Please complete and score each task and note any comments you may have regarding each task.

release 25.10! Frankenmuth Credit Union Credit Union Name: **Hollie Britton** Primary Contact Name: 989.497.1629 Primary Contact Phone Number: How likely are you to perform the task after beta? Rate each item on a scale of 1-5. X Tried in CBX and GOLD Did you complete the Are you satisfied with How helpful will the task be to staff? (5 = highest, 1 = lowest) **5** Extremely the results you 4 Very received? 3 Somewhat **Comments/** 2 Slightly 1 Not at all **Explanation of Rating** Tool Task N/A **Not applicable** 1-5 1-5 1-5 MEMBER FACING This feature will really make processing much 5 Sample tool Sample task 3 2 4 easier for tellers. TWO FACTOR AUTHENTICATION FOR ONLINE BANKING PASSWORD RESETS Review the changes made to the Online Banking Password and Security Settings configuration. When ready turn on "Use Two Factor" for password resets. 569 *Please ensure you confirm with Quality Control that your Υ 5 5 5 5 mobile apps have been properly updated to the proper version to avoid errors to users attempting to reset password through mobile app* Test the forgot password feature when configurations in Tool #569 are set to Use Two Factor and ensure you are successfully able to reset a password using the two-factor OLB(It'sMe) Υ 5 5 5 5 У method.

Thank you for helping us test the software

improvements of

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	A Did you complete the task?	How easy was the task?	4. Are you satisfied with the results you received?	1. How helpful will the task be to staff?	How likely are you to 9-1 perform the task after beta?	Tried in CBX and GOLD	Comments/ Explanation of Rating
72	screen and test resetti questions, and usernar	screen. Test all functionality of the ng a user's password, security ne. Test multiple combinations to y display the correct information.	Υ	5	5	5	5	у	
1072	and reset the member *If your Credit Union v	e this new tool to activate/deactivate s phone banking PIN. wishes to use the custom PIN feature, uality Control to have this activated*	у	5	5	5	5	у	
	1	ACCOUNT AGGREG	ATION (SEE/JUI	MP) FOR I	BIZLINK 2	47		
14	BizLink 247 online ban "Aggregation/Jump Pe company ID/employee see/jump to. (Employe	set function for an account tied to king. Select an employee ID and use the rmissions" option to set up a related ID combination for that user to e ID must already exist). This procedure Itiple business memberships are one or manager.	У	5	5	5	5	Υ	8.26 – shared a screen shot with QC team to show where it says "success credit union" in the product description for the member in OLB
BizLink 247	accounts. Select an accounts. Verify that	nembership to which you have related count to jump to from the Profile Menu you are jumped to the correct you can successfully jump back.	у	5	5	5	5	na	

Tool	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5	/A Did you complete the task?	T-P How easy was the task?	Are you satisfied with the results you received?	Thow helpful will the task be to staff?	How likely are you to 1-2 perform the task after beta?	/A Tried in CBX and GOLD	Comments/ Explanation of Rating
BizLink 247	Login to the business membership to which you have related accounts. Select an account to jump to from the Profile Menu dropdown. Verify that you are jumped to the correct membership, and that you can successfully jump back.	У	5	5	5	5	na	
BizLink 247	Login to the business membership to which you have related accounts. Navigate to the Cross-Account Summary module. Select one of the jump links from this page and verify that you are jumped to the correct membership.	У	5	5	5	5	na	
BizLink 247	Login to the business membership to which you have related accounts. Navigate to the Cross-Account Summary module. Make sure the filter capabilities function as you would expect.	У	5	5	5	5	na	
				DIN				
	T	JLE FUTU	RE RATI	CHANGE	:S	 		
506	If you are able to change Base Loan Rates during BETA, use this tool to schedule the change in advance. Confirm that you can enter in a new Base Rate and a Rate Change Date for a fixed rate loan. Confirm that the Save/Done function presents a confirmation window, and the rate change is recorded.	У	5	5	5	5	У	

