

24.10

Imaging Solutions Software Release

Beta	Online	In-House
8/28/2024	10/06/2024	10/06/2024

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: Imaging Solutions will be contacting you to schedule the update for your system starting October 6th, 2024.

Have an in-house imaging server, but are not a Release Managed client? Sign up for Release Management today and we will waive the fee for the first year! Other options are also available. Contact Imaging Solutions for details at imaging@cuanswers.com.



Enhanced Online/Online Clients: Imaging Solutions will deploy your release on October 6th, 2024. Any added features can be purchased in the store at store.cuanswers.com.

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CU*Forms



New CU*BASE Form Fields Available

With this update, your credit union now has access to more form fields to make using CU*Forms even better. The star of the show is going to be the TIS fields that can be programmed on TIS disclosures. Below is a full list of new fields.

- Membership Reason
- TIS - Dividend Rate
- TIS - Dividend APY
- TIS - CD Rate
- TIS - CD APY
- Proxy Ballots
- Loan - Collateral Definition
- CD - APY
- CD - Allow Principal Distributions
- Other Gross Income
- Other Gross Income Frequency
- Other Income Source
- Reference - Type
- Loan - Payment Amount - First
- Loan - Number of Payments - Total
- Mailing - Full Name
- Mailing - Address Line 1
- Mailing - Address Line 2
- Mailing - Street Address
- Mailing - City
- Mailing - State
- Mailing - ZIP Code
- Mailing - City, State ZIP
- Mailing - Full Address
- Mailing - Recipient Address
- Mailing - Phone Number
- Credit Union - Name
- Credit Union - Routing/Transit Number
- Credit Union - Address Line 1
- Credit Union - Address Line 2
- Credit Union - Street Address
- Credit Union - City
- Credit Union - State
- Credit Union - ZIP Code
- Credit Union - City, State ZIP
- Credit Union - Full Address
- Credit Union - Phone Number
- Credit Union - Website URL
- Membership Designation
- CD Suffixes
- Tax Escrow Suffixes
- Closed-End Loan Suffixes
- Line of Credit Loan Suffixes
- Loan Suffixes
- Has Savings Account
- Has Checking Account
- Has CD Account
- Has Tax Escrow Account
- Has Closed-End Loan Account
- Has Line of Credit Loan Account
- Has Loan Account
- Overdraft Accounts - Protected Account Base
- Overdraft Accounts - Protected Account Suffix
- Overdraft Accounts - Protected Account Base & Suffix
- Overdraft Accounts - Protection Account Base
- Overdraft Accounts - Protection Account Suffix
- Overdraft Accounts - Protection Account Base & Suffix
- Pledged Share - Current Account Balance



Default Signing Roles Name and Email

To create better workflow in your credit union’s electronic process, we have added a new template role called “Predefined Signer”. Predefined Signer eliminates the need to type the same name and email for a required credit-union signer every time. This role can optionally be hidden, so the document is automatically sent for eSign to the predefined signer without additional steps required by staff.

Required	Role Name	Signing Order	Color	Auto-Fill Default	Default Name	Default Email	Default Auth Code	Hide
<input type="checkbox"/>	Member/Applicant	1	Orange	Member				<input type="checkbox"/>
<input type="checkbox"/>	Joint Owner 1	1	Light Green	Joint Owner				<input type="checkbox"/>
<input type="checkbox"/>	Joint Owner 2	1	Light Blue	Joint Owner				<input type="checkbox"/>
<input type="checkbox"/>		1	Light Orange	Predefined Signer	Enter a Default Name...	Enter a Default Email...	Enter an Auth Coi	<input type="checkbox"/>

[+ Add Role](#)

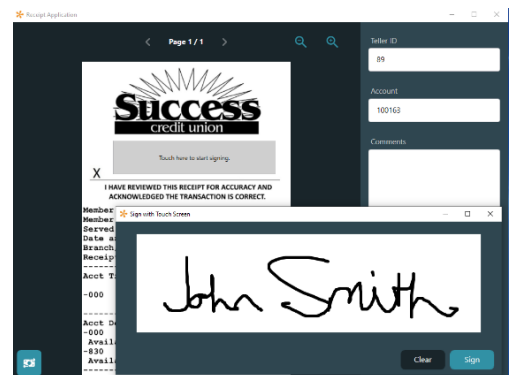
[Cancel](#) [Save](#)

In the “Edit Signer Roles” screen, under the form template creation screen, you will now have an available role called “Predefined Signer”. Enter the signer’s name and email address, which will be used as the default each time the form is created.

