Writing Team: Tricks of the Trade
November Top Picks: 15.2 Release Documentation #2
Issue 48

Be sure to attend the upcoming Tricks of the Trade webinar on November 17 from 3:30-4:00 PM ET. Watch for an invitation via email. Learn about more features included in the 15.2 CU*BASE release.

Pick #1: How can I quickly find out about release enhancements directly related to my job?

The 15.2 CU*BASE Release Summary is organized by job description. When features affect more than one job, they are referenced in the other section of the Release Summary. Use the Table of Contents to find your job or department. Then click on the page numbers to move directly to that page in the Summary.

The 15.2 CU*BASE Release Summary is posted on the Release Summaries page. On this page you also can find the release summaries from previous releases.

Pick #2: Where can I learn more about the Cross Sales Incentives feature added with the 15.2 release?

The new Cross Sales Incentives configuration allows you to create incentives tied to a memo type (e.g. Approved), Need Group (e.g. Electronic Services), and Tasks (e.g. Bill Pay Enrollment). Once Cross Sales Incentives are configured, the Cross Sales Analysis dashboard now automatically includes these incentive amounts in the calculation.

Additionally, on the CU*BASE Main Menu (MNMAST) there is a now also access to a version of the Cross Sales Analysis dashboard that filters to show only the employee's own activity. Managers can allow access to this screen to motivate employees as they watch their progress towards their monthly incentive payments.

Learn all about these and other new Cross Sales enhancements in the Cross Selling and Next Suggested Product booklet, available under "C" on the CU*BASE Reference page.

Pick #3: I want more flexibility to define my loan application experience.

The 15.2 release introduces a new Loan Workflow Controls screen and a new Loan Application Styles feature. Use this new feature to control your loan officers' experience when working a loan application. Learn more in the Configuring Tools for Your Loan Team booklet, available under "L" on the CU*BASE Reference page.

Pick #4: I hear enhancements have been added to the Consumer Skip-Pay feature. Where can I learn more?

The 15.2 CU*BASE Release Summary is the best place to find highlights of what has been added with the release, including the ability to configure more exclusions, a new Skip-Pay dashboard, and more. For detailed documentation, refer to the Skip Pay for Consumer Loans booklet, available under "S" on the CU*BASE Reference page.

Pick #5: Where can I learn more about new Tri-Merge credit reports with CBCInnovis?

A Tri-Merged credit report takes the data from all of the major credit repositories: Trans Union, Experian and Equifax and merges it into one comprehensive report. Learn more in the Online Credit Bureau Access and 247 Lender Introductory/Startup Guide, available under "C" on the CU*BASE Reference page.

Refer to the Tricks of the Trade Newsletter Series page to review previous Tricks of the Trade newsletters!