24.05 Imaging Solutions Software Release

Beta	Online	In-House
3/18/2024	**5/5/2024**	**5/5/2024**

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 May 5th, 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 May 5th, 2024. Any added features can be purchased in the store at *store.cuanswers.com*.

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CU*Forms

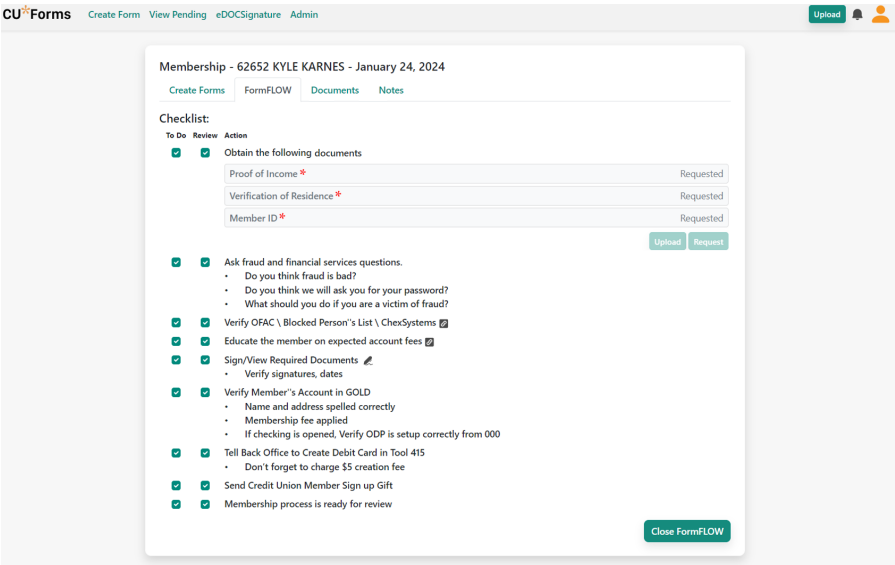
FormFLOW

CU*Forms is more convenient than ever! Now you can use this popular forms-generation tool to replace the disclosures, signature cards, and other forms used for new accounts, and then have those forms automatically generated when new accounts are opened in CU*BASE.

When we first started developing CU*Forms, we built it without interacting with the membership workflow process; credit unions were manually navigating to the CU*Forms website to start the form creation process. Following the 24.05 release, when creating new memberships or doing maintenance on accounts you will be prompted to jump from CU*BASE right into CU*Forms, where it will select your predesigned forms with our new membership form product. Not only will it select the forms you designated for your member products, it can also look at membership designation to override forms in the case you would want business forms presented instead!

As we understand membership workflow isn't just about forms, we created a new product called FormFLOW, which gives your credit union the ability to create a membership checklist. This checklist is completely customizable. Use the following items to help your staff have a successful and predictable membership opening every time.

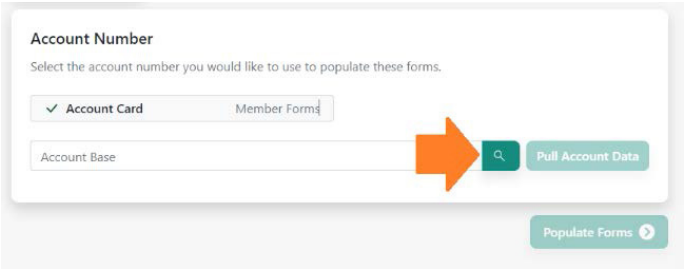
- Upload/request documents from the member that save to your credit unions archive.
- Place bullet point steps that need to be completed before or after the signing process.
- Easily jump out to a website to obtain documentation, like a fee schedule.
- Notify staff members of steps they need to complete.
- Notify your auditor when the opening process is ready for review.
- Audit document automatically created and saved stating who/when completed each step.

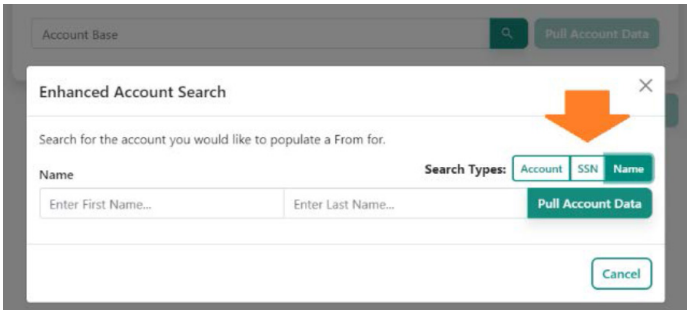


If you're already a CU*Forms user, contact imaging@cuanswers.com for next steps of turning on this feature. If you have not turned on CU*Forms yet, sign up today and get started!

