Beta Test Checklist

Please complete and score each task and note any comments you may have regarding each task.

Credit Union Name: **Frankenmuth Credit Union**

Primary Contact Name: **Hollie Britton**

Primary Contact Phone Number: **989.497.1629**

Rate each item on a scale of 1-5.
(5 = highest, 1 = lowest)

5	Extremely
4	Very
3	Somewhat
2	Slightly
1	Not at all
N/A	Not applicable

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
MEMBER FACING							
Sample tool	*Sample task*	*Y*	*3*	*2*	*4*	*5*	*This feature will really make processing much easier for tellers.*
777	If possible, activate debit card round up to allow donation transfers. Create a recipient code for donation transfers and enroll a member using tool #14. Confirm debit card transactions on account for the day. The next day, confirm round up posted to members account with the configured transaction description and that the funds posted to the G/L attached to recipient code. Verify report TRUPST2 to see debit card round up that posted for member enrolled	y	5	5	5	5	Very easy. Nice feature that has a lot of marketability and appeal
569	If possible, turn on two factor authorization. Use tool 569, select the second option, “Online Banking Password and Security Settings.” (Hit enter on the first panel to continue to the next page.) Turn on “Require two factor authorization” according to your plan for testing or implementation. Select the Update button to save your configuration.						8/28 MT approved turning on MFA for consumer accounts only. Shooting for 9/18 to go live. 7 days to remember on desktop, can be 30 on the app. Anita and HB will work on notices to member, and make sure call center is prepped for password resets. Will test – possibly 8/17

Rate each item on a scale of 1-5.
(5 = highest, 1 = lowest)

5	**Extremely**
4	**Very**
3	**Somewhat**
2	**Slightly**
1	**Not at all**
N/A	**Not applicable**

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
Online Banking	Login to your **It's Me 247** account. Choose your desired communication method to receive your one-time password (OTP) for multi-factor authentication (MFA). Make sure you receive the OTP and enter it into the field provided. Submit your OTP and verify that you are successfully logged in.						
Online Banking	Have an employee with an A2A account configured login to **It's Me 247**. Go to the transfer page and select the A2A account as the 'From' account. Verify the daily and 30-day limits for incoming A2A transfers are correctly displayed.	y	5	5	4	5	Very handy, easy to see
Online Banking	Have an employee with an A2A account configured login to **It's Me 247**. Go to the transfer page and select the A2A account as the 'To' account. Verify the daily and 30-day limits for outgoing A2A transfers are correctly displayed.	y	5	5	4	5	
Notify CU*A	If possible, contact the Imaging team to set up the ability to use the request forms functionality in the lending workflow (this is also in the Management section).	y					Emailed Kyle Karnes 8/27/24. He set this up. Forms are working properly now
Timeout (ESC)	Attempt to request documents from a member of the credit union. Ex: Documents could be for a pending loan app. Note that the setup will need to be done with Imaging prior to this working. See step listed above	y	5	5	5	5	I did not have to contact Imaging Team – the ability to request forms from time out worked when I tried it on 8/27/24
L E N D I N G							
Online Banking	Have an employee with a debit card roundup eligible account and a Transfer Control List navigate to the debit card roundup edit page and verify that the TCL accounts appear as possible destination accounts for debit card roundups.	y	5	5	5	5	Nice feature

Tool	Task Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
458	Review existing Line of Credit/Credit Card loan categories. Confirm that all categories are flagged to Allow for overdraft protection. (second panel)						
458	If possible, change a Line of Credit/Credit Card category to Not Allow for overdraft protection. Confirm warning message is returned. Monitor Existing Overdraft protection accounts for proper posting.						
908	If a Line of Credit/Credit Card category has been flagged to Not Allow for overdraft protection – confirm that associated loan products cannot be added to NEW Overdraft Protections.						
TELLER/MEMBER SERVICE							
Phone Operator	Access Member Account Transfer through Phone Operator for an account with an A2A relationship established. Access the 'A2A In' screen and confirm that the Incoming limits are displaying correctly. Access the 'A2A Out' screen and confirm that the Outgoing limits are displaying correctly. If possible, attempt transfers for A2A In and A2A Out that exceed the limits displayed and confirm the error message displays correctly.	Y	5				Handy to have this info on the screen as a reminder

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely; 4 Very; 3 Somewhat; 2 Slightly; 1 Not at all; N/A Not applicable — Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
884	Access tool# 884 and select an account with an established A2A relationship. Select "Add A2A In," select A2A relationship, Continue, Continue. Confirm that the limits are displaying correctly. Attempt establishing an Auto Funds Transfer that exceeds the limits and confirm the error message displays correctly. Repeat this process for "Add A2A Out."	Y					sent to Nick Cooper 9/5/24 to see if he uses and can verify. He can see the limits and they were accurate. "Being call center, it is second nature to us all because we do them so much. I couldn't test if it would pop a warning in that I had to stay within my authorization. It is nice though. We do get calls fairly regularly from staff who don't know the limits and can't figure out why it isn't working, so that is nice for them."
1 / 991 / 1600	When completing a CTR form, verify that the RSSD# is properly auto-populating in the associated field.	N					Sent to Jess & Sierra to test 9/5/2. We do not use Gold for CTR filings. We use Verafin
Phone Operator	When working with a member, try searching for their account using the new search fields. Try using the advance search for DBA, driver's license, etc. Pay special attention to hyphenated names or names including apostrophes	Y					Sent direct feedback from FCU staff to Nicholas. Many complaints about the First Name Last name instead of Last name First name. Complaints that you can't double click/need to hit enter. Complaints about the middle initial being included so requires an extra tab to get to last name
1056	If applicable, enter a business account number. Try to add another cross-reference member by clicking the add button and entering the relevant data. Have an employee of the biz login to their account and verify that they can go to the appropriate Product ID.	Y					We have tested this for Magic Wrighter SSO back in early August and it worked

