



See the end of this guide for a zippy top ten to help you and your staff quickly step into **CBX**!

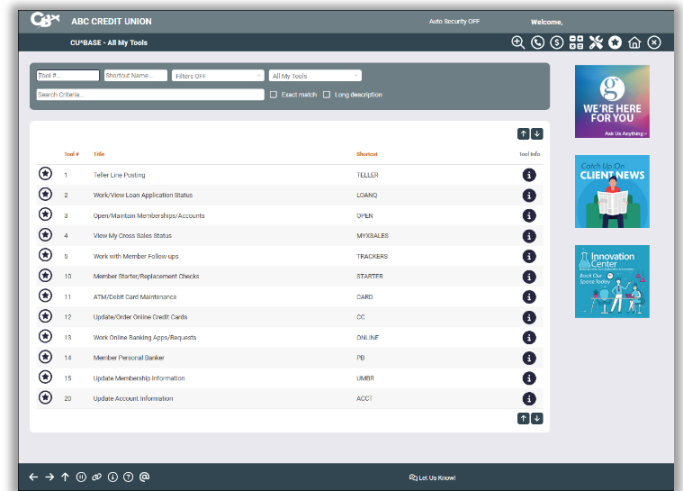
# Welcome to CBX!

## An Introduction Guide to Your Core Software

### Let's Start Here: What is CBX?

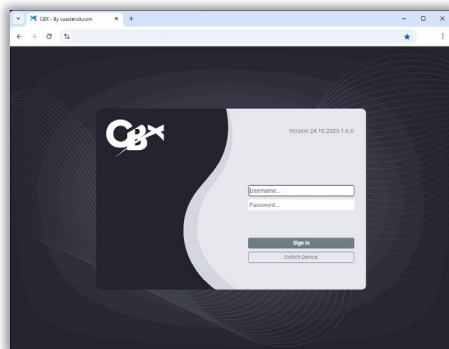
**CBX** is the new browser-based processing platform that will replace **CU\*BASE GOLD** as our core software product. While we use “browser-based” as a loose framework for **CBX**, for more context, **CBX** is what is called a ‘single-page application’ (SPA); a website that, instead of using multiple web pages, uses a single page that is updated by the server when a user interacts with it.

While that is a bit in the weeds for daily users, know that when you select your **CBX** icon, all the tools, features, and processes you need will be at your fingertips, in your browser!



The following things are not changing with the rollout of **CBX**:

- For the initial rollout, the layout of data on the screen will be pretty much identical to what users are familiar with now. The learning curve for your teams will be low.
- The underlying host screen, business logic, and architecture is the same; only the UI presentation is changing.
- The underlying database and table structure is the same. You'll use the same analytics dashboards, reports, and Query tools to analyze and export data as you do now.
- A user must still be set up on our network to access **CBX**. We're not building a web-based product that's available via the Internet. We're simply presenting the UI via a web browser.



### Getting Started With CBX

We understand that this will be a shift in routine, and some muscle memory. After a robust alpha period with Board of Director credit unions, as well as our internal staff, we feel confident that you will feel comfortable in **CBX** as the processes are very similar to the CU\*BASE experience. You will of course see many visual differences; mainly where we've improved how data is displayed and selected, such as a former radio button is now a drop down, etc.



## Rollout and Adoption

Our Network Service teams have been hard at work completing any router changes needed to connect with **CBX**. At this time, there's nothing you need to do with those changes (and don't worry, all credit unions will have these changes made for them, whether they are Complete Care clients or not!). There are a few tasks related to integrations that will need to be completed, more on that below. Otherwise, once you're given the greenlight, flip the proverbial switch and log in!

However, it's important that we are transparent about the realities of a project of this magnitude:

- On day 1, things won't be perfect, nor will we have all our help and education materials updated to show the new look.
- While we will of course do basic QC testing, with over 18,000 screens to test, we will not catch every nuance. But your teams can help! Every screen will have a "Let Us Know!" button you can use to report a problem or provide a suggestion.
- **CU\*BASE GOLD** will continue to be developed in parallel and will be supported for a period of time during the transition. Once we've worked through any showstoppers, we will set a sunset date for the old UI.

As with other foundation projects, **CBX** is a "base camp" for the next decade of evolution and innovation, and we're chomping at the bit to get started on the journey!

## When Will My Credit Union Start Using CBX?

**Following our initial board rollout, we have scheduled the remaining credit unions across all CUSOs at a schedule accessible here: <http://alerts.cubase.org/cbx-availability/>**

*Note that this schedule is private and only accessible when on the network.*

## Why Was My Date Picked and Can I Change It?

The short answer is no, you are not able to select a different date than you have been assigned. While we don't anticipate changes, there is a possibility that we may have to make adjustments to the schedule as we move along. In the case of a date change, we will notify you in advance.

