

**Conversations on\***

# **3**

# What's Next for CBX

A CU\*Answers Collaboration Group

April 29, 2026



**WELCOME!**

# Today's Agenda

## What's been happening lately...

Recent refinements

Coming in 26.05

## Reviewing your ideas from last time...

Using APIs in CBX: The First Domino

What we're working on, what we're still researching

Noted but not a CBX thing

## Let's hear from you...

Problems & suggested solutions



**What's been  
happening lately?**



# What's been happening lately?

## Recently

- Ongoing tweaks
  - Adjust column widths in lists
  - Values in drop-downs
  - etc.
- Marketing images on Xpress Teller home page
  - Via CU Publisher

## Coming Soon

- Separate color theme for CTE
  - (Other themes are coming!)
- Marketing images on home page – *coming this summer*
- Spell check – 26.05
  - Just marks the mistakes
  - Where shall we put it to start?



# Denomination Helper

Will now pop before the receipt

The screenshot shows the Denomination Helper interface with a 'MATCHES' status. The 'Bills' section shows a total of \$60.00, and the 'Coins' section shows a total of \$0.00. The transaction total is \$60.00.

Bills				Bills Total		
BILLS	COUNT		VALUE	\$60.00		
\$100	0	+	\$0.00			
\$50	1	+	\$50.00			
\$20	0	+	\$0.00			
\$10	1	+	\$10.00			
\$5	0	+	\$0.00			
\$2	0	+	\$0.00			
\$1	0	+	\$0.00			

Coins				Coins Total		
COINS	COUNT		VALUE	\$0.00		
\$1	0	+	\$0.00			
50c	0	+	\$0.00			
25c	0	+	\$0.00			
10c	0	+	\$0.00			
5c	0	+	\$0.00			
1c	0	+	\$0.00			

TRANSACTION TOTAL: **\$60.00**

**MATCHES**

Will be stored with the receipt

The screenshot shows the Denomination Helper interface with a 'DOES NOT MATCH' status. The 'Bills' section shows a total of \$65.00, and the 'Coins' section shows a total of \$0.00. The transaction total is \$60.00, which is over \$5.00.

Bills				Bills Total		
BILLS	COUNT		VALUE	\$65.00		
\$100	0	+	\$0.00			
\$50	1	+	\$50.00			
\$20	0	+	\$0.00			
\$10	1	+	\$10.00			
\$5	1	+	\$5.00			
\$2	0	+	\$0.00			
\$1	0	+	\$0.00			

Coins				Coins Total		
COINS	COUNT		VALUE	\$0.00		
\$1	0	+	\$0.00			
50c	0	+	\$0.00			
25c	0	+	\$0.00			
10c	0	+	\$0.00			
5c	0	+	\$0.00			
1c	0	+	\$0.00			

TRANSACTION TOTAL: **\$60.00** Over \$5.00

**DOES NOT MATCH**

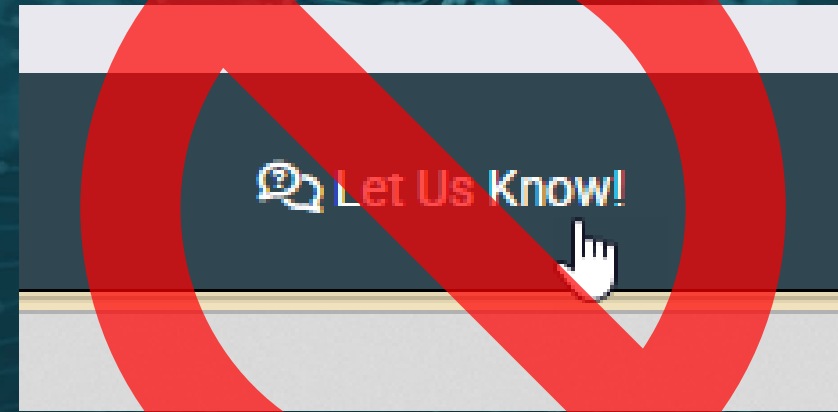
Helps you get the cash right!



