

CU*BASE 23.10 Release Training



Training Session: September 28th, 2023

Presenter: Kristian Daniel & Patty Saladin

Online and Site Four Release Date is October 8

Self-Processor Release Date is October 15

➞ Reminders

GOLD Version Check

- Following the release, if someone logs into a workstation that is not at the proper version of GOLD or the JWalk Client, the user will be instructed to sign off, and the workstation must be brought up to date before it can be log into CU*BASE.

Online Banking Service Interruption

- As with all CU*BASE GOLD releases, there will be a brief service interruption to **It's Me 247** Online Banking and CU*Talk phone banking on the day of the release. A splash page will be presented in online banking informing members of an estimated time when service will again be available.

➞ Beta Reports

- If you are interested in reviewing the beta credit unions' commentary from their time with the software, visit the [Feedback from Recent Beta Tests](#) on the beta pool information page to learn more.

➞ Training

- **Attend a release review webinar!**
- Thursday, October 5 @ 3:00 PM – 4:30 PM ET

➞ Documents

[23.10 Release Summary](#)

[23.10 New and Updated Tool Summary](#)

[23.10 Database Changes Summary](#)

Featured Enhancement



* New! Reset a Printer Device

Star of the Show - Reset a Printer Device

- * New **Tool #1036** – Reset a Printer Device
 - * Reactivates a print session locked out from invalid password tries
 - * Screen displays CU's configured printers
 - * Displays confirmation window

File Edit Tools Help

Reset Printer Device

Jump to printer ID Search for description containing

ID	Printer Description	Model	Type	Branch	Dup
			L	01	N
			T	01	N
			E	01	N
			E	01	N
			L	01	Y
			L	01	Y
			L	01	Y
			L	01	N
			L	01	N
			L	01	Y
			L	01	Y
			L	01	Y
			L	01	Y
			L	01	Y
			L	01	Y
			L	01	Y
			L	01	Y
			L	24	N
			L	01	N

■ Select

PRINT SESSION FOR [redacted] WILL BE VARIED ON.

Add/Update

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Refresh

← → ↑ || 🖨️ 🔗 ⓘ ? @

Featured Enhancement



* Questions?

Member Facing



- * Multi-Factor Authentication added to Pay Anyone

Multi-Factor Authentication for P2P in Online Banking

- * **Tool # 569** – Online/Mobile/Text Banking VMS Config
 - * Online/Mobile Web Banking Features
 - * Apply multi-factor authentication to P2P
 - * Checking the box activates 2FA for P2P
 - * Anytime (once per OLB session) a user navigates to the P2P module they will be required to complete 2FA before being granted access

File Edit Tools Help

Update Credit Union Online Banking Settings

Corp ID 01

☒ Allow new membership application online Member Instructions

☒ Apply membership application fee

Dividend application to be used SH

☒ Activate savings rate board Member Instructions

☒ Activate certificate rate board Member Instructions

☒ Activate loan rate board Member Instructions

☐ Require co-applicant if marital status is Married

Allow maint of personal info by member (online) ☐ Direct update (no approval) ☒ Reviewed update (approval required) ☐ No

☐ Direct update with two factor (text/email)

☒ Allow member to enter account nicknames

Default setting when setting up transfer control list ☒ All sub-accounts ☐ Owned sub-accounts only ☐ Specify

☐ Allow member to change Reg E Opt In/Out choice Member Instructions

☒ Show who was served (either a jump guest or via Teller Currently Serving) in transaction history

☐ Apply two factor authentication to P2P

Update

Instructions

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Multi-Factor Authentication for P2P in Online Banking

- * Multi-Factor Authentication Module from a member's perspective
 - * When navigating to access P2P module from the mega menu the member will be presented with the module
 - * This process is the same as First-Time user as well as the recently released 2FA Personal Information option from the 23.05 release
 - * Once selecting an option(Text/Email) the member will then need to enter that code on the next page
 - * The member must select either a phone number that has text availability or an email to receive the one-time access code

The screenshot displays the online banking interface. At the top, a navigation bar includes the 'It's All 24/7 Online Banking' logo and links for Home, Pay & Transfer, Member Services, Go Mobile, and New Accounts. The user's name 'JAYME' and a profile icon 'JG' are in the top right. Below the navigation bar, the 'SEND MONEY' section is active, with 'Pay Anyone' highlighted in a red box. Other options include 'Quick Transfer', 'Schedule a Transfer', 'View/Edit Scheduled Transfers', and 'Bill Pay'. To the right, the 'CHECK SERVICES' section lists 'Automated Check Transfers', 'Check Withdrawal', and 'Cancel Check Payments'.

A modal window titled 'Let's Verify Your Identity' is overlaid on the screen. It contains the text: 'Since protecting your information is our top priority, we must verify it's you. Select a contact method to receive a one-time verification code to continue.' Below this text are three radio button options: 'Text Code to (***) ***-7501', 'Text Code to (***) ***-2235', and 'Email Code to jos*****3@gmail.com'. A 'Send Code' button is located at the bottom right of the modal.

Multi-Factor Authentication for P2P in Online Banking

- * Multi-Factor Authentication Module from a member's perspective
 - * A code will be sent to the member via the channel they selected (text/email)
 - * Once the member receives the code, they must then enter it within the module and then they will gain access to the P2P Module
 - * Code available for 15 minutes

< Enter Your Code

Your code should be arriving shortly. If you feel that your code has not been sent correctly, tap 'Resend Code' to try again or go back and try another verification method.

Verification Code

Enter Code...

Resend Code

Continue

Multi-Factor Authentication for P2P in Online Banking

- * Multi-Factor Authentication Module from a member's perspective
 - * Once entering the code you are then given access to P2P module
 - * Depending if the member is enrolled or not will depend on the next steps. An enrolled user will be brought straight to the main P2P page. Unenrolled will go through enrollment process
 - * Member will not have to go through 2FA again until they log out of OLB

Pay Anyone

This is a test enrollment message.

This is a service offered to you free of charge. All you need is an email address or phone number and you can send money to anyone.

Payments must be made to US individuals.

Pay Anyone

Send money directly from your accounts to anyone. All you need is their email address or a phone number capable of receiving texts.

[Send New Payment](#)

⚙ Enrollment Preferences >

Payment History

All Payments ▾

Status	Recipient	Destination	Amount
--------	-----------	-------------	--------

[Enroll for Pay Anyone](#)

Elect to Mute e-Alerts/E-Notices During Specific Time

- * Tool #569 – Online/Mobile/Text Banking VMS Config
 - * You have the option to set a quiet time for eAlerts and e-Notices!
 - * This setting uses your local time to configure a blackout period for sending notifications; the process will still run, but no alerts will be sent during the time period selected.
 - * Just remember that when we adjust our clocks for daylight savings, you'll have to make the adjustment manually here too!

Session 0 - Update Credit Union e-Alert/e-Notice Settings

Corp ID 01

☒ Activate e-Alerts/e-Notices

Do not send email or text message notifications between 12:00 [HHMM] AM and 06:00 [HHMM] AM local credit union time each calendar day (standard time only; will not adjust for daylight-savings time)

Update

Navigation icons: back, forward, up, down, print, link, info, help, email

UCUEAL-01

Member Facing



* Questions?

EFT



- * Merchant Category Code Groups for Credit Card Promotions and Card Activity Rebates
- * Sortable Columns for Credit and Debit Card Maintenance Screens

Card Activity Rebate by Merchant Category Code Group

* **Tool # 1320** – Card Activity Rebate Configuration

- * To configure, use the MCC Group radio button
 - * Use icon to select MCC Groups configured in Tool #1024
 - * Set rebate rate for MCC Group
 - * 'All Other' rate will pay all other purchase transactions with other MCC codes
 - * Card Activity Rebate process on the last day of the month
- * Retailer group option-for future enhancement, not currently active
- * If no separate rate for MCC group, leave as None

File Edit Tools Help

Configure Card Activity Rebate Program

CHANGE

Rebate program code 10

Program description CHECKING SD-MCC GROUP

Rebate rate per eligible transaction by group ☐ None ☒ MCC Group ☐ Retailer Group

Group TRAVEL 2.75 %

Rebate rate per eligible transaction 1.25 % (all other)

Maximum monthly rebate amount 999.99

Per-transaction cap amount 1,500.00

Minimum monthly rebate amount 0.00

Expense G/L account 132.00

Transaction description DEBIT CARD REBATE

Transactions to use in rebate calculation

Type Session 0 CU*BASE GOLD - Choose MCC Group

Origins

Jump to description starting with Jump to code starting with

Search for description containing # of records 4

MCC Group	Description
FOOD	FOOD RELATED-RESTAURANTS, GROCERY
SCHOOLS	ALL SCHOOLS
STORES	VARIOUS STORES
TRAVEL	AIRLINES, RESORTS, HOTELS, CAR RENTALS,

Select

MCC Group	Description

Select

Navigation icons: back, forward, up, down, print, link, info, help, search

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A CREDIT UNION SERVICE ORGANIZATION

- * Once Card Activity Rebate code is configured, the Group and Rate display for easy view

[illegible]

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- | 7/31/23 | | 9:43:24 | | RUN ON | | 8/09/23 | | CARD ACTIVITY REBATE CALCULATION REPORT FOR 07/2023 | | | | TCARP3 | | PAGE | |
|---|--------|---------|------|----------------------------------|----------|---------|--------|---|--------|-------|--|--------|--|------|--|
| | | | | | | | | 07/01/2023 TO 07/31/2023 | | | | USER | | | |
| PROGRAM 10 1.25% CHECKING SD-MCC GROUP | | | | | | | | | | | | | | | |
| MCC 2.75% AIRLINES, RESORTS, HOTELS, CAR RENT | | | | | | | | | | | | | | | |
| ----- MCC GROUP TRANSACTIONS----- | | | | -----ALL OTHER TRANSACTIONS----- | | | | -----TOTAL TRANSACTIONS----- | | | | | | | |
| | | | | REBATE | | | | REBATE | | TOTAL | | TOTAL | | | |
| ACCOUNT # | DIVAPL | AMOUNT | RATE | EARNED | AMOUNT | RATE | EARNED | AMOUNT | REBATE | NOTE | | | | | |
| 63 070 | SD | .00 | 2.75 | .00 | 238.16 | 1.25 | 2.97 | 238.16 | 2.97 | | | | | | |
| 65 070 | SD | .00 | 2.75 | .00 | 2,451.10 | 1.25 | 30.63 | 2,451.10 | 30.63 | | | | | | |
| 75 070 | SD | .00 | 2.75 | .00 | 381.47 | 1.25 | 4.76 | 381.47 | 4.76 | | | | | | |
| 80 070 | SD | .00 | 2.75 | .00 | 559.35 | 1.25 | 6.99 | 559.35 | 6.99 | | | | | | |
| 94 070 | SD | .00 | 2.75 | .00 | 899.97 | 1.25 | 11.24 | 899.97 | 11.24 | | | | | | |
| 10 070 | SD | .00 | 2.75 | .00 | 289.21 | 1.25 | 3.61 | 289.21 | 3.61 | | | | | | |
| 39 070 | SD | .00 | 2.75 | .00 | 2,477.44 | 1.25 | 30.96 | 2,477.44 | 30.96 | | | | | | |
| 47 070 | SD | 408.30 | 2.75 | 11.22 | 3,116.16 | 1.25 | 38.95 | 3,524.46 | 50.17 | | | | | | |
| 66 070 | SD | .00 | 2.75 | .00 | 194.99 | 1.25 | 2.43 | 194.99 | 2.43 | | | | | | |

Card Promotions Based on Merchant Category Code Groups

- * **Tool # 907** – Update Online CC Rate/Charge Types
 - * Add MCC Groups to Credit Card promotional buckets
 - * Merchant purchases will receive the special configured promotional rate
 - * Other purchases will receive default rate

The screenshot displays the 'Credit Card Definition' tool interface. At the top, there's a menu bar with 'File', 'Edit', 'Tools', and 'Help'. The title bar reads 'Credit Card Definition' with an 'UPDATE' button on the right. Below the title bar, the 'Category code' is set to '70 TEST CREDIT CARD'. The main form is divided into several sections: 'Type' is 'PU Purchase', 'Sequence' is '004 Promo', and the status is 'Unlocked'. 'Start date' is 'Aug 27, 2023' and 'End date' is 'Oct 06, 2023'. A note below these dates says '(Leave start date and end date zero for the default code)'. 'Description' is 'Test Purchase Promo' and 'Statement description' is 'Promo'. 'Rate' is '3.000' and 'Daily rate' is '0.008219000000000'. Below this, a red-bordered box highlights the 'MCC Group' section, which has a 'Select' button and shows '1 selected'. The form is split into two columns: 'Variable Rate Information' and 'General Rate Information'. Under 'Variable Rate Information', there's a 'Variable rate code' field. Under 'General Rate Information', there are checkboxes for 'Use grace period' and 'Forgive finance charges for zero balance loans'. 'Transaction charges' are listed with fields for '% of transaction amount' (1.000), 'Minimum' (1.00), and 'Maximum' (10.00, with a note '(Max 999.99 = no maximum)'). 'Transaction finance charge G/L account' is '112.25'. 'Transaction description' is 'Test Description'. At the bottom left, there are 'Comments' and 'Unlock' buttons. The bottom of the window features a navigation bar with icons for back, forward, up, down, print, link, info, help, and search.

