CU*BASE 23.10 Release Resource Companion

October 2023

This edition of the Release Resource Companion covers new and updated materials related to the 23.10 Release of CU*BASE. Take a look at the topics below to view important updates to several booklets, all collected in one convenient document for your staff!

Updated Booklets

1Click Offers

Now credit unions have the option to add multiple forms to an offer, including credit card offers. Click here to check out the updated booklet.

Bank Secrecy Act Monitoring Tools

The BSA Watch Analysis Dashboard makes verifying Currency Transaction Reports (CTRs) a snap and now includes reusable response tracker conversation text. Click here to learn more.

CLR Path Decision Advisor

Run your whole membership against a CLR Path program to see how your members score in a test function with no scores saved. You can also run a file against a program to see the passing members. Click here for more details.

Credit Scores in Online Banking

When manually entering a score, indicate whether the score is a VantageScore® or Other (FICO). Check out the updated booklet.

CU*BASE Marketing Clubs

You can now perform active status tracking against number and amount of combined ACH and payroll transactions, debit card transactions, and credit card transactions. You can also track against Remote Deposit Capture (RDC) enrollment. View the updated booklet.

CU*Forms

The new "Upload forms" feature allows you to archive a specific PDF form to a certain membership. Check out the updated booklet.

eAlerts

You can now configure a block out period when members will not receive eAlert emails or text messages. Click here to view the updated booklet.

Flex Loans

You can now block members from requesting Flex Loan modifications on their loans in **It's Me 247** if they have already made one in a configured number of months. View the updated booklet.

It's Me 247 Bill Pay User Guide (Paymentus)

It's Me 247 Person to Person (P2P) User Guide

It's Me 247 Strategies for Controlling Member Access

Two-factor authentication can be activated to access the Pay Anyone module in **It's Me 247**. The member is emailed or texted a code to send Person to Person (P2P) payments, or to enroll or unenroll.

View the **It's Me 247** Bill Pay User Guide (Paymentus) booklet.

View the **It's Me 247** Person to Person (P2P) User Guide booklet.

View the **It's Me 247** Strategies for Controlling Member Access booklet.

Loan Statement Notices

HELOC loan statements (generated via Tool #659) have additional lines on pages two and following to allow for credit union custom address and logo. Take a look at the booklet.

Member Notices and eNotices

You can now configure a block out period when members will not receive eNotice emails or text messages. Click here to view the booklet.

Native Receipts

CashTracker and marketing messages for receipts are now supported. View the booklet.

Online Credit Bureau Access User Guide FUEL

New Forecasted Underwriter Express Lending (FUEL) Performance report is now available to monitor loan applications. Check out the booklet.

Positive Pay

The Share Draft Exception Dashboard will show memberships on the check block list as highlighted to indicate they need special procedures. Take a look at the booklet.

Variable Rate Loan Products

Now for Mini Contract (Group) variable rate loans, when the index increases, CU*BASE will update the rate on the loan to the maximum change set by the cap. Click here to view the booklet.