Coming in May!

# Say goodbye!

- With 26.05 the “Let Us Know!” button will be removed
- Contact a CSR as usual
  - Via AnswerBook
  - Give us a call
- We’re making an internal process to pass ideas on to the UI team



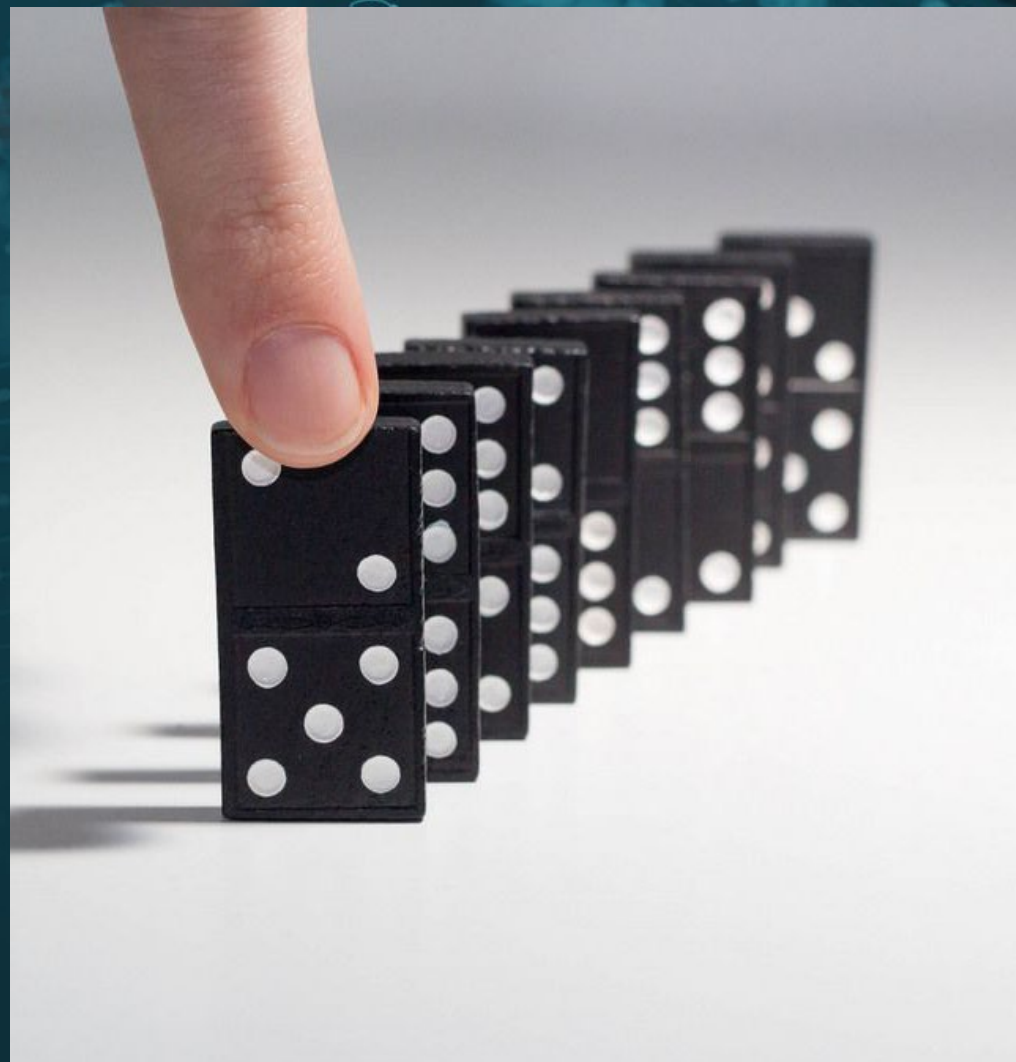


# **Review of Ideas From Last Time**



# Using APIs in CBX: The First Domino

- Before we open the floodgates for API integrations, we have some infrastructure to build
- It's a little "in the weeds," but something we're working on



