

Conversations on*

4

What's Next for CBX

A CU*Answers Collaboration Group

August 25, 2026



WELCOME!

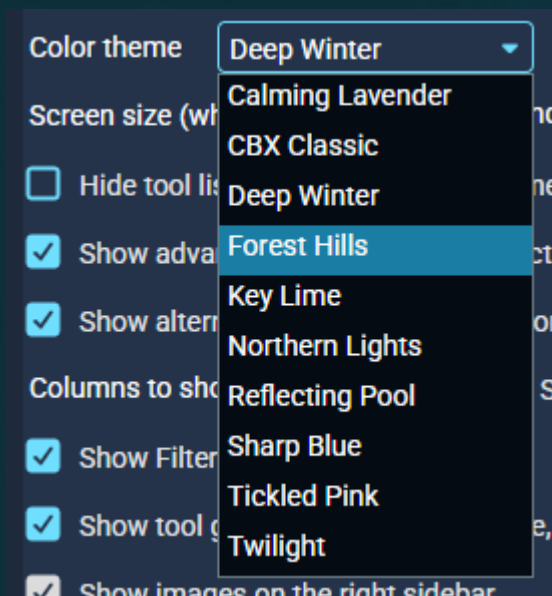


**What's been
happening lately?**



What's been happening lately?

- The return of color themes
 - First update: drop-down field in place of the lookup button.



- Minor release summaries
 - CBX updates with UI changes
 - Pausing during 26.10 beta, restarting again late October

- Spell check added to 54 additional large text fields

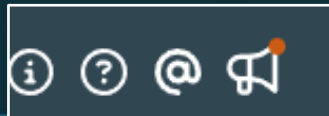
Coming soon...

- Home page updates (UI only) coming in September
- Changes to 'Next Suggested Products' – Mockups in a moment

