



Writing Team: Tricks of the Trade

June Top Picks: More 17.05 Release Doc

Issue 66

Be sure to attend the upcoming Tricks of the Trade webinar on June 27 from 3:30-4:00 PM ET.

Watch for an invitation via email. Learn about more documentation related to the 17.05 release.

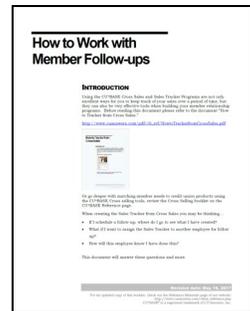
Pick #1: [Where can I find what is included in the CU*BASE 17.05 release?](#)

We talked about the first half of the CU*BASE 17.05 Release Summary in the last webinar. This time we will focus on the second half, including more about marketing/management, lending, and accounting /back office features. Find the summary on the [Release Summaries page](#). Enter “release summary” in the CU*Answers website Google search to find that page.



Pick #2: [How can I assign work to employees who don't initiate the sale?](#)

Now with the 17.05 release you can assign follow-ups to a different employee than the one that created the task. Learn more about the Tracker Reassignment Tool in the [Member Follow-Ups booklet](#). Find the booklet by entering “Member Follow-Ups 2017” in the CU*Answers website Google search.



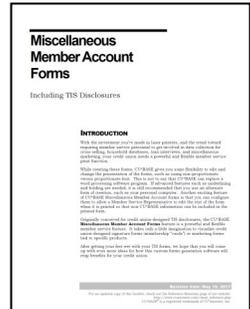
Pick #3: [Where can I learn about changes to Automated Non>Returns?](#)

Automated Non>Returns, also know as Courtesy Pay, is a popular service credit unions offer to members who take their balance below their available balance. Learn about new daily reviews and other exciting changes in the [Automated Non Returns booklet](#). Find the booklet by entering “Automated Non Returns 2017” in the CU*Answers website Google search.



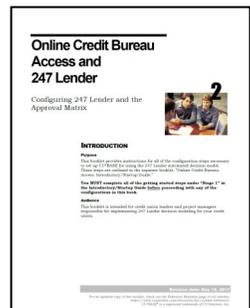
Pick #4: [How can I mask account numbers so they are not printed on miscellaneous member account forms?](#)

Look no further that the [Miscellaneous Member Account forms booklet](#) for information on the new masking feature that allows you to print forms without member account numbers. Find the booklet by entering “Miscellaneous Member Account Forms 2017” in the CU*Answers website Google search.



Pick #5: [What new flexibility has been added configuring Automated 247 Loan Approvals?](#)

Now the Automated 24/7 loan matrix configuration is set according to days instead of months. Learn more in the booklet found on the CU*BASE Reference page under “C.” Refer to the configuration guide.



[Refer to the Tricks of the Trade Newsletter Series page to review previous issues in the Tricks of the Trade.](#)