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
1057	If applicable, ensure that you’re able to view the data entered in tool 1056 but not alter it.		y					
MANAGEMENT								
499	Confirm that the savings, loans, and combined values are listed with an “or” condition between them. Confirm the new options for “Aggregate combined savings and loan balance” and “Deposit hold group for __ or more NSF occurrences over the last 6 months” appear and can be configured if using the “Basic Parameters” configuration.		n					
499	If using basic parameters for member in good standing, verify member accounts after month end based on the parameters configured. Make sure the correct deposit hold groups were assigned based on the minimums.		n					
258	If possible, work with your team to configure the Notice Event Text for the new Dormancy, Dormant, and Escheat events. You will want to work with your compliance team to configure this text. If it has been a while since your team has configured one of these events, check out our Booklet!		N					We do not use GOLD to send notices for dormancy or escheats
258	Once the events have been configured, use the same tool to configure the notices and link them to the specific event. If it has been a while since your team has configured one of these forms, check out our Booklet!		N					

Tool	Task Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
346	There will be three new configurations for notices in Tool #346. If applicable select these notices to generate. During the beta period if you have members that meet your criteria for Dormancy or Escheat status the event will trigger. This will send notices to be printed via Tool #653.	N					
388	Access your DailyXX and try to view a report as a PDF. Confirm that a new web browser window is open. You should see a spinning wheel to confirm the PDF is loading. Then the document should automatically open as a PDF for viewing.	Y	5	4	5	5	I was able to open a file that was 278 pages and it was quick and easy Cheryl: Was nice to be able to have the file print directly to PDF and not have to transfer to download to get it to print. The only thing that would make it better would be to download directly to excel.
388	Access your DailyXX and try to view a report that has more than 1000 pages as a PDF. Confirm the new warning window is displayed informing you that when selecting more than 1000 pages an INSTANTXX is required.	Y	5	5	5	5	Got the expected warning
388	Access your DailyXX and try to view more than nine reports. Confirm the new warning window is displayed to you. This warning should inform you that you can select nine or fewer reports at once.	y	5	5	5	5	Got the warning message to only select 9 or less
A U D I T							
169	Update the credit unions contact information to include the institutions assigned RSSD#.	n					

Rate each item on a scale of 1-5.
(5 = highest, 1 = lowest)

5	Extremely
4	Very
3	Somewhat
2	Slightly
1	Not at all
N/A	Not applicable

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
101	Use Tool #101 to access the Abnormal Activity Monitoring Configuration. Select Transaction Patterns and create a new Pattern to play around with. Confirm the new MCC group lookup is showing correctly. Confirm the MCC groups showing in the lookup match the groups you have configured via Tool #1024 - Configure Credit Union MCC Groups. If you have questions on the configuration, please reach out to our Audit link team. AuditLinkTeam@cuanswers.com	n					
101	Use Tool #101 to access the Abnormal Activity Monitoring Configuration. Select Transaction Patterns and create a new Pattern to play around with. Setup the configuration as normal then select Out-of-Ordinary Trigger. Configure the trigger as you normally would and select the dollar amount average to be based on the number of transactions (New calculation). If you have questions on the configuration, please reach out to our Audit link team. AuditLinkTeam@cuanswers.com	n					
537	Throughout the beta period use Tool # 537 to monitor your new patterns. If possible, check the member record to confirm the trigger is operating correctly. If you have questions on how the trigger works, please reach out to our Audit link team. AuditLinkTeam@cuanswers.com	n					
BACK OFFICE							
577	Confirm that the tool has the option to pull by account or reference number. Also confirm the report will output based on the selected option.	y					did show one investor with an offage, and it did properly list the reference number

Rate each item on a scale of 1-5.
(5 = highest, 1 = lowest)

5	Extremely
4	Very
3	Somewhat
2	Slightly
1	Not at all
N/A	Not applicable

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
578	Confirm that the tool has the option to pull by account or reference number. Also confirm the report will output based on the selected option.	y					Delinquent report under tool 578 also showed by reference number