Enhanced Account Search

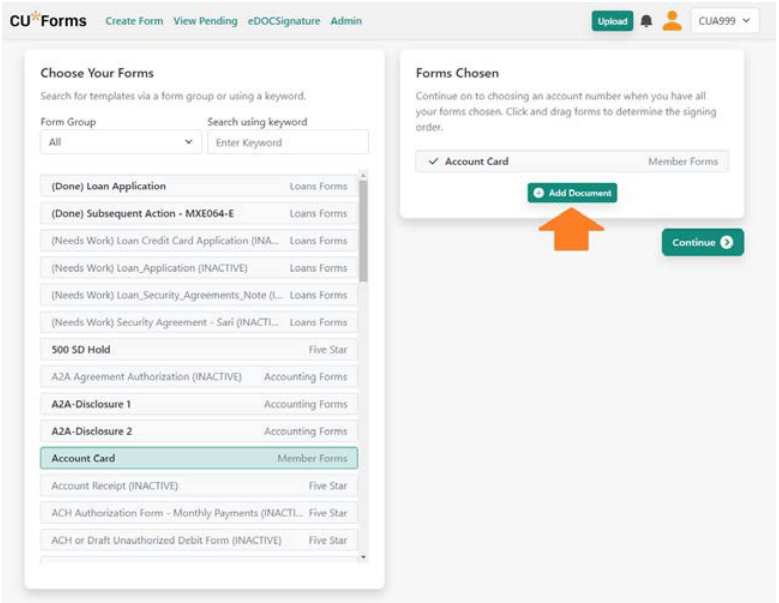
Previously, searching for member accounts was restricted to account number only. You can now utilize Enhanced Account Search to also search by SSN or name.





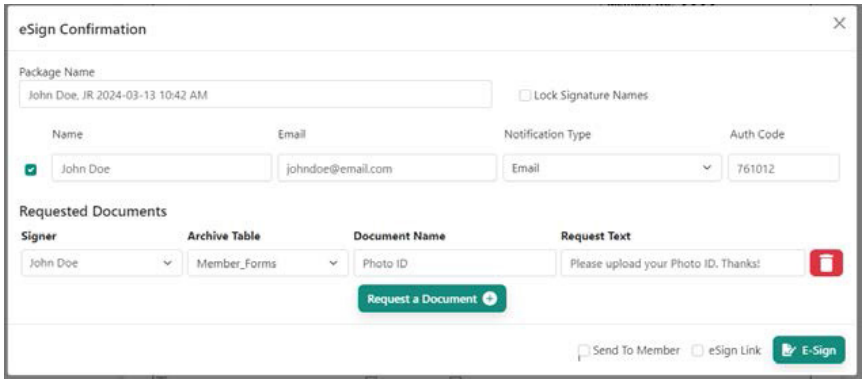
Add Reference and Additional Signing Documents

When selecting forms, you can now use the *Add Document* button to include reference documents, and even additional documents for signing that you can configure on-the-fly.



Request Documents During eSign

On the eSign Confirmation screen, you can now click the *Request a Document* button to request as many documents from your member as you'd like.



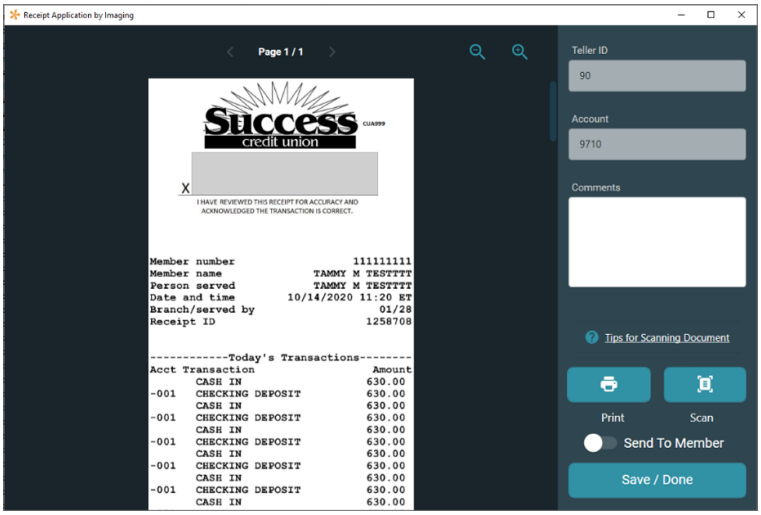
Native Receipts

Native Receipts Everywhere!