Tool	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5	A Did you complete the task?	How easy was the task?	4.1 Are you satisfied with 5.1 the results you received?	T-P How helpful will the task be to staff?	How likely are you to 9-1 beta?	X Tried in CBX and GOLD	Comments/ Explanation of Rating
470	On the date the base rate is scheduled to change confirm that the Base Rate was changed and is accurate and any rate deviations (Online Banking, Risk Based Pricing) are also changed. Confirm that the PLNPRTU report was generated, and the Product and rate information are accurate	у	5	5	5	5	У	
	REF	RESH FU	EL DECI	SIONS				
2/53	Review the Credit Report Decision Screen when working an application (New or Existing). Confirm that you are presented with the new screen, and the information is correct for the applicant. Access the Function Keys and confirm they work as expected.							**Feedback from emails with Thomas H
2/53	If you have CLR Path programs configured confirm that the 'Decision Advice' function button is present on the Credit Report Decision Screen. Select the button and confirm that you are presented the CLR Path Decision Advice window.	У						
2/53	Review the Credit Report Decision Screen for an application with a FUEL Credit pull performed AFTER the function is enabled by LenderVP. Confirm that 'Refresh This Decision' button is presented.	у						
2/53	Select 'Refresh This Decision' Confirm a confirmation window is presented- select Confirm. Review the refreshed decision. Confirm that the Decision elements are correct for the existing credit report and current application number.	У						

Tool	Rate each item on a scal (5 = highest, 1 = low 5	M/K Did you complete th task?	1-1 How easy was the task?	4 Are you satisfied with 4 the results you received?	T How helpful will the task be to staff?	How likely are you to 1-2 perform the task after beta?	X/ Tried in CBX and GOLD	Comments/ Explanation of Rating
100	QUERY (Tool 100) that the Pull Type Number (Field on the Credit Report Profile Information table (CRBSI '32'. Use the Credit Report Number (Field CRRPTNO) primary applicant as your selection criteria.	JMS) is						
159	If the Decision Code changes (ER to EP or EP to ER) or refreshed decision confirm that the change writes of CUFMAINT.							
	ABNORMAL AC	TIVITY MONITORI		D I T P-NO-GO I	FOR ACH	DEPOSITS		
101	Select Stop-No-Go Patterns. Verify that the preconfi 'ACHDEPOSIT' pattern has been populated in the moconfiguration and the initial status is inactive.							
101	Activate the 'ACHDEPOSIT' Pattern. Setup ACH deposit monitoring limits for specific mer designations and/or for all other membership design Use limits that best suit your member's ACH banking	nations.						

Tool	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5	A Did you complete the task?	F How easy was the task?	T Are you satisfied with 9.1 The results you received?	T How helpful will the task be to staff?	How likely are you to 1. perform the task after beta?	X Tried in CBX and GOLD	Comments/ Explanation of Rating
1875	Review/Monitor daily ACH exceptions for ABNL records. Verify them against your configured abnormal monitoring limits. Process exception records based on your credit union's outlined procedures.							
OLB(It'sMe)	If possible, verify via It'sMe that an ACH outside of configured limits is marked as unavailable for deposit.							
		N E D		СОМ	M E N	T 5		
		N L K		CON	IVI E IV			

Task

Tool

Please complete and score each task and note any comments you may have regarding each task.

Credit Union Name:

Primary Contact Name:

Primary Contact Phone Number:

Rate each item on a scale of 1-5.