Native Receipts

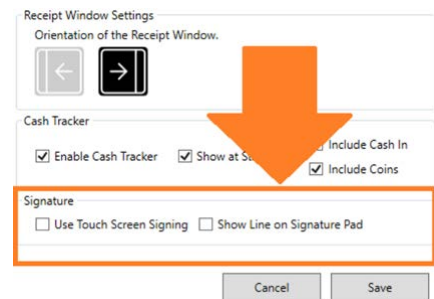
Support for Touch Screen Signing

If your tellers are looking for increased mobility, simply start using Native Receipts with a Windows tablet and allow your members to sign with their fingers. There is no need for a signature pad if you have a touch-screen device. To enable this feature, simply select “Use Touch Screen Signing” in the Native Receipts settings menu.



Displaying a Signature Line on the Signature Pad

To better support larger signature pads, we have added the ability to display a signature line on the signature pad’s screen. To enable this feature, simply select the “Show Line on Signature Pad” in the Native Receipts settings menu.



Support for Multiple Users on a Workstation

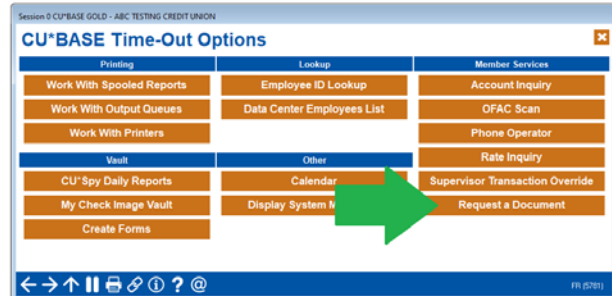
In the past, Native Receipts did not support multiple Windows users being logged into the workstation. That required staff to exit Native Receipts before they clicked switch user. With this update, we are happy to announce that Native Receipts will run properly with both users logged in. This gives your staff one less thing to worry about before leaving for lunch!

Requested Documents



Enhancement to Request a Document!

Love the “Request a Document” feature on the loan application screen? Now you can request a document anywhere, anytime, for any reason, via the CU*BASE time-out window!



Simply click the “Request a Document” button, provide account details, and select from the premade requested documents such as driver’s license, copy of insurance, or proof of income, or you can even create your own request. Better yet, we have improved the Request a Document experience to allow you to pull an account from the last ten memberships you assisted. Request up to ten different documents and click Send. The member will receive a message or email with a link that will launch an interface like the one you use for eDOCsSignature that will walk your member through the process of uploading the document. You even receive an email when the task is done so you know that it is waiting for you! This feature will be activated when the release is implemented for Imaging clients.

Request a Document

- 1 Select the request method.
- 2 Verify/Enter the member's information.
- 3 Enter requested document type and message text.
- 4 If desired, click "Add Additional Request" and repeat steps 1-3.

13:04 minutes left
SERVERNAME IN ENV - In-House

Select a request method Search Accounts

Email

First Name Last Name

Email Phone Number

Document #1

Document Type

Where do you want to save the document?

Email Text (3-69 characters)