# Next Up

## Working on now...

- PCL5 to PDF
  - Completing the project to eliminate print sessions/ProDoc
  - Includes checks/money orders, notices, and similar
- Updating Favorites
  - Removing old features, other enhancements for CBX
- Auto-complete address info
  - Requires an integration
- Workflow enhancements for membership creation

## Still thinking...

- Solve awkward scrolling
  - “Data tables”
- 1Click offers visible on PITT screens for MSRs
- 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)



# Reviewing your ideas from last time

- Chat bot idea for trolling doc?
- Greenbar-type look for reports viewed as PDF?
- Match input fields to the length of the box?
- Gray-shade tools you can't access?
  - Return the # of Tools indicator on the home page?
- Workflow things
  - Easier way to get to collections trackers when accessing an account?
  - Link TR inquiry directly from GL history?
  - Add access for updating trans descriptions to Tool #1?
- Change logs/release summary embedded in CBX?
  - Esp. for mini-releases



# Added to the Wish List (not a CBX thing)

- Comments acknowledgement when read?
- Picking “all members” for a Member Connect communication?
- Longer description fields for GL entries?
- Changing an account number without closing the account?
- Returning ACH items directly from trans history?



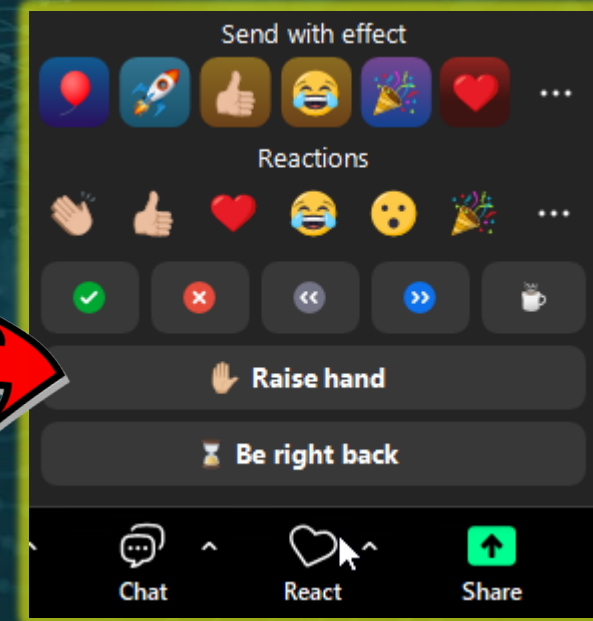


**Let's Hear from You**



# 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

Conversations on 

## What's Next for CBX

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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](https://cuanswers.com/resources/conversations-on)

on the trail



# In the Meantime

CBX - Network Links

Support	Learn	Resources
<ul style="list-style-type: none"><li>● Ask a Question</li><li>● Check on Client Service Incidents</li><li>● Check on Network Services Tickets</li><li>● GOLD Update Support</li><li>● Monitor Projects in the Queue</li><li>● Who Should I Contact?</li></ul>	<ul style="list-style-type: none"><li>● Accounting Website</li><li>● CU*Answers Online University</li><li>● CU*BASE Alerts!</li><li>● News &amp; Updates</li><li>● Reference Library</li><li>● Show Me the Steps!</li><li>● What's New?</li></ul>	<ul style="list-style-type: none"><li>● CU*Answers Website</li><li>● "It's Me 247" Online Banking</li><li>● Network Services Website</li><li>● Submit an Idea</li><li>● Submit to Show Me the Steps</li><li>● Xtendcu.com</li><li>● Your Credit Union's Website</li></ul>

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**Thank you!**