Rate	each item on a scale of 1-
(5 = highest, 1 = lowest)
5	Extremely
4	Very
3	Somewhat
2	Slightly
1	Not at all
N/A	Not applicable

 Load you complete the task? How easy was the task? The results you received? The how helpful will the task be to staff? How likely are you to perform the task after
--

Comments/ Explanation of Rating

	MEMBER FACING							
Sample tool	Sample task	Υ	3	2	4	5	Υ	This feature will really make processing much easier for tellers.
	TWO FACTOR AUTHENTICAT	ON FOR	RONLIN	E BANKIN	IG PASSW	ORD RESE	TS	
569	Review the changes made to the Online Banking Password and Security Settings configuration. When ready turn on "Use Two Factor" for password resets. *Please ensure you confirm with Quality Control that your mobile apps have been properly updated to the proper version to avoid errors to users attempting to reset password through mobile app*	N						Our settings for #of hours before first-time password/password reset expires is set at 24. However when we rest the password we get a message that the password is good for three days. Reset a password yesterday and we received a message that member will have until 9/16/2025 at approximately 12:00 to reset. However after 24 hours they receive a message the password has expired.
OLB(It'sMe)	Test the forgot password feature when configurations in Tool #569 are set to Use Two Factor and ensure you are successfully able to reset a password using the two-factor method.	N						We have not turned this on as our intent for the Beta testing was only for BizLink 247

Tool	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5	A Did you complete the Task?	F-P How easy was the task?	4.1 Are you satisfied with 5.1 the results you received?	1. How helpful will the task be to staff?	How likely are you to perform the task after beta?	Tried in CBX and GOLD	Comments/ Explanation of Rating
72	Review the redesigned screen. Test all functionality of the screen and test resetting a user's password, security questions, and username. Test multiple combinations to ensure screens properly display the correct information.	Y	5	5	5	5	5	Our settings for #of hours before first-time password/password reset expires is set at 24. However when we rest the password we get a message that the password is good for three days. Reset a password yesterday and we received a message that member will have until 9/16/2025 at approximately 12:00 to reset. However after 24 hours they receive a message the password has expired. Partner feedback was they like the reset/delete option s all in one place.
1072	If you use CU*Talk, use this new tool to activate/deactivate and reset the members phone banking PIN. *If your Credit Union wishes to use the custom PIN feature, please reach out to Quality Control to have this activated*	N						We have not turned this on as our intent for the Beta testing was only for BizLink 247
	ACCOUNT AGGRE	GATION (SEE/JUI	MP) FOR	BIZLINK 2	247		
14	Enter the password reset function for an account tied to BizLink 247 online banking. Select an employee ID and use the "Aggregation/Jump Permissions" option to set up a related company ID/employee ID combination for that user to see/jump to. (Employee ID must already exist). This procedure may be repeated if multiple business memberships are related to the same owner or manager.	Y						We have one member testing the jump feature right now and they love it. They are very happy with the upgrade. We hope to have more members using it in the next couple of weeks.

Tool	Rate each item on a so (5 = highest, 1 = lo 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	west) u complete th	A task? 1-1 How easy was the task?	4.1 Are you satisfied with the results you received?	How helpful will the task be to staff?	How likely are you to 9.1 perform the task after beta?	Tried in CBX and GOLD	Comments/ Explanation of Rating
BizLink 247	Login to the business membership to which you had accounts. Select an account to jump to from the Pridropdown. Verify that you are jumped to the corresponding and that you can successfully jump be	ove related rofile Menu Y					-	We have one member testing the jump feature right now and they love it. They are very happy with the upgrade. We hope to have more members using it in the next couple of weeks.
BizLink 247	Login to the business membership to which you had accounts. Select an account to jump to from the Pridropdown. Verify that you are jumped to the corresponding and that you can successfully jump be	rofile Menu Y ect						We have one member testing the jump feature right now and they love it. They are very happy with the upgrade. We hope to have more members using it in the next couple of weeks.
BizLink 247	Login to the business membership to which you had accounts. Navigate to the Cross-Account Summary Select one of the jump links from this page and verare jumped to the correct membership.	module.						We have one member testing the jump feature right now and they love it. They are very happy with the upgrade. We hope to have more members using it in the next couple of weeks.
BizLink 247	Login to the business membership to which you had accounts. Navigate to the Cross-Account Summary Make sure the filter capabilities function as you we	module.						We have one member testing the jump feature right now and they love it. They are very happy with the upgrade. We hope to have more members using it in the next couple of weeks.
			L E N	DINO	G _			