GENERAL COMMENTS

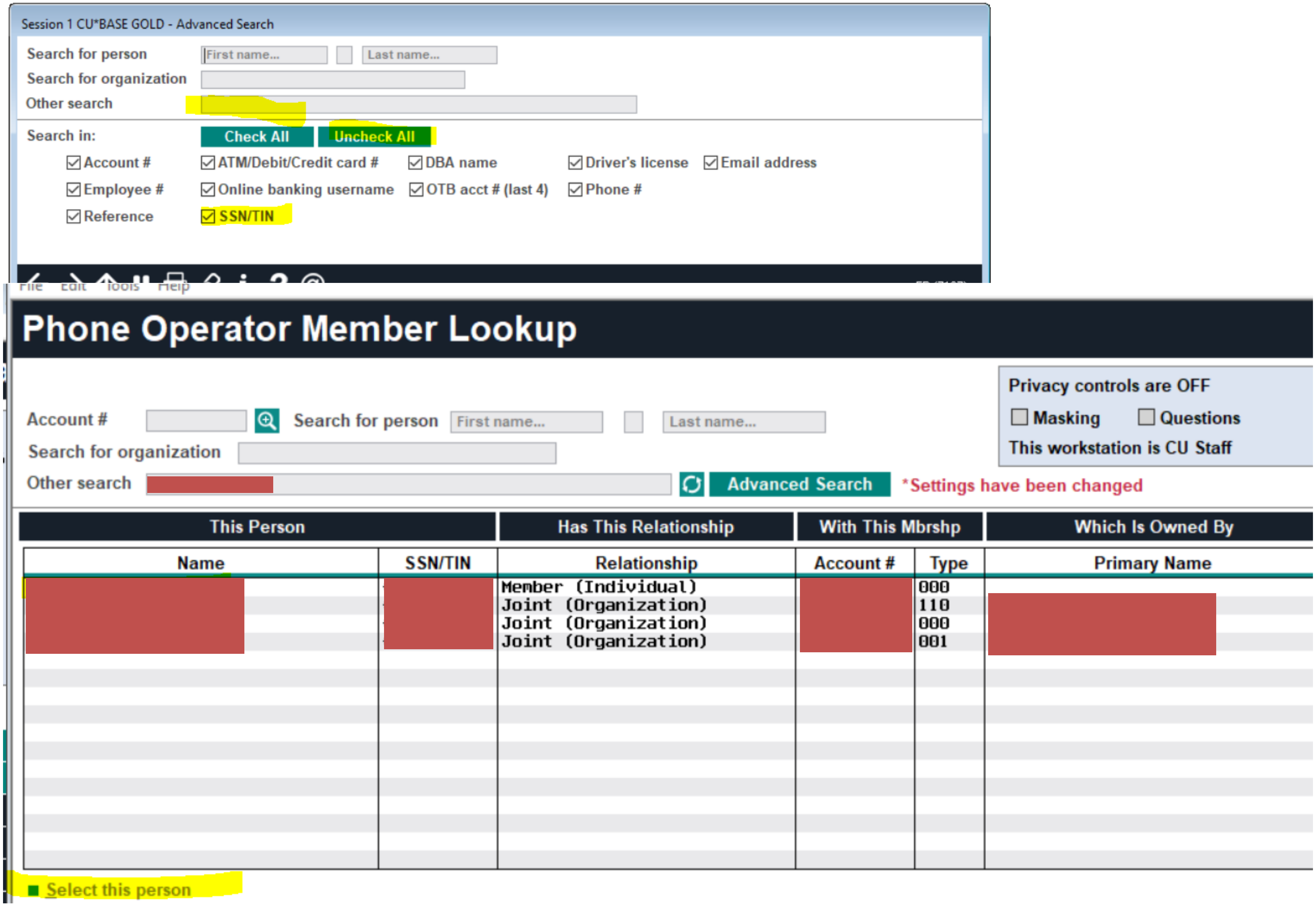
From Call center supervisor:
I just wanted to add my two cents (and Call Centers) on a couple things with the new updates in Gold.

The phone op screen changed (see below) it mimics the member inquiry screen. We lost the option to quickly search by SSN number off the main screen. (We use this function a lot.) We can still search by SSN but it takes 4 clicks (one to get to the search area then to actually search). It is doable, but we went backwards on how quickly we could do the same search before.

A second point,

Once the search is complete our double click option disappeared. Now you have to click the member then click towards the bottom of the screen “select this person”. Again, not a big deal but I don’t get why the double click feature went away.

I tried to add snips to help explain.



MSR: The name search in phone op is nice but once it brings up the results it doesn't allow us to bring up the account by clicking on it like it used to. Instead have to type the account number into the account field to get into the account. Would be nice if we could just click on one of the results to get into the account still.

Beta Test Checklist

Please complete and score each task and note any comments you may have regarding each task.

Credit Union Name: **Service 1 Federal Credit Union**

Primary Contact Name: **Kelly Goven**

Primary Contact Phone Number: **231-246-8832**

Rate each item on a scale of 1-5. (5 = highest, 1 = lowest)

5	Extremely
4	Very
3	Somewhat
2	Slightly
1	Not at all
N/A	Not applicable

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
MEMBER FACING							
Sample tool	*Sample task*	*Y*	*3*	*2*	*4*	*5*	*This feature will really make processing much easier for tellers.*
777	If possible, activate debit card round up to allow donation transfers. Create a recipient code for donation transfers and enroll a member using tool #14. Confirm debit card transactions on account for the day. The next day, confirm round up posted to members account with the configured transaction description and that the funds posted to the G/L attached to recipient code. Verify report TRUPST2 to see debit card round up that posted for member enrolled	N					
569	If possible, turn on two factor authorization. Use tool 569, select the second option, “Online Banking Password and Security Settings.” (Hit enter on the first panel to continue to the next page.) Turn on “Require two factor authorization” according to your plan for testing or implementation. Select the Update button to save your configuration.	Y	5	5	5	5	Configured text and email for both online and mobile

Rate each item on a scale of 1-5.
(5 = highest, 1 = lowest)

5	Extremely
4	Very
3	Somewhat
2	Slightly
1	Not at all
N/A	Not applicable

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
Online Banking	Login to your **It's Me 247** account. Choose your desired communication method to receive your one-time password (OTP) for multi-factor authentication (MFA). Make sure you receive the OTP and enter it into the field provided. Submit your OTP and verify that you are successfully logged in.	Y	5	5	5	5	Tested text and email for online – both had codes sent quickly, successful Tested text and email for mobile – both had codes sent quickly, successful
Online Banking	Have an employee with an A2A account configured login to **It's Me 247**. Go to the transfer page and select the A2A account as the 'From' account. Verify the daily and 30-day limits for incoming A2A	Y	5	5	5	5	Verified it is displayed
Online Banking	Have an employee with an A2A account configured login to **It's Me 247**. Go to the transfer page and select the A2A account as the 'To' account. Verify the daily and 30-day limits for outgoing A2A	Y	5	5	5	5	Verified it is displayed
Notify CU*A	If possible, contact the Imaging team to set up the ability to use the request forms functionality in the lending workflow (this is also in the Management section).	Y	4	3	3	3	Feedback from lending is the images coming back from members are zoomed in and unusable. This is not 100% of the time, but a frustration and not sure what could be happening on the user end to cause this to help. Inconvenient that the doc saves straight to the vault and has to be manually moved to the package.
Timeout (ESC)	Attempt to request documents from a member of the credit union. Ex: Documents could be for a pending loan app. Note that the setup will need to be done with Imaging prior to this working. See step listed above	Y	5	4	5	5	Text phone # not moving to edoc in the correct format resulting in package not sent.UPDATE: This has been fixed and tested with a couple of phone # formats, all is transferring correctly now. Love the convenience, same image issues with some members as listed above.

