



Writing Team: Tricks of the Trade

May Top Picks: Additional Features in 15.0

Issue 42

Be sure to attend the upcoming Tricks of the Trade webinar on May 19 from 3:30-4:00 PM ET. Watch for an invitation via email. Learn about documentation on additional features included in the 15.0 release.

Pick #1: [How does the enhanced write-off and charge-off feature work?](#)

With the 15.0 release, improved write-off and charge-off processing was built into CU*BASE. The new "Write-Off/Charge-Off Tools" booklet explains the thinking behind the design of the write-off and charge-off tool. The booklet includes configuration instructions, step-by-step directions for processing, and an overview of tools for auditing. The added insight from CU*Answers Collections Services make this a must-read for all collections professionals.

Learn more in the "Write-Off/Charge-Off Tools" booklet, available under "W" on the CU*BASE Reference page.

Pick #2: [How can my credit union configure CU*BASE to send automated emails when a loan is approved?](#)

Since the 15.0 release was implemented, your lending department now has the ability to receive system-generated emails each time a loan approval code is changed on the Loan Recap screen. Minimize the wait time for your lending officers and improve your service to your members with this easy-to-configure feature.

Learn more in the "Configuring Tools for Your Loan Team" booklet, available under "L" on the CU*BASE Reference page.

Pick #3: [Which new reports have been added to the Report Automation feature?](#)

The Report Scheduler feature allows you to configure filters and settings for reports and save them. Then at the beginning of the month these reports are run automatically for you. With the 15.0 release, fourteen new reports were programmed with this feature, bringing the total to 35 reports!

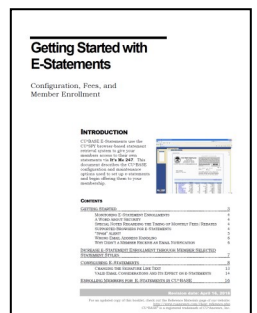
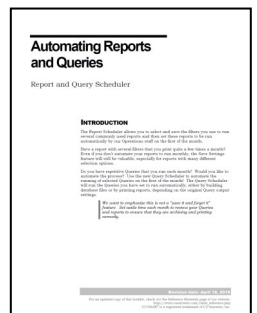
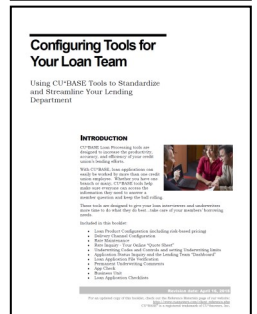
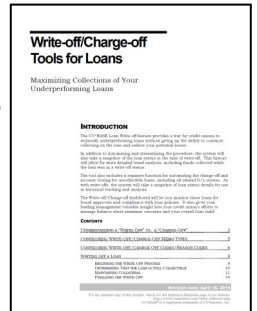
A listing of the new reports added to the Report Scheduler feature can be found in the 15.0 Release Summary. Learn more about this feature in the "Automated Reports and Queries" booklet, available under "A" on the CU*BASE Reference page.

Pick #4: [Can credit unions change the title of the email that is sent to notify members that their eStatement is ready?](#)

With the 15.0 release, we implemented the ability to change the title of your eStatement notification email. This allows for greater customization of the monthly communication you have with your members. Learn more about changing this notification in the "Getting Started with eStatements" booklet, available under "E" on the CU*BASE Reference page.

Pick #5: [What new controls are now in place when a member makes a transfer to another financial institution while in online banking?](#)

Additional controls were added with the 15.0 release when members make account-to-account (A2A) transfers to other financial institutions. Members can now also print a record of the transfer for their own auditing purposes. Learn more in the "Account-to-Account (A2A) Transfers" booklet, available under "A" on the CU*BASE and *It's Me 247* Reference pages.



[Refer to the Tricks of the Trade Newsletter Series page](#) to review previous Tricks of the Trade newsletters!