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete thetask?	1-1 How easy was the task?	4.1 Are you satisfied with 5.1 the results you received?	1. How helpful will the task be to staff?	How likely are you to 1-1 beta?	/A Tried in CBX and GOLD	Comments/ Explanation of Rating
		SCHEDU	LE FUTU	RE RATI	E CHANGE	S			
506	this tool to schedule can enter in a new B fixed rate loan. Confirm that the Sav	ange Base Loan Rates during BETA, use the change in advance. Confirm that you ase Rate and a Rate Change Date for a re/Done function presents a confirmation e change is recorded.	N						We have not turned this on as our intent for the Beta testing was only for BizLink 247
470	the Base Rate was ch deviations (Online Ba changed. Confirm that the PLN	e rate is scheduled to change confirm that nanged and is accurate and any rate anking, Risk Based Pricing) are also NPRTU report was generated, and the ormation are accurate	N						We have not turned this on as our intent for the Beta testing was only for BizLink 247
		REF	RESH FU	EL DECI	SIONS		1		
2/53	application (New or with the new screen applicant.	eport Decision Screen when working an Existing). Confirm that you are presented , and the information is correct for the Keys and confirm they work as expected.	N						We have not turned this on as our intent for the Beta testing was only for BizLink 247
2/53	'Decision Advice' fun	programs configured confirm that the action button is present on the Credit area. Select the button and confirm that	N						We have not turned this on as our intent for the Beta testing was only for BizLink 247

the Beta testing was only for BizLink 247

Report Decision Screen. Select the button and confirm that

you are presented the CLR Path Decision Advice window.

Review the Credit Report Decision Screen for an application with a FUEL Credit pull performed AFTER the function is enabled by LenderVP. Confirm that 'Refresh This Decision' button is presented. Select 'Refresh This Decision' Confirm a confirmation window is presented- select Confirm.	of Rating
Confirm a confirmation window is presented, select Confirm	
2/53 Review the refreshed decision. Confirm that the Decision elements are correct for the existing credit report and current application number.	on as our intent for nly for BizLink 247
For any application with a refreshed decision - confirm via QUERY (Tool 100) that the Pull Type Number (Field CRPULL#) in the Credit Report Profile Information table (CRBSUMS) is '32'. Use the Credit Report Number (Field CRRPTNO) of the primary applicant as your selection criteria. N We have not turned this the Beta testing was o	
159 If the Decision Code changes (ER to EP or EP to ER) due to the refreshed decision confirm that the change writes out to CUFMAINT. We have not turned this the Beta testing was o	
A U D I T ABNORMAL ACTIVITY MONITORING: STOP-NO-GO FOR ACH DEPOSITS	

Tool	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5	Did you complete the task?	How easy was the task?	4.1 Are you satisfied with the results you received?	1. How helpful will the task be to staff?	How likely are you to 9-1 perform the task after beta?	X Tried in CBX and GOLD	Comments/ Explanation of Rating
101	Select Stop-No-Go Patterns. Verify that the preconfigured 'ACHDEPOSIT' pattern has been populated in the monitoring configuration and the initial status is inactive.	N						We have not turned this on as our intent for the Beta testing was only for BizLink 247
101	Activate the 'ACHDEPOSIT' Pattern. Setup ACH deposit monitoring limits for specific membership designations and/or for all other membership designations. Use limits that best suit your member's ACH banking habits.	N						We have not turned this on as our intent for the Beta testing was only for BizLink 247
1875	Review/Monitor daily ACH exceptions for ABNL records. Verify them against your configured abnormal monitoring limits. Process exception records based on your credit union's outlined procedures.	N						We have not turned this on as our intent for the Beta testing was only for BizLink 247
OLB(It'sMe)	If possible, verify via It'sMe that an ACH outside of configured limits is marked as unavailable for deposit.	N						We have not turned this on as our intent for the Beta testing was only for BizLink 247
	G I	NER	AL	СОМ	MEN	I T S		

