

**Conversations on\***

# What's Next for CBX

A CU\*Answers Collaboration Group

October 2, 2025



**WELCOME!**

# Today's Agenda

## Setting the Stage

Where we are today

Phase 2 refinements already in process

## Preparing for the Future

We have a foundation...what's next?

Balancing speed and safety

## Let's Hear From You

Problems & suggested solutions

Prioritizing the work

Preparing for our next events







# Setting the Stage



# Phase 1: Rollout

- October 2024-October 2025
  - Alpha release
  - Deployment to all network workstations
  - Bandwidth testing
- October 2025
  - Shift to beta release
  - Sunset GOLD for early adopters
- Year-end 2025
  - Sunset of GOLD for all
- Q12026
  - Sunset the “Let Us Know” button



Remember to  
test your own  
custom  
screens...  
forms too!

or the trail

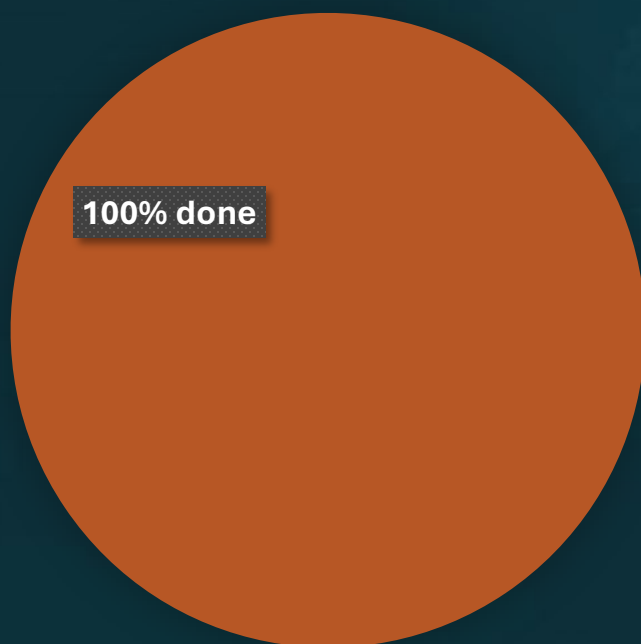




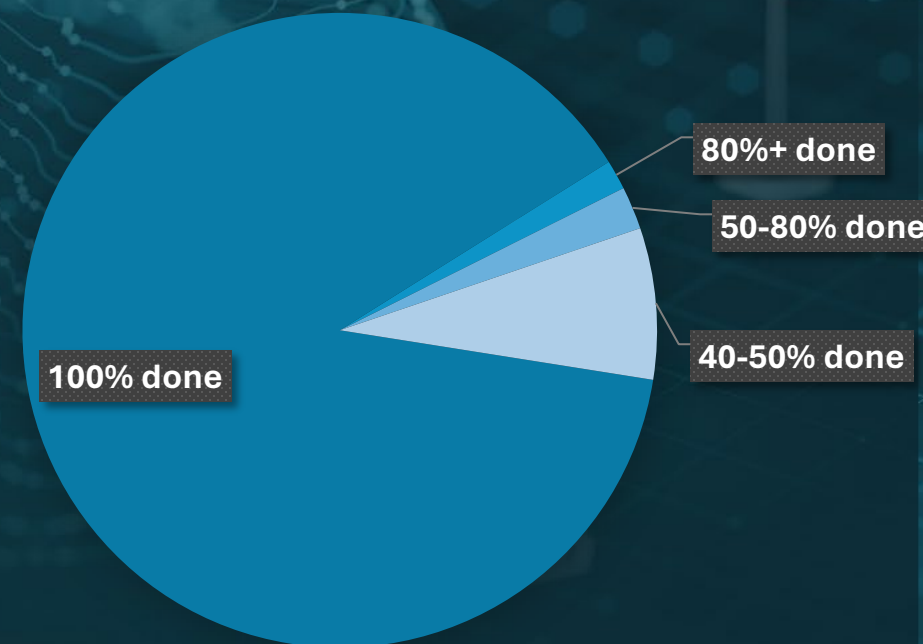
# Where We Are: Final Round of QC

- 88 tools = 90% of all activity
- Defining what “done” means

**Critical Tools (88)**



**"All" Tools (1,228)**



QC sign-off progress: 3/24/2025 through 9/29/2025

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# Phase 2: Refinements

## Already begun

- VAT (Visual Analytic Tools)
  - Export to PDF / Export to Excel / Export to CSV
  - On-screen Graphs
- GOLD special treatments
  - Work Follow-ups button
  - Highlighting in lists
  - Font colors (red Code Word!)
  - Query screen tweaks
  - Scan button in Xpress Teller
- Password change validation