on the trail

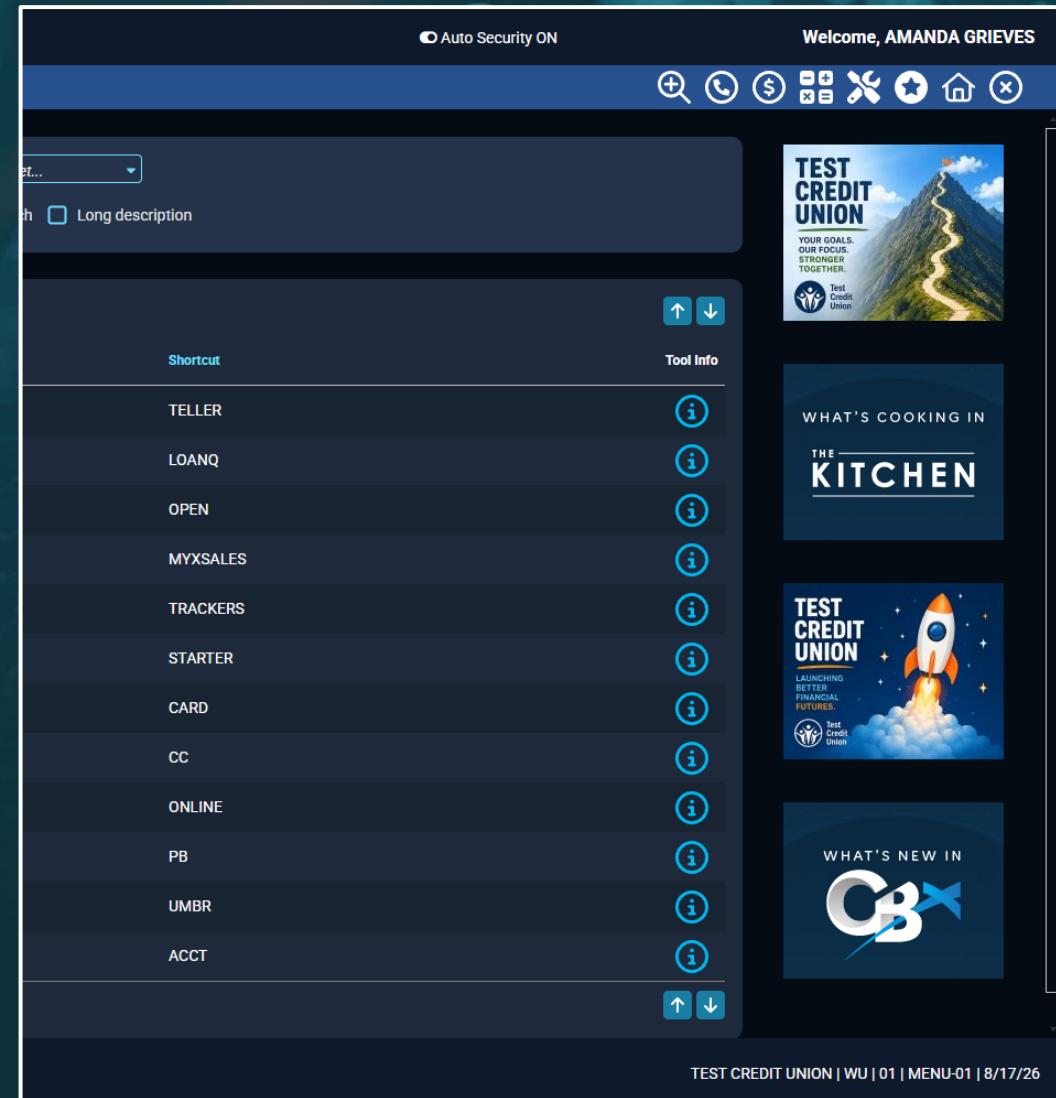


- “What’s New” feature



What's been happening lately?

- CU-defined images on the CBX homepage
 - Customize up to 4 images
 - URL enabled
 - Configured in CU*Publisher
 - CBX Manager is a free add-on
 - Contact IRSC team or visit the online store



Coming soon...

- Next Suggested Product

P [REDACTED] T
 Account # 129610 Indirect
 VIP-PLATINUM Member
[More Info](#)


SIGN MEMBER UP FOR AN ATM CARD
[View Details](#)

Cash	0.00	Total funds in	0.00	Refresh Cash Back
Outside checks 	0.00	Check cash		
Inhouse checks 	0.00	Transaction		
Total funds in	0.00	Cash back		

Y [REDACTED] E
 Account # 77224 Primary
 Name ID WH Corp ID 01
 VIP-PLATINUM Tier
 305 Points


SIGN MEMBER UP FOR AN ATM CARD
[View Details](#)

Opened Mar 22, 2018

[Contact Info](#)
[Member Data](#)
[Participation/Products](#)
[Status Flags](#)
[Decision Advice](#)

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Coming soon...

- Data Tables – Before: Tool #2 – Work/View Loan Application Status

Work/View Application Status Pending Processing

New Application > Loan Amount > Activity Tracking > Counts by UW Code >

Date created: May 30, 2026 To Jun 29, 2026
 Jump to: Loan #... Last name...

Filters: UW status Select? Dealer Select? Loan category Select? Product code Select? Business unit Select? Interviewer ID Select? Underwriter ID Select? Interviewer branch Select? Delivery channel Select?

Clear All Filters Save Settings

Key activity tracking: SUBMIT- UNDERWRITER (0) SUBMIT- LOAN REVIEW (0) SUBMIT- MSO/MSR (0)
 HOME BANKING REQUEST (1) DEALERTRACK (0) ROUTE ONE (0)

Pending Booked Denied Modifications 1Click Offers

Options...

App #	Applicant Name	App Date/Time	DC	Pass	Fail	Review	Central Underwriting Status
							Int ID Action
653323	M	Jun 26, 2026 13:48	CU				09 Model-Requested
653322	K	Jun 26, 2026 13:45	CU				09 Model-Requested
653321	D	Jun 26, 2026 13:43	CU				09 Model-Requested
653314	T	Jun 23, 2026 12:37	CU				92
653311	R	Jun 22, 2026 15:32	CU			Deal	92 Model-Requested
653310	J	Jun 22, 2026 15:31	CU				92
653305	W	Jun 19, 2026 11:07	CU				92 Model-Requested
653302	T	Jun 17, 2026 13:18	CU				92
653303	T	Jun 17, 2026 13:18	CU				92
653281	U	Jun 08, 2026 12:09	HB			Deal	96 96 HOME BANKING REQUEST
653228	I	Jun 03, 2026 10:36	CU			Deal	AA Model-Requested
653215	I	Jun 01, 2026 17:25	CU			Deal	AA Model-Requested

Options...



Coming soon...

