25.10 Imaging Solutions Software Release

Beta	Online	In-House
9/18/2025	**10/12/2025**	**10/12/2025**

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 October 12th, 2025.

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 October 12th, 2025. Any added features can be purchased in the store at *store.cuanswers.com*.

Contents

Native Receipts

🏠🌐 ## Scanning in Native Receipts

Scanning from ProDOC will now be replaced with Native Receipts. If you click on any scan button in CU*BASE or CB*X in the future, it will take you to Native Receipts scanning.

When prompted to scan, you can enter the form name, FormFLOW, and the account number. Once the account number is entered, it will automatically fill the required index information. Simply click "Scan" or "Upload" to add a document to be archived. Click "Save/Done" to save to iDocVAULT.

NOTE: if you would like to add forms in the dropdown, they can be added in CU*Forms. Jump to the CU*Forms adding Upload Templates section for more information.

🏠 🌐₊ Photo ID viewing now in Native Receipts

Photo IDs will now open in the new Native Receipts viewer allowing most document types to display correctly (including PDF). It will also auto-scale the documents to allow your staff an easier time viewing full-page documents. You will be able to rotate, download, and zoom the documents with the application.
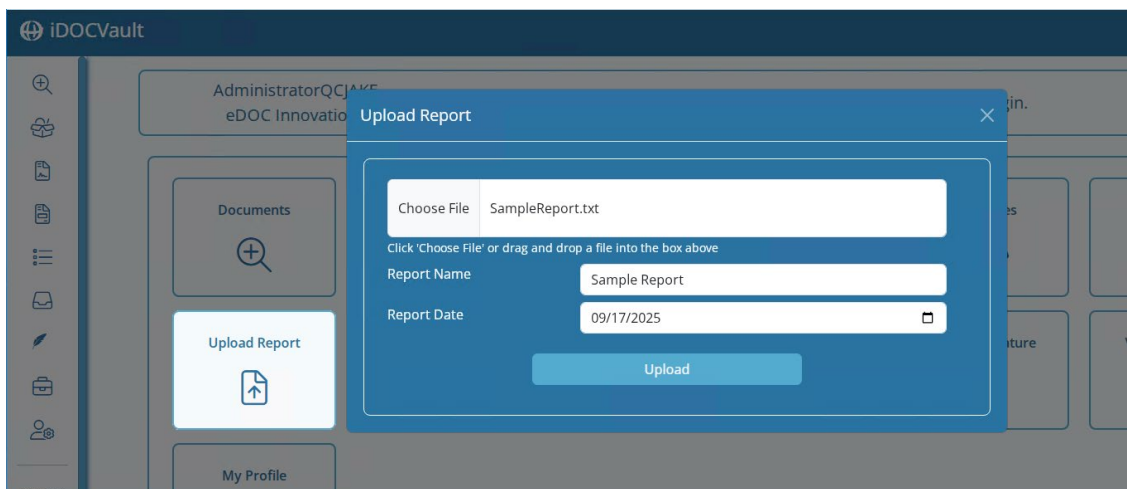

