

October 2024 Monthly Recap

The Owner's View Monthly Recap is designed to keep you informed on an ongoing basis of feature improvements, vendor enhancements, and other miscellaneous changes to CU*BASE and our other core software products. This specific Owner's View Monthly Recap covers programming changes implemented during the month of October.

EFT Modifications

- 61003 Created an integration with Zelle/CO-OP using the shared branching network.
- 63675 SHAZAM mandate: partial approval support for Funds Transfer Debits.

Enhancements

- 54581 Added the new Express Teller Search Engine to Phone Operator.
- 58992 Eliminated Error Message When A2A Transfer Exceeds Credit Union Limits.
- 59075 Modified all existing programs that use a vendor name to now pull from ISOVEND and ISOCUVND fields that were repurposed in Project #59073.
- 60412 & 62654 Member in Good Standing – Added NSF criteria and Basic parameters expansion.
- 60503 New Dormancy/Escheat Notices.
- 61004 Added Two Factor Authentication to Online Banking Member Login.
- 61275 Added Loan Category Setting to Prevent selected Credit Card Accounts to be used as Overdraft Protection.
- 61645 Enhancements to Transaction Patterns for Abnormal Activity Monitoring.
- 61923 Automated File Transfer Process for McQueen Financial.
- 62358 Account Cross-reference Enhancements for the FPS GOLD Integration Projects (and other **BizLink 247** custom SSOs).
- 62454 Creation of debit card round up program that a member can elect to contribute to charitable causes.
- 62475 Added a Request Document button to the time-out window.
- 62476 Added "View as PDF" option to the Work with Spooled Reports

- 62844 Dashboard.
- 62844 Create new files and make screen changes to accommodate EFT related transactions via a DataQ instead of a JobQ.
- 62927 Expanded functionality of the API-based **It's Me 247** interface with MagicWrighter to allow ACH payments.
- 63381 Updated Interest Only Loan Switch Process to Add A Switch to Loan Category.
- 63427 Added Financial Institution RSSD# to BSA Configuration to Auto-Populate to CTR Form.
- 63439 CU*BASE file & screen changes for adding two-factor authentication (2FA) to **It's Me 247** and **BizLink 247** (via Project #61004).
- 63842 Added Skip a Pay file to LoanPay Xpress Exchange with Magic Wrighter.
- 62749 Created a new monthly purge process for the SECMAINT table to retain the last 5 years.
- 63942 Implement Supporting APIs for an integration with Sharpen CX.

GOLD Screen Modifications

- 63763 Removed "Save Changes" button on View-Only Marketing Tips screen.
- 63779 Corrected the URL link for Member Tracker Review.
- 64073 Adjusted the mapping of the Backup Arrow in **Tool #13 Work Online Banking Apps/Requests** to exit out of the tool.
- 64301 Re-formatted FIDM GOLD screen to move variables up for visibility.
- 64619 Updated GOLD homepage graphics for 24.10 CU*BASE release.

Modifications

- 62572 Changed report output criteria selection to allow for choice of investor number on Participation reports.
- 63001 Updated **Tool #1970** to allow records with special characters in the investment description to be properly updated in the work table.
- 63183 Updated the close account processing program to delete stop payment records for share accounts.
- 63328 Added edits/field to Stand In files maintenance program.
- 63700 Added CUFMAINT records for marketing club maintenance.
- 63727 Added Tool#/Desc columns to the canned Query for insider/employee activity (SECAUD).

- 63738 EFT file was updated to position to a subfile by CU ID and hold the subfile position of the last record maintained and viewed.
- 63858 Updated Error Message Displayed in **Tool #32: Teller/Vault Cash Transfers & Inquiry** when no branch is entered to be more descriptive.
- 63994 Added "Print Receipt" option to **Tool #492 Member Account Adjustment** when adjusting a credit card account.
- 64689 Screen adjustments for future changes for modified APR for 1Click Offers.
- 64782 Corrected override logic in Dealer Track Payoff file process.
- 64837 Updated CU*FORMS cd product tier rates to include tier levels 2-6.
- 64514 Updated credit card maintenance program to not send phone number changes on blocked cards.
- 64581 Expanded the supported incoming status codes for Optis.
- 61024 Adjusted Accounts Payable history maintenance to display credit G/L # for credit entries.
- 63816 Enhanced EOM and HST save file clear programs to bypass screen for batch processing – internal project.
- 64031 Added an edit in the loan category configuration to only allow a principle payment calc for credit card products.
- 64211 Change to not send Static Pool Analysis error emails for new credit unions.
- 65045 Corrected the PIN reset password process in UPIN to perform the update on the records prior to the write.

Warranty Modification/Adjustment

- 62183 Adjusted logic within the One Time Code method retrieval to ensure all phone numbers are being returned regardless of sequence number.
- 63922 Corrected Maturity Date and Review Date in LNAP for Accepted 1Click Loan offers that are marked as completed.
- 64274 Adjusted Debit Card Round Up program to include EDB type transactions.
- 64627 Eliminated an error in the Teller and Member Services workflow controls.
- 64801 Adjusted Credit Card Ordering to transmit the SSN that is input in the card activation fields.
- 64845 Adjustment to eliminate Receipt print looping for certain accounts.
- 64862 Corrected Logic in PSCU Vendor File Program to Close SQL

Cursors.

- 62528 Adjustment to allow verification of shared branch transactions for consumers with member record in **Tool #984 Work Daily BSA/CTR Activity**.
- 63921 Added edits for birth date on a CTR form.
- 64901 Addressed duplicate error message on Daily Report sends to eDoc.
- 64987 Updated dormancy warning notices to obey the correct flag.