

Conversations on *

2

What's Next for CBX

A CU*Answers Collaboration Group

January 27, 2026



WELCOME!

Today's Agenda

State of the Union

Update on the GOLD sunset

Recent refinements to note

Review of Ideas From Last Time

Already done

We're on it

Maybe...more research needed

Noted but not a CBX thing

Let's Hear From You

Problems & suggested solutions

on the trail



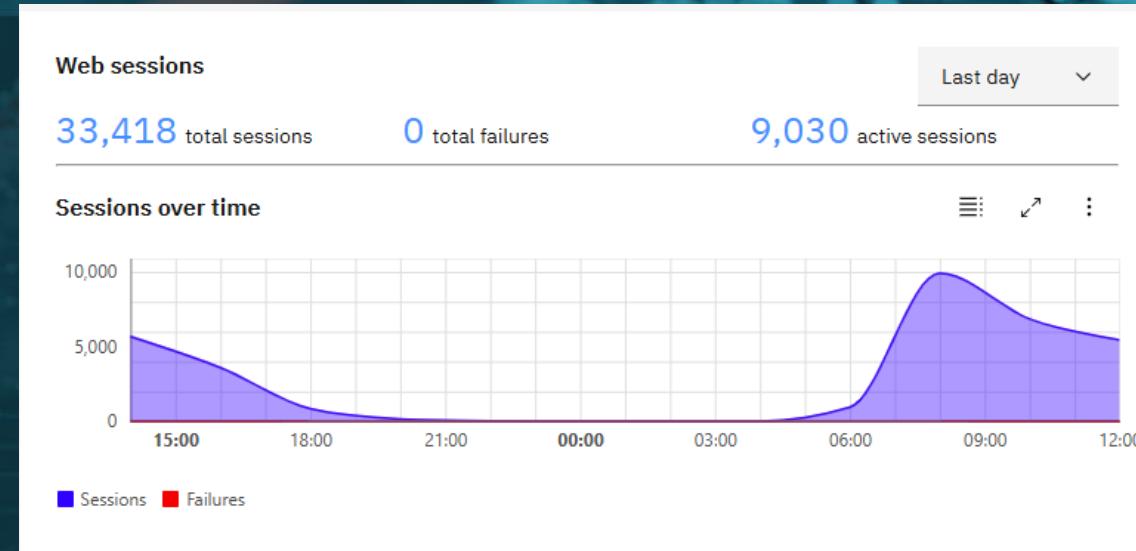


State of the Union



Update on the GOLD Sunset

- CUs using CBX only
 - 1/26 – 102 CUs
 - 1/27 – About 286 CUs
- GOLD sunset TBD
 - Mid February for all remaining CUs
- Session disconnect update
 - Disconnects stems from two different issues
 - Front End – Network, Browser, Session (Estimated 1/28)
 - Back End – Rocket services (Full estimated Mid Feb)
 - **GOAL:**
 - 1) Sessions that are inactive/background tabs should have a lifespan of 1 hour.
 - 2) Activity within these sessions should reset the lifespan.



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Recent Refinements to Note

Released

- Increased contrast for text
- Full-size screen-prints
- VAT (Visual Analytic Tools)
Export to PDF / Excel / CSV



- Restoring misc. GOLD special treatments
- Password change validation

On the list

- VAT on-screen graphs
- Separate color theme for CTE
- Restoring more misc. GOLD special treatments
- Ongoing adjustments for consistency
- Favorites settings
- Marketing images on home page and in Xpress Teller

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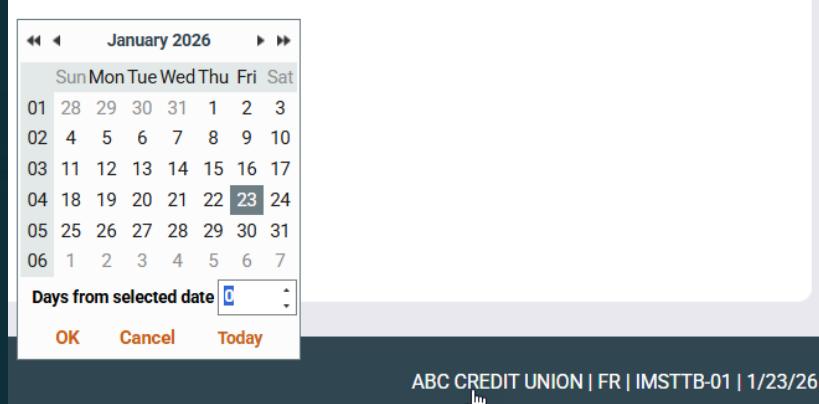


Review of Ideas From Last Time



Already Done

- The Date Calculator is back!