## Still studying

- Increasing the contrast for text!
- Separate color themes for CTE
- Favorites settings
- Screen-print tweaks
- On-screen photo IDs
- Marketing images on home page and in Xpress Teller



# CBX Releases

- Most Tuesdays
  - CBX screen refinements
  - Program changes that don't involve screens
  - Small program changes with minor CBX screen changes
- Major releases in 2026
  - Spring
  - Fall
  - Year-end
- Major releases in 2027
  - Maybe quarterly? TBD!







**Preparing for  
the Future**





# The Future with CBX

- The foundation is finally here...so, what's next?
- Building something that GOLD couldn't
- Utilizing features GOLD couldn't
- Move faster than GOLD could while staying safe
- Opening up for our future

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# GOLD



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# Tear Down Walls



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# Remodeling



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# Ideas We're Already Researching

- Pop-up tool to assist tellers counting cash
- Integration to IRS treasury check fraud tool
- Buttons to view more member details
  - Recent Tracker notes, last few posted transactions, etc.
- Pop-up alerts re incoming loan apps, OLB requests, etc.
- Drag-and-drop methods for arranging sequential records
  - Products for the online banking rate board, Favorite tools, G/L journal entries?
- Combining multiple screens into one long, scrollable page
- Teller check deposit capture with eDOC





