

CBX

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TECHNICAL PROJECT COORDINATOR



CBX: Building for the Future

- Foundational changes
 - CBX is a browser-based application
 - Moving to centralized deployments
 - Minimized workstation configuration
 - More options for innovation

- Converting over 20,000 screens
 - Never stopped adding new features & enhancements in CU*BASE



CBX: Our Top Priorities

► Performance

- Entirely new windows server network – 16 dedicated servers for CBX
- Doubling our bandwidth early in 2025

► User experience

- Easy transition for our users
- Dual development in GOLD and CBX



Current User Interface

Session 0 - TEST CREDIT UNION
Individual

Update Membership

Date opened [MMDDYYYY]

Account base

Branch # TEST BRANCH NUMBER 2

Scan e-Document
View e-Document

Required Information

Name SSN Name ID Foreign address

Gender Male Female Other Designation Foreign citizen

Birth date [MMDDYYYY] Death date [MMDDYYYY]

DBA name Home type Own Rent N/A

Address #1 Address maintained by employee ID /Y on on Jul 22, 2020

Address #2

City State ZIP code

County

Date moved to [MMDDYYYY]

Certify address Incorrect address

Misc Information

Driver's license State

Long last name

Other ID Deny membership

Full middle name

Last contacted [MMDDYYYY] Last maintained

Contact Numbers	Ext	Label	Comments
1. <input type="text" value="2694711413"/>	<input type="text"/>	<input type="text" value="Home"/>	<input type="text"/>
2. <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

International Text messages Wrong # Mobile Daytime # Nighttime #

International Text messages Wrong # Mobile Daytime # Nighttime #

The numbers stored here are separate from text banking.

Skip	Unlock Fields	Risk Assessment	More Contact #s	Custom Fields	
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CBX: New Look, Familiar Feel

Update Membership Open New Membership

CBX **Imaging Solutions** [Scan e-Document](#) [View e-Document](#)

Date opened: Jul 11, 1997
Account base: [REDACTED]
Branch #: 02 TEST BRANCH NUMBER 2

Required Information

Name: MICHELLE E PROCTOR SSN: [REDACTED] Name ID: PR Foreign address
Gender: Male Female Other Designation: MI Individual Foreign citizen
Birth date: Jan 23, 1979 Death date: MMDDYYYY Report dividends via
DBA name: [REDACTED] Home type: Own Rent N/A
Address #1: 1234 HAPPY LANE Address maintained by employee ID /Y on Jul 22, 2020
Address #2: [REDACTED]
City: GRAND RAPIDS
ZIP code: 49546 0000
State: MI
County: [REDACTED]
Date moved to: Jan 01, 2020
 Incorrect address

Misc Information

Driver's license: P623-603-209=062
Long last name: [REDACTED]
Other ID: [REDACTED] Deny membership
Full middle name: [REDACTED]
Last contacted: MMDDYYYY Last maintained: May 24, 2021

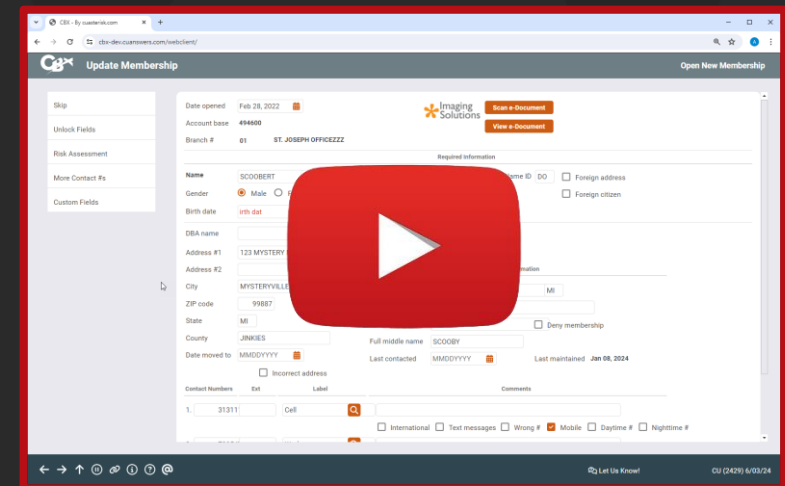
Contact Numbers	Ext	Label	Comments
1. 2694711413		Home	<input type="checkbox"/> International <input checked="" type="checkbox"/> Text messages <input type="checkbox"/> Wrong # <input checked="" type="checkbox"/> Mobile <input type="checkbox"/> Daytime # <input checked="" type="checkbox"/> Nighttime #
2. [REDACTED]		[REDACTED]	<input type="checkbox"/> International <input type="checkbox"/> Text messages <input type="checkbox"/> Wrong # <input type="checkbox"/> Mobile <input type="checkbox"/> Daytime # <input checked="" type="checkbox"/> Nighttime #

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CBX: Day 1 User Experience

- Easy transition for users
 - Familiar layout and functionality
 - CU*BASE hasn't changed
 - GOLD and CBX share user credentials
- New features
 - Larger screen size
 - Web look and feel
- Parallel access with GOLD
 - Beta tester user progression
 - Let us know!