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all		task? Are you sa the results received?	How helpful will the task be to staff? How likely are you to perform the task after beta?	Tried in CBX and GOLD	Comments/ Explanation of Rating
		N/A Not applicable	Y/N 1	-5 1-5	1-5 1-5	Y/N	

Please complete and score each task and note any comments you may have regarding each task.

release 25.10! **Route 31 Federal Credit Union** Credit Union Name: Melissa Adams Primary Contact Name: 231-246-7282 Primary Contact Phone Number: How likely are you to perform the task after beta? Rate each item on a scale of 1-5. X Tried in CBX and GOLD Did you complete the Are you satisfied with How helpful will the task be to staff? (5 = highest, 1 = lowest) **5** Extremely the results you 4 Very received? 3 Somewhat **Comments/** 2 Slightly 1 Not at all **Explanation of Rating** Tool Task N/A **Not applicable** 1-5 1-5 1-5 MEMBER FACING This feature will really make processing much 5 Sample tool Sample task 3 2 4 easier for tellers. TWO FACTOR AUTHENTICATION FOR ONLINE BANKING PASSWORD RESETS Review the changes made to the Online Banking Password and Security Settings configuration. When ready turn on "Use Two Factor" for password resets. 569 *Please ensure you confirm with Quality Control that your Ν Not using mobile apps have been properly updated to the proper version to avoid errors to users attempting to reset password through mobile app* Test the forgot password feature when configurations in Tool #569 are set to Use Two Factor and ensure you are OLB(It'sMe) successfully able to reset a password using the two-factor Ν Not using method.

Thank you for helping us test the software

improvements of

Tool	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5	A Did you complete the task?	1-5 task?	4. Are you satisfied with 4. The results you received?	Thow helpful will the task be to staff?	How likely are you to 9.1 perform the task after beta?	X Tried in CBX and GOLD	Comments/ Explanation of Rating
72	Review the redesigned screen. Test all functionality of the screen and test resetting a user's password, security questions, and username. Test multiple combinations to ensure screens properly display the correct information.	N						Not using
1072	If you use CU*Talk, use this new tool to activate/deactivate and reset the members phone banking PIN. *If your Credit Union wishes to use the custom PIN feature, please reach out to Quality Control to have this activated*	Y	5	5	1	5	Υ	The staff do not like going to a separate tool to reset a CU*Talk PIN. I showed them how to use it but still like it better in tool #14 with the online banking reset. We will use it after the beta test is over.
	ACCOUNT AGGREG	ATION (SEE/JU	MP) FOR	BIZLINK 2	47		
14	Enter the password reset function for an account tied to BizLink 247 online banking. Select an employee ID and use the "Aggregation/Jump Permissions" option to set up a related company ID/employee ID combination for that user to see/jump to. (Employee ID must already exist). This procedure may be repeated if multiple business memberships are related to the same owner or manager.	Υ	5	5	5	2	Y	Both our business development officer and I have set up at least one member with this feature. It works great. Not sure how often this will be used after beta. Business member's typically have one membership for their business and one for their personal. They wanted the ability for see/jump to and from their personal accounts.
BizLink 247	Login to the business membership to which you have related accounts. Select an account to jump to from the Profile Menu dropdown. Verify that you are jumped to the correct membership, and that you can successfully jump back.	N						We do not have any accounts that can be linked internally as they do not have users listed.