Rate each item on a scale of 1-5.
(5 = highest, 1 = lowest)

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4	Very
3	Somewhat
2	Slightly
1	Not at all
N/A	Not applicable

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
Online Banking	Have an employee with a debit card roundup eligible account and a Transfer Control List navigate to the debit card roundup edit page and verify that the TCL accounts appear as possible destination accounts for debit card roundups.	N					
458	Review existing Line of Credit/Credit Card loan categories. Confirm that all categories are flagged to Allow for overdraft protection. (second panel)	N					
458	If possible, change a Line of Credit/Credit Card category to Not Allow for overdraft protection. Confirm warning message is returned. Monitor Existing Overdraft protection accounts for proper posting.	N					
908	If a Line of Credit/Credit Card category has been flagged to Not Allow for overdraft protection – confirm that associated loan products cannot be added to NEW Overdraft Protections.	N					
TELLER/MEMBER SERVICE							
Phone Operator	Access Member Account Transfer through Phone Operator for an account with an A2A relationship established. Access the ‘A2A In’ screen and confirm that the Incoming limits are displaying correctly. Access the ‘A2A Out’ screen and confirm that the Outgoing limits are displaying correctly. If possible, attempt transfers for A2A In and A2A Out that exceed the limits displayed and confirm the error message displays correctly.						A2A limits not showing in Phone Op transfer
884	Access tool# 884 and select an account with an established A2A relationship. Select “Add A2A In,” select A2A relationship, Continue, Continue. Confirm that the limits are displaying correctly. Attempt establishing an Auto Funds Transfer that exceeds the limits and confirm the error message displays correctly. Repeat this process for “Add A2A Out.”	Y	5	5	5	5	Limits were shown Error was displayed as expected

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
1 / 991 / 1600	When completing a CTR form, verify that the RSSD# is properly auto-populating in the associated field.		Y	5	5	5	5	It is auto populating from all three tools
Phone Operator	When working with a member, try searching for their account using the new search fields. Try using the advance search for DBA, driver's license, etc. Pay special attention to hyphenated names or names including apostrophes		Y	3	3	3	4	Need the double click back for selection! Tried a business with an apostrophe and it did not find the account. Hyphenated last name worked. DBA worked Many do not like the extra box for middle initial. We miss searching by the last 4 of SSN box and last 4 of card with more accurate results. Staff that use Phone Op over Inquiry are not happy with the search result they get now. I think selective advanced search options instead of having all checked, may help. I have sent that tip to the staff and
1056	If applicable, enter a business account number. Try to add another cross-reference member by clicking the add button and entering the relevant data. Have an employee of the biz login to their account and verify that they can go to the appropriate Product ID.		N					*We do not use Biz247*
1057	If applicable, ensure that you're able to view the data entered in tool 1056 but not alter it.		N					*We do not use Biz247*

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
MANAGEMENT								
499	Confirm that the savings, loans, and combined values are listed with an "or" condition between them. Confirm the new options for "Aggregate combined savings and loan balance" and "Deposit hold group for __ or more NSF occurrences over the last 6 months" appear and can be configured if using the "Basic Parameters" configuration.		Y					Options are available
499	If using basic parameters for member in good standing, verify member accounts after month end based on the parameters configured. Make sure the correct deposit hold groups were assigned based on the minimums.							We have not made changes because our current configuration is not producing correct results for assigned groups. Questioned if the $O.oo in loans with "or" is affecting the results since we are only looking at savings balance. Response is $0.00 is not a supported value so it is not being considered. Examples of incorrect groups have been emailed to figure out why it is not working. Will continue testing after our current results are corrected. Suggestion: Expanding basic parameters to allow different levels of savings/loan aggregate for groups without having to setup tiered services. Having a couple of groups available to set different savings/loan levels easier would be beneficial.
258	If possible, work with your team to configure the Notice Event Text for the new Dormancy, Dormant, and Escheat events. You will want to work with your compliance team to configure this text. If it has been a while since your team has configured one of these events, check out our Booklet!		N					

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
258	Once the events have been configured, use the same tool to configure the notices and link them to the specific event. If it has been a while since your team has configured one of these forms, check out our Booklet!	N					
346	There will be three new configurations for notices in Tool #346. If applicable select these notices to generate. During the beta period if you have members that meet your criteria for Dormancy or Escheat status the event will trigger. This will send notices to be printed via Tool #653.	N					
388	Access your DailyXX and try to view a report as a PDF. Confirm that a new web browser window is open. You should see a spinning wheel to confirm the PDF is loading. Then the document should automatically open as a PDF for viewing.	Y	5	5	5	5	Opened Daily via Spooled reports, and pdf loaded correctly.
388	Access your DailyXX and try to view a report that has more than 1000 pages as a PDF. Confirm the new warning window is displayed informing you that when selecting more than 1000 pages an INSTANTXX is required.	Y					Warning window appeared suggesting INSTANT queue
388	Access your DailyXX and try to view more than nine reports. Confirm the new warning window is displayed to you. This warning should inform you that you can select nine or fewer reports at once.	Y	5	5	5	5	Worked correctly – 9 reports did open, 10 & 12 both responded with an error and would not open.Y
A U D I T							
169	Update the credit unions contact information to include the institutions assigned RSSD#.	Y					*Updated*

