

24.07

Imaging Solutions Software Release

| | |
|-----------|-----------|
| Online | In-House |
| 7/21/2024 | 7/21/2024 |

What is this release?

The Imaging Solutions release is for online, enhanced online, and in-house release managed clients. Some features do not apply to all three types of clients. Refer to the symbols within the document for details.

How do I get this release?



In-House Managed Clients: This release will be provided to everyone on 7/21/2024.



Enhanced Online/Online Clients: This release will be provided to everyone on 7/21/2024. Any added features can be purchased in the store at store.cuanswers.com.

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CU*Forms

Ability to create multiple Membership FormFLOWS

Your credit union now can create multiple Membership FormFLOWS. Just like you needed multiple membership checklists for underage and business memberships, you can now do that with FormFLOW.

In the Membership FormFLOW Admin screen, you can now “Create New Configuration” and build your FormFLOW just like you did in the past.

- Set your default FormFLOW by clicking on the  next to your preferred FormFLOW.
- Copy an existing FormFLOW by clicking the  and naming your new FormFLOW.



Now mass close, reopen, and delete FormFLOWS

To better help your credit union manage their FormFLOWS, we now allow the ability to mass close, reopen, and delete FormFLOWS. Simply select the desired FormFLOW(s) and click “Close” or “Delete” in the bottom right-hand corner. Once they are closed, you can go to the closed status and click “Reopen”, if needed.



Restrict who can click on the reviewer checkboxes

Restrict what users can click on the reviewer checkboxes in FormFLOW. This can be done in the FormFLOW configuration admin page. You can now select which reviewers are eligible to click on the membership review steps.

Eligible Reviewers
 The users below are allowed to review steps for this FormFLOW. If no users are specified, any user can review steps for this FormFLOW.

Enter Username...

Would you like this step to be audited? (If Review step is present) On

Would you like to send a notification when this step is marked done? Off



Turn on and off "To Do" and "Reviewer" steps.

As some steps might not need tracking from both the membership officer and the membership reviewer, we have now added the ability to turn those checkboxes on and off for each step in FormFLOW.


Name

B *I* U 16

Verify Member's Account in GOLD

- Name and address spelled correctly
- Membership fee applied
- If checking is opened, Verify ODP is setup correctly from 000

Step Type
 Custom Step

Show a "To Do" checkbox next to this step.  On


Would you like this step to be audited? (If Review step is present) On

Would you like to send a notification when this step is marked done? Off



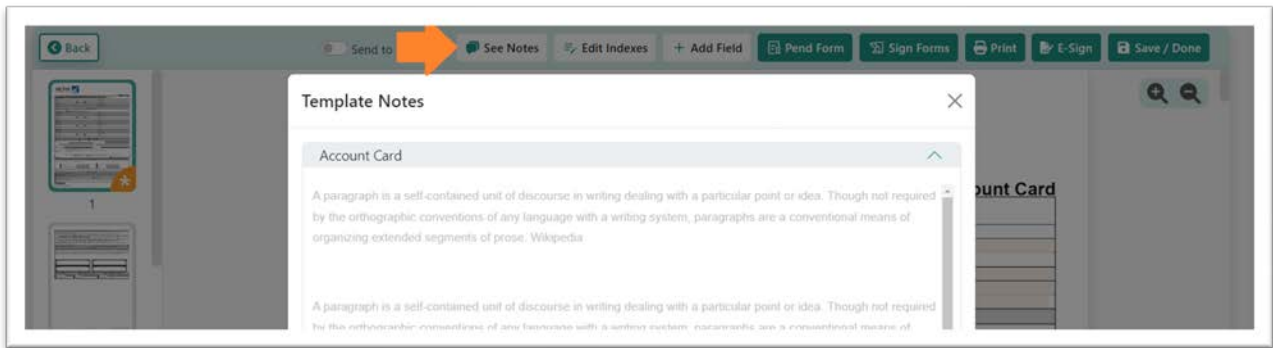
Add documentation on forms to give your staff easy Instructions



When building a template, you can now add documentation to the template that your staff can see while working with the form. Click "Add Note" and type in the given text box any notes you would like your staff to see.

Account Card 

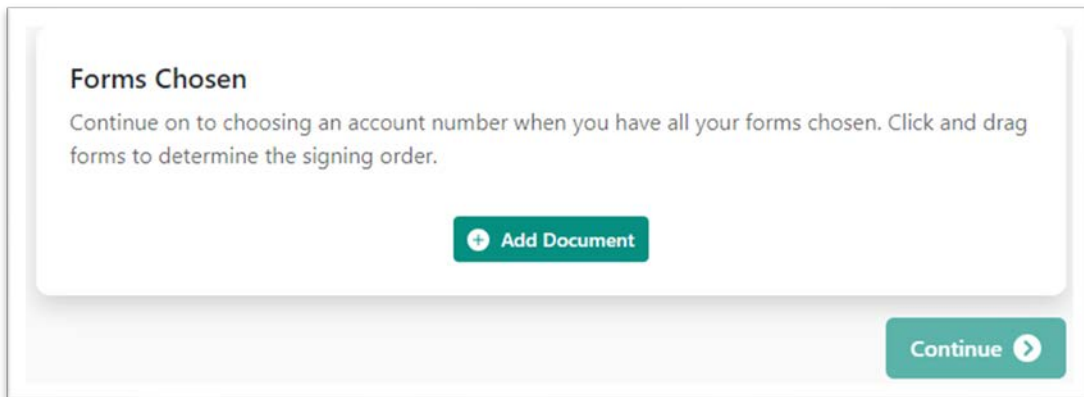
Role: Member/Applicant

While your staff is using/signing that template, they will have the option to click “See Notes” and be presented with all the notes for each template.

