23.12 Imaging Solutions Software Release

Beta	Online	In-House
N/A	**1/07/2024**	**1/07/2024**

What is this release?

The Imaging Solutions release is for online, enhanced online, and in-house release managed clients. Some features do not apply to all three types of clients. Refer to the symbols within the document for details.

How do I get this release?

In-House Managed Clients: Imaging Solutions will be contacting you to schedule the update for your system starting January 7th, 2024.

Have an in-house imaging server, but are not a Release Managed client? Sign up for Release Management today and we will waive the fee for the first year! Other options are also available. Contact Imaging Solutions for details at imaging@cuanswers.com.

Enhanced Online/Online Clients: Imaging Solutions will deploy your release on January 7th, 2023. Any added features can be purchased in the store at *store.cuanswers.com*.

Contents

Online Banking and CU*Spy Updates

### 🏠🌐🌐 2021 Tax Statements Update

Yearly update to support IRS regulation changes for tax forms.

CU*Forms

🏠🌐 Ability to Mass Update Fields

While programing forms, select multiple fields at the same time to make mass changes. Start by selecting the multi-select tool. Then click and drag around the fields you would like to update and unclick. The Mass Update Fields pop-up will display and give you the ability to make changes.
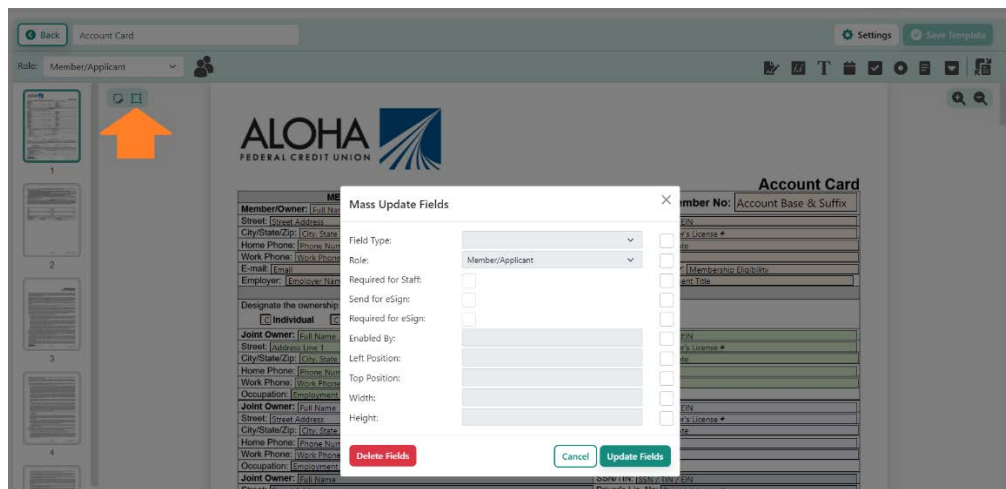
🏠🌐 Assign Users to default form groups

Users can now choose to land on a default form group based on their configuration. Simply have your users click on 👤 and change default form group to the desired group they want to automatically land on.
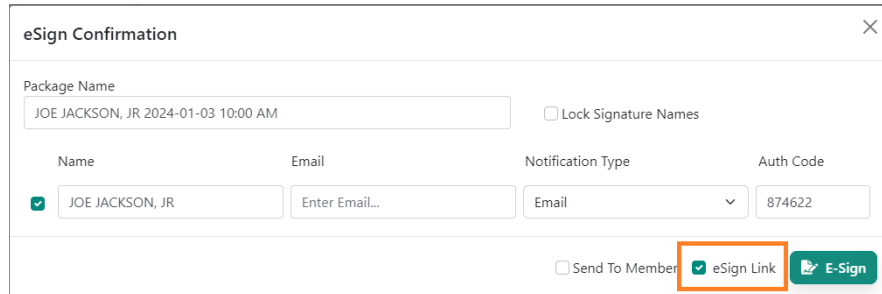
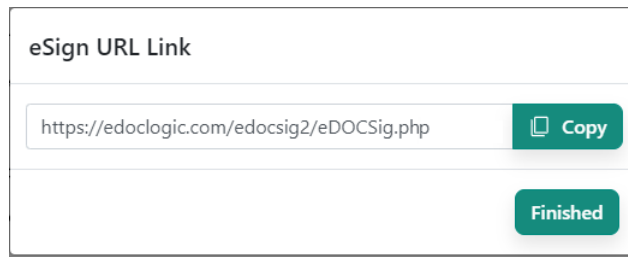## 🏠🌐 Display eSign Link when sending documents out for eSign

If your credit union is using a remote signing experience (like POPi/o) or need a way to display eSign documents in a browser right away with your member. This feature is for you.

