

# 26.05

# Imaging Solutions Software Release

Beta	Online	In-House
4/6/2026	05/17/2026	05/17/2026

## 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 17, 2026.




























*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](mailto:imaging@cuanswers.com).*



**Enhanced Online/Online Clients:** Imaging Solutions will deploy your release on May 17, 2026. Any added features can be purchased in the store at [store.cuanswers.com](http://store.cuanswers.com).

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## eDOCSignature

### **Important Update: New eDOCSignature URL**

The URL used to access eDOCSignature is moving. While this update will be mostly unnoticed by your staff because of all features, tools, and workflows will remain identical, please make sure to update your personal bookmarks and internal documentation to the new address:

- **Old URL:** <https://edocsignature.edoclogic.com/>
- **New URL:** <https://cusign.edocsignature.com/>

#### What You Need to Do

1. **Update Bookmarks:** Ensure all staff members update their browser bookmarks to the new URL.
2. **Update Templates:** If your organization utilizes **eDOCSignature templates**, you must update them with the new URL to ensure continued functionality.
3. **No Action for End Users:** This change is administrative. Your members/end users will not experience any changes to the signing process or interface.

#### What is Staying the Same?

- **Functionality:** All features, tools, and workflows remain identical.
- **Security:** Your login credentials and data security protocols are unaffected.
- **Support:** Our team is available to assist you if you have any questions during this transition.

## CU\*Forms

### **Changes to Cleaning Up Old FormFLOWS**

Currently, CU\*Forms purges closed FormFLOWS older than 180 days. This release introduces a global setting to remove **inactive** FormFLOWS older than 365 days and reduces the retention period for closed FormFLOWS to 90 days. These updates ensure the system remains uncluttered, significantly improving load times for users handling large volumes of records. *Note: This process does not affect documents stored in iDocVAULT and does not generate an audit document.*

### **Text Justification in CU\*Forms**

You will now be able to dictate if the text is justified to the right, left or center. The power is in your hands! This is now built into all “Edit Field” modals in the Template Creation screen.





## Pending Screen Now Gives Option to jump to FormFLOW

The Pending screen now allows your staff to see all documents currently on hold. Additionally, you can easily navigate directly to FormFLOW if the documents were originally pending within that system.

Pending Manage Pending Areas

Pending Area: All Search using keyword

ⓘ Pended documents that have not been modified in 90 days will be deleted.

Title	Last Updated	Last Pended By	Pending Area	FormFLOW	Actions
> JOHN DOE - Consumer Loan Agreement <b>Pending Forms:</b> <ul style="list-style-type: none"> <li>Consumer Loan Agreement</li> <li>AZA-Disclosure&amp;1</li> <li>Notice to Co-Signer</li> <li>WMCU Price You Pay For Credit - Consumer</li> <li>Misc Loan Form</li> </ul>	Mar 20, 2026, 2:25 p.m.	Kyle K	Branch 2	<a href="#">View Package</a>	
> TOMMY TESTER - Account Card	Feb 13, 2026, 1:12 p.m.	Kyle K	Accounting		
> KYLE KARNES - Credit Insurance Application - PCIC	Dec 31, 2025, 11:10 a.m.	Kyle K	Accounting		

Showing 1 to 3 of 3 entries



## Added iDOCVault to Top Panel for Convenience

You can now navigate directly to iDOCVault to view your documents within CU\*Forms.

CU\*Forms [Create Form](#) [View Pending](#) [eDOCSignature](#) [Request a Doc](#) **iDOCVault** [Admin](#)



## Added Delete Document Permission

To give your credit union more control over who can delete documents from CU\*Forms, we have added a Delete Document permission in the Manage Users section.

To enable this for a specific user, go to Admin, select Manage Users, and choose the individual from the dropdown menu. From there, simply check the box for 'Delete Documents'.

Manage Users

Info

eDOC User:

Full Name:

Email Address:

Default Form Groups:

Permissions

- Build Templates
- Manage Users
- Manage Pending
- Delete Documents



## Now Save Joint Owner Credit Reports to Membership

### FormFLOW

We have added the ability to archive a joint owner's credit report from the Membership FormFLOW Archive Supporting Documents Step.