iDocVAULT
🏠 Report Uploads

If you have files, you'd like to store in the reports section of iDocVAULT, you can now upload them directly from your computer! **Note: Report uploads are restricted to plain text**
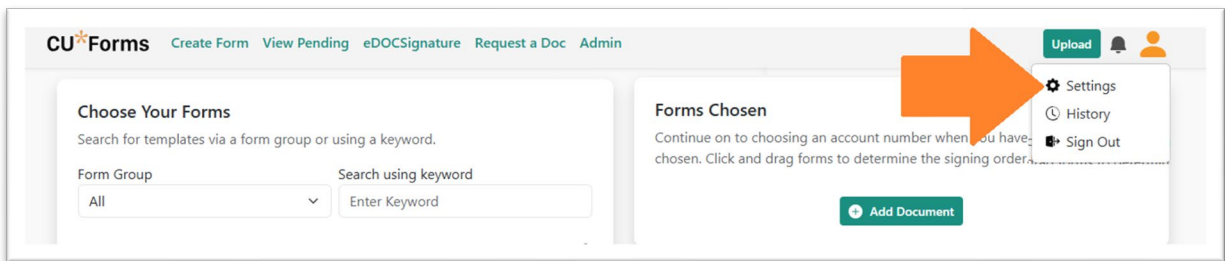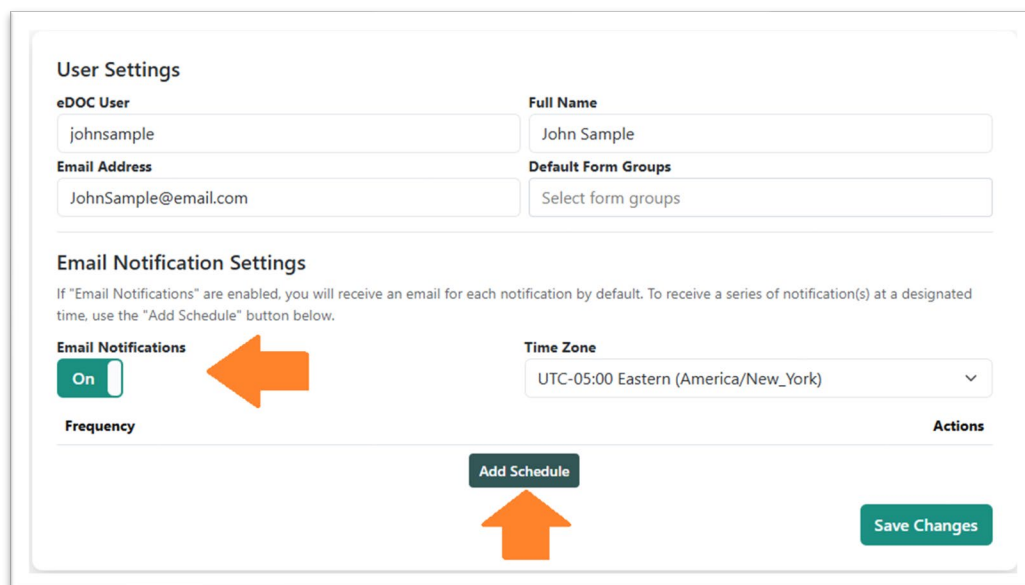
CU*Forms

🏠🌐 Email Notifications

Email notifications are now supported! If notifications are sent from a FormFLOW, staff will have the option to get emails for every notification or set a schedule of combined notifications.

**To activate Notifications:** Click on the 👤 and select settings.

Click the "on/off" toggle to activate notifications. This will send an email for each notification sent or add scheduled notifications by clicking "Add Schedule" to configure notifications on specific days and times.

Example: Multiple schedules can be created to create notifications M-F at 10:00 AM ET and 2:00 PM ET.

🏠🌐 User History

View the last 7 days of activity (saving or sending documents for eSign) in CU*Forms with the new "History" button in the user menu.
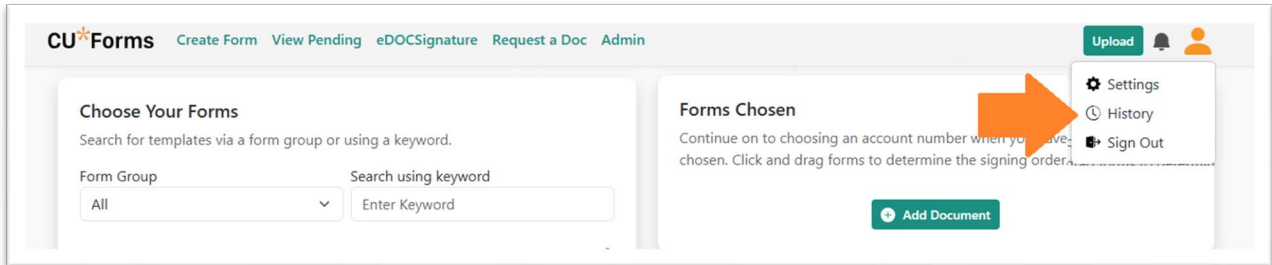
🏠🌐 Adding Upload Templates to CU*Forms