Tool	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5	/A Did you complete the utask?	F.How easy was the task?	L Are you satisfied with '1 the results you received?	L How helpful will the task be to staff?	How likely are you to 2.1 9.1 9.1 9.1 9.1 9.1 9.1 9.1 9.1 1	/A Tried in CBX and GOLD	Comments/ Explanation of Rating
BizLink 247	Login to the business membership to which you have related accounts. Select an account to jump to from the Profile Menu dropdown. Verify that you are jumped to the correct membership, and that you can successfully jump back.	N						
BizLink 247	Login to the business membership to which you have related accounts. Navigate to the Cross-Account Summary module. Select one of the jump links from this page and verify that you are jumped to the correct membership.	N						
BizLink 247	Login to the business membership to which you have related accounts. Navigate to the Cross-Account Summary module. Make sure the filter capabilities function as you would expect.	N						
	CCUEDI			DIN				
506	If you are able to change Base Loan Rates during BETA, use this tool to schedule the change in advance. Confirm that you can enter in a new Base Rate and a Rate Change Date for a fixed rate loan. Confirm that the Save/Done function presents a confirmation window, and the rate change is recorded.	N N	NE NATE	CHANGE	<u> </u>			Not using

Tool	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5	Did you complete the task?	F How easy was the task?	L Are you satisfied with G the results you received?	T How helpful will the task be to staff?	How likely are you to 9-1 perform the task after beta?	X Tried in CBX and GOLD	Comments/ Explanation of Rating
470	On the date the base rate is scheduled to change confirm that the Base Rate was changed and is accurate and any rate deviations (Online Banking, Risk Based Pricing) are also changed. Confirm that the PLNPRTU report was generated, and the Product and rate information are accurate	N						Not using
	REF	RESH FU	EL DECI	SIONS				
2/53	Review the Credit Report Decision Screen when working an application (New or Existing). Confirm that you are presented with the new screen, and the information is correct for the applicant. Access the Function Keys and confirm they work as expected.	N						Have FUEL but have not gone live yet
2/53	If you have CLR Path programs configured confirm that the 'Decision Advice' function button is present on the Credit Report Decision Screen. Select the button and confirm that you are presented the CLR Path Decision Advice window.	N						Have FUEL but have not gone live yet
2/53	Review the Credit Report Decision Screen for an application with a FUEL Credit pull performed AFTER the function is enabled by LenderVP. Confirm that 'Refresh This Decision' button is presented.	N						Have FUEL but have not gone live yet
2/53	Select 'Refresh This Decision' Confirm a confirmation window is presented- select Confirm. Review the refreshed decision. Confirm that the Decision elements are correct for the existing credit report and current application number.	N						Have FUEL but have not gone live yet

Tool	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5	A Did you complete the task?	1.1 How easy was the task?	Are you satisfied with the results you received?	1. How helpful will the task be to staff?	How likely are you to 9-1 perform the task after beta?	N/A Tried in CBX and GOLD	Comments/ Explanation of Rating
100	For any application with a refreshed decision - confirm via QUERY (Tool 100) that the Pull Type Number (Field CRPULL#) in the Credit Report Profile Information table (CRBSUMS) is '32'. Use the Credit Report Number (Field CRRPTNO) of the primary applicant as your selection criteria.						•	Have FUEL but have not gone live yet
159	If the Decision Code changes (ER to EP or EP to ER) due to the refreshed decision confirm that the change writes out to CUFMAINT.	e N						Have FUEL but have not gone live yet
	ADNODMAL ACTIVITY A	ONITODIA		DIT	50D 46U	DEDOCITO		
	ABNORMAL ACTIVITY N	ONITORIN	IG: 510	P-NO-GO	FOR ACH	DEPOSITS		
101	Select Stop-No-Go Patterns. Verify that the preconfigured 'ACHDEPOSIT' pattern has been populated in the monitoring configuration and the initial status is inactive.	N						Not using
101	Activate the 'ACHDEPOSIT' Pattern. Setup ACH deposit monitoring limits for specific membership designations and/or for all other membership designations. Use limits that best suit your member's ACH banking habits.	N						Not using