## Added the ability to give FormFLOWS Status

To help your staff manage their current FormFLOWS and ensure they are servicing members in a timely manner, you can now add a status to each FormFLOW. On the Manage FormFLOW page, users can click the downward caret and enter a status message. Any FormFLOW that currently has a message will display a green chat icon.

The screenshot shows the 'FormFLOWS' management page. At the top, there are filters for Status (Open), Assigned User (KYLEK\_CUA112), and FormFLOW Type (All). A search bar is also present. Below the filters, a table lists FormFLOWS entries. The first entry is expanded to show a 'Status' dropdown set to 'Open' and a text input field containing the message: 'Waiting on the member to sign their documents. Check back on Monday.' The table columns are Title, Assigned User, Type, Created On, and Actions.

Title	Assigned User	Type	Created On	Actions
Loan - 648962 LUCINDA BONADIO	KYLEK_CUA112	Vehicle Loan	Mar 23, 2026	[Green Chat Icon] [Edit] [Copy] [Delete]
Loan - 648980 JAMES LIST	KYLEK_CUA112	Vehicle Loan	Mar 23, 2026	[Green Chat Icon] [Edit] [Copy] [Delete]
Loan - 1-606 TOM MEMBER	KYLEK_CUA112	Vehicle Loan	Nov 24, 2025	[Green Chat Icon] [Edit] [Copy] [Delete]
Loan - 616483 DINA TESTING	KYLEK_CUA112	Vehicle Loan	Sep 11, 2025	[Green Chat Icon] [Edit] [Copy] [Delete]



## Right-click on Fields in the Template Admin Screen

To make editing and copying fields easier on the Template creation page, you can now right-click to Edit, Copy, or Delete.

The screenshot shows the 'MEMBER APPLICATION AND OWNERSHIP INFORMATION' form. A right-click context menu is open over the 'Street Address' field, showing options for 'Edit', 'Copy', and 'Delete'. The form includes fields for Member/Owner (Full Name), Street Address, City/State/Zip, Home Phone, Work Phone, E-mail, Employer, SSN/TIN, Driver's Lic. No., Date of Birth, Password, Membership Eligibility, and Occupation.



## Skip Account Selection to Fill Forms

There may be times when you need to print or eSign a form for a member who is not associated with a specific account. To support your day-to-day needs, we have added a 'Skip Account' button that allows you to generate these forms as needed. While these forms will not auto-populate with member

information, they remain fully fillable by your staff for manual entry.

**Account Number**  
Select the account number you would like to use to populate these forms.

✓ Account Card Member Forms

Account Base Search Types: Account Loan App SSN Name

Enter Account Base... Pull Account Data

Skip Account Populate Forms



### **IDPal in eDOCSignature Now Available**

CU\*Forms now supports IDPal integration with eDOCSignature. If you are interested in these services, you can learn more about them from eDOC Innovations - <https://edoclogic.com/product/id-pal/>.



### **Denial Fields Now Update Back to the Core**

The following denial fields now update the application tables in CBX. This gives credit unions the ability to run reports and queries on these tables to gather additional denial information.

- Denial - Application Denied
- Denial - Bankruptcy
- Denial - Can Offer Credit on Terms
- Denial - Credit Terms Comment Line 1
- Denial - Credit Terms Comment Line 2
- Denial - Credit Terms Comments
- Denial - Credit Terms Notify Date
- Denial - Date
- Denial - Decision Based on Other Outside Source
- Denial - Decision Based on Report
- Denial - Delinquent Past or Present Credit Obligations
- Denial - Excess Obligations in Relation to Income
- Denial - Garnishment, Attachment, Foreclosure, Collection Action or Judgement, Repossession, or Suit
- Denial - Incomplete Application
- Denial - Insufficient Income for Amount of Credit Requested
- Denial - Insufficient Number of Credit References
- Denial - Is Missing Information
- Denial - Length of Employment
- Denial - Length of Residence
- Denial - Limited Credit Experience
- Denial - Missing Information Comment Line 1
- Denial - Missing Information Comment Line 2
- Denial - Missing Information Comments
- Denial - Missing Information Due Date
- Denial - No Credit File

- Denial - Obtained Credit Score
- Denial - Other Reason
- Denial - Other Reason Description
- Denial - Poor Credit Performance with Us
- Denial - Temporary or Irregular Employment
- Denial - Temporary Residence
- Denial - Unable to Verify Credit References
- Denial - Unable to Verify Employment
- Denial - Unable to Verify Income
- Denial - Unable to Verify Residence
- Denial - Unacceptable Type of Credit References



## New CU\*Forms Feilds

With this update, your credit union now has access to more form fields to make using CU\*Forms even better.