Your credit union can now lock down template names in CU*Forms! In the past, CU staff could type any document name. With this new feature, they will only be able to select the template names of the forms you have built. You can enable this feature by clicking on the "Template Settings" and checking "Restrict document names to Upload Templates on upload"
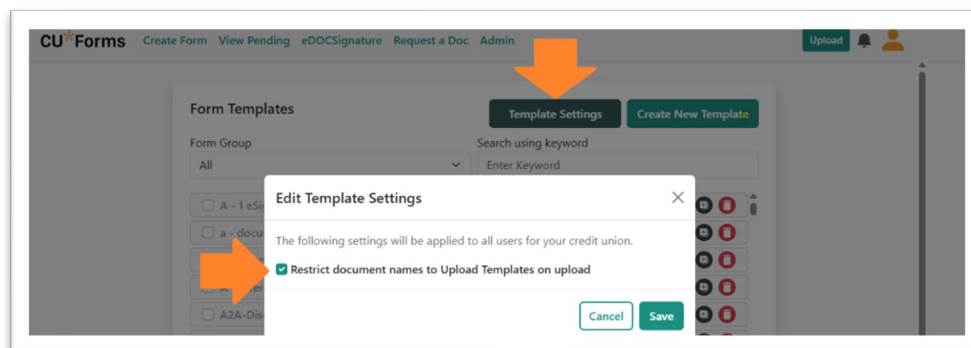
You will want to add any additional documents that your staff will need to upload, as an example, Proof of Income, Proof of address, and NADA. This can be done by using the "Create New Template" feature on the "Form Templates" screen under Admin.
- Select "Upload Template"
- Enter Template Name
- Select Storage Table and set your required indexes.

🏠🌐 Scan using CU*Forms via Native Receipts

Your credit union can now scan from CU*Forms! On screens where you would upload documents in the past, you will find scan buttons as well. It will launch Native Receipts and prompt you to scan documents. For more information on scanning documents, please reference the Native Receipts scanning section on the top of this document.

🏠 🌐 New CU*BASE Form Fields Available

With this update, your credit union now has access to more form fields to make using CU*Forms even better. The star of the show is going to be all the new credit card fields.

- Credit Card Category - Description
- Credit Card Category - Balance Transfer Variable Rate Index
- Credit Card Category - Balance Transfer Variable Rate Margin
- Credit Card Category - Balance Transfer Rate
- Credit Card Category - Cash Advance Variable Rate Index
- Credit Card Category - Cash Advance Variable Rate Margin
- Credit Card Category - Cash Advance Rate
- Credit Card Category - Purchase Variable Rate Index
- Credit Card Category - Purchase Variable Rate Margin
- Credit Card Category - Purchase Rate
- Credit Card - Balance Transfer Promo Rate
- Credit Card - Cash Advance Promo Rate
- Credit Card - Purchase Promo Rate
- Credit Card - Balance Transfer Variable Rate Index
- Credit Card - Balance Transfer Variable Rate Margin
- Credit Card - Cash Advance Variable Rate Index
- Credit Card - Cash Advance Variable Rate Margin
- Credit Card - Purchase Variable Rate Index
- Credit Card - Purchase Variable Rate Margin
- Loan - Variable Rate Index
- Loan - Variable Rate Margin
- Loan - Collateral Color
- Loan - Collateral Trim
- Loan - Collateral Title Holder
- Loan - Has Variable Rate

- LOWS - Applicant Comments
- LOWS - Net Worth
- LOWS - Total Assets
- LOWS - Total Debt
- LOWS - Unsecured Debt
- LOWS - Secured Debt
- LOWS - Line-of-Credit Debt
- LOWS - Contingency Line-of-Credit Debt
- LOWS - Total Credit Limit
- LOWS - Total Income
- LOWS - Total Expense
- LOWS - Mortgage/Rent Expense
- LOWS - Unsecured Expense
- LOWS - Secured Expense
- LOWS - Total Expense / Total Income Ratio
- LOWS - Total Expense / Total Income Score
- LOWS - Unsecured Debt / Total Income Ratio
- LOWS - Unsecured Debt / Total Income Score
- LOWS - Mortgage/Rent Expense / Total Income Ratio
- LOWS - Mortgage/Rent Expense / Total Income Score
- LOWS - Total Debt / Total Income Ratio
- LOWS - Total Debt / Total Income Score
- LOWS - Total Line-of-Credit / Total Income Ratio
- LOWS - Total Line-of-Credit / Total Income Score
- LOWS - Loan to Value

Software Versions

Below are the versions currently in use with this release:

Product	New Version
2020DOC	7.24.0.3
ConState	7.24.0.0
CUForms	1.22.0
Document Server	7.24.0.3
Go Microservices	8.25.0.44
iDoc Vault 2.0	8.25.0.11
ISAdapter Service	1.7.1
JMS	1.6.0
MySQLConfig	8.25.0.0
MySQL Server	8.4.6
MySQL Workbench	8.0.43
Native Receipts	1.7.14
PHP	8.4.12
RAP	8.25.0.3
Vault Manager	1.4.1
WebCommon	8.25.0.1