Tool	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5	A Did you complete the task?	F-b How easy was the task?	4.1 Are you satisfied with 5.1 the results you received?	1. How helpful will the task be to staff?	How likely are you to 9-1 beta?	X Tried in CBX and GOLD	Comments/ Explanation of Rating
1875	Review/Monitor daily ACH exceptions for ABNL records. Verify them against your configured abnormal monitoring limits. Process exception records based on your credit union's outlined procedures.	N						Not using
OLB(It'sMe)	If possible, verify via It'sMe that an ACH outside of configured limits is marked as unavailable for deposit.	N						Not using
	G E	NER	A L	СОМ	M E N	I T S		
	BizLink 247 – since we do not have accounts that can be linked reaching out to them to find out how the see/jump function we							

Please complete and score each task and note any comments you may have regarding each task.

release 25.10! **Thornapple Credit Union** Credit Union Name: **Courtney Stonehouse** Primary Contact Name: 2699488369 Primary Contact Phone Number: How likely are you to perform the task after beta? Rate each item on a scale of 1-5. X Tried in CBX and GOLD Did you complete the Are you satisfied with How helpful will the task be to staff? (5 = highest, 1 = lowest) **5** Extremely the results you 4 Very received? 3 Somewhat **Comments/** 2 Slightly 1 Not at all **Explanation of Rating** Tool Task N/A **Not applicable** 1-5 1-5 1-5 MEMBER FACING This feature will really make processing much Sample tool 5 Sample task 3 2 4 easier for tellers. TWO FACTOR AUTHENTICATION FOR ONLINE BANKING PASSWORD RESETS Review the changes made to the Online Banking Password and Security Settings configuration. When ready turn on "Use Two Factor" for password resets. CBX is where I did it as we are primarily using 569 *Please ensure you confirm with Quality Control that your Υ 5 3 3 3 Ν CBX. I haven't noticed a difference with our mobile apps have been properly updated to the proper membership version to avoid errors to users attempting to reset password through mobile app* Test the forgot password feature when configurations in Tool #569 are set to Use Two Factor and ensure you are OLB(It'sMe) successfully able to reset a password using the two-factor Ν method.

Thank you for helping us test the software

improvements of

Tool	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5	A Did you complete the task?	1-2 How easy was the task?	4. Are you satisfied with the results you received?	1. How helpful will the task be to staff?	How likely are you to 9-1 perform the task after beta?	Tried in CBX and GOLD	Comments/ Explanation of Rating
72	Review the redesigned screen. Test all functionality of the screen and test resetting a user's password, security questions, and username. Test multiple combinations to ensure screens properly display the correct information.	Y	4	2	2	4	N	Again we primary use CBX.
1072	If you use CU*Talk, use this new tool to activate/deactivate and reset the members phone banking PIN. *If your Credit Union wishes to use the custom PIN feature, please reach out to Quality Control to have this activated*	N	1	1	1	1	N	I did reach out and last time I did I was told it was still not working. I tried in CBX and Gold.
	ACCOUNT AGGRE	GATION (SEE/JU	MP) FOR I	BIZLINK 2	47		
14	Enter the password reset function for an account tied to BizLink 247 online banking. Select an employee ID and use the "Aggregation/Jump Permissions" option to set up a related company ID/employee ID combination for that user to see/jump to. (Employee ID must already exist). This procedure may be repeated if multiple business memberships are related to the same owner or manager.	N						We do not have Biz Link
BizLink 247	Login to the business membership to which you have related accounts. Select an account to jump to from the Profile Menu dropdown. Verify that you are jumped to the correct membership, and that you can successfully jump back.	N						We do not have Biz Link