- Branch Number
- CD - Dividend Calculation Type
- CD - Dividend Payment Frequency
- Credit Insurance - Has Joint Disability
- Credit Insurance - Has Single Disability
- Employee Number
- Has One of All Products
- Limit Increase - Current Credit Limit
- Limit Increase - Increase Amount
- Limit Increase - Increased Credit Limit
- Limit Increase - Process Fee
- Lives in Community Property State
- LOWS - Multiple Collateral Indicator
- LOWS - Total Collateral Value
- Membership Designation - Joint Owner Label
- Membership Designation - Primary Label
- Middle Name
- Previous Gross Income
- Previous Income Frequency
- Previous Net Income
- Suffixes By Products

## Native Receipts

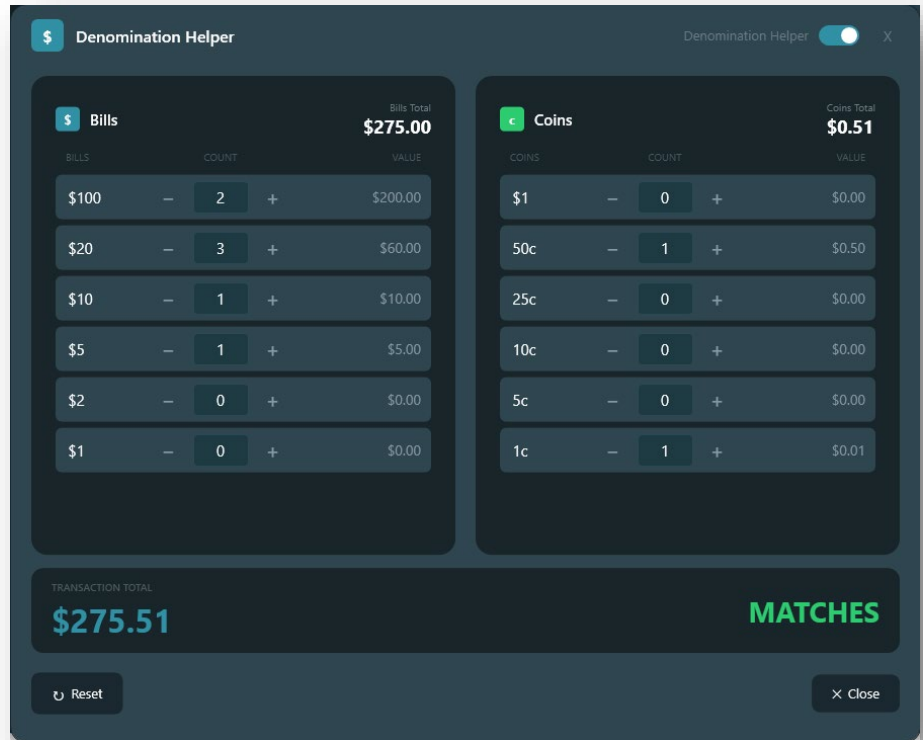


## New Denomination Helper and changes to Cash Tracker

We have built a **Denomination Helper** to guide your staff when providing cash to members. If you choose to enable this feature, the system will automatically calculate the fewest number of bills required for any 'cashback' transaction.

If a member requests specific denominations, staff can easily adjust the values to meet their needs. To ensure accuracy, the tool also displays whether the manually entered values match the required total.

**How to enable:** You can turn this feature on in the **Settings** menu of Native Receipts. Simply right-click the icon in the system tray and select **'Enable Denomination Helper.'** You can also customize which denominations are available under the **Denominations** tab in Settings.