Credit Card Definition		UPDATE
Category code 70 TEST CREDIT CARD		
Type	PU Purchase	Sequence 004 Promo Unlocked
Start date	Aug 27, 2023 [MMDDYYYY]	End date Oct 06, 2023 [MMDDYYYY]
(Leave start date and end date zero for the default code)		
Description	Test Purchase Promo	Statement description Promo
Rate	3.000	Daily rate 0.008219000000000
MCC Group Select 1 selected		
Variable Rate Information		General Rate Information
Variable rate code		<input checked="" type="checkbox"/> Use grace period
		<input checked="" type="checkbox"/> Forgive finance charges for zero balance loans
		Transaction charges:
		% of transaction amount 1.000
		Minimum 1.00
		Maximum 10.00 (Max 999.99 = no maximum)
		Transaction finance charge G/L account 112.25
		Transaction description Test Description
Comments		
Unlock		
Navigation icons: back, forward, up, down, print, link, info, help, search		

Card Promotions Based on Merchant Category Code Groups

- * **Tool # 907** – Update Online CC Rate/Charge Types
 - * New! The history record will show if any MCC Groups were added to the promotional bucket

File Edit Tools Help

Credit Card Rate Change History

History Record 380

Category code 70 TEST CREDIT CARD

TypePU PurchaseSequence004

Start dateAug 27, 2023End dateOct 06, 2023

Rate3.000Variable rate code

DescriptionTest Purchase PromoStatement descriptionPromo

☒ Use grace period

☒ Forgive finance charges for zero balance loans

Transaction charges1.000 (% of transaction amount)

Minimum\$1.00Maximum\$10.00 (Max 999.99 = no maximum)

Transaction charge G/L account112.25Transaction descriptionTest Description

MCC group1 selected

Historical Information

Last maintainedAug 11, 2023

By userNICHOLASID =2Action Created

Skip

Comments

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Card Promotions Based on Merchant Category Code Groups

- * **Tool # 12** – Update/Order Online Credit Cards
 - * New! When viewing the Credit Card activity the Merchant code is visible on the transaction line

The screenshot displays the 'Recorded Card Activity' window. At the top, it shows the Card #, Account, and Card sequence # 00000. Below this, transaction details are listed, including Embossed name (Line 1 and Line 2), Local activity date (Jun 14, 2023), Time (21:00:23), Settlement date (Jun 15, 2023), PIN or signature (S), ODP/ANR used (No-Not Used), From account, To account, Amount available (0.00), Original message type, Response code (00 Approved), Last message type, Response code (00 Approved), Process code (003000 PUR From LOC Account), and MCC (5411).

A table titled 'Member Transaction Generated' is shown below the details. The table has columns for Transaction Amount, Resulting Balance, Account, Secondary G/L Acct #, Business Date, Activity (Date and Time), Transaction Description, Seq #, and MCC. The MCC column is highlighted with a red box, showing the value 5411.

Below the table is the 'Additional Network Information' section, which includes fields for Vendor, BIN, Retrieval ref #, Auth ID response, Unique seq #, Event seq #, ISO seq #, Net ID, Terminal ID, System trace #, Message code, Trans desc link, Maintenance date (Aug 03, 2023), Maintained by, and Time (10:46:28).

Credit and Debit Card Maintenance Screens Now with Sortable Screens

* **Tool # 11** – ATM/Debit Card Maintenance & **Tool #12** – Update/Order Online Cards

- * New! Now displays Active cards first
- * New! All Columns are now sortable

File Edit Tools Help

ATM/Debit Card Maintenance UPDATE

Relationship account

Card #	Seq #	Card Type	Card Status / Desc	Embossed Name Line 1	Embossed Name Line 2	Last Used
	1	DEBIT CARD 2	ACTIVE			Jul 07, 2023
	1	DEBIT CARD 2	CLOSED			Mar 15, 2014
	1	DEBIT CARD 2	CLOSED			Jun 03, 2021
	1	DEBIT CARD 2	CLOSED			Mar 23, 2017
		DEBIT CARD	CLOSED			Jul 09, 2006
		DEBIT CARD	CLOSED			Jul 03, 2007
	1	DEBIT CARD 2	CLOSED			Apr 03, 2019
	1	DEBIT CARD 2	CLOSED			Jan 18, 2019
	1	DEBIT CARD 2	CLOSED			Mar 25, 2013

File Edit Tools Help

Credit Card Maintenance UPDATE

Account #

Card #	Acct Type	Embossed Name	#	Card Status	Last Status	Last Used	Last Maint	Card Description
			1	ACTIVE		7/04/2023	10/02/2021	
			1	ACTIVE	5/31/2019	7/07/2023	8/05/2019	
			1	ACTIVE		6/05/2023	3/03/2023	
			1	CLOSED	2/27/2023	4/05/2018	2/27/2023	
			2	CLOSED	3/20/2020	12/29/2011	3/20/2020	
			1	CLOSED	6/03/2022	6/03/2022	6/03/2022	
			2	CLOSED	3/20/2020	1/15/2013	3/20/2020	
			1	CLOSED	2/27/2023	12/19/2018	2/27/2023	
			1	CLOSED	3/20/2020	1/01/2011	3/20/2020	
			2	CLOSED-PER INSTITUTI	2/05/2010	2/23/2009	12/04/2008	
			1	CLOSED-PER INSTITUTI	1/25/2010	9/25/2007	9/24/2007	

EFT



* Questions?


Lending:



- * Enhancements to Locked Loan Application
- * Multiple Forms for 1 Click Offers!
- * Enhancements to CLR Path Advisor
- * New FUEL Decision Performance Report
- * Easily Run a Credit Report or Risk Assessment on Non-Members
- * Flex Loan Enhancements
- * Enhancements to Mini-contracts
- * Miscellaneous Enhancements

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- * Enhancements to ease some of the impact of loan lock
- * Print Combined and Individual Loan Officer Worksheets
- * Print 5-Page Application
- * View Household


File Edit Tools Help

Loan Request Maintenance

Account base 12106 TIMMY LOANMEMBER
Household # 11111111

Last Loan Request

Application # 526238
Application date Aug 08, 2023
Result APPROVED

Work with loan request #

Outstanding Loan Requests

Account #	Loan Req #	Amount Requested	Category	Purpose	Application on File
12106	526147	5,500.00	KASASA TAKEBACK	NEW AUTO	YES

Work with Loan Request
Delete Loan Request
Print Loan Officer Worksheet

Print Underwriter Packet
View Household

Household Maintenance
New Loan Request
Delete All Loan Reqs

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Enhanced 1Click Offers Now Offer Multiple Loan Forms Per Offer

- * **Tool # 1340** – Create Batch of 1Click Loan Offers
 - * Additional Forms Button now allows for the selection of multiple forms to be added to the e-sign process
 - * Please contact Imaging and LenderVP for their assistance if you need new forms configured

Create Batch of 1Click Loan Offers ADD

Table name in [] for list of member account base numbers [ONELCLICK1]

Loan product code [001] Closed End Loans

Disbursement limit/Loan amount [500.00]

☒ Use banner ad

Online self-service form(s) for e-signing [CDSL] Additional forms **Select**

Processing fee [10.00]

Fee G/L account [111.01] Fee transaction description [Fee]

Default approval ID []

Jump to description starting with [] Only 99 Selections Allowed

Jump to code starting with []

Search for description containing []

Code	Description		Code	Description	
CDSL	CDSL	OL			
LOC1	LOC1	OL			
LOC2	LOC2	OL			
LOC3	LOC3	OL			
SDSL	SDSL	OL			
UNLC	UNLC	OL			
UNLN	UNLN	OL			
UNL2	UNL2	OL			
UNL3	UNL3	OL			

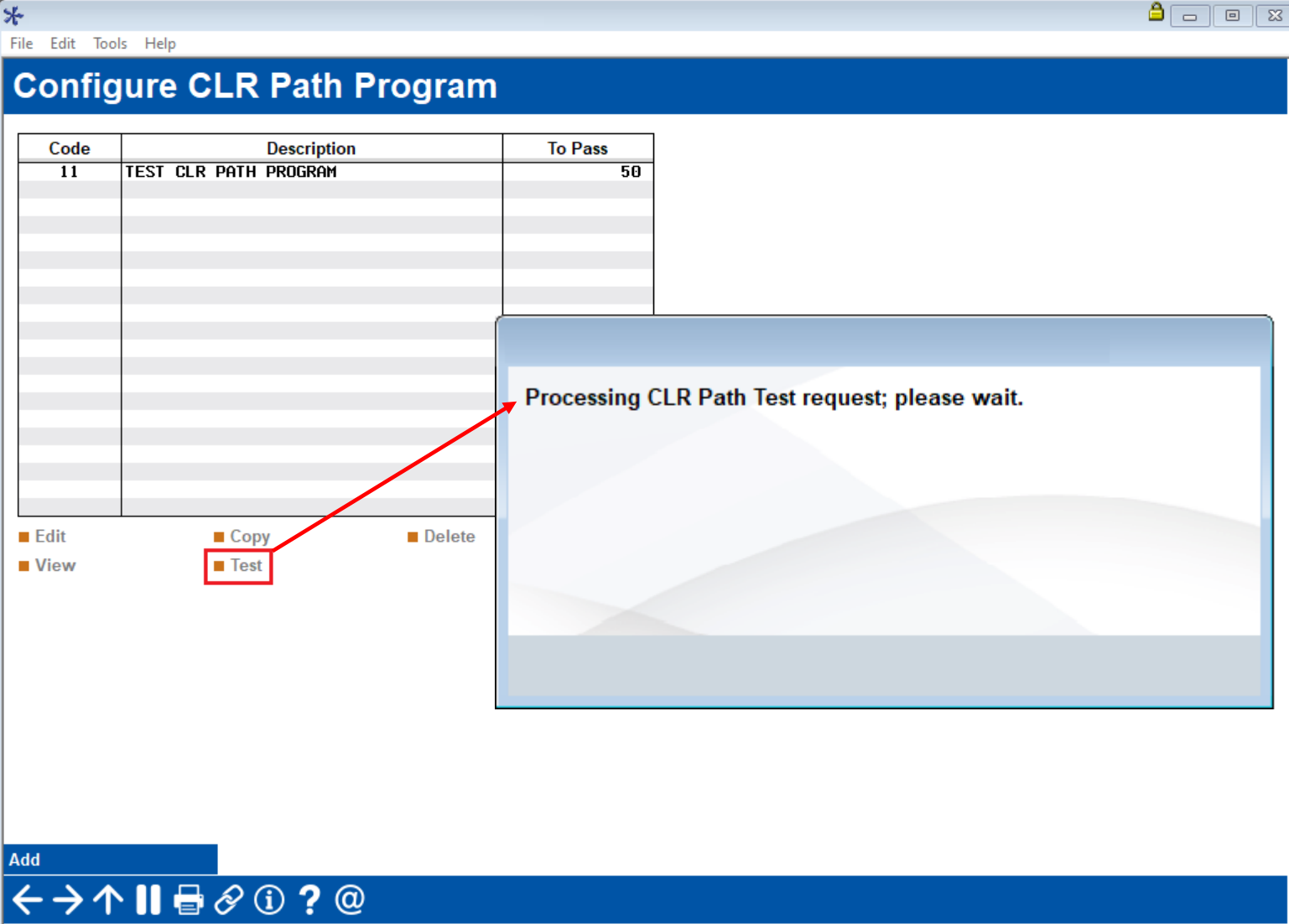
Select **Select**

Navigation icons: < > ↑ ↓ || ⏮ ⏭ ⏯ ? @

Run a Batch of Members or Your Entire Membership Against CLR Path Advisor

- * **Tool # 1110** – Configure CLR Path Criteria

- * New Action Key 'Test' will allow you to run CLR Path against all members
- * Will not save score on members account
- * Provides break down of members who passed (next side)



The screenshot shows a software window titled "Configure CLR Path Program". It contains a table with the following data:

Code	Description	To Pass
11	TEST CLR PATH PROGRAM	50

Below the table are several action buttons: "Edit", "View", "Copy", "Test", and "Delete". The "Test" button is highlighted with a red box. A red arrow points from this button to a modal dialog box that displays the text: "Processing CLR Path Test request; please wait." The dialog box has a light blue header and a white body with a faint background image. At the bottom of the main window, there is a blue bar with an "Add" button and a series of navigation icons (back, forward, up, down, pause, print, link, info, help, and search).