- Data Tables – After: Tool #2 – Live demo

CB

Work/View Application Status

Pending Processing

New Application

Loan Amount

Activity Tracking

Counts by UW Code

Date created

Jul 25, 2026

To

Aug 24, 2026

Clear All Filters

Save Settings

Filters:

UW status

Select

Interviewer ID

Select

Dealer

Select

Underwriter ID

Select

Product code

Select

Delivery channel

Select

Loan category

Select

Interviewer branch

Select

Business unit

Select

Key activity tracking:

SUBMIT- UNDERWRITER (0)

SUBMIT- LOAN REVIEW (3)

SUBMIT- MSO/MSR (17)

HOME BANKING REQUEST (8)

DEALERTRACK (0)

ROUTE ONE (1)

Pending

Booked

Denied

Modifications

1Click Offers

Options...

Centralized Underwriting Status

App #	Applicant Name	App Dt/Time	Channel	Pass	Fail	Review	Interviewer	ID	Action
671849	ERIN M	Jul 25, 2026 03:09	HB			Deal	87	87	PENDING- NEED INFO
671850	MICHA	Jul 25, 2026 04:38	HB			Deal	87	87	PENDING- NEED INFO
671851	KAREN	Jul 25, 2026 07:07	HB			Deal	96	L8	DUPLICATE APPLICATION
671854	STEVE	Jul 25, 2026 09:03	CU	Decision			36		Model-Requested
671856	STEVE	Jul 25, 2026 09:06	DT	Decision			R2	R2	APPROVAL INDIRECT
671857	CHRIS	Jul 25, 2026 09:14	CU	Decision			A8	AD	APPROVED- AUTO DEC.
671858	VANEZ	Jul 25, 2026 09:19	DT			Deal	R2	R2	DUPLICATE APPLICATION
671860	KAREN	Jul 25, 2026 09:35	HB			Deal	96	L8	PENDING- MBR CONTACT

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Review of Your Ideas From Last Time



Reviewing your ideas from last time

- Tracker search improvements
 - Lots more coming in a rewrite of the Tracker database structure (*in QC testing now!*)
- Minor notation and birthday greetings at the same time – **in process**
- Inject CU*Forms into denial workflow – **in process**
- Notices and checks/money orders via PDF – **halfway there!**
- Printing a list of account balances and/or recent transactions to a receipt printer – **in process**
- Make it harder to click the wrong button
 - Save/clear inventory in drawer/vault control



Reviewing your ideas from last time

- More member info on the PITT* screens!
 - More obvious notations when members are negative or delinquent (like Xpress Teller)
 - Recent tracker conversations
 - Keep member name and account # visible even after scrolling down
 - Make account comments more visible

Let's chat...

What do you think is the best way to present all this extra stuff? Tabs? Buttons for pop-ups? And what personalization options make sense?

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*PITT = Phone / Inquiry / Teller / Transfers

Added to the core wish list (not UI stuff)

- More lines for account adjustments on the same account
- ACH deposits/distributions to add-on certificates
- Shortcut to Work with Vendors (Tool #990) when creating invoices (Tool #998)
- More search/sort capabilities for G/L History Inquiry (Tool #60)
- Add long last name field to non-member database, display it in Secondary Names inquiry and elsewhere



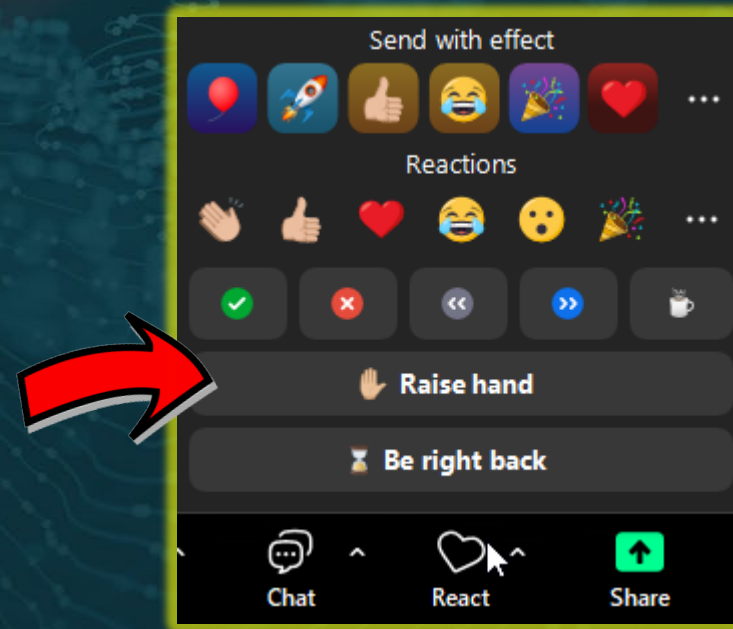


Let's Hear from You



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

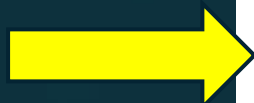
Conversations on 

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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