Before clicking on "E-Sign" to send the documents out for eSign, check "eSign Link" and display the URL that can be copied in a browser to start the signing process.

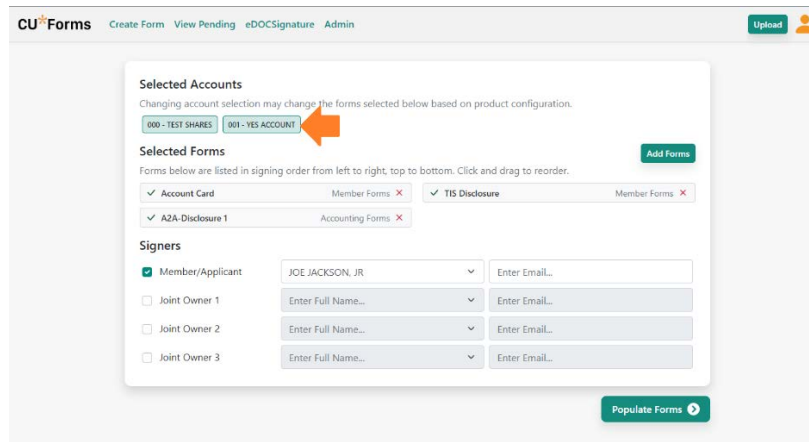

CU*Forms – BETA FEATURES

If your credit union is interested in joining the beta, email imaging@cuanswers.com to get started.

🏠🌐 Membership Process (BETA)

In preparation for the CU*BASE 24.05 Release, beta credit unions can start using the Membership Process for selecting and printing forms. This new process will allow your staff to enter an account number, be presented with that account's suffixes for selection which will grab the predetermined forms based on the configuration for your credit union (needs setup). Additionally, your staff can add forms manually as well.
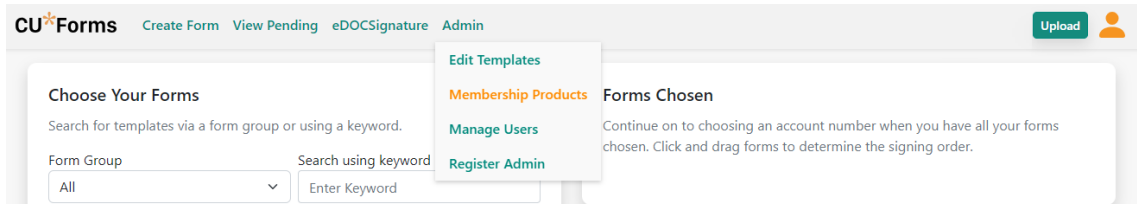
Setting up your Membership Configuration

Select "Membership Products" in the admin dropdown to open the product management screen.

On the product management screen, select the product in the drop down. Then select "add forms" to add forms to that product. If you need to make an override of forms based on member designation (example: business accounts), click "add override", select member designations, and required forms.
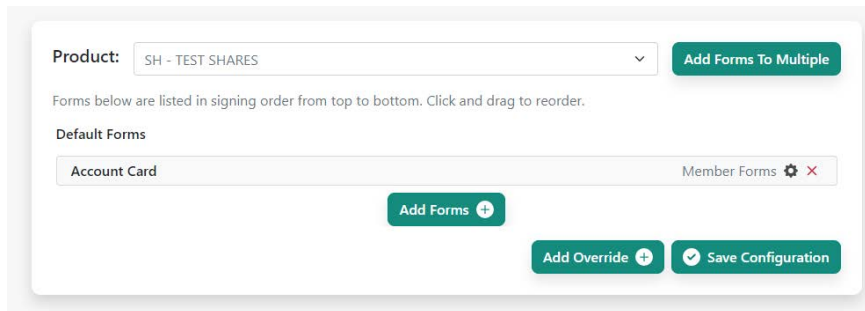
Software Versions

Below are the versions currently in use with this release:

Product	New Version
AutoImportCon	7.21.0.2
CU*Forms	1.12.2
Doclib	2.2.10.0
Imaging API	1.5.3
IS-API	1.5.3
Job Management Service	1.2.1