




Release Information

Product	Release Date
CBX®	July 7, 2026
Released to the Following:	Keys to the Symbols:
<ul style="list-style-type: none">• Online Credit Unions• Site-Four Credit Unions• Self-Processing Credit Unions	<ul style="list-style-type: none"><input checked="" type="checkbox"/> You'll see it immediately. You'll need to activate it. You'll need to work with a CSR to set it up. There may be related fees; contact a CSR.

Notes for This Release

All projects will be available immediately. Your credit union will not need to implement any.

Included in This Release

Print Option Now on Payroll Post Screen

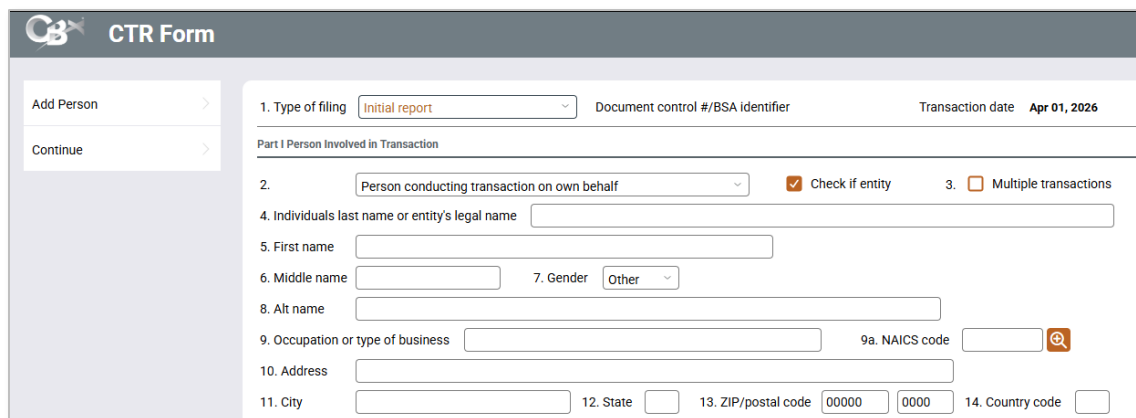
Project Number: 65090

Currently there is no option to select a printer on the Payroll Post Print screen (**Tool #696 Process/Post Member Payrolls**). Instead, the reports are printed to the printer based on the workstation configuration. With this release we are adding the print option pop-up after you select **Post** on the *Payroll Select and Balance For Posting* screen so you can choose a printer or have it route to INSTANTxx.

Middle Name Option Added to CTR Forms

Project Number: 65522

We currently only pull middle initials for our CTR forms. With this release the CTR screen will now read as "Middle Name or Initial" and the system pull from the full middle name if it exists, or from middle initial if it doesn't. Additionally, you can now edit in **Tool #991**. *NOTE: Changes do not write back to CBX tables.*



The screenshot shows the 'CTR Form' interface. On the left, there are two buttons: 'Add Person' and 'Continue'. The main form area contains the following fields and options:

- 1. Type of filing: **Initial report** (dropdown)
- Document control #/BSA identifier
- Transaction date: **Apr 01, 2026**
- Part I Person Involved in Transaction
- 2. Person conducting transaction on own behalf (dropdown)
- 3. Check if entity
- 3. Multiple transactions
- 4. Individuals last name or entity's legal name (text input)
- 5. First name (text input)
- 6. Middle name (text input)
- 7. Gender: **Other** (dropdown)
- 8. Alt name (text input)
- 9. Occupation or type of business (text input)
- 9a. NAICS code (text input)
- 10. Address (text input)
- 11. City (text input)
- 12. State (dropdown)
- 13. ZIP/postal code: **00000** (text input)
- 14. Country code (text input)



Updating Calculation of Early Post if Amount is Exceeded Before Charging Fee

Project Number: 67279

We are updating the Early ACH Post feature calculation to stop allowing early posting when the amount is exceeded before charging the early posting fee.

Database Changes

Running Your Custom Queries

If a file listed below is included in any of your custom reports or inquiries, you must refresh the Query definition, or your Query **MAY NO LONGER RUN**:

1. In **Tool #100 CU*BASE Report Builder (Query)**, choose **2=Change** and enter your Query name, then use Enter to proceed
2. Select **Choose Files**
3. Use Enter **→** to move through these screens until you're back to the **Report Builder - Main Menu**
4. Use **Exit ↑**
5. Select **Save query definition** and Run **Interactively** then use Enter **→**

NOTE: If the field changes from a numeric to an alpha-numeric field, you will need to add 'single quotes' around the Selection Criteria.

Updating Your Automated Queries

If you ever remove or add a file to a Query definition of a Query that you have automated, your Query **MAY NO LONGER RUN** unless you also **update the Query automation configuration** as follows:

1. Access **Tool #758 Report Automation – Custom Rpts/Files**
2. Select the Query and use **Edit**
3. Make the necessary changes and use **Add/Update** to save

NOTE: You do not need to do this if all you do is tweak a selection parameter such as modifying a date.

Changed Database Tables

For details on the formats and available values for specific table columns, refer to **Tool #332 Database Search Assistant**.

Table	Description	Changes Made	PS#
CTRINVOLVD	Currency Transaction Report (CTR) Member Listing	Increase middle name from 1 to 15 characters	65522

Tool Changes

Attention Security Administrators: With each new release, new tools or changes to existing tools may be implemented. **There are no tool updates in this release.**

End