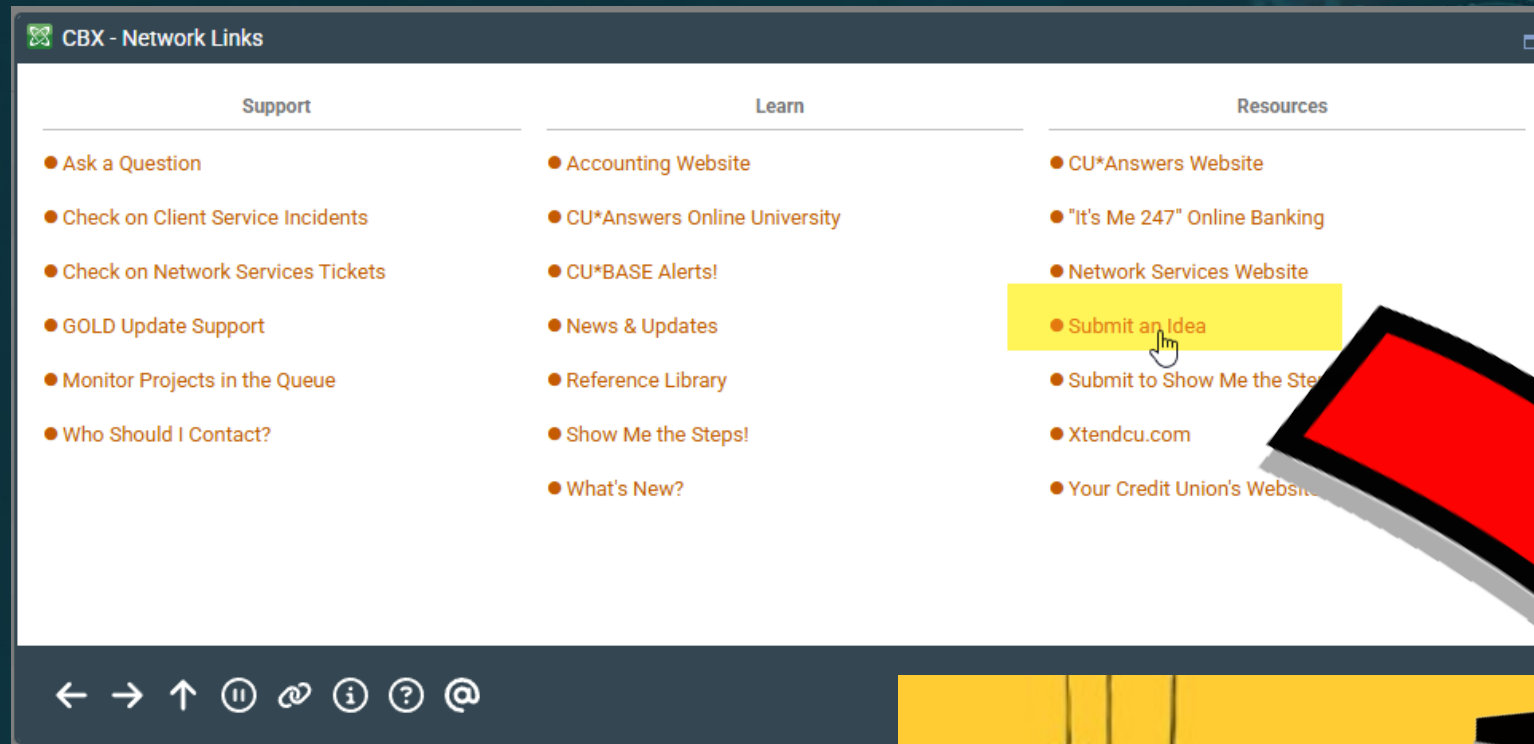


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In the Meantime





Thank you!