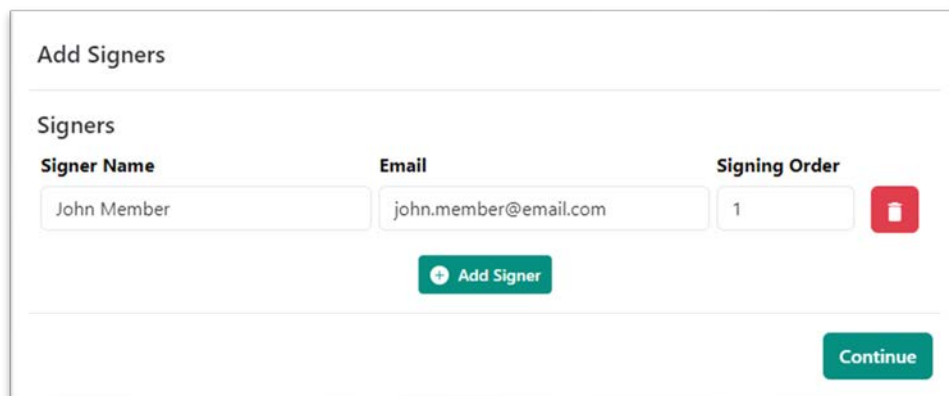


  Ability to upload one-off documents for signature/eSign and reference

Your credit union can now upload documents to send for eSign without selecting any programmed forms. Click “Add Document” and choose your file and an archive table to save the signed document.



After uploading the document your staff will be prompted to define the signer(s) for the document.



Finally, click “Add Field” to add Text, Memo, Signature, Initials, or Date Signed fields to the document.

Edit Field ✕

Field Name:

Field Type: ▼

Signer: ▼


eSign

Send for eSign:

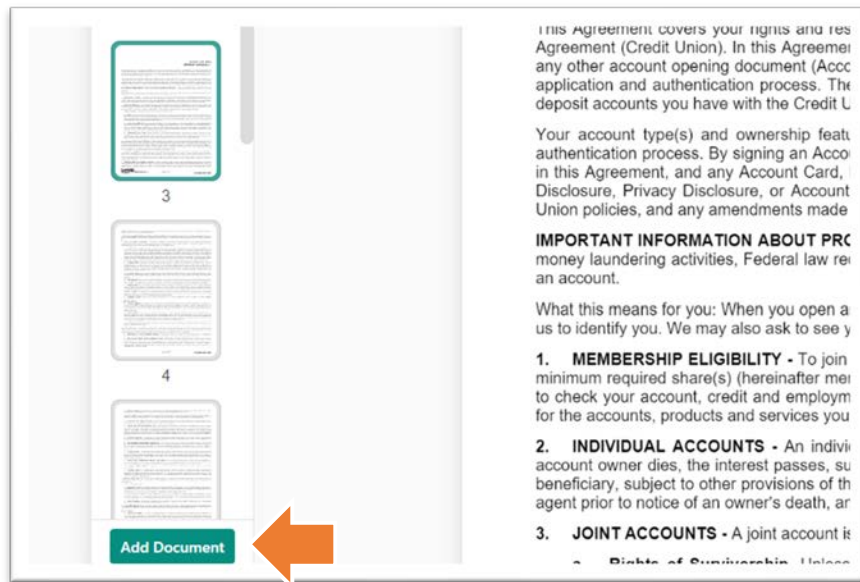
Required for eSign:

Delete Field

Cancel
Save

 Added ability to upload a document directly on the preview page.

When previewing a form or package, your staff can add external documents by clicking the “Add Document” button.

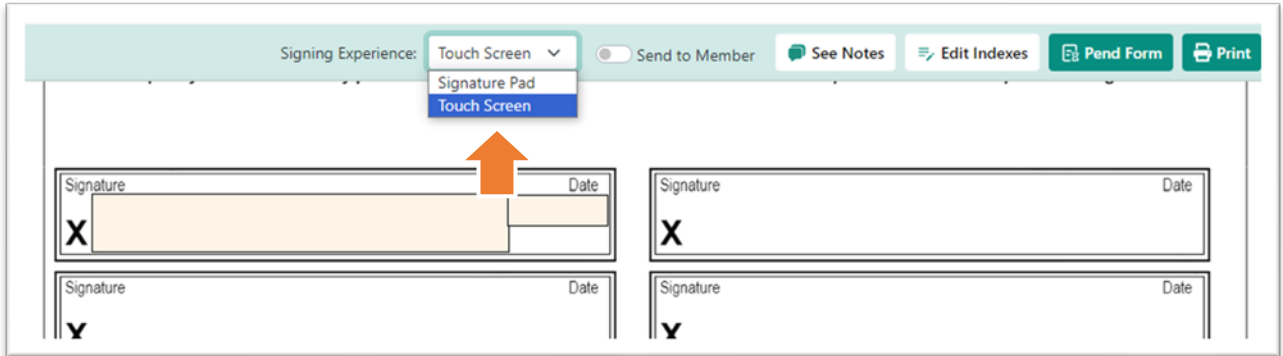


Like the previous feature, your staff can add certain fields to the uploaded document and define signers and eSign options.



Added touchscreen and mouse signing capability.

You can now sign forms with your finger or a mouse. On the form preview page, click the “Sign Forms” button then select which Signing Experience you wish to use.



After selecting Touch Screen, click on any Signature or Date Signed fields on the form to bring up the Signature box. You can use your mouse to sign if you don't have a signature pad. Signatures/Dates will appear in the corresponding fields once you select “Sign”.



Software Versions

Below are the versions currently in use with this release:

| Product | New Version |
|----------|-------------|
| RAP_Doc | 8.22.0.4 |
| IS-API | 1.7.0 |
| CU*Forms | 1.14.0 |