March and April credit unions were selected based on unique situations that we want to explore early in the rollout process, such as our credit unions in distant locations, or who have branches in locations across the country, or who participate in various services at their CUSO. We also welcomed a group of early adopters who long requested early access.

## Let Us Know! Using the Reporting Tool

As mentioned above, the **Let Us Know!** button will be available during the initial use period to report a problem. These reports enter our workflow queue, managed by multiple teams at CU\*Answers for quick tagging, sorting, and assignment. Note that these issues will not receive a confirmation or a fix date.



A dark grey button with a white speech bubble icon containing a question mark and the text "Let Us Know!" in white.

The **Let Us Know!** button is located on the footer of each page, including the homepage. Shown here in color context, this button will launch a web page with a fillable form guiding users through entering all the relevant details.

If you encounter an issue, ensure that you are selecting the button on the screen that contains the issue! The button transmits relevant details into the form that assists our teams with assigning the appropriate screen and panel information to the report. It's imperative that you remain on-screen, use the button, and fill in as many details as possible for a smooth report and a faster correction.

**Introducing CBX: Reporting Defects:** <https://www.youtube.com/watch?v=T3o0R17WKjk>

## Resources and Training

**CU\*BASE Online Help** and resources will be available to help guide through processes like they always have been. As our documentation teams are working on updating documentation for **CBX** congruent to the software development, **CU\*BASE Online Help** will transition to **CBX Online Help** with the 25.05 Spring release on May 18<sup>th</sup>.

While we will take some time to work through our reference guides, video documentation, and other supporting resource material to reflect **CBX** screens and processes, feel confident that existing documentation will still hold the fundamentals needed to understand and complete tasks.

Throughout the rollout period, we have several demos scheduled for oncoming credit unions that will show **CBX** workflows and highlight differences.

**Sign up for a demo session here:**

<https://www.cuanswers.com/resources/edu/courses/syllabi/?course=SE.2025.11>

Additionally, we have two overview videos:

**Introducing CBX: A Walkthrough**

<https://ondemand.cuanswers.com/introducing-cbx-a-walkthrough/>

**Introducing CBX: An Overview**

<https://ondemand.cuanswers.com/introducing-cbx-an-overview/>

Most importantly, remember that our initial rollout is simply a transition to the new design. All fields and buttons will have roughly the same appearance and placement, and they will function exactly as they do in **CU\*BASE**. We expect the learning curve to be extremely low!

## System and Network Information

As **CU\*BASE GOLD** has specific requirements, as does **CBX**.

**Review the CBX system and network requirements here:**

[CBX System and Network Requirements](#)



Keep in mind that as the project progresses these may be refined and adjusted. Before you make any large investments, you might want to consult with our Network Services team about your situation.

## What Browser Should I Use?

Due to the ability to manage updates and support, we have selected Microsoft Edge as our preferred browser. However, the software can be used in your preferred browser.

## Browser Sizing: Can I Make This Giant or Teeny Tiny?

**Find your “sweet spot” when it comes to sizing.** One of the most exciting things we love about **CBX** is that the sizing is choose-your-own-adventure style.

However, we have a minimum recommended size, **1280x1024** (the same size as the *Large* screen size in **CU\*BASE GOLD**, actually). What does this mean? It means that we are adapting our product to a browser experience, and this is as small as you can go to have the best experience with the on-screen content. That said, you can resize your window UP dynamically to as large as you’d like!

You can size the window down as well, but it’s important to note that **CBX** is not optimized for tablet or mobile use. There is also a point where you will lose scroll bars, functionality, and on-screen information.

## Browser Tips and Tricks: Will it Work the Same?

**Do not use your browser’s back buttons or refresh buttons.** This is related to the SPA framework underlying **CBX**, as mentioned above. Instead of using the browser buttons, continue to use the familiar navigation buttons within the **CBX** screen, just as you would in **CU\*BASE**.

**CBX is geared towards mouse use.** We recommend a mouse for navigating **CBX**. While you can of course still tab and key around, you’ll need to keep track of your tabbing as sometimes a tab will land on a button, and an Enter will click that button. Using a mouse helps keep focused on where you are on screen.

**Print-screen is best done in-browser.** That means that in Edge, you will use the menu in the browser window to drop down and select Print. The printer icon from **CU\*BASE** has been retired!