Run a Batch of Members or Your Entire Membership Against CLR Path Advisor

* Tool # 1110 – Configure CLR Path Criteria

- * Statistics Screen will show a breakdown of how many members pass/fail
- * Easily export list of passing members

File Edit Tools Help

CLR Path Test Run Statistics

Program TEST CLR PATH PROGRAM
Minimum score to pass 50

Failed Members			Passed Members		
Score Range	# of Members	% of Members	Score Range	# of Members	% of Members
0-10		0.00 %	50-60	959	13.05 %
11-21		0.00 %	61-71		0.00 %
22-32		0.00 %	72-82		0.00 %
33-43	6,388	86.94 %	83-93		0.00 %
44-49		0.00 %	94+		0.00 %
Total # of members 7,347					
# of members passed 959					
# of members failed 6,388					
% of members passed 13.05 %					
% of members failed 86.94 %					

Export member account numbers to file name TEST XPORT
☒ Export immediately

File will be stored in your credit union's QUERYxx library (where xx is your 2-character CUID).

Export Passed Members

Run a Batch of Members or Your Entire Membership Against CLR Path Advisor

- * **Tool # 1029** – Run CLR Path Decision Advisor
- * Run a group of members through a CLR Path Program
- * Must have member account number as first record in file
- * Export list of passing members


# of accounts in input file	959
# of accounts with passing score to output file	563



File Edit Tools Help

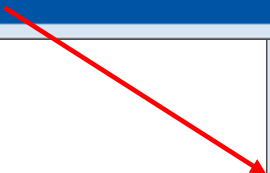
Run CLR Path Decision Advisor Scoring

Use Accounts from File name (Must reside in QUERYxx)

Run through CLR Path Program  TEST CLR PATH PROGRAM

Output only Account Bases with a passing score or higher to file name (to QUERYxx)

Process



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FUEL Decision Performance Report

- * **Tool # 1028** – FUEL Decision Performance Report

- * Monitor loan applications that were run through the FUEL decision model

The screenshot shows the 'FUEL Decision Performance Report' tool interface. The main window has a menu bar (File, Edit, Tools, Help) and a title bar. The main content area is divided into two sections: 'Report Options' and 'Response'. The 'Report Options' section includes fields for 'Request date range' (Jul 01, 2023 to Jul 31, 2023), 'Decision code' (All, Pass, Review, No decision), 'Include in report' (Applications, Loans, Both), and checkboxes for 'List non-members separately' and 'Export to file'. The 'Response' section includes a 'Job queue' checkbox, 'Copies' (1), and 'Printer' (P1). A red arrow points from the 'Export to file' checkbox to the 'Exporting data' field in a separate window below. This window also has a title bar and a menu bar. It contains the text 'Exporting data' and a description: 'File will be stored in your credit union's QUERYxx library (where xx is your 2-character CUID)'. At the bottom of this window is a blue bar with icons for navigation and help. Below the main window is a 'Retrieve Settings' and 'Save Settings' button bar, followed by another blue bar with icons for navigation and help.

File Edit Tools Help

FUEL Decision Performance Report

Report Options

Request date range: Jul 01, 2023 to Jul 31, 2023 [MMDDYYYY]

Decision code: ☒ All ☐ Pass ☐ Review ☐ No decision

Include in report: ☐ Applications ☐ Loans ☒ Both

☐ List non-members separately

☐ Export to file

Response

☒ Job queue

Copies: 1

Printer: P1

Exporting data

File will be stored in your credit union's QUERYxx library (where xx is your 2-character CUID)

Retrieve Settings

Save Settings

FUEL Decision Performance Report

* **Tool # 1028** – FUEL
Decision
Performance Report

- * Provides a break down of applications and decision information

8/14/23 10:43:31 RUN ON 8/14/23			FUEL Decision Performance Report 5/01/2023 to 5/31/2023			LFUELDPROP		PAGE 1 USER NICHOLAS	
DECISION CODE EP ER EF LOAN APPLICATION									
ACCOUNT BASE	LOAN APP #	CREDIT REPORT #	DECISION INFORMATION	DECISION CODE	CREDIT SCORE	REQUEST DATE			
			P - Number of 30 Day Late Payments <= None - value: 0.0 0.0	ER		5/11/2023			
			P - Number of 60 Day Late Payments <= None - value: 0.0 0.0	ER		5/11/2023			
			P - Number of 90 Day Late Payments <= None - value: 0.0 0.0	ER		5/11/2023			
			P - Number of Foreclosures <= None - value: 0.0 0.0	ER		5/11/2023			
			P - Number of Bankruptcies <= None - value: 0.0 0.0	ER		5/11/2023			
			P - Number of Inquiries <= 10.0 - value: 1.0 1.0	ER		5/11/2023			
			P - Number of Public Records <= None - value: 0.0 0.0	ER		5/11/2023			
			P - Number of Repossessions <= None - value: 0.0 0.0	ER		5/11/2023			
			P - Collection Balance <= 1000.0 - value: 0.0	ER		5/11/2023			
			P - Charge off Balance <= None - value: 0.0	ER		5/11/2023			
			P - Applicant Age >= 18.0 - value: 53.0 48.0	ER		5/11/2023			
			P - Currently Self Employed = None - value: 0.0 0.0	ER		5/11/2023			
			N - Months at Current Residence >= 12.0 - No time at current	ER		5/11/2023			
			P - Months at Current Job >= 12.0 - value: 24.0 0.0	ER		5/11/2023			
			P - Gross Income >= 2000.0 - value: 3501.0 0.0	ER		5/11/2023			
			P - Ofac Hit = None - value: 0.0 0.0	ER		5/11/2023			
			P - Debt to Income <= 47.0 - value: 23.19	ER		5/11/2023			
			P - Mla Match = None - value: 0.0 0.0	ER		5/11/2023			

Credit Report and Risk Assessment for Non-Members

- * **Tool # 997** – Work With Non-Member Database
 - * Addition of Qualifile Risk Assessment and Credit Report
 - * Simplified process to assess risk for Non-Members.
 - * Easily check credit

Non-Member Information CHANGE

Name (FML) ☐ MEMBER ☐ Name ID Corp ID SSN

Birth date [MMDDYYYY] Date of death [MMDDYYYY]

☐ Allow teller transactions ☐ Foreign citizen Gender ☒ Female ☐ Male ☐ Other

☐ Deny membership Denial reason Denial date [MMDDYYYY]

Current Address		Previous Address	
Address	<input type="text" value="1234 TEST ST"/> <input type="checkbox"/> Wrong address	Address	<input type="text"/>
City	<input type="text" value="FANTASY ISLAND"/> State <input type="text" value="MI"/> ZIP <input type="text" value="44444"/>	City	<input type="text"/> State <input type="text"/> ZIP <input type="text"/>
County	<input type="text"/> <input type="checkbox"/> Foreign address <input checked="" type="checkbox"/> Certify address		
Moved	<input type="text" value="00000000"/> [MMDDYYYY]	Moved	<input type="text" value="Nov 01, 2021"/> [MMDDYYYY]
Own/rent	<input type="radio"/> Own <input type="radio"/> Rent	Own/rent	<input type="radio"/> Own <input type="radio"/> Rent
Landlord	<input type="text"/> Landlord phone <input type="text"/>	Landlord	<input type="text"/> Landlord phone <input type="text"/>

Contact Numbers	Ext	Label	Comments
1. <input type="text" value="6161112222"/>	<input type="text"/>	<input type="text" value="HOME"/> <input type="checkbox"/>	<input type="text"/>
2. <input type="text"/>	<input type="text"/>	<input type="text"/> <input type="checkbox"/>	<input type="text"/>

☐ International ☐ Text messages ☐ Wrong # ☐ Mobile ☐ Daytime # ☒ Nighttime #

☐ International ☐ Text messages ☐ Wrong # ☐ Mobile ☐ Daytime # ☐ Nighttime #

Sort field (user-defined) Letter code Department/sponsor #

DBA name Marital status ☐ Married ☐ Separated ☐ Unmarried

License #/State ☐ Photo ID on file

Delete	Organization	Risk Assessment	Verify Name	Blocked Persons	Non-member Notes
More Contact #s	Envelope	Credit Report			

Navigation icons: back, forward, up, down, print, link, info, help, search

Flex Loan Enhancement Limit the Number of Modifications in a Specified Period

- * **Tool # 458** – Loan Category Configuration
 - * Limit loan modifications by a specific number of months
 - * Will provide member a message in online banking advising them the account is not eligible

File Edit Tools Help

Loan Modification Parameters

CHANGE

Category KN TEST CATEGORY

☒ Loan modification requests allowed in online banking

☒ Block if modification made in last 12 months

☐ Allow auto-approvals (process modification if qualifications are met)

Minimum payment change amount \$ 100.00

Maximum payment change amount \$ 250.00

Minimum # of payments after modification 1 months

Maximum # of payments after modification 12 months

☐ Charge fee

Exclude from auto-approval/pre-qualification (Y/N)

☒ Delinquent 1 days or more

☐ Delinquent 0 times or more over life of loan

< Modify Your Loan Payment

We're sorry, this loan is not eligible for online modifications to the loan's term or payment amount. However, if you are having trouble making your loan payment, please contact the credit union department and we'll be happy to talk about your options.

Last maintained by

Continue

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Mini-Contract Rate Change Improvements

- * **Tool # 935** – Variable Rate Code Configuration

- * Improving existing loan options given current environments
- * Currently no change occurs if:
 - * The rate will exceed the cap (Per, Annual, or Lifetime)
 - * The rate starts outside the lifetime limits
- * Now,
 - * If a rate change exceeds a cap, it will adjust to meet the cap
 - * If a rate starts below/above a ceiling/floor cap, it will continue to change towards these limits

The screenshot shows a software window titled "Update Mini-Contract/Group Var Rate Loan Terms" with a menu bar (File, Edit, Tools, Help) and a toolbar. The main form contains the following fields and sections:

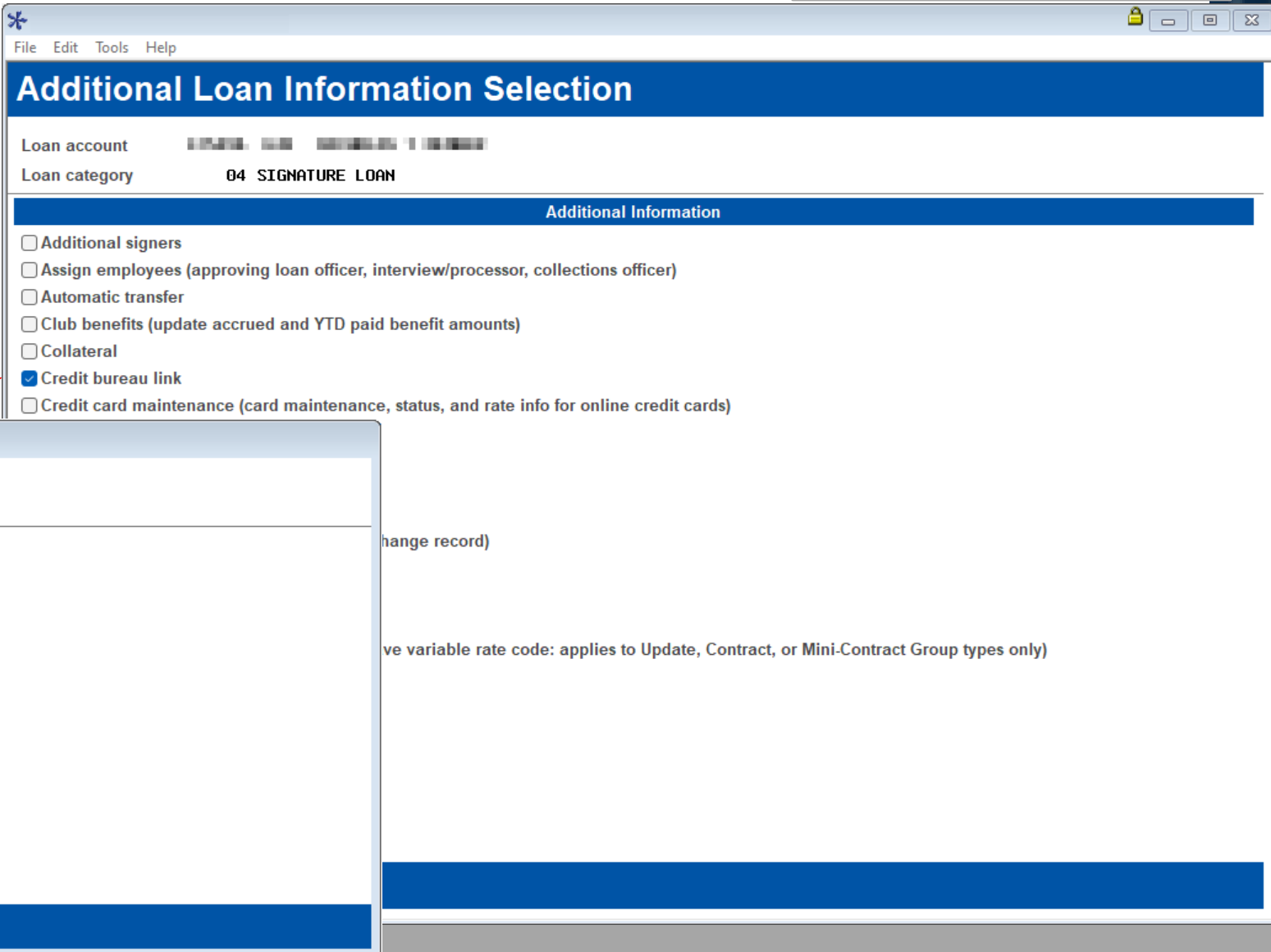
- Loan account #**: 111111111111 TIMMY LOANMEMBER
- Loan category**: [Dropdown menu]
- Variable rate code**: 070 TEST MINI
- Original loan rate**: 8.250
- Rate as of January of current year**: 8.250
- First change effective date**: Aug 16, 2023 [Calendar icon] [MMDDYYYY]

Change Caps	Max Increase	Max Decrease
Per change caps	2.000	2.000
Annual change caps	4.000	6.000
Lifetime change caps	11.750	8.000
Calculated ceiling/floor caps	20.000	0.250

At the bottom left, there are three buttons: "Save/Continue", "Calculate Ceiling/Floor", and "Unlock Original Rate". At the bottom right, there is a toolbar with icons for navigation (back, forward, up, down, stop), printing, linking, information, help, and a search icon.

Allowing VantageScore Flag to be Changed Via Credit Score Maintenance

- * Tool # 51 – Miscellaneous Loan Maintenance
 - * New! Indicator shows if the Credit Score is a VantageScore
 - * When marked as VantageScore will show in online banking if configured



The screenshot shows a software window titled "Additional Loan Information Selection". It has a menu bar with "File", "Edit", "Tools", and "Help". Below the title bar, there's a section for "Loan account" and "Loan category" (04 SIGNATURE LOAN). A blue header bar contains the text "Additional Information". Below this, there's a list of checkboxes: "Additional signers", "Assign employees (approving loan officer, interview/processor, collections officer)", "Automatic transfer", "Club benefits (update accrued and YTD paid benefit amounts)", "Collateral", "Credit bureau link" (which is checked), and "Credit card maintenance (card maintenance, status, and rate info for online credit cards)". A red arrow points from the "Credit bureau link" checkbox to the "Score mode" section in the bottom window.

The bottom window is a form for "Loan account" and "Loan category" (04 SIGNATURE LOAN). It contains the following fields:

- Credit report #: 0000000 (Use 0000000 if not on-line report)
- CU risk level: 1
- Bureau: None Specified (dropdown)
- Report date: Aug 03, 2023 (calendar icon) [MMDDYYYY]
- Credit score: 0700
- MDS score: 0000
- Score mode: ☒ Vantage ☐ Other

At the bottom of the form, there are three buttons: "Update", "View Credit Report", and "Continue". Below the buttons is a navigation bar with icons for back, forward, up, down, print, link, info, help, and search.

Collections Summary Dashboard NCUA Delinquency Term Enhancements

* **Tool # 229** – Collections Dashboard/Summary

- * Collections Summary Dashboard Terms now broken out to match NCUA day ranges
 - * 60 – 179 day range is now broken out into 60 – 89 and 90 – 179 day ranges
- * New “Toggle Totals” button to change between Total Reportable and Total all for the last column

File Edit Tools Help

Collections Summary

Amounts: All Collections

Branch **99** (99 = All) Loan balances to include ☒ All ☐ CU owned portion ☐ Investor owned portion

Summary Yesterday Last Week Last Month

Yesterday **Jul 07, 2023** [MMDDYYYY]

Category	1 to 29 Days	30 to 59 Days	60 to 89 Days	90 to 179 Days	180 to 359 Days	360 Days & Over	Total Reportable
Delinquent loans	164,418,166	20,304,167	5,649,838	0	795,074	386,320	6,831,232
Negative balances	687,225	109,832	61,162	0	14,438	41,755	117,355
Overline accounts	8,616,123	0	0	0	0	0	0
Written off loans	342,683	794,349	10,159,341	0	17,405,690	5,989,073	33,554,104

Last week **Jul 01, 2023** [MMDDYYYY]

Category	1 to 29 Days	30 to 59 Days	60 to 89 Days	90 to 179 Days	180 to 359 Days	360 Days & Over	Total Reportable
Delinquent loans	32,341,232	22,268,346	6,218,026	0	553,750	386,320	7,158,096
Negative balances	558,805	120,758	59,926	0	14,130	42,055	116,111
Overline accounts	10,474,280	0	0	0	0	0	0
Written off loans	342,818	794,854	10,174,970	0	17,410,428	5,994,648	33,580,046

Last month **Jun 30, 2023** [MMDDYYYY]

Category	1 to 29 Days	30 to 59 Days	60 to 89 Days	90 to 179 Days	180 to 359 Days	360 Days & Over	Total Reportable
Delinquent loans	58,366,035	6,486,871	7,068,217	0	625,793	386,320	8,080,330
Negative balances	656,086	132,227	57,147	0	14,285	42,179	113,611
Overline accounts	3,368,577	0	0	0	0	0	0
Written off loans	342,818	794,854	10,180,106	0	17,416,494	5,995,421	33,592,021

Clear Filter	Category	Collector	Dealer	Memo Summary	Toggle Accounts/Amts
Export	Business Unit	Web Version	Power Line	Toggle Totals	

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CU^{*}ANSWERS
A CREDIT UNION SERVICE ORGANIZATION

- | Preview Escrow Analysis | | | | | | | | | | |
|--------------------------|----------------|--------------------------------|---|---------------|----------|----------------------|------------------|--------------|-----------|---|
| Account base | | <input type="text" value="0"/> | <input type="checkbox"/> Show exceptions only | | | | | | | |
| Print | Last Name | Escrow Account | Loan | Last Analysis | Balance | Overage/
Shortage | Old Loan Payment | Next Payment | Exception | * |
| <input type="checkbox"/> | SEFTON | 2437-039 | 790 | 2/23/2023 | 431.91 | 953.83- | 1,173.20 | 9/01/2023 | P | |
| <input type="checkbox"/> | YORK | 2897-039 | 705 | 3/09/2023 | 539.03 | 738.70- | 2,195.54 | 8/01/2023 | | |
| <input type="checkbox"/> | TAYLOR | 4365-034 | 712 | 3/21/2023 | 1,630.68 | 47.44- | 816.65 | 8/03/2023 | | |
| <input type="checkbox"/> | SCHMUNK | 4421-038 | 790 | 3/28/2023 | 1,822.51 | 57.17- | 1,127.01 | 8/01/2023 | | |
| <input type="checkbox"/> | RODAMMER | 5412-043 | 712 | 3/21/2023 | 4,672.24 | | 1,628.20 | 8/01/2023 | | |
| <input type="checkbox"/> | KNOLL | 9162-039 | 712 | 2/23/2023 | 2,468.12 | | 924.70 | 8/01/2023 | | |
| <input type="checkbox"/> | ENGELHARDT | 9930-039 | 712 | 2/23/2023 | 2,261.75 | 322.92- | 540.97 | 9/01/2023 | P | |
| <input type="checkbox"/> | AMEND | 11467-034 | 712 | 2/23/2023 | 1,162.84 | 423.41- | 726.12 | 7/01/2023 | D | |
| <input type="checkbox"/> | BERGMAN | 15255-034 | 712 | 2/23/2023 | 588.98 | 142.45- | 472.48 | 7/01/2023 | D | |
| <input type="checkbox"/> | DONIGAN | 15538-037 | 790 | 3/28/2023 | 2,174.14 | 395.31- | 898.41 | 9/01/2023 | P | |
| <input type="checkbox"/> | DENTON | 16413-039 | 712 | | 58.30 | 341.70 | 1,921.63 | 6/01/2023 | S | |
| <input type="checkbox"/> | BAKER | 16969-039 | 712 | 2/23/2023 | 2,296.25 | 195.04- | 1,071.82 | 8/01/2023 | | |
| <input type="checkbox"/> | SMITH | 17096-039 | 712 | 2/23/2023 | 1,315.63 | | 676.15 | 8/01/2023 | | |
| <input type="checkbox"/> | REINBOLD-HEALY | 17151-039 | 712 | | 1,688.64 | .11 | 1,119.12 | 8/01/2023 | | |
| <input type="checkbox"/> | COMPTON | 17380-039 | 712 | 3/30/2023 | 5.73- | 2,035.04- | 1,381.89 | 6/01/2023 | D | |
| <input type="checkbox"/> | BENKO | 17926-039 | 712 | 3/07/2023 | 2,549.78 | | 1,140.76 | 8/01/2023 | | |
| <input type="checkbox"/> | RIVARD | 20435-037 | 790 | 3/28/2023 | 2,129.07 | 248.12- | 1,019.81 | 8/01/2023 | | |
| <input type="checkbox"/> | ESTERLINE | 20568-034 | 712 | 2/23/2023 | 1,386.84 | .15 | 499.76 | 8/01/2023 | | |
| <input type="checkbox"/> | MAINPRIZE | 21095-034 | 712 | 2/23/2023 | 446.55 | 52.85- | 427.17 | 7/01/2023 | D | |
| <input type="checkbox"/> | CEDERBERG | 21346-043 | 712 | 2/23/2023 | 4,359.21 | 607.80- | 1,949.90 | 8/01/2023 | | |

☒ Exclude record
 ☒ View history
 ☒ View projection
 ☒ Member inquiry
 ☒ View Escrow record

i Exception codes: S - Suspended, P - Paid ahead, D - Delinquent, L - Loan not found
 Asterisk indicates future date condition where the due date on the escrow record exceeds the Escrow Analysis Projection

Refresh	Export	Toggle Payment Amount	Print Selected	Print All
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Miscellaneous Updates

- * On demand Loan Statement Notices generated via Tool #659 have made a warranty adjustment to Home Equity Statements to support letterhead printing.

Lending



* Questions?