Rate each item on a scale of 1-5. (5 = highest, 1 = lowest)

5	Extremely
4	Very
3	Somewhat
2	Slightly
1	Not at all
N/A	Not applicable

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
101	Use Tool #101 to access the Abnormal Activity Monitoring Configuration. Select Transaction Patterns and create a new Pattern to play around with. Confirm the new MCC group lookup is showing correctly. Confirm the MCC groups showing in the lookup match the groups you have configured via Tool #1024 - Configure Credit Union MCC Groups. If you have questions on the configuration, please reach out to our Audit link team. AuditLinkTeam@cuanswers.com	Y	5	3	3	3	1014 Config: Description in MCC configuration is not what's printed on member statements. The master list, which is what prints on statements) are coded incorrectly (needs updating). The incorrect category printed on statements is creating issues for our members. It is not helpful that we can only pull from the master list (not the MCC groups) to analyze spending. (#1025) We like the concept of the new MCC codes, but we have not been able to create the pattern to pull exactly what we are looking for, and expanding the master list to utilize the groups more would be beneficial
101	Use Tool #101 to access the Abnormal Activity Monitoring Configuration. Select Transaction Patterns and create a new Pattern to play around with. Setup the configuration as normal then select Out-of-Ordinary Trigger. Configure the trigger as you normally would and select the dollar amount average to be based on the number of transactions (New calculation). If you have questions on the configuration, please reach out to our Audit link team. AuditLinkTeam@cuanswers.com	Y	3	2	2	2	It's challenging to get the configurations to pull the information we want to see. MCC codes are difficult to configure to find the right pattern that we want.

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
537	Throughout the beta period use Tool # 537 to monitor your new patterns. If possible, check the member record to confirm the trigger is operating correctly. If you have questions on how the trigger works, please reach out to our Audit link team. AuditLinkTeam@cuanswers.com		Y	2	2	2	4	When the Beta released, it caused an issue with our current configurations. It affected the reports by multiplying the days for activity reported. This caused a large amount of work to decipher our previously setup report data. New configuration: The report gives multiple days worth (repeating) of activity still, but we are looking for the average of those days. Setting up the configurations is slightly difficult while trying to understand the effects. We are working with AuditLink to understand this better. Clarification on configuration/instructions, would be helpful before trying to create new configurations. We are encouraged about the possibilities, but discouraged that it affected our current setup.
B A C K O F F I C E								
577	Confirm that the tool has the option to pull by account or reference number. Also confirm the report will output based on the selected option.		N					*Do not have participation loans*

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
578	Confirm that the tool has the option to pull by account or reference number. Also confirm the report will output based on the selected option.	N					*Do not have participation loans*

GENERAL COMMENTS

Beta Test Checklist

Please complete and score each task and note any comments you may have regarding each task.

Credit Union Name: ______________________________

Primary Contact Name: ______________________________

Primary Contact Phone Number: ______________________________

Rate each item on a scale of 1-5.
(5 = highest, 1 = lowest)

5	**Extremely**
4	**Very**
3	**Somewhat**
2	**Slightly**
1	**Not at all**
N/A	**Not applicable**

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
MEMBER FACING							
Sample tool	*Sample task*	*Y*	*3*	*2*	*4*	*5*	*This feature will really make processing much easier for tellers.*
777	If possible, activate debit card round up to allow donation transfers. Create a recipient code for donation transfers and enroll a member using tool #14. Confirm debit card transactions on account for the day. The next day, confirm round up posted to members account with the configured transaction description and that the funds posted to the G/L attached to recipient code. Verify report TRUPST2 to see debit card round up that posted for member enrolled						Nathan – built donation recipient, will attempt transactions.
569	If possible, turn on two factor authorization. Use tool 569, select the second option, “Online Banking Password and Security Settings.” (Hit enter on the first panel to continue to the next page.) Turn on “Require two factor authorization” according to your plan for testing or implementation. Select the Update button to save your configuration.	Y	5		5	5	Nathan – Will be turning on soft launch 9/18/2024.

Rate each item on a scale of 1-5.
(5 = highest, 1 = lowest)

5	Extremely
4	Very
3	Somewhat
2	Slightly
1	Not at all
N/A	Not applicable

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
Online Banking	Login to your **It's Me 247** account. Choose your desired communication method to receive your one-time password (OTP) for multi-factor authentication (MFA). Make sure you receive the OTP and enter it into the field provided. Submit your OTP and verify that you are successfully logged in.	Y	5	5	5	5	Nathan – done, tested email and ph
Online Banking	Have an employee with an A2A account configured login to **It's Me 247**. Go to the transfer page and select the A2A account as the 'From' account. Verify the daily and 30-day limits for incoming A2A transfers are correctly displayed.						Nathan – Need to activate A2A, check on status of project opened late July
Online Banking	Have an employee with an A2A account configured login to **It's Me 247**. Go to the transfer page and select the A2A account as the 'To' account. Verify the daily and 30-day limits for outgoing A2A transfers are correctly displayed.						Nathan – same as above
Notify CU*A	If possible, contact the Imaging team to set up the ability to use the request forms functionality in the lending workflow (this is also in the Management section).						Brandon/Lisa – done by 9/27, **Brandon**
Timeout (ESC)	Attempt to request documents from a member of the credit union. Ex: Documents could be for a pending loan app. Note that the setup will need to be done with Imaging prior to this working. See step listed above						Brandon/Lisa - **Brandon**
L E N D I N G							
Online Banking	Have an employee with a debit card roundup eligible account and a Transfer Control List navigate to the debit card roundup edit page and verify that the TCL accounts appear as possible destination accounts for debit card roundups.						Nathan