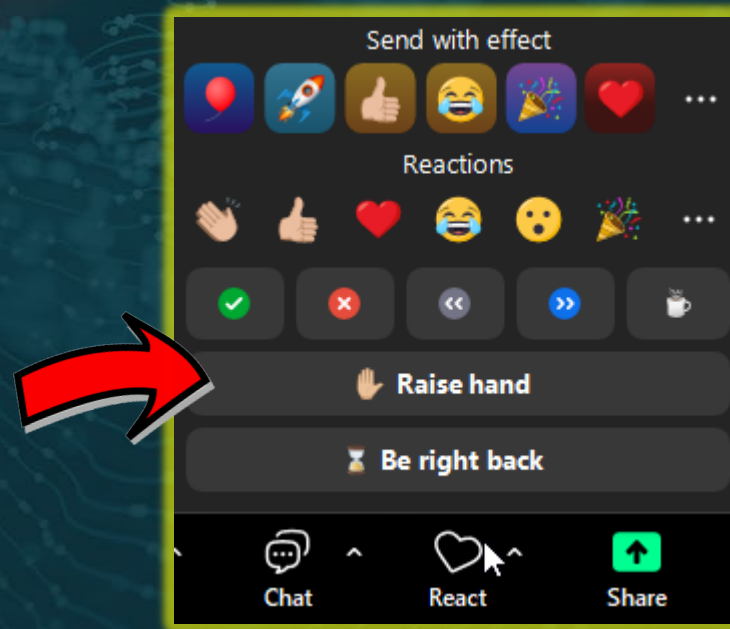


**Let's Hear from You**



# 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





# Prioritizing the Work

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### Upcoming Events

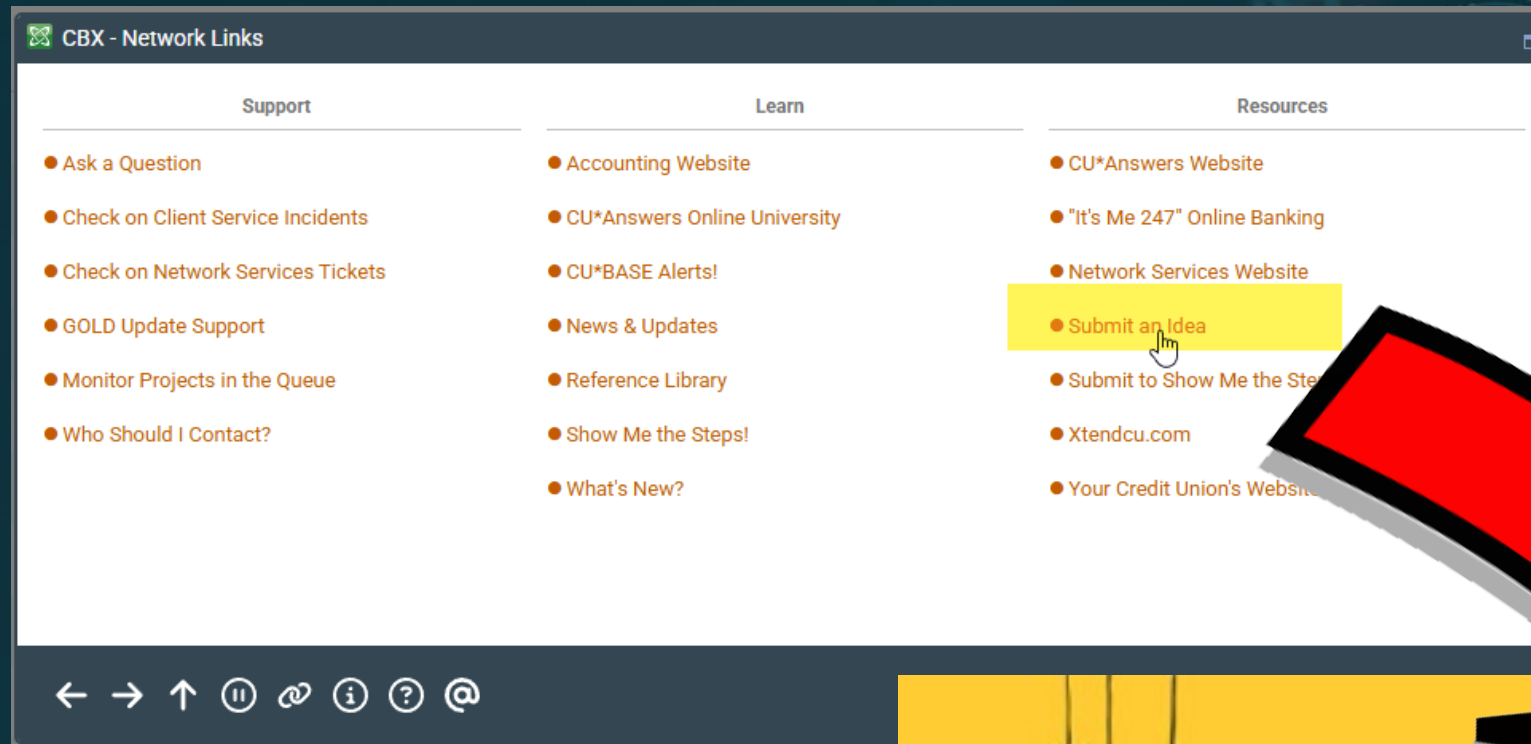
Date	Time
Thursday, October 2, 2025	2:00-3:00 pm ET
Tuesday, January 27, 2026	2:00-3:00 pm ET
Wednesday, April 29, 2026	2:00-3:00 pm ET
Thursday, July 30, 2026	2:00-3:00 pm ET
Tuesday, October 20, 2026	2:00-3:00 pm ET

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# In the Meantime



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**Thank you!**