Xpress Teller/Teller



- * Vertical Receipts Enhancements
- * Hide Drawer Amount in Xpress Teller
- * Buy and Sell from Vault in Xpress Teller
- * Configurable Contact Enhancement
- * Enhancements to Cash Inventory Features for Teller and Vault
- * Member Inquiry now shows Escrow Analysis Adjustment Amount

Vertical Receipts Now Support Additional Receipt Types

- * **Tool # 326** – CU Hardware Configuration
 - * Consolidated Print flag controls into two new flags
 - * Produce receipt via Teller posting
 - * Default for printing receipts via other posting tools
 - * New! When flagged adds a new flagged print option to the following screens.
 - * Tool 30/492 – Member account Adjustment (Coded and Full)
 - * Tool 31 – Reverse Tran/Adjust Drawer (Vertical Only)
 - * Tool 50 – Disburse Member Loan Funds
 - * Tool 353 – Effective-Date Account Adjustment
 - * Phone Op: SB Transfer (Vertical Only)

Device Configuration

Terminal ID #ACUA

Description ☐ Use TCD/TCR ☐ Teller check capture device attached

Type Branch #

Default Printer IDs

General printer ☐ Prompt

Checks/money orders

Receipts

Custom loan forms

Loan app/denial

Posting/Receipt Information

Name ID verification

☐ Always ask for employee ID in teller

Time zone

☒ Daylight savings

☒ Produce report for bulk cash transfer

Receipt Options

☒ Produce receipt via teller posting (any transaction type)

☒ Default for printing receipts via other posting tools

Receipt Options (Horizontal Receipts Only)

Receipt form type Maximum transactions per receipt ☐ Sheet feed ☐ Prompt

☐ Certificate creation ☐ Direct/Mail batch deposits ☐ On-demand dividend payments (CDs) ☐ On-demand dividend payments (savings)

☐ Stop payment orders

Delete

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Vertical Receipts Now Support Additional Receipt Types

- * **Tool # 326** – CU Hardware Configuration
 - * New! Receipt printing functionality
 - * Phone Op: SB Transfer (Vertical Only)
 - * Reinstated functionality
 - * Tool 31 – Reverse Tran/Adjust Drawer (Vertical Only)

The screenshot displays two windows from the CU*ANSWERS software. The top window is titled "Shared Branch Phone Transfer" with the subtitle "Getting Funds FROM a SB Credit Union". It features a "Print receipt" checkbox (checked) highlighted with a red box. Below this are fields for "Select Account to Transfer FROM" (Credit union ID, Account #, First 3 characters of last name) and "Select Account to Transfer TO" (Account #). The "Transaction Information" section shows a "Transfer amount" of 0.00 and a "Primary description" of "SB PHONE TRANSFER".

The bottom window is titled "Account Transaction Reversal". It shows an "Account #" field. Below is a table with transaction details:

Date	Origin	Type	Amount	(not used)	Description	Transfer Account	ID
Aug 22, 2023	01	11	0.01		REG SAVING DEPOSIT		92

Below the table, there is a "Print receipt" checkbox (checked) highlighted with a red box. To its right is the "Reversal transaction description" field with the value "REV. REG SAVING DEPO".

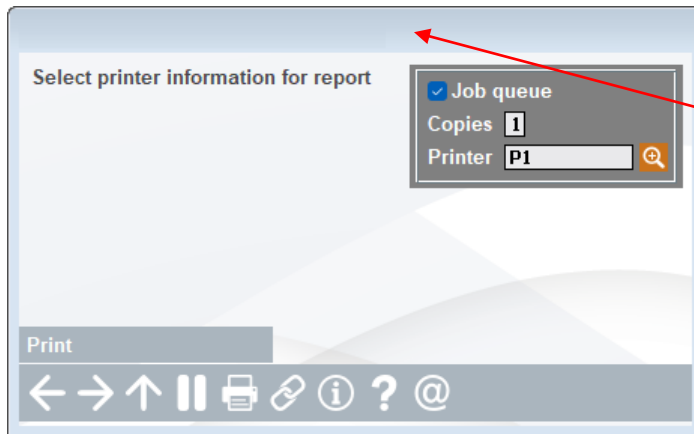
At the bottom, there is a table titled "Reversal Transaction Determined As" with columns "G/L Accounts Affected" and "Effect on Account Balance".

Reversal Transaction Determined As		G/L Accounts Affected	Effect on Account Balance
Code 15	Type 92 DEBIT BALANCE ONLY	Debit 901.00	Current balance 9.99-
		Credit 739.00	Reversal amount 0.01-
			Adjusted balance 10.00-

Printer Selection for Bulk Transfers

* Tool # 326 – CU Hardware Configuration

- * New! When Produce Report for bulk cash transfers is selected this printer selection box will appear in Tool #32 when processing cash transfers.



Device Configuration

Terminal ID #ACUA

Description ☐ Use TCD/TCR ☐ Teller check capture device attached

Type Branch #

Default Printer IDs

General printer	<input type="text" value="P1"/>	SYSTEM PRINTER
Checks/money orders	<input type="text" value="P1"/>	SYSTEM PRINTER
Receipts	<input type="text" value="P1"/>	SYSTEM PRINTER
Custom loan forms	<input type="text" value="P1"/>	SYSTEM PRINTER
Loan app/denial	<input type="text" value="P1"/>	SYSTEM PRINTER

☐ Prompt

Posting/Receipt Information

Name ID verification

☐ Always ask for employee ID in teller

Time zone

☒ Daylight savings

☒ Produce report for bulk cash transfer

Receipt Options

☒ Produce receipt via teller posting (any transaction type)

☒ Default for printing receipts via other posting tools

Delete

Navigation icons: back, forward, up, down, print, link, info, help, search

Hide Cash in Drawer Amount and New Teller Vault Cash Transfer Features

* **Tool # 1775** – Workflow Controls: Xpress Teller

- * You now have the option to hide cash in drawer on the search screen
- * You can enable/disable the option to buy/sell from the supplemental vault or from the teller drawer

File Edit Tools Help

Xpress Teller Workflow Controls

Account Search Features

Corp 1 Branch 1

- ☒ Display CU-defined images until a search is performed
- ☒ Show Return to Last Account shortcut button
- ☐ Find base accounts only (no sub-accounts)
- ☒ Display warning (fraud alert) if other transaction(s) occurred within past today only calendar days
- ☒ Allow teller to perform advanced search
- ☒ Hide Cash in Drawer on search screen

For transactions originated via: ☒ Teller posting (01) ☒ PIN-based ATM/debit (13) ☒ Phone Op (15) ☒ ARU/Online banking (96)

Defaults for Searches

Default setting for name searches Both

Where to look when performing other searches (shown in alphabetic order)

- ☐ Account #
- ☐ ATM/Debit/Credit card #
- ☐ DBA name
- ☐ Driver's license
- ☐ Email address
- ☒ Employee #
- ☒ Reference
- ☒ SSN/TIN
- ☒ Online banking username
- ☒ OTB account #
- ☒ Phone #

Columns for Search Results

- ☒ Name
- ☒ SSN/TIN
- ☒ Relationship
- ☒ Account #
- ☒ Account type
- ☒ Primary name on account

Allow Access To Other Member Service Tools

- ☒ Open accounts
- ☒ Close accounts
- ☒ Comments
- ☒ Drawer control/Audit
- ☒ Device/Workstations config
- ☒ Edit secondary tran descriptions
- ☒ Rate inquiry
- ☒ Transfers
- ☒ Buy/Sell from supplemental vault
- ☒ Buy/Sell from teller drawer

Navigation icons: back, forward, up, down, print, link, info, help, search

Hide Cash in Drawer Amount and New Teller Vault Cash Transfer Features

* Tool # 1600 – Xpress Teller

- * Based on your selection, you have the ability to hide the cash in drawer information at the top of Xpress teller
 - * This will be useful for credit unions that may share the screen with the member
- * The Additional Member services menu will now have the new options to buy/sell from the teller drawer or from the supplemental vault, if selected

The screenshot displays the XpressTeller application window. At the top, the title bar shows 'File Edit Tools Help'. The main header area includes the 'XpressTeller' logo and a status message: 'You are activated as drawer [icon]...'. Below this, there are input fields for 'Account #' and 'Shared Branch CU ID', both with search icons. A 'Find a name' field is followed by an 'Include' dropdown set to 'Both' and a 'Find other' field. An 'Advanced' button with a refresh icon is on the right. A red arrow points from the 'Cash in Drawer' label in the menu to a red-bordered box containing the text 'Cash in Drawer: \$6,505.00'. The central menu lists several options: 'Comments', 'Device Configuration', 'Transfer', 'Edit 2nd Tran Description', 'Sell To Supplemental Vault', 'Buy From Supplemental Vault', 'Buy/Sell From Teller Drawer', 'Open Accounts', 'Close Accounts', 'Rates', 'Drawer Control/Audit', and 'Additional Member Services' with a dropdown arrow. The last three items are enclosed in a red box. The bottom of the window features a navigation bar with icons for back, forward, up, down, print, link, info, help, and search.

Configurable Contact Preferences to Better Meet Member Needs

- * **Tool # 1038** – Configure Contact Preferences
 - * Existing preferences will not change on release
 - * Can now add or change contact preferences for CU specific reasons
 - * The new verbiage will show in Inquiry, Phone, Teller and Transfer screens
 - * New options will also show in online banking for members to choose

Code	Description
EM	Email
MU	Come knock on my door
NP	No Preference Selected
OB	Online Banking Message
PH	Phone
SP	Spanish speaking

■ Edit ■ Delete ↑ ↓

Add

Code

Contact description

← → ↑ ↓ ⏻ ⏶ ⓘ ? @

← → ↑ ↓ ⏻ ⏶ ⓘ ? @

Configurable Contact Preferences to Better Meet Member Needs

- * **Tool # 1038** – Configure Contact Preferences

- * New verbiage will show in Inquiry, Phone, Teller and Transfer screens
- * New option will also show in online banking for member update

Individual Account

SSN/TIN 385-55-5555
Birthdate Jan 01, 1950

Name **GEORGE T TESTER**

Account # 118 Name ID TE Corp ID 01

VIP-PLATINUM member with 365 points! (click for more info)

Member Data

Marital status Unmarried Sponsor
Full middle name Branch/Loc 22
Reference 500658 Reason code 00
Employee # 0000000000
Preferred contact method **Come knock on my door**
☒ 3rd-party opt out ☒ CU contact opt out

Mother's maiden name: MOM
Driver's license: T

Typ	Description	Loan Payoff/ Current Balance	Loan Payment Net Available	Next Pmt/ Last Trans/ CD Maturity	IRA	P/R	ATM Go!	AFT Go!	FRZ	TRK Go!	ACH Go!	ODP	BOX Go!	J/O
000	REGULAR SAVINGS	1,596.27	0.00	8/16/2023	.	.	.	.	1	Y	.	.	.	Y
		49,845.42	49,845.42	8/04/2023	Y	.	.	.	0	.	.	.	.	Y
		76,450.16	76,450.16	8/03/2023	.	.	.	.	0	.	.	.	.	Y
		6,588.66	0.00	8/03/2023	.	.	.	Y	1	.	Y	Y	.	Y
		4,000.00	4,000.00	7/25/2023	.	.	.	.	0	.	.	.	.	Y
		100,000.00	0.00	8/10/2023	.	.	.	.	0	.	.	.	.	Y
		101,408.20	1,408.20	12/14/2023	.	.	.	.	0	.	.	.	.	Y
		1,813.00	0.00	3/03/2024	Y	.	.	.	0	.	.	.	.	Y
		760.00	0.00	11/03/2023	Y	.	.	.	0	.	.	.	.	Y
		850.25	0.00	9/03/2024	Y	.	.	.	0	.	.	.	.	Y