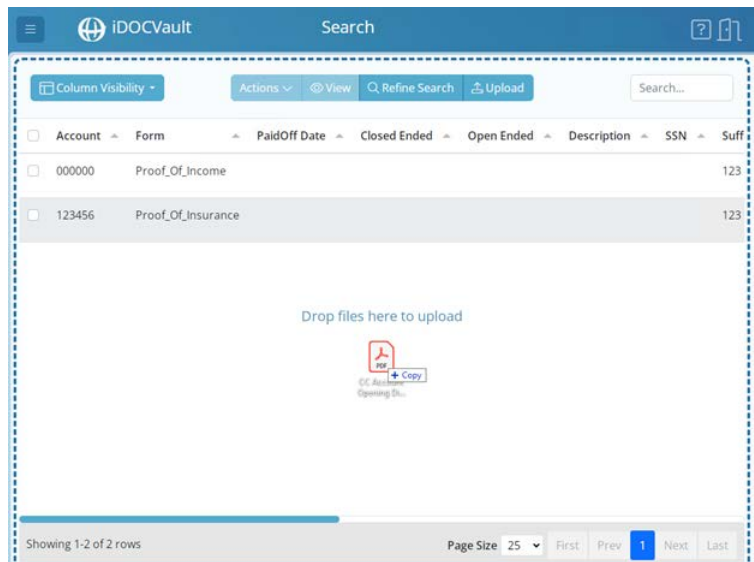
+ Add Additional Request

Send

iDocVAULT

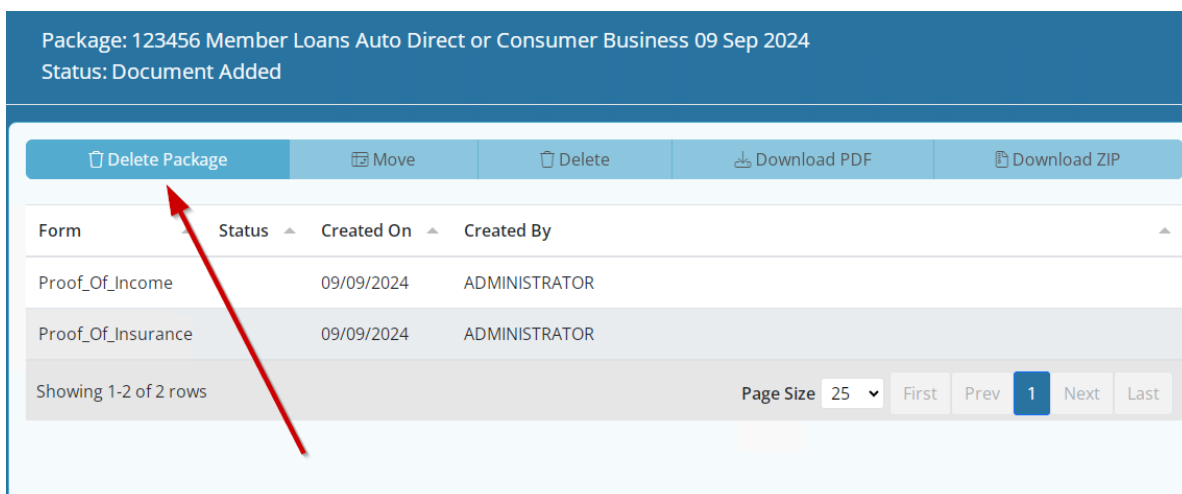
Upload Multiple Files At Once

iDocVAULT now supports the ability to upload more than one document at a time. In the document upload interface, use the file browser or drag-and-drop multiple files at once and index them back-to-back.



Delete Packages in iDocVAULT Packages Screen

Package management from iDocVAULT just got easier! Now, in addition to searching and viewing packages from iDocVAULT, you can delete documents or the entire package without navigating to ProDOC's package manager. When deleting the entire package, you also have the option to retain or delete the documents contained within the package.



Software Versions

Below are the versions currently in use with this release:

Product	New Version
Archive Job Control	7.22.0.1
AutoImportCon	7.22.0.0
2020DOC	7.23.0.0
ConState	7.23.0.3
CU*Forms	1.15
DocLib	2.2.11
Document Server	7.23.0.4
Go Microservices	8.23.0.9
iDoc Vault 2.0	8.23.0.47
Intellisweep	7.23.0.2
iSweep	7.23.0.1
ISAdapter Service	1.4.1
ISAPI Gateway	7.23.0.1
ISAPI Web Portal	7.23.0.0
JMS	1.4.1
MySQLConfig	8.23.0.7
MySQL Connector	9.0.0
MySQL Server	8.0.39
MySQL Workbench	8.0.38
Native Receipts	1.4.10
PHP	8.1.29
RAP	8.23.0.2
RAP Doc	8.23.0.4
RAP Pkg	8.23.0.4
RAP Rpt	8.23.0.3
RAP Sta	8.23.0.1
Security Manager	7.23.0.0
Vault Manager	1.2.2
WebCommon	8.23.0.8