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely, 4 Very, 3 Somewhat, 2 Slightly, 1 Not at all, N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
458	Review existing Line of Credit/Credit Card loan categories. Confirm that all categories are flagged to Allow for overdraft protection. (second panel)		Y	5	5	5	5	Nathan
458	If possible, change a Line of Credit/Credit Card category to Not Allow for overdraft protection. Confirm warning message is returned. Monitor Existing Overdraft protection accounts for proper posting.		Y	5	5	5	5	Nathan
908	If a Line of Credit/Credit Card category has been flagged to Not Allow for overdraft protection – confirm that associated loan products cannot be added to NEW Overdraft Protections.							Steve/Lisa/Kelly set apt 9/17 to test this out next week.
TELLER/MEMBER SERVICE								
Phone Operator	Access Member Account Transfer through Phone Operator for an account with an A2A relationship established. Access the 'A2A In' screen and confirm that the Incoming limits are displaying correctly. Access the 'A2A Out' screen and confirm that the Outgoing limits are displaying correctly. If possible, attempt transfers for A2A In and A2A Out that exceed the limits displayed and confirm the error message displays correctly.							Nathan/Lisa
884	Access tool# 884 and select an account with an established A2A relationship. Select "Add A2A In," select A2A relationship, Continue, Continue. Confirm that the limits are displaying correctly. Attempt establishing an Auto Funds Transfer that exceeds the limits and confirm the error message displays correctly. Repeat this process for "Add A2A Out."							Nathan/Lisa

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
1 / 991 / 1600	When completing a CTR form, verify that the RSSD# is properly auto-populating in the associated field.						Lisa/Kelly will need to enable CTR processing, do prior to 9a on a day. $15k cash deposit to acct 1
Phone Operator	When working with a member, try searching for their account using the new search fields. Try using the advance search for DBA, driver's license, etc. Pay special attention to hyphenated names or names including apostrophes	Y	3	3	5	5	Lisa/Kelly – feedback has been provided, the tab to middle initial instead of last name, and the double clicking of account name. **box sizes could be increased.**
1056	If applicable, enter a business account number. Try to add another cross-reference member by clicking the add button and entering the relevant data. Have an employee of the biz login to their account and verify that they can go to the appropriate Product ID.						Lisa/Kelly – N/A not using BizLink actively with members.
1057	If applicable, ensure that you're able to view the data entered in tool 1056 but not alter it.						Lisa/Kelly – N/A not using BizLink actively with members.
MANAGEMENT							
499	Confirm that the savings, loans, and combined values are listed with an "or" condition between them. Confirm the new options for "Aggregate combined savings and loan balance" and "Deposit hold group for __ or more NSF occurrences over the last 6 months" appear and can be configured if using the "Basic Parameters" configuration.	Y	5	5	5	5	Nathan

Rate each item on a scale of 1-5. (5 = highest, 1 = lowest)

5	Extremely
4	Very
3	Somewhat
2	Slightly
1	Not at all
N/A	Not applicable

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
499	If using basic parameters for member in good standing, verify member accounts after month end based on the parameters configured. Make sure the correct deposit hold groups were assigned based on the minimums.						Nathan – 8/28: values > $100k in aggreg L+S not working. 9/13/24 – still not working.
258	If possible, work with your team to configure the Notice Event Text for the new Dormancy, Dormant, and Escheat events. You will want to work with your compliance team to configure this text. If it has been a while since your team has configured one of these events, check out our Booklet!	Y	5	5	5	5	Nathan
258	Once the events have been configured, use the same tool to configure the notices and link them to the specific event. If it has been a while since your team has configured one of these forms, check out our Booklet!	Y	5	5	5	5	8/27 – id's not pulling in. 8/28 - configured
346	There will be three new configurations for notices in Tool #346. If applicable select these notices to generate. During the beta period if you have members that meet your criteria for Dormancy or Escheat status the event will trigger. This will send notices to be printed via Tool #653.	Y	5	5	5	5	Nathan
388	Access your DailyXX and try to view a report as a PDF. Confirm that a new web browser window is open. You should see a spinning wheel to confirm the PDF is loading. Then the document should automatically open as a PDF for viewing.	Y	5	5	5	5	Nathan -
388	Access your DailyXX and try to view a report that has more than 1000 pages as a PDF. Confirm the new warning window is displayed informing you that when selecting more than 1000 pages an INSTANTXX is required.						Nathan no reports yet

Rate each item on a scale of 1-5. (5 = highest, 1 = lowest)

5	Extremely
4	Very
3	Somewhat
2	Slightly
1	Not at all
N/A	Not applicable

Rate each item on a scale of 1-5.
(5 = highest, 1 = lowest)