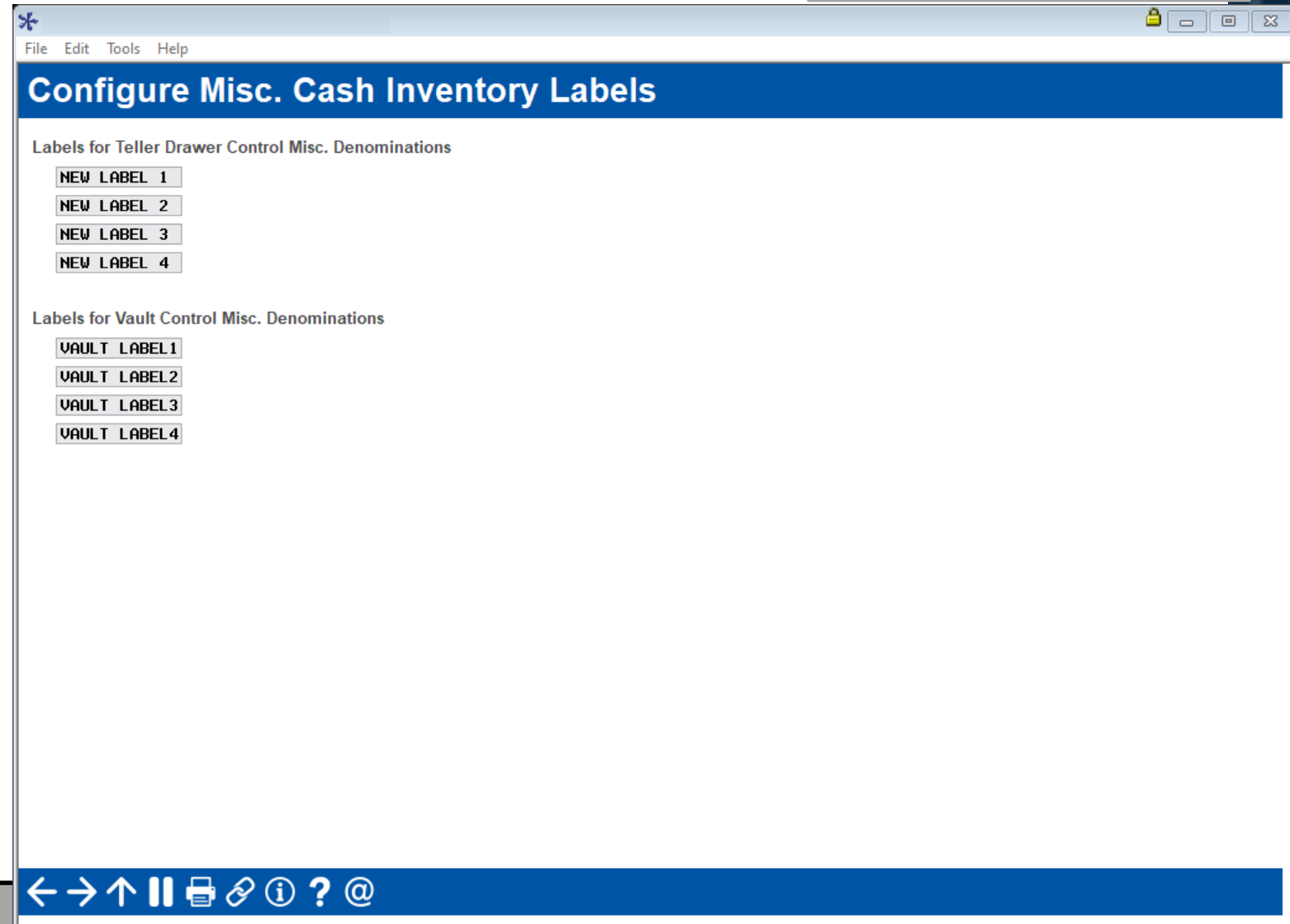
Select Account type desired 000

Scan e-Document Imaging Solutions Log!

View e-Document

Enhancements to Cash Inventory Features for Teller Drawer & Vault Control

- * **Tool # 1034** – Configure Misc. Cash Inventory Labels
 - * Now Available! Configure custom names for the teller drawer misc. denominations
 - * Also, configure custom names for the vault control misc. denominations
 - * Vault Control will now have four Misc. labels instead of just one



Enhancements to Cash Inventory Features for Teller Drawer & Vault Control

- * **Tool # 33** – Teller Drawer Control/Inquiry
 - * Will now display the new configurable teller miscellaneous labels

File

Edit

Tools

Help

Teller Control

Vault 01

Employee ID 92

CU*ANSWERS PROGRAMMING SUPPORT

Beginning cash

0.00

Cash in drawer

17,428.03

Vaults to teller

+

0.00

Checks in drawer

26,452.00

Teller to vaults

-

0.00

Inhouse drafts

0.00

Teller to teller

-

0.00

Total drawer balance

43,880.03

TCD/TCR +/- members

+

0.00

Cash +/- member

+

28,759.35

Wdr/disb from accounts

-

11,331.32

Cash in drawer

17,428.03

Cash in drawer

17,428.03

Cash over (+)

0.00

Cash short (-)

0.00

Adj closing cash

17,428.03

Cash inventory as of Jul 10, 2023 [MMDDYY] Enter Amounts

Coins

Rolled

Loose

Bills

Total

Pennies

0.00

0.00

Ones

0.00

Subtotal

0.00

Nickels

0.00

0.00

Fives

0.00

NEW LABEL 1

0.00

Dimes

0.00

0.00

Tens

0.00

NEW LABEL 2

0.00

Quarters

0.00

0.00

Twenties

0.00

NEW LABEL 3

0.00

Half dlr

0.00

0.00

Fifties

0.00

NEW LABEL 4

0.00

Dollars

0.00

0.00

Hundreds

0.00

Total cash

0.00

Subtotal

0.00

0.00

Subtotal

0.00

Net (Adj cash - inv)

17,428.03-

Activate

Close

Audit

Clear

Save Inventory

Quantity

Cash Xfers Inq

Device Config

Change Vault

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Enhancements to Cash Inventory Features for Teller Drawer & Vault Control

- * **Tool # 35** – Branch Vault Control
 - * Increased the Misc. Vault labels to have four labels for the vault control
 - * Will now show the new configured labels

Branch Vault Control

Vault # 01Description

Beginning of Day		Change Fund Daily Activity	
Teller's cash	+ 0.00	+/- Bank	+ 99,890.00
Vault cash	+ 1,545,913.00	+/- Supplemental vaults	- 9,300.00
Change fund	= 1,545,913.00	TCD disp to members	+ .00
		Outside checks	- 30,888.64
End of Day		Cash disbursed	- 411,182.71
Teller's cash	+ 21,186.03	In-house drafts	- 6,718.53
Vault cash	+ 1,632,905.00	Cash short	- .00
Change fund	= 1,654,091.03	Receipts	+ 466,377.91
		Cash over	+ .00

Cash Inventory as of Jul 06, 2023 [MMDDYY]

Coins	Rolled	Loose	Bills	Balance
Pennies	0.00	0.00	Ones 3,600.00	Sub total 1,085,600.00
Nickels	0.00	0.00	Fives 15,000.00	VAULT LABEL1 460,313.00
Dimes	0.00	0.00	Tens 2,000.00	VAULT LABEL2 0.00
Quarters	0.00	0.00	Twenties 490,000.00	VAULT LABEL3 0.00
Half dollars	0.00	0.00	Fifties 545,000.00	VAULT LABEL4 0.00
Dollars	0.00	0.00	Hundreds 30,000.00	Total cash 1,545,913.00
Sub total	0.00	0.00	Sub total 1,085,600.00	Net 439,126.97

Escrow Inquiry Enhancements

- * Escrow inquiry will now display any escrow analysis shortage

The screenshot displays the 'Member Account Inquiry' window. On the left is a sidebar menu with options: New Account, New Account Type, Dividend Calculator, NSF, Secured Funds, Escrow Detail, Additional Signer, Payroll, and Tracker Review. The main area shows account information for MARY L SMITH, Account # 037, ESCROW FANNIE MAE. It includes fields for Date opened (Oct 12, 2010), G/L account (901.64-22), Current balance (1,821.82), and various sub-balances. A red box highlights the 'Escrow analysis amortized shortage amount' as 25.70. Below this is a 'Dividend Information' table showing quarterly and total accrued amounts. At the bottom right, there is a 'Transaction inquiry date' field set to Aug 11, 2023.

Member Account Inquiry				
MSR 32	Account #	MARY L SMITH	Date opened	Oct 12, 2010
Loan 192-790	Account type	037 ESCROW FANNIE MAE	G/L account	901.64-22
# of withdrawals 0	Current balance	1,821.82	Annual b/u withholding	0.00
# of transfers	- secured	0.00	Period average balance	1,554.71
Frozen 1 W/D	- uncollected	0.00	Period minimum balance	1,236.20
Passbook NO	= Net available	0.00		
AFT NO	Escrow payment	212.34	Outstanding accrued club benefits	0.00
Payroll NO	Escrow partial pay	.00	YTD club benefits	0.00
	Escrow run date			
	Escrow analysis date			
	Escrow analysis amortized shortage amount	25.70		
Dividend Information				
	Quarter 1	0.00	Total	0.00
	2	0.00	Accrued	0.000
	3	0.00		
	4	0.00		
Transaction inquiry date Aug 11, 2023 [MMDDYYYY]				

Xpress Teller/Teller



* Questions?

CEO/Management



- * New! Active Status Parameters for Marketing Clubs

Marketing Club Enhancement

Add Active Status Tracking Features

* **Tool # 486** – Marketing Club Configuration

* New monthly parameters include:

- * Minimum number of debit card transactions
- * Minimum amount of debit card transactions
 - * With or without PIN Based POS transactions
- * Minimum number of credit card transactions
- * Minimum amount of credit card transactions
 - * The presence of a debit or credit card is tracked daily
- * Minimum number of ACH/payroll transactions (amount is already tracked)
- * Remote Deposit Capture (RDC) enrollment

Club Active Status Tracking CHANGE

Club name **GLD GOLD TIER CLUB** Qualified

☐ Monitor for active status

Verify member active status ☒ Monthly ☐ Daily Reactivate member ☐ Daily ☒ Monthly

Daily and/or Monthly Tracking Parameters

Age range to

of dividend applications selected Select 0 Require ☒ N/A ☐ All ☐ Any

of loan categories selected Select 0 Require ☒ N/A ☐ All ☐ Any

☐ CD account required

Loan balance required 0.00 Include ☒ N/A ☐ All loans ☐ Selected loan categories

Savings balance required 0.00 Include ☒ N/A ☐ All ☐ Selected dividend applications

Combined loan/savings balance required 0.00 Include ☒ N/A ☐ All ☐ Selected loans/savings

Require: ☐ ATM card ☐ Debit card ☐ OTB credit card ☐ Online credit card

of OTB products (OTB code) selected Select 0 Require ☒ N/A ☐ All ☐ Any

Monthly Only Tracking Parameters

Note: All selected parameters must be met

☐ Require valid address ☐ Valid email address ☐ Loan payment via ACH

☐ Opt-in Credit Union marketing ☐ Opt-in 3rd party marketing ☐ Opt-in Reg E

Minimum # of: Payroll/ACH deposits Debit card transactions Credit card transactions

Minimum amount of: Payroll/ACH deposits 0 Debit card transactions 0 Credit card transactions 0

☐ Include PIN based POS transactions for debit cards

Required participation: ☐ Audio response/Online banking ☐ AFT

Required enrollment: ☐ Bill Pay ☐ E-Statements ☐ E-Notices ☒ RDC

Marketing Club Enhancement

Add Active Status Tracking Features

- * **Tool # 486** – Marketing Club Configuration – Minimum Amount of Payroll/ACH deposits

- * Now ACH and payroll tracking are combined for number and amount
- * At project deployment any amounts in Minimum required Payroll and Minimum required ACH deposit fields are combined into a single minimum amount field

Tracking Parameters - Monthly Only

Minimum required deposits:	Required participation:	Required enrollment:	<input checked="" type="checkbox"/> Require valid address
Payroll <input type="text" value="500"/>	<input type="checkbox"/> Audio response/home banking	<input checked="" type="checkbox"/> Bill pay	<input checked="" type="checkbox"/> Valid email address
ACH <input type="text" value="500"/>	<input type="checkbox"/> AFT	<input type="checkbox"/> E-Statements	<input type="checkbox"/> Loan payment via ACH
		<input type="checkbox"/> E-Notices	<input type="checkbox"/> Opt-in Credit Union marketing
			<input type="checkbox"/> Opt-in 3rd party marketing
			<input type="checkbox"/> Opt-in Reg E

CURRENT SETTINGS

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Monthly Only Tracking Parameters

Note: All selected parameters must be met

<input checked="" type="checkbox"/> Require valid address	<input checked="" type="checkbox"/> Valid email address	<input type="checkbox"/> Loan payment via ACH
<input type="checkbox"/> Opt-in Credit Union marketing	<input type="checkbox"/> Opt-in 3rd party marketing	<input type="checkbox"/> Opt-in Reg E

Minimum # of: Payroll/ACH deposits

Minimum amount of: Payroll/ACH deposits

☐ Include PIN based POS transactions for debit cards

Required participation: ☐ Audio response/Online banking ☐ AFT

Required enrollment: ☒ Bill Pay ☐ E-Statements ☐ E-Notices ☐ RDC

Debit card transactions Credit card transactions

AFTER RELEASE 23.10

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CEO/Management



* Questions?