Tool	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5	A Did you complete the task?	1-1 How easy was the task?	4. Are you satisfied with 4. the results you received?	1. How helpful will the task be to staff?	How likely are you to 9. perform the task after beta?	X Tried in CBX and GOLD	Comments/ Explanation of Rating
BizLink 247	Login to the business membership to which you have related accounts. Select an account to jump to from the Profile Menu dropdown. Verify that you are jumped to the correct membership, and that you can successfully jump back.	N						We do not have Biz Link
BizLink 247	Login to the business membership to which you have related accounts. Navigate to the Cross-Account Summary module. Select one of the jump links from this page and verify that you are jumped to the correct membership.	N						We do not have Biz Link
BizLink 247	Login to the business membership to which you have related accounts. Navigate to the Cross-Account Summary module. Make sure the filter capabilities function as you would expect.	N						We do not have Biz Link
			L E N	DIN	G			
	SCHEDL	ILE FUTU	RE RATI	CHANGE	S			
506	If you are able to change Base Loan Rates during BETA, use this tool to schedule the change in advance. Confirm that you can enter in a new Base Rate and a Rate Change Date for a fixed rate loan. Confirm that the Save/Done function presents a confirmation window, and the rate change is recorded.	N						We are not testing this

Tool	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5	A Did you complete the task?	How easy was the task?	4 Are you satisfied with 4 the results you received?	How helpful will the task be to staff?	How likely are you to 9-1 perform the task after beta?	N Tried in CBX and GOLD	Comments/ Explanation of Rating
470	On the date the base rate is scheduled to change confirm that the Base Rate was changed and is accurate and any rate deviations (Online Banking, Risk Based Pricing) are also changed. Confirm that the PLNPRTU report was generated, and the Product and rate information are accurate	N						We are not testing this
	REF	RESH FU	EL DECI	SIONS				
2/53	Review the Credit Report Decision Screen when working an application (New or Existing). Confirm that you are presented with the new screen, and the information is correct for the applicant. Access the Function Keys and confirm they work as expected.	N						We do not use fuel decisions
2/53	If you have CLR Path programs configured confirm that the 'Decision Advice' function button is present on the Credit Report Decision Screen. Select the button and confirm that you are presented the CLR Path Decision Advice window.	N						We do not use fuel decisions
2/53	Review the Credit Report Decision Screen for an application with a FUEL Credit pull performed AFTER the function is enabled by LenderVP. Confirm that 'Refresh This Decision' button is presented.	N						We do not use fuel decisions
2/53	Select 'Refresh This Decision' Confirm a confirmation window is presented- select Confirm. Review the refreshed decision. Confirm that the Decision elements are correct for the existing credit report and current application number.	N						We do not use fuel decisions

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5	A Did you complete the task?	1-1 How easy was the task?	Are you satisfied with the results you received?	How helpful will the task be to staff?	How likely are you to 9.1 perform the task after beta?	X/X Tried in CBX and GOLD	Comments/ Explanation of Rating
100	QUERY (Tool 100) that the Credit Report Prof	a refreshed decision - confirm via he Pull Type Number (Field CRPULL#) file Information table (CRBSUMS) is ort Number (Field CRRPTNO) of the	N					•	We do not use fuel decisions
159		nges (ER to EP or EP to ER) due to the rm that the change writes out to	N						We do not use fuel decisions
		ABNORMAL ACTIVITY MO	NITORIN		P-NO-GO	OR ACH	DEPOSITS		
101		rns. Verify that the preconfigured as been populated in the monitoring itial status is inactive.							
101	designations and/or for	IT' Pattern. toring limits for specific membership all other membership designations. your member's ACH banking habits.							

Tool	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5	A Did you complete the task?	How easy was the task?	T Are you satisfied with G the results you received?	How helpful will the task be to staff?	How likely are you to 1. perform the task after beta?	Tried in CBX and GOLD	Comments/ Explanation of Rating
1875	Review/Monitor daily ACH exceptions for ABNL records. Verify them against your configured abnormal monitoring limits. Process exception records based on your credit union's outlined procedures.							
OLB(It'sMe)	If possible, verify via It'sMe that an ACH outside of configured limits is marked as unavailable for deposit.							
		N E D		СОМ	MEN	T 5		
		N L K		CON	IVI E IV			