Specify the Temporary Password.
- 60061 Home Equity Statements changed to set page break on multiple pages for specialized logo paper.
- 60115 Loan Queue Enhancement: Added "Print Underwriter Packet" Option to View Data on a Locked Application.
- 60779 Adjust Accounts Payable listing report to follow the filters selected for report.
- 61866 Updates to add contact information for co-borrowers in Allied CPI

- file.
- 62040 Remove un-needed statement for over-riding the file MEMBER.
- 62200 Corrected CD Type field to allow alphanumeric value in the Marquis file creation program.
- 56806 Updated **It's My Biz 247** to **Biz Link 247** on emails generated for password resets for business banking.
- 62158 Added CU# range for 3501 to 3599 for Credit Bureau reports for Site-Four.
- 62281 Adjusted length of penalty field to handle CD amounts > 1.2 million dollars in the certificate detail display of online banking.
- 62288 Eliminated credit card statement style code error.
- 61566 Analytics Booth: Upgrade Dashboard Annotations Feature to match the upgraded Trends Annotations.
- 61868 Analytics Booth: Adjust the data table amount for three cash data trends. Amount shown is incorrect.
- 58852 Updated direct mail posting for 360 mortgage payments when making future principal only curtailments.
- 59407 Change to not show fund available on LOCS if flag for "disbursements are not allowed after the review date has passed" has been activated.
- 60477 Update 1Click Offers to Obey First Payment Date Details from Loan Product Config.
- 62270 Adjusted loan modification approval program to handle excessive delinquent months > 99 during the validation process.
- 62330 Corrected processing of Kasasa record when Kasasa product code is blank but OTBMST3 record exists.
- 62381 Updated program to set default password when invoked from Toolbox option 22.
- 62466 Update the "day of first payment" logic to be ignored for loans from 3rd party interfaces and Ready to Book loans.

Warranty Modification/Adjustment

- 60158 When running the Subsidiary Trial Balance sorting by category the final category will now total before the all categories total.
- 59538 **Tool #1985 Auto-Post RDC Deposit Dashboard** will now display Correct Amount for Mortgage Payments with Escrow Accounts Linked to Loan.
- 59758 Prevented warning message hard stop error when multiple users access Disburse Loan function from **Tool #2**.
- 60463 Correction to the skip-a-pay credit card tool (**Tool #317**) to write

out to statement program when multiple loan categories are chosen to participate in the program.

- 60645 Added edits on the AP Vendor Listing - **Tool #136**.
- 60896 When going into Tax File inquiry from phone op and the member is an organization it is now displaying correctly.
- 61097 Change to Check requests processed against a credit card loan to run OFAC Scan.
- 61467 **Tool# 447 Member List Generator** - Identify Issue and Correct Programming for "Include Members with Services" Screen.
- 61663 Corrected Issues with ANR limit occasionally being set at wrong time.
- 60659 Changed the program that determines open credit payment changes to handle blank maturity date.
- 61903 Prevent duplicate writes to uncollected funds tables during ITM check deposit programs.
- 61950 Improved the email validation process used for the Auto enrolment RDC process to properly handle valid email domains.
- 61951 Added back the functionality to the Members Instructions button for Reg E opt in/opt out in the online banking configuration.
- 62291 Updated Xpress Teller screen to only include "more" option on comments when there are additional records.
- 62329 NT alerts data lookup correction for member devices to avoid missing alerts.
- 62339 Adjusted tracker program to eliminate blank text fields in collection trackers.
- 62349 Corrected logic used to update email address field within RDC configuration.
- 62165 Eliminated the ability to delete a monetary member transaction in **Tool #918**.
- 62318 Adjusted Xpress Teller to address pop up error and looping when a specific number of comments.

Web Enhancements

- 60047 Create CryptoFi SSO.
- 62087 Standardize verbiage for Two Factor Authentication.

Web Modifications

- 61762 FIS Scorecard Rewards Update per FIS Technology Upgrades.
- 62280 Update monthly Lender*VP billing reports with formatting fixes.

- 62308 Update CryptoFi SSO to allow per membership eligibility checks.