Accounting/Back Office



- * New Option to Post All Incoming ACH Transactions
- * Enhancements to Nostradamus Prediction Engine
- * Now Perform Multiple Account Overrides at Once
- * Automatic Freeze Code for New Accounts by DIVAPL
- * Share Draft Exception Enhancements
- * Ability to Block New Members from Xtend Shared Branching

New ACH Posting Feature to Post Credits Immediately

* **Tool # 113** – ACH Posting Controls Config

- * New option to post incoming ACH credits as soon as possible
- * This controls ALL credits rather than the maintenance by individual company ID
 - * If selected, this would set ALL companies to post immediately
 - * If turned off, it will set ALL companies to no early post and they would need to be set up again if desired
 - * This is an option that would essentially replace the on-demand posting feature, so it could impact fee income if turned on

File Edit Tools Help

Maintain ACH Posting Controls

Post ACH Items in the Warehouse to Member Accounts

In the first run	Post credits only ▾
In the second run	Post credits only ▾
In the third run	Post credits only ▾
In the fourth run	Post both credits and debits ▾

Allow early post ☒ Allow early post/effective date override (credits only) for specific Company IDs
☐ Post credits for all Company IDs immediately upon receipt regardless of effective date
☐ Do not allow early post

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Because of variations in time zones, refer to online help for more details about what time of day these runs generally are processed, based on your data center.

Accept

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Nostradamus Enhancements

- * **Tool # 1676** – Nostradamus Predictor Configuration
 - * New option to set Must-Haves
 - * If the member gets a miss on this item (or any other must-haves) then set this profile's score to 0.00%

The screenshot shows a web application window titled "Review Criteria and Set Must-have Attributes" with a "Score Details UPDATE" link. The profile name is "SAVVY SAVERS" and the criteria is "Active members w/ at least \$50k in savings". A table lists five criteria with checkboxes for "Must Have".

Score Type	Attribute	Must Have
Score if member DOES have	Member age between 18 and 999	<input type="checkbox"/>
Score if member DOES have	Between 1 and 999 of these savings accounts: AI, CC, ES, GS, GT, GU, GV, KB, KY, MS, SC, SP, SS, SV	<input type="checkbox"/>
Score if member DOES have	Between 1 and 999 of these certificate accounts: B3, B4, 01, 02, 03, 04, 05, 06, 07, 08, 09, 10, 1	<input type="checkbox"/>
Score if member DOES have	Aggregate savings balance equal to or over 100 (whole dollars). Include SH,	<input type="checkbox"/>
Score if member DOES have	Aggregate savings balance is higher than aggregate loan balance (net saver)	<input type="checkbox"/>

Navigation icons: back, forward, up, down, print, link, info, help, search.

Nostradamus Enhancements

- * **Tool # 1675** – Nostradamus Predictor
 - * Added hide profiles with match below xx% filter
 - * If the member gets a miss on this item (or any other must-haves) then set this profile's score to 0.00%

The screenshot shows a web application window titled "Nostradamus Predictive Retailing Results". The interface includes a menu bar with "File", "Edit", "Tools", and "Help". Below the title bar, there is a section for account information and filters. The "Account" field is partially obscured by a redacted box. The "Member is a" field shows "100.00 % match to the No Credit Card profile (Members over 18 with no credit card)". The "Hide profiles with match below" field is set to "65.00 %". A "See All Results" button is located to the right of the filter fields. Below this, a blue header bar reads "Recommended Products and Services to Sell to This Member". Underneath, there is a list of products: "product 1", "product 2", "product 3", and "product 4". At the bottom left, there are two buttons: "Cross Sales" and "Member Inquiry". The bottom of the window features a blue bar with navigation icons: back, forward, up, down, print, link, info, help, and email. On the right side of the main content area, there are two orange arrows pointing up and down.

Enhance Transaction Override Feature to Allow Multiple Overrides to same Account

- * **Tool # 585** – Perform Transaction Override
 - * You can now perform multiple overrides for the same account at one time by selecting each option required
 - * You no longer need to process multiple transactions to apply more than one override

The screenshot shows a web application window titled "Session 1 - * Transaction Override". It features a form with the following elements:

- Account #**: A text input field containing "000000111" followed by a dropdown menu showing "000" and a magnifying glass icon.
- Override**: A section containing five checkboxes:
 - ☐ Override frozen account status for one transaction
 - ☐ Override secured balance for one transaction
 - ☐ Override uncollected funds for one transaction
 - ☐ Override par value (account type 000) for one transaction
 - ☐ Reset code word/confirmation question lockout for membership
- Footer**: A blue bar containing a series of navigation icons: left arrow, right arrow, up arrow, pause, print, link, information, question mark, and at-sign.

Configurable Automatic Freeze Code for New Accounts Under DIVAPL

- * **Tool # 777** – Savings/Checking Products Configuration
 - * You now have the ability to apply a freeze code to all new accounts opened with a specific dividend application
 - * E.G. You can use this for all tax escrow accounts where you don't want to allow withdrawals
 - * You can just specify the freeze code to apply to new accounts in tool #777

Share Account Setup Update

Dividend application **01** Dividends are calculated **E00**; Dividends are posted **B00**

General Account Information | Accounting Interface | Dividend Information

Description: [Text Field]
Account range: **097** to **099**
Application type: **Share/savings products**
IRA plan type: ☐ IRA ☐ HSA
☐ Reg D transaction account Reg D transfers per month ☐
Zero balance account option: **No action taken**
Freeze code: All activity
☐ Prompt for credit report on open
☐ Prompt for marketing club enrollment
Create secured shares record ☐
☐ Club processing allowed
☒ Allow account nicknames
☐ Allow share secured via OLB

Configure Negative Balance Processing

ATM surcharge rebate program code ☐
ATM service charge rebate program ☐
Card activity rebate program code ☐

Dividend rates are entered using Tool #506: Member Rate Maintenance

Suspend	Save	Skip	Qualified Dividends	ARU/Online Banking	Restrict Mbr Desgn
Checklist	ANR Scoring				

Navigation icons:

- * New highlight for check exceptions listed on the blocked list for in-house checks
- * Helps identify checks that may need a bit more research for processing

[illegible]

Blocking New Member from Shared Branching

- * **Tool # 1005** – Workflow Controls – Teller/Member Service
 - * New access point for ‘# of days to block a new member from using shared branching’
 - * Previously only available as a back office configuration by contacting Client Services
 - * Flag now applies to Xtend shared branching and COOP shared branching

The screenshot shows the 'Teller and Member Service Workflow Controls' window. The 'Teller Processing Controls' tab is selected. The field '# of days to block new member from shared branching' is highlighted with a red box and contains the value '90'. Other visible controls include checkboxes for 'Auto-display warning window for wrong e-mail address in Inquiry' and 'Phone', 'Print daily follow-ups report', 'Auto-display member account comments window in Inquiry/Phone', 'Auto-display delinquent loan account info window in Inquiry', 'Auto-freeze all sub-accounts if member is deceased', 'Purge stop payment records after 6 months', 'Print current balance on receipts', 'Allow ACH distribution maintenance via Phone Op', 'Allow negative balance override for ACH exceptions', 'Phone operator wrap up', 'Show to', 'Vertical receipts', 'Account balance summary', 'Current balance', 'Available balance', and 'Include All accounts'. A red box also highlights the 'No CR' radio button under 'Freeze code'. A bottom bar contains navigation icons and a status bar with links to 'View Privacy Controls', 'View BSA Configuration', and 'View Check Holds Config'.

Blocking New Member from Shared Branching

- * **Tool # 1**– Edit message for new members
 - * New edit message for new members if the account does not meet the configured number of days
 - * Messaging - “Member is blocked from shared branching per CU configuration”

The screenshot shows the 'Teller Processing' window. At the top, there's a menu bar with 'File', 'Edit', 'Tools', and 'Help'. Below it, the title 'Teller Processing' is displayed. The main area contains several input fields: 'Credit union ID', 'Account #', 'Process code' (set to 'Funds in/serving another owner'), 'Vault ID' (01), and 'Account type' (000). A 'Search Criteria' section includes fields for 'Last name', 'First name', 'DBA name', 'SSN/TIN' (with a '9 digits' label), 'Card #', 'Employee #', and 'Reference'. On the right, a box indicates 'Privacy controls are OFF' with checkboxes for 'Masking' and 'Questions', and a note 'This workstation is Call Center'. At the bottom, a message bar with an information icon states: 'If using either the "Check" or "Money Order" process code, use the account type field to specify the account from which funds should be taken.' Below this is a table with columns: 'Comments', 'Device Config', 'Transaction Desc', 'Transfer', 'Non-Member Svcs', and 'Close Accounts'. The 'Comments' column contains 'Rate Inquiry', and 'Device Config' contains 'Drawer Control/Audit'. At the very bottom, a status bar with navigation icons and a red-bordered box displays the message: '0595-Member is blocked from shared branching per CU configuration'.

Comments	Device Config	Transaction Desc	Transfer	Non-Member Svcs	Close Accounts
Rate Inquiry	Drawer Control/Audit				

0595-Member is blocked from shared branching per CU configuration

Accounting/Back Office



* Questions?

Audit:



- * Configurable Password Resets
- * Enhancements to Fraud Incident Maintenance Dashboard

Manually Enter a Temporary Password for User ID Resets

- * **Tool # 763** – Reset user Login Password/Device
 - * Password Reset can now be chosen instead of standard X1234
 - * Temporary password can be custom to each user
 - * User must change at first login

The screenshot displays the CU*BASE - All My Tools interface. At the top, there's a search bar with '763' entered. Below the search bar, a table lists tools. The first tool, #763, is 'Reset User Login Password / Device' with a shortcut 'RESETDEV'. A modal window is open for this tool, showing two sections: 'Reset AS/400 Sign-On Password' with fields for 'User ID' (TESTPERSON) and 'Password' (passwd123), and 'Reset Terminal or PC Device (Vary On)' with a 'Device name' field. The interface includes a sidebar with 'SettleMINT' and 'RESOURCES' sections, and a footer with a welcome message for 'NICHOLAS' and a total tool count of 1.

Tool #	Title	Shortcut	More
Go! 763	Reset User Login Password / Device	RESETDEV	Info Star

Reset AS/400 Sign-On Password

User ID:

Password:

Reset Terminal or PC Device (Vary On)

Device name:

Welcome, NICHOLAS

Auto-security is ON for employee ID

Total # of tools: 1

- * Added a search option for Account Number
- * Selection for Fraud type and or Fraud Status

[illegible]

BSA Watch Enhancements!

CU^{*}ANSWERS
A CREDIT UNION SERVICE ORGANIZATION

AuditLink

Special training for 23.10 BSA updates

Tuesday, October 2 @ 1:30 – 2:30 PM ET

Thursday, October 12 @ 3:30 – 4:30 PM ET

[Click here to register!](#)

Audit:

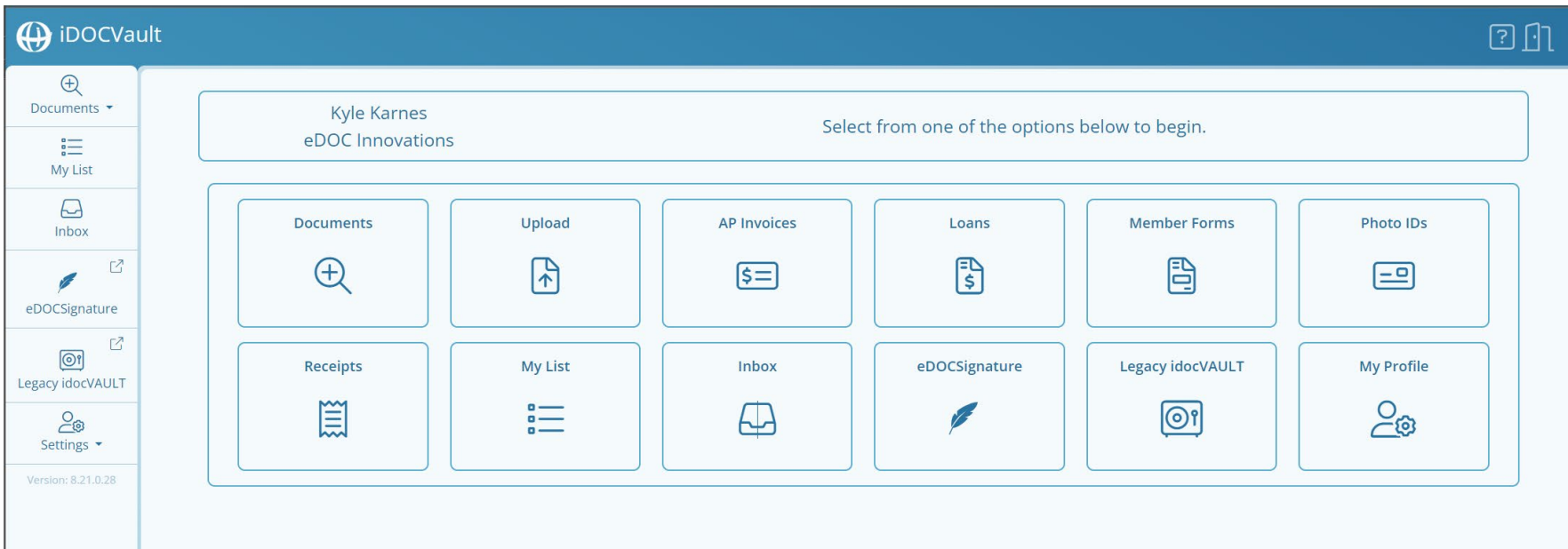


* Questions?