5	Extremely
4	Very
3	Somewhat
2	Slightly
1	Not at all
N/A	Not applicable

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
388	Access your DailyXX and try to view more than nine reports. Confirm the new warning window is displayed to you. This warning should inform you that you can select nine or fewer reports at once.	Y	5	5	5	5	Nathan
A U D I T							
169	Update the credit unions contact information to include the institutions assigned RSSD#.	Y	5	5	1	5	Nathan – we don't use this, we use Verafin.
101	Use Tool #101 to access the Abnormal Activity Monitoring Configuration. Select Transaction Patterns and create a new Pattern to play around with. Confirm the new MCC group lookup is showing correctly. Confirm the MCC groups showing in the lookup match the groups you have configured via Tool #1024 - Configure Credit Union MCC Groups. If you have questions on the configuration, please reach out to our Audit link team. AuditLinkTeam@cuanswers.com						Lisa/Kelly – need accesss to 1024
101	Use Tool #101 to access the Abnormal Activity Monitoring Configuration. Select Transaction Patterns and create a new Pattern to play around with. Setup the configuration as normal then select Out-of-Ordinary Trigger. Configure the trigger as you normally would and select the dollar amount average to be based on the number of transactions (New calculation). If you have questions on the configuration, please reach out to our Audit link team. AuditLinkTeam@cuanswers.com						Lisa/Kelly

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely, 4 Very, 3 Somewhat, 2 Slightly, 1 Not at all, N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
537	Throughout the beta period use Tool # 537 to monitor your new patterns. If possible, check the member record to confirm the trigger is operating correctly. If you have questions on how the trigger works, please reach out to our Audit link team. AuditLinkTeam@cuanswers.com							Lisa/Kelly
BACK OFFICE								
577	Confirm that the tool has the option to pull by account or reference number. Also confirm the report will output based on the selected option.		Y	5	5	1	5	Works but don't use reference numbers
578	Confirm that the tool has the option to pull by account or reference number. Also confirm the report will output based on the selected option.		Y	5	5	1	5	Steve – unsure, do not have any DQ at this point. Next testing point will be 10/1.
GENERAL COMMENTS								

Beta Test Checklist

Please complete and score each task and note any comments you may have regarding each task.

Credit Union Name: **TBA Credit Union**

Primary Contact Name: **Christie Dompierre**

Primary Contact Phone Number: **231.631.5425**

Rate each item on a scale of 1-5.
(5 = highest, 1 = lowest)

5	**Extremely**
4	**Very**
3	**Somewhat**
2	**Slightly**
1	**Not at all**
N/A	**Not applicable**

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
MEMBER FACING							
Sample tool	*Sample task*	*Y*	*3*	*2*	*4*	*5*	*This feature will really make processing much easier for tellers.*
777	If possible, activate debit card round up to allow donation transfers. Create a recipient code for donation transfers and enroll a member using tool #14. Confirm debit card transactions on account for the day. The next day, confirm round up posted to members account with the configured transaction description and that the funds posted to the G/L attached to recipient code. Verify report TRUPST2 to see debit card round up that posted for member enrolled						Will test in the coming weeks.
569	If possible, turn on two factor authorization. Use tool 569, select the second option, “Online Banking Password and Security Settings.” (Hit enter on the first panel to continue to the next page.) Turn on “Require two factor authorization” according to your plan for testing or implementation. Select the Update button to save your configuration.	Y	5	1	?	?	Already provided feedback on this to the QC team.

Tool	Task Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
Online Banking	Login to your **It's Me 247** account. Choose your desired communication method to receive your one-time password (OTP) for multi-factor authentication (MFA). Make sure you receive the OTP and enter it into the field provided. Submit your OTP and verify that you are successfully logged in.	y	5	1	?	?	Already provided feedback on this to the QC team.
Online Banking	Have an employee with an A2A account configured login to **It's Me 247**. Go to the transfer page and select the A2A account as the 'From' account. Verify the daily and 30-day limits for incoming A2A transfers are correctly displayed.						Will test in next round.
Online Banking	Have an employee with an A2A account configured login to **It's Me 247**. Go to the transfer page and select the A2A account as the 'To' account. Verify the daily and 30-day limits for outgoing A2A transfers are correctly displayed.	Y	5	5	5	5	
Notify CU*A	If possible, contact the Imaging team to set up the ability to use the request forms functionality in the lending workflow (this is also in the Management section).						Will test in next round.
Timeout (ESC)	Attempt to request documents from a member of the credit union. Ex: Documents could be for a pending loan app. Note that the setup will need to be done with Imaging prior to this working. See step listed above						Will test in next round.
L E N D I N G							
Online Banking	Have an employee with a debit card roundup eligible account and a Transfer Control List navigate to the debit card roundup edit page and verify that the TCL accounts appear as possible destination accounts for debit card roundups.	Y	5	5	5	5	

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
458	Review existing Line of Credit/Credit Card loan categories. Confirm that all categories are flagged to Allow for overdraft protection. (second panel)	Y	5	5	5	3	Tested on VISA Tier I and removed the ability. Ours were all defaulted to be on and we will likely remove from all loan categories from the ability.
458	If possible, change a Line of Credit/Credit Card category to Not Allow for overdraft protection. Confirm warning message is returned. Monitor Existing Overdraft protection accounts for proper posting.	Y	5	5	5	5	Not able to test for proper posting.
908	If a Line of Credit/Credit Card category has been flagged to Not Allow for overdraft protection – confirm that associated loan products cannot be added to NEW Overdraft Protections.						Will test in next round.
TELLER/MEMBER SERVICE							
Phone Operator	Access Member Account Transfer through Phone Operator for an account with an A2A relationship established. Access the ‘A2A In’ screen and confirm that the Incoming limits are displaying correctly. Access the ‘A2A Out’ screen and confirm that the Outgoing limits are displaying correctly. If possible, attempt transfers for A2A In and A2A Out that exceed the limits displayed and confirm the error message displays correctly.	Y					Did not see the limits displayed for either, unless I totally missed it? (reported on 8/28)
884	Access tool# 884 and select an account with an established A2A relationship. Select “Add A2A In,” select A2A relationship, Continue, Continue. Confirm that the limits are displaying correctly. Attempt establishing an Auto Funds Transfer that exceeds the limits and confirm the error message displays correctly. Repeat this process for “Add A2A Out.”	Y					Did not see the limits displayed for either, unless I totally missed it? (reported on 8/28)