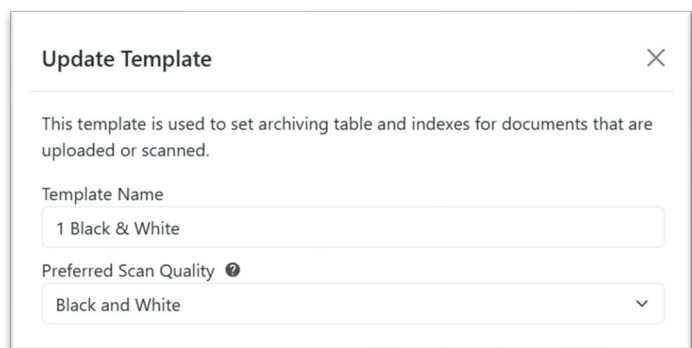
### **“Print to Native Receipts” printer**

In an effort to sunset ProDOC in October 2026, we have replaced the ProDOC printer with our very own 'Print to Native Receipts' printer. The new printer will be automatically installed with this Native Receipts update. It allows you to print most electronic documents directly to CU\*Forms for archiving. Simply click print, select 'Print to Native Receipts', and Native Receipts will pop up with the document for indexing.

### **Smarter Scan Settings**

To help users have a better scanning experience, Native Receipts now automatically tells the scanner to use 'archive quality' best practices, such as 150 DPI and black-and-white mode. This ensures your scanner defaults to archival quality settings, which keeps our image servers running efficiently and effectively.

The **'Preferred Scan Quality'** can be set within the **Upload Template** configuration in **CU\*Forms**. Selecting grayscale or color mode should only be necessary for special circumstances, such as photos of collateral or mortgage documents.





## Added branch as an index for Receipts

Branch number is now an index for receipts. This field will be available for credit unions who want to archive this information in their current\_receipts tables. To keep this information, you will need to update their table indexes to include "branch". If you need assistance with this, please reach out to [imaging@cuanswers.com](mailto:imaging@cuanswers.com).



## Push Marketing Messages to all PC Support

Now update all Native Receipts Marketing Messages with the click of your mouse. While we still support individual updates.

# iDOCVault



## New Cash Tracker View in iDOCVault

When viewing receipts in iDOCVault, there is now a Cash Tracker button that will display the original cash in and cash out.

The screenshot displays the iDOCVault interface with a 'Cash Tracker' modal window open. The modal is divided into two main sections: 'Cash Out' and 'Cash In'. Each section contains a table for 'Bills' and 'Coins' with input fields for their respective counts. At the bottom of each section, there are fields for 'Total Currency', 'Checks', and 'Misc'. A 'Total Cash Out' field is highlighted with a red border and shows a value of \$2.51. The 'Total Cash In' field shows a value of \$0.00. Below the modal, there are fields for 'Net Effect Cash' (\$0.00) and 'Net Effect Check/Misc' (\$0.00), along with a 'Close' button. In the background, a receipt view is visible with a 'Cash Tracker' button at the bottom right, which is pointed to by a red arrow.

Cash Out		Cash In	
<b>Bills</b>			
\$100s	0	\$100s	0
\$50s	0	\$50s	0
\$20s	0	\$20s	0
\$10s	0	\$10s	0
\$5s	0	\$5s	0
\$1s	0	\$1s	0
<b>Coins</b>			
\$1	1	\$1	0
50c	3	50c	0
25c	0	25c	0
10c	0	10c	0
5c	0	5c	0
1c	1	1c	0
Total Currency	\$2.51	Total Currency	\$0.00
Checks	\$0.00	Checks	\$0.00
Misc	\$0.00	Misc	\$0.00
<b>Total Cash Out</b>	<b>\$2.51</b>	<b>Total Cash In</b>	<b>\$0.00</b>

Net Effect Cash: \$0.00    Net Effect Check/Misc: \$0.00

Close

## Software Versions

Below are the versions currently in use with this release:

Product	New Version
AutoRenamer	7.27.0.0
Constate	7.26.0.5
CU*Forms	1.23.0
Doclib	2.4.3
Go Microservices	8.26.0.40
iDOC Vault	8.26.0.19
IntelliSweep	7.26.0.6
ISAdapter	1.9.4
IS-API	1.16.0
MySQL Server	8.4.9
Native Receipts	1.8.19
PHP	8.4.19
RAP Doc	8.26.0.3
Statements	7.26.0.0
Webcommon	8.26.0.3