Special Imaging Related Enhancements

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 **CU^{ANSWERS}**
Imaging Solutions



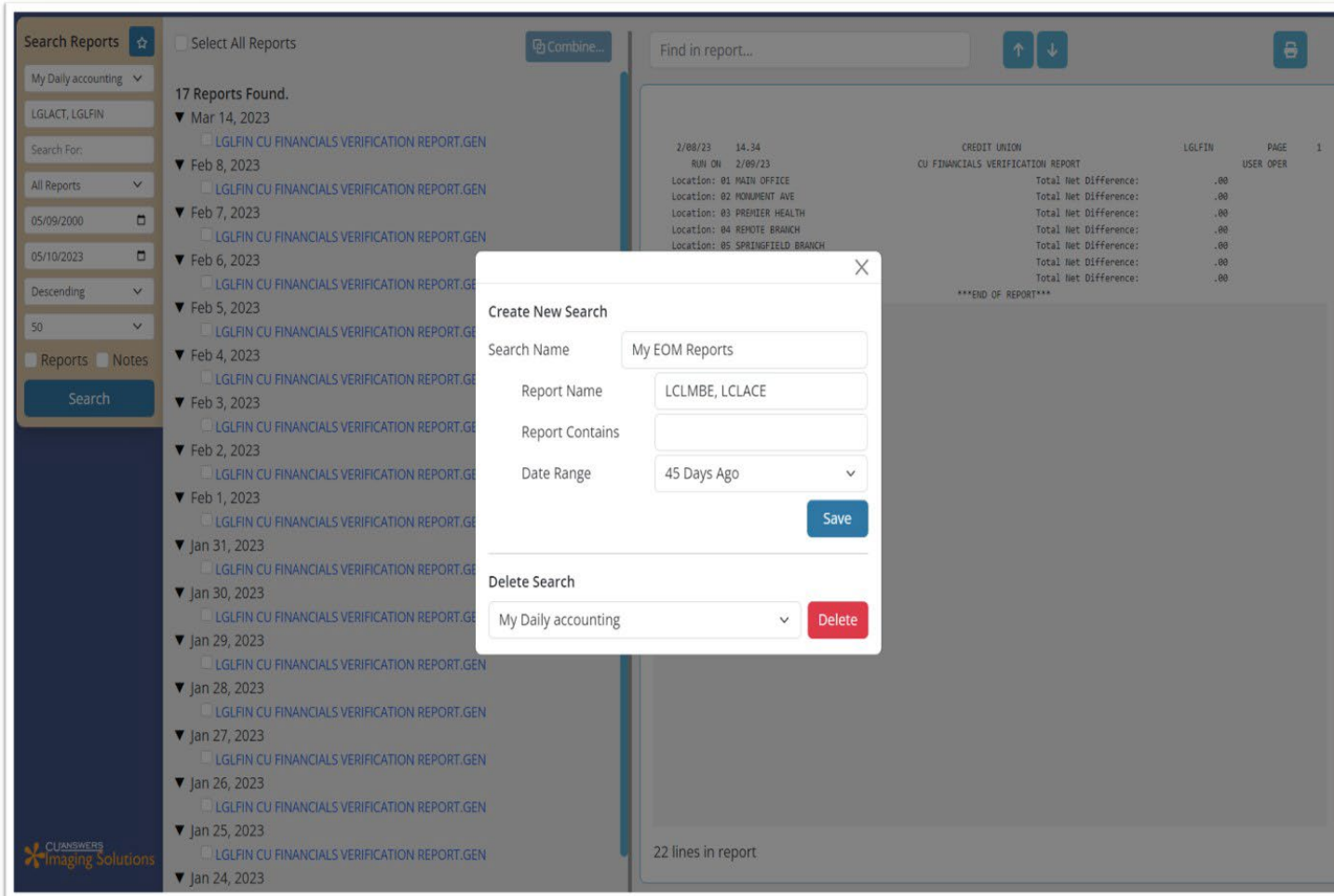
iDocVAULT Upgrade – Online CU*Spy Clients

- New updated look
- Download and combine documents
- Upload documents
- Link to eDOCSignature
- New My List feature
- Create your own searches

Special Imaging Related Enhancements

CU*ANSWERS
A CREDIT UNION SERVICE ORGANIZATION

 **CU*ANSWERS**
Imaging Solutions



The screenshot displays the CU*ANSWERS Imaging Solutions web application. On the left, a sidebar contains a 'Search Reports' section with a star icon, a 'Select All Reports' checkbox, and a 'Combine...' button. Below this is a search filter section with a dropdown menu set to 'My Daily accounting', a 'Search For:' input field, and a 'Search' button. The main area shows a list of 17 reports found, with dates ranging from Jan 24, 2023, to Mar 14, 2023. Each report entry includes a checkbox and the text 'LGLFIN CU FINANCIALS VERIFICATION REPORT.GEN'. A 'Create New Search' dialog box is open in the center, featuring fields for 'Search Name' (My EOM Reports), 'Report Name' (LCLMBE, LCLACE), 'Report Contains' (empty), and 'Date Range' (45 Days Ago). There is a 'Save' button and a 'Delete Search' section at the bottom with a dropdown menu set to 'My Daily accounting' and a 'Delete' button. The background shows a report preview with columns for 'CREDIT UNION', 'CU FINANCIALS VERIFICATION REPORT', 'LGLFIN', and 'PAGE'. The report content includes a table with 'Total Net Difference' values and a footer indicating '22 lines in report'.

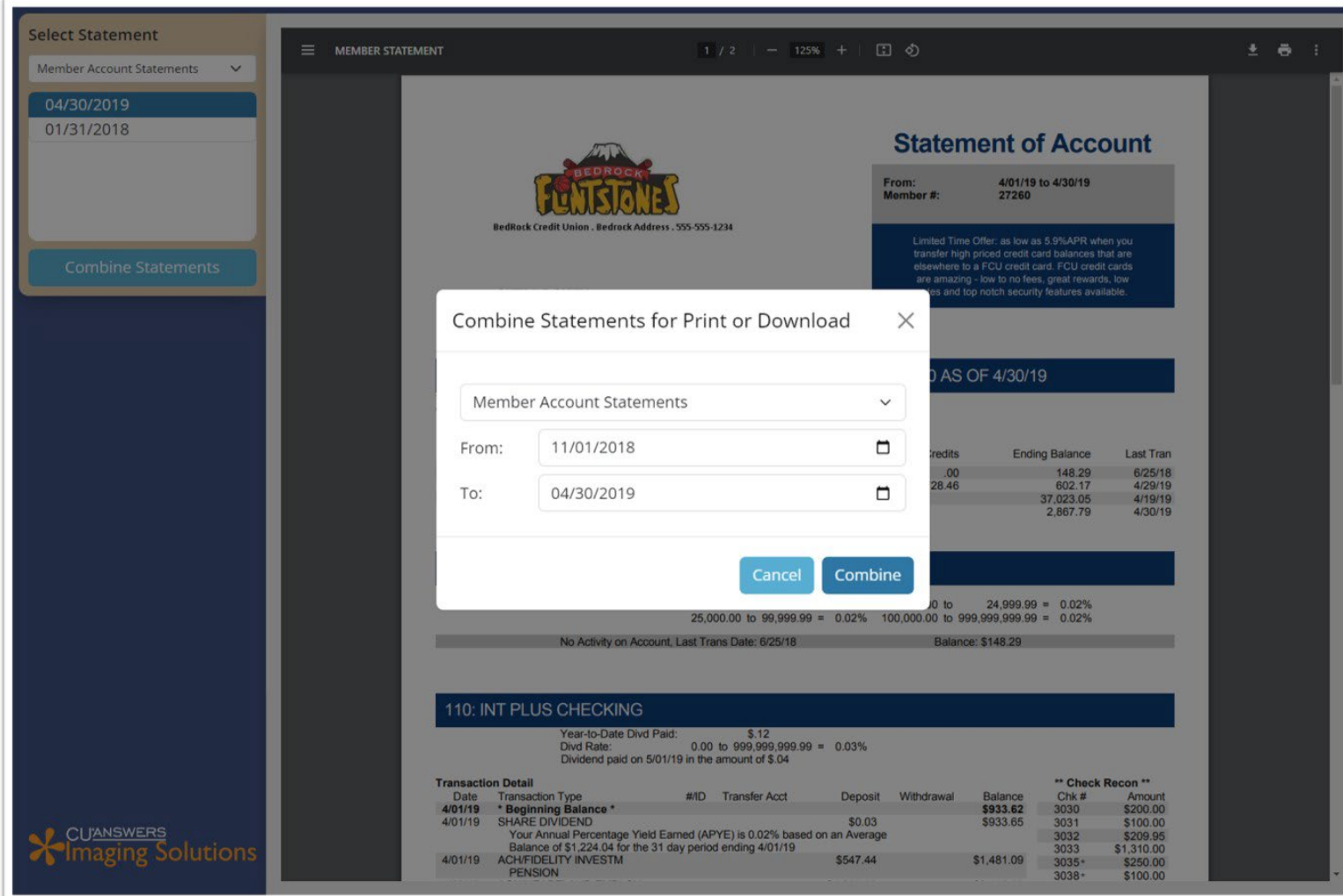
CU*Spy Reports

- New look and feel
- Ability to create favorite searches
- Print inline notes

Special Imaging Related Enhancements

CU*ANSWERS
A CREDIT UNION SERVICE ORGANIZATION

 **CU*ANSWERS**
Imaging Solutions



The screenshot displays the 'MEMBER STATEMENT' page for BedRock Credit Union. A modal dialog titled 'Combine Statements for Print or Download' is open, allowing the user to select a range of statements to combine. The dialog includes a dropdown menu for 'Member Account Statements', 'From' and 'To' date pickers, and 'Cancel' and 'Combine' buttons. The background shows a 'Statement of Account' for a checking account ending 4/30/19, with a balance of \$148.29. Below the balance, there is a section for '110: INT PLUS CHECKING' and a 'Transaction Detail' table.

Date	Transaction Type	#/ID	Transfer Acct	Deposit	Withdrawal	Balance	** Check Recon **
4/01/19	* Beginning Balance *					\$933.62	3030 \$200.00
4/01/19	SHARE DIVIDEND			\$0.03		\$933.65	3031 \$100.00
	Your Annual Percentage Yield Earned (APYE) is 0.02% based on an Average Balance of \$1,224.04 for the 31 day period ending 4/01/19						3032 \$209.95
4/01/19	ACH/FIDELITY INVESTM PENSION			\$547.44		\$1,481.09	3033 \$1,310.00
							3035* \$250.00
							3038* \$100.00

CU*Spy Statements

- New look and feel
- Ability to combine Statement files

Special Imaging Related Enhancements

- * CU*Forms

- * A web application that allows Credit Unions to build their very own membership form templates

- * Cash Tracker

- * This release adds support for a built-in CashTracker for Native Receipts. This allows tellers to put in their denominations for withdrawals and deposits.

- * Native Receipts Optional Marketing Messages

- * Now you can add your own Credit Union marketing spin to another piece that members leave the branch with – their receipt!



Thank you for attending!



Reference Materials:

<https://www.cuanswers.com/resources/doc/release-planning/>