Rate each item on a scale of 1-5. (5 = highest, 1 = lowest)
5 Extremely
4 Very
3 Somewhat
2 Slightly
1 Not at all
N/A Not applicable

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
1 / 991 / 1600	When completing a CTR form, verify that the RSSD# is properly auto-populating in the associated field.						We do not use CU*Base for CTRs.
Phone Operator	When working with a member, try searching for their account using the new search fields. Try using the advance search for DBA, driver's license, etc. Pay special attention to hyphenated names or names including apostrophes	Y	5	2	2	Staff want the old version	Our departments that use Phone Operator ran into a few challenges, with the upgrade adding additional steps/clicks to search for members. See general comments for examples.
1056	If applicable, enter a business account number. Try to add another cross-reference member by clicking the add button and entering the relevant data. Have an employee of the biz login to their account and verify that they can go to the appropriate Product ID.						Will test in next round.
1057	If applicable, ensure that you're able to view the data entered in tool 1056 but not alter it.						Will test in next round.
M A N A G E M E N T							
499	Confirm that the savings, loans, and combined values are listed with an "or" condition between them. Confirm the new options for "Aggregate combined savings and loan balance" and "Deposit hold group for __ or more NSF occurrences over the last 6 months" appear and can be configured if using the "Basic Parameters" configuration.	Y	2	3	3	3	Found the wording confusing within the configuration screen with the two blanks.

Rate each item on a scale of 1-5. (5 = highest, 1 = lowest)
5 Extremely
4 Very
3 Somewhat
2 Slightly
1 Not at all
N/A Not applicable

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
499	If using basic parameters for member in good standing, verify member accounts after month end based on the parameters configured. Make sure the correct deposit hold groups were assigned based on the minimums.	Y	5	3	3	3	
258	If possible, work with your team to configure the Notice Event Text for the new Dormancy, Dormant, and Escheat events. You will want to work with your compliance team to configure this text. If it has been a while since your team has configured one of these events, check out our Booklet!	Y	5	5	5	5	Should save us a lot of time!
258	Once the events have been configured, use the same tool to configure the notices and link them to the specific event. If it has been a while since your team has configured one of these forms, check out our Booklet!	Y	5	5	5	5	
346	There will be three new configurations for notices in Tool #346. If applicable select these notices to generate. During the beta period if you have members that meet your criteria for Dormancy or Escheat status the event will trigger. This will send notices to be printed via Tool #653.	Y	5	5	5	5	
388	Access your DailyXX and try to view a report as a PDF. Confirm that a new web browser window is open. You should see a spinning wheel to confirm the PDF is loading. Then the document should automatically open as a PDF for viewing.	Y	5	5	5	5	Would love to be able to download to excel as well please and thank you!
388	Access your DailyXX and try to view a report that has more than 1000 pages as a PDF. Confirm the new warning window is displayed informing you that when selecting more than 1000 pages an INSTANTXX is required.	Y	5	3	3	3	

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
388	Access your DailyXX and try to view more than nine reports. Confirm the new warning window is displayed to you. This warning should inform you that you can select nine or fewer reports at once.	Y	5	5	3	3	I could view more than 9 reports at time, but not when selected View as PDF.
A U D I T							
169	Update the credit unions contact information to include the institutions assigned RSSD#.	N					We do not use CU*Base for CTRs
101	Use Tool #101 to access the Abnormal Activity Monitoring Configuration. Select Transaction Patterns and create a new Pattern to play around with. Confirm the new MCC group lookup is showing correctly. Confirm the MCC groups showing in the lookup match the groups you have configured via Tool #1024 - Configure Credit Union MCC Groups. If you have questions on the configuration, please reach out to our Audit link team. AuditLinkTeam@cuanswers.com	Y	5	1	1	1	We are planning to onboard Verafin in 2025.
101	Use Tool #101 to access the Abnormal Activity Monitoring Configuration. Select Transaction Patterns and create a new Pattern to play around with. Setup the configuration as normal then select Out-of-Ordinary Trigger. Configure the trigger as you normally would and select the dollar amount average to be based on the number of transactions (New calculation). If you have questions on the configuration, please reach out to our Audit link team. AuditLinkTeam@cuanswers.com	Y	5	1	1	1	

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
537	Throughout the beta period use Tool # 537 to monitor your new patterns. If possible, check the member record to confirm the trigger is operating correctly. If you have questions on how the trigger works, please reach out to our Audit link team. AuditLinkTeam@cuanswers.com		Y	5	1	1	1	
BACK OFFICE								
577	Confirm that the tool has the option to pull by account or reference number. Also confirm the report will output based on the selected option.		Y	5	5	1	1	We do use this currently, because our current participation loans do not go through GOLD. Majority that we would do, are commercial and would go through Element 22.
578	Confirm that the tool has the option to pull by account or reference number. Also confirm the report will output based on the selected option.		Y	5	5	1	1	We do use this currently, because our current participation loans do not go through GOLD. Majority that we would do, are commercial and would go through Element 22.

GENERAL COMMENTS

Phone Operator- Received feedback from two departments, both asked if Phone Operator could go back to the old version and stay that way since the upgrade has not enhanced the process of looking up members. ☹

Example 1: Previously, when searching T in the first name field and Smith in the last name field, results would have only shown members with the first name starting with a T and last name of Smith, now there is a massive list of results.

Example 2: Previously, we could enter the last 4 of a member's debit/credit card and hit search, now we have to hit Advances search, unselect all fields, select the card field, then search using the last 4 of the members debit/credit card.