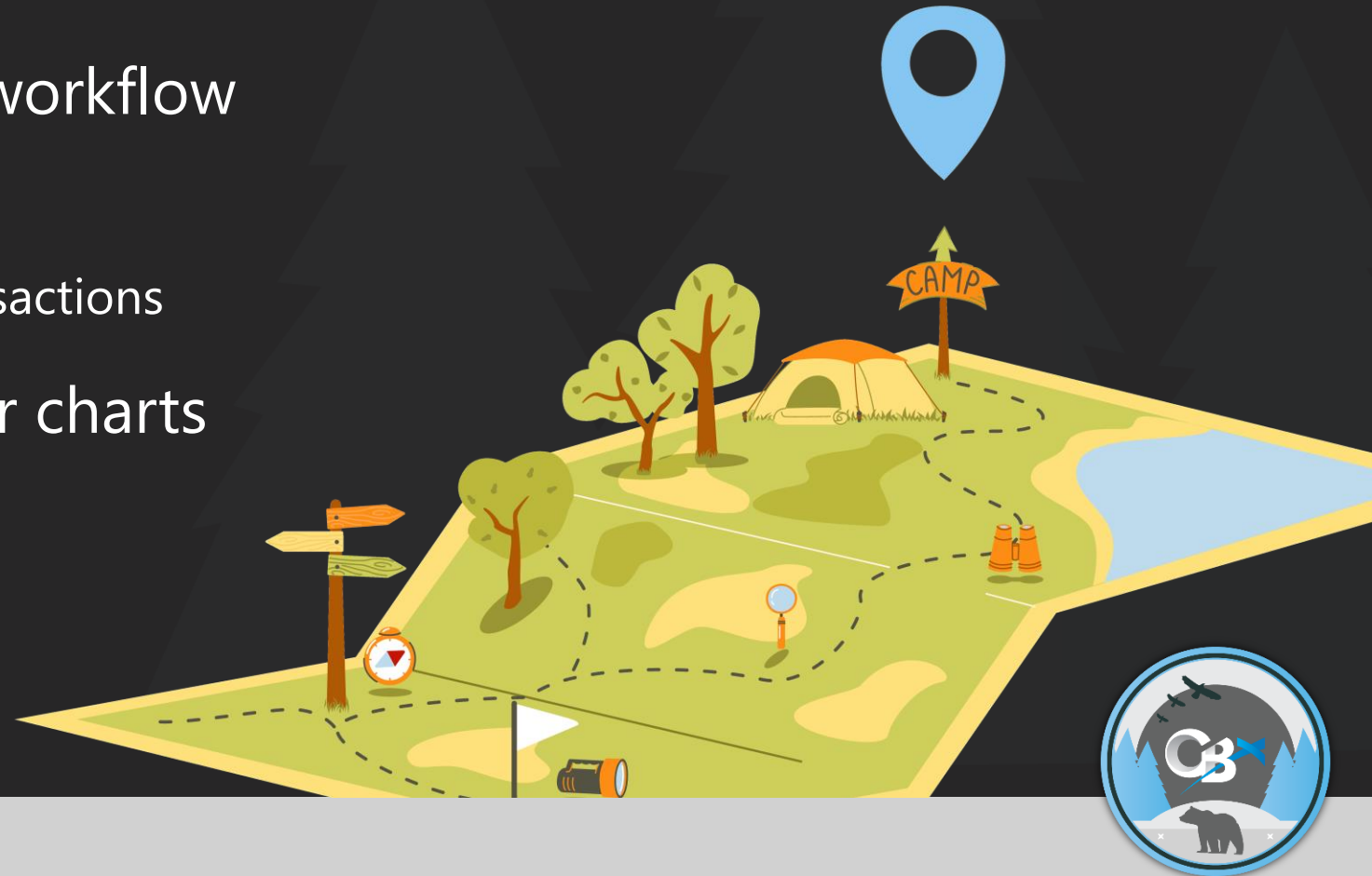


**Watch for the preview
video during lunch**



The Trail Ahead: CBX

- API integrations
- Simplified loan application workflow
- Teller cash calculator
 - Denomination count for cash transactions
- Implementing a new tool for charts and graphs



CBX: Beta Coming Soon

- Summer/fall 2024: Board credit unions will get CBX
- Late 2024: A few partner board credit unions will get CBX
- Late 2024: Sign-ups for access to CBX in early 2025



General Access for CBX

- Early 2025: Begin onboarding clients signed-up for early access
- Mid 2025: All remaining clients will have CBX
- *Most* of 2025: GOLD will be accessible alongside CBX



What Does This Mean for CU*BASE GOLD?

- Last GOLD release will be 25.10
 - No further development, only critical bug fixes
- Mid/Late 2025: Clients will start losing access to GOLD
- Late 2025: GOLD will be sunset for all clients



Stay Informed About CBX

- Kitchen: open.cuanswers.com/CBX
- CBX email series coming in July
- CBX webinars
 - Technology and workstation questions
 - Introducing CBX and Q&A
- Conversations On...
 - Blazing the Trail: What's Next for CBX
 - CU*BASE/CBX releases deployments in the future

Learn more: LC24.info/CBX

