Writing Team: Tricks of the Trade
June Top Picks: 16.05 CU*BASE Release Documents
Issue 55

Be sure to attend the upcoming Tricks of the Trade webinar on June 14 from 3:30-4:00 PM ET. Watch for an invitation via email. Learn about new documentation updates related to the 16.05 CU*BASE release.

Pick #1: What was included in the 16.05 release?

The 16.05 Release Summary is the best place to find an overview of everything implemented with the release. Find the 16.05 Release Summary on the Release Summaries page found in the "Resources" section of our website.

For a deeper dive, check out the What's New" help topic that links to individual help topics and reference materials. Access the What's New topic by clicking on the "?" button on any CU*BASE screen and then "What's New."

Pick #2: How can I configure the new SAR/Fraud alert warning window and also research cashed checks?

Look in the new "SAR/Fraud Alert and Research Tool" and "Research Transactions (Including Cashed Checks)" sections in the "Bank Secrecy Act Monitoring Tools" booklet for more information on the new SAR/Fraud alert warning and the new "Activity for this Member" screen.

The "Bank Secrecy Act Monitoring Tools" booklet is posted under "B" on the CU*BASE Reference page.

Pick #3: How can I streamline the loan application and creation process?

With the 16.05 release we have implemented two new features: "Loan Product Defaults" and "Default Loan Forms." Learn more about how you can use "Loan Product Defaults" to prefill in your loan requests and "Default Loan Forms" to preset form to print by loan product. Both will save you time training your loan staff!

Check out the "Configuring Tools for Your Loan Team" booklet posted under "L" on the CU*BASE Reference page for more details.

Pick #4: How can I monitor board approvals and bankruptcy dates associated with written-off loans?

The Write-off/Charge-off dashboard has a new analysis tool full of helpful information, including a way to track board approvals and bankruptcy dates associated with written-off loans. Learn more in the "Write-off/Charge-off Tools for Loans" booklet, posted under "W" on the CU*BASE Reference page.

Pick #5: I hear it is even easier to run promotions at the teller line now that this release has been implemented. Tell me more.

Next Suggested Product has been enhanced so that the graphic or text is now clickable and takes you directly to the promotion to log the interaction! Learn more in the "Cross-Selling and Next Suggested Product booklet" posted 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!