## Station Control, Installer, and Connecting the Pieces

As **GOLD** transitions to **CBX**, we are shifting from an application that runs directly on a workstation to a more modern, browser-based solution. Previously, **GOLD** relied on command-line arguments and local temporary files to interact with multiple applications. This approach is not sustainable for the future, as web browsers lack the capability to execute command-line requests and require called applications to be installed and registered on the system.

To address this limitation, we’ve developed a centralized application to validate and manage requests for the following applications:



## CBX Installer

The **CBX Installer** is responsible for preparing the workstation by installing necessary applications and creating a desktop shortcut for **Microsoft Edge**, configured to open **CBX** for the specific workstation.

## Station Control

**Station Control** serves as the intermediary between the browser and the applications listed below. When installed, it registers itself in the Windows Registry to enable browser-to-application communication via a standard mechanism known as **Registered URL Protocol**. This is a standard way of registering applications for Windows. This application is created to only allow requests specifically for the applications listed below.

### *Native Receipts*

**Native Receipts** is designed for processing, printing, and scanning receipts, as well as archiving them. This application processes requests from **Station Control** by calling an API to gather the data needed for generating a receipt. Features include:

- Displaying receipts within the application.
- Enabling digital signatures using a **Topaz Signature Pad** and the **SigPlus** driver.
- Writing temporary files and storing data locally for emergencies.
- Archiving documents directly to the client's **eDoc** archiving system via HTTP/HTTPS protocols.

### *ProDOC*

**ProDOC**, which will be deprecated in 2026, is an application for receipts and forms archiving. It shares functionality with **Native Receipts**, such as digital signature support, but stores archived files in local folders or mapped drives instead of utilizing HTTP/HTTPS protocols. **Native Receipts** and **CU\*Forms** will replace **ProDOC**.

### *SearchLink*

**SearchLink** retrieves documents from an **eDoc archiving system**. It processes requests from **Station Control**, commonly used to fetch photo IDs or check images via HTTP/HTTPS protocols.

### *SigPlus*

**SigPlus**, developed by **Topaz**, is a driver that enables communication between workstation applications and the **Topaz Signature Pad**. It is primarily utilized by **Native Receipts** and **ProDOC** for signing functionality.

### *SigWeb*

**SigWeb**, also developed by **Topaz**, allows communication between web browsers and the **Topaz Signature Pad**. It is used exclusively by **CU\*Forms** for signing documents.

To learn more about, and install, Station Control on your workstations, see this Knowledge Base item: [CBX Station Control Deployment](#).



## Miscellaneous Information

Note the following additional items regarding ancillary applications and integrations:

**ITMs:** These will work as intended, with no additional configuration required.

**TCD/TCM:** We have completed our internal work to ensure that the Dynacash/Dynacore systems will integrate as intended. However, you may need to contact for vendor to receive the update that will include the mapping for standard Teller and Xpress Teller.

**CU\*Forms:** We are continuing to push forward with **CU\*Forms** as our form solution in **CBX**. More information will follow in the 25.05 release.

**Data on the Move (DotM):** We are exploring **Data on the Move** as our file download/upload tool, as the underlying framework behind Tool #1375 will no longer perform the needed functions in **CBX**. More information will soon follow on this solution.

The Kitchen is still your place for updates and news. [Visit the CBX Kitchen Page](#)



## Want the quick start guide for CBX? Check out these highlights to get you up to speed and ready to go!



### What is CBX?

**CBX** is your new core software, launching throughout 2025 and replacing **CU\*BASE GOLD**.



### How do I get to CBX?

Your local administrator will install Station Control on your workstation, which will create an easy-to-use icon to launch **CBX**, just like **CU\*BASE**.



### Will I need any new login credentials?

Nope! All of your **CU\*BASE** information will work in **CBX** on day one.



### How does CBX work?

**CBX** is the same underlying software structure that you are familiar with, presented with a new in-browser UI. We are recommending Edge as the default browser.



### When will my credit union start using CBX?

Our teams will contact your credit union beginning mid-March to arrange your rollover date.



### What will we have to do to rollover to CBX?

Once **Station Control** is installed, simply click and go! There's no conversion or training needed (*though keep at eye out for upcoming demos and webinars*).



### Can I use CBX on my phone?

**CBX** is a desktop-sized browser-based software. You can dynamically resize your screen to be as large as you need, but it is not supported on tablet or mobile.



### Does this impact my members at all?

No! Member online banking and services are all the same. Only credit union staff will use **CBX** and experience the new software.



### Does this cost me any money?

This investment is for our entire cooperative, and rolling to the new UI will not cost your credit union money.



### Is CU\*BASE GOLD going away immediately?

No, we will continue to support **CU\*BASE GOLD** throughout 2025 until a sunset date is announced.