CU*BASE 24.05 Release Resource Companion

May 2024



This edition of the Release Resource Companion covers new and updated materials related to the 24.05 Release of CU*BASE. Take a look at the topics below to view important updates to several booklets, all collected in one convenient document for your staff!

Updated Booklets

Automated Non-Returns

Interested in learning more about your NSF/ANR fee income? Now you can use a canned Query to identify all NSF/ANR transactions that have occurred on any day for analysis and to evaluate fee reversals, if appropriate. <u>Click here to learn more</u>.

CU*Forms

CU*Forms is more convenient than ever! Now you can use this popular forms-generation tool to replace the disclosures, signature cards, and other forms used for new accounts, and then have those forms automatically generated when new accounts are opened in CU*BASE. Learn more in the booklet.

Interest Payment Only Loans

New curtailment configuration allows you to determine how mortgages are paid if they include more than the amount due and are after the payment date. <u>View this booklet and the loan category documentation for more details.</u>

It's Me 247 Mobile Text Banking

If your credit union configures this feature without a fee, a new warning message alerts the employee that member-facing instructions are required. Check out the booklet.

Native Receipts User Guide

Now you can print all receipts with the Native Receipts Application! It's not just for Xpress Teller anymore! View the booklet.

Credit Card Configuration Guide

Members can overpay their credit card within a new, configurable overpayment limit, as they prepare for vacations, large purchases, or other needs. Learn more about configuring an overpayment limit in the booklet.

Balancing Made Easy

Use the NEW **Tool #1048** Corporate Check Reconciliation Dashboard to supplement your corporate check reconciliation process.

<u>Learn more in the Balancing Made Easy booklet</u>.

A2A Transfers

The Daily A2A Exception Report (LMBRA2AEXP) includes now more exceptions that prevented A2A transfers from posting. There is also a brand-new A2A Transfers report, Daily **Posting** (LMBRA2ACP), that lists all successfully posted A2A transfers at EOD. Learn more about the A2A report enhancements in the A2A Transfers booklet.

1Click Offers

We have expanded our 1 Click Offers with the 24.05 Release to include what are coined as 1 Click Unfunded Offers. Using the same 1 Click functionality, credit unions will have the same ability to offer a pre-approved secured loan to members in online and mobile banking, without immediate funding and loan creation. Click here to view the booklet.

Updated Help Topics

CU*BASE Query: Q-NSF Fees (NSFTR)

Alongside the updates to the Automated Non-Returns booklet, we have added new details to this Help topic. View the Help topic.

Updated AnswerBook Topics

Can Members Pay Their On-Demand ACH Instant Deposit Fees from Their Incoming Deposit?

<u>Check out this Knowledge Base item to learn</u> more about this topic.

Can Members Overpay Their Credit Cards in Order to Extend Their Credit Line, Such as for a Vacation?

<u>Check out this Knowledge Base item to learn</u> more about this topic.