In the October 2022 release, we created a new lightweight receipt processing application called NativeReceipts. Native Receipts allows tellers to view, sign, print, and archive receipts, replacing all the functionality currently performed by ProDOC and the "R" print sessions for receipts for Xpress Teller.

Fast forward to today, and we think you will want to give Native Receipts another look!

Now Native Receipts can print high quality receipts for all receipts that print from CU*BASE, be they from Standard Teller, loan receipts, receipt reprinting, Phone Operator, just to name a few.



Native Receipts (cont'd)

Check out these exciting features of Native Receipts!

- Modernized look and feel.
- Saves logo with receipt so reprint from iDOC Vault includes this information.
- Optionally send receipts to member storage in It's Me 247.
- Account balances will be printed on receipts to match the point in time when the receipt was printed. *Additionally, we have added new functionality for you to mask balances for joint owner receipts when they are not on the account.*
- No need for a receipt print session.
- Replacement for ProDOC Receipts
- Supports Marketing Messages

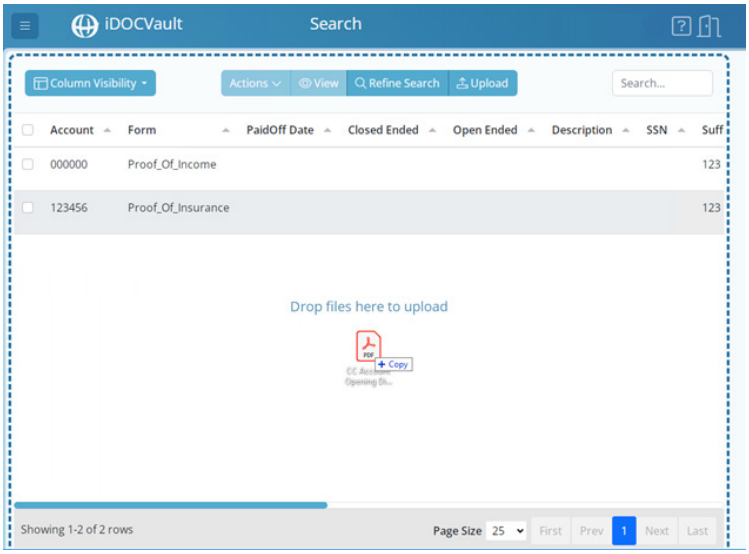
Configure Native Receipts in Tool #1775 Xpress Teller Workflow Controls and now also and Tool #1005 Workflow Controls: Teller/Member Service. *If you already have Native Receipts configured in Tool #1775, the controls for Branch 01 will be flooded into Tool #1005 at implementation.*

New to Native Receipts? Initial setup is required by the Imaging Team. Sign up for Native Receipts today! https://store.cuanswers.com/product/native-receipts-active-beta/

iDoc Vault 2.0

Drag and Drop to Upload

From a search results screen in iDoc Vault 2.0, simply drag and drop documents into your web browser to upload them. Once uploaded, they will be displayed to allow you to add index information.



Software Versions

Below are the versions currently in use with this release:

Product	New Version
2020DOC	7.22.0.1
CU*Forms	1.13.4
Document Server	7.22.0.2
iDoc Vault 2.0	8.22.0.37
Intellisweep	7.22.0.2
ISAdapter Service	1.3.3
ISAPI Gateway	7.22.0.1
ISAPI Web Portal	7.22.0.1
JMS	1.3
MySQLConfig	8.23.0.2
MySQL Server	8.0.36
MySQL Workbench	8.0.36
PHP	8.1.27
RAP	8.22.0.9
RAP Doc	8.21.0.4
RAP Pkg	8.23.0.1
RAP Rpt	8.22.0.2
RAP Sta	8.22.0.1
Security Manager	7.22.0.3
Statements	7.21.0.4
Vault Manager	1.2.1