- Tool #61 – use arrow keys to move between fields

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- Use the NumPad + key as Tab



We're on it

- CTE color theme
 - Later this year: other user-defined color themes
- Fix the Query report display so it's as wide as it is in GOLD (?)
 - We're thinking about printing Query display reports directly to PDF
- PCL5 to PDF
 - Completing the project to eliminate print sessions/ProDoc
 - Includes checks/money orders, notices, and similar

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Maybe...more research is needed

- Cash deposits – show the cash counter BEFORE posting
 - “Denomination Helper”
- Cash counter – different color fonts for in vs. out to make it easier to differentiate
 - Anyone remember what this one meant?
- 1Click offers visible on PITT screens for MSRs
- Spell checker for Tracker text
- Link Account Comments to a specific Tracker note
 - Button to click from the Comment to that Tracker
 - (Rather than expand the size for account comments)
- More keyboard hints (for Cmd keys, etc.)

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Added to the Wish List (not a CBX thing)

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- Chat bot for CBX to find things more easily
- Way to send reports to an external data warehouse
- Way to get real-time data into an external data warehouse
- Separating our current marketing opt out flags by email vs. text
- Allow change to receipt (trans) descriptions before the transaction posts
- Organizing accounts and data by SSN instead of acct #
 - (“acct aggregation” for CBX)
 - Enhance the “All Accounts...” window?

Added to the Wish List (not a CBX thing)

- 1Click offers sent individually to a single member, on the fly
- Expand login password length, allow the minimum to be longer
- Add a printable report to Tool 1874 Work ACH Suspense (Invalid Accounts)

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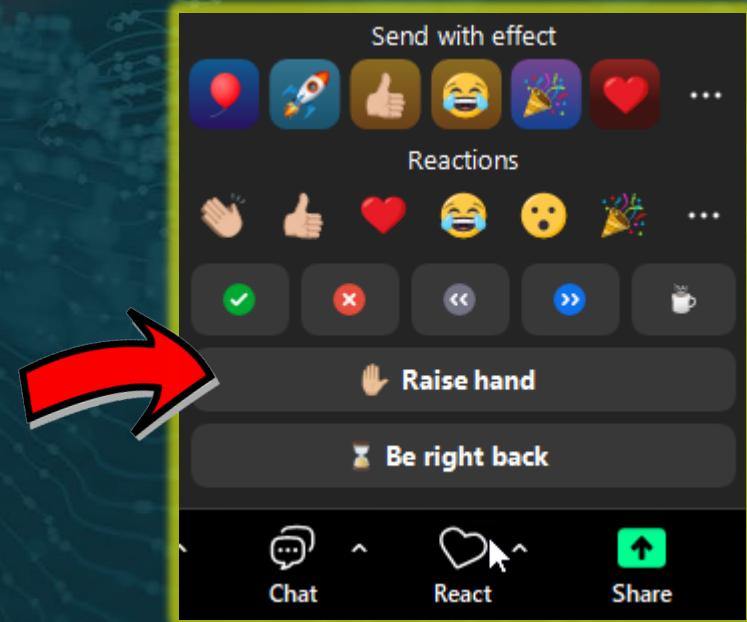


Let's Hear from You



Guidelines for Our Conversations

- Think beyond minor screen tweaks
- Use the “Raise hand” feature and we’ll call on you
- Describe the problem you want to solve
- Pitch your proposed solution
- We will research, then report back at our next event



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Prioritizing the Work

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Upcoming Events

Date	Time
Thursday, October 2, 2025	2:00-3:00 pm ET
Tuesday, January 27, 2026	2:00-3:00 pm ET
Wednesday, April 29, 2026	2:00-3:00 pm ET
Thursday, July 30, 2026	2:00-3:00 pm ET
Tuesday, October 20, 2026	2:00-3:00 pm ET

cuanswers.com/resources/conversations-on

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In the Meantime

CBX - Network Links

Support	Learn	Resources
● Ask a Question	● Accounting Website	● CU*Answers Website
● Check on Client Service Incidents	● CU*Answers Online University	● "It's Me 247" Online Banking
● Check on Network Services Tickets	● CU*BASE Alerts!	● Network Services Website
● GOLD Update Support	● News & Updates	● Submit an Idea
● Monitor Projects in the Queue	● Reference Library	● Submit to Show Me the Steps!
● Who Should I Contact?	● Show Me the Steps!	● Xtendcu.com
	● What's New?	● Your Credit Union's Website

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Thank you!

