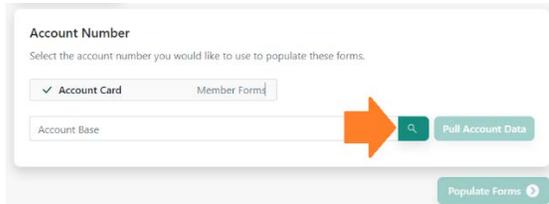


# CU\*Forms Update Coming March 24<sup>th</sup>, 2024

On March 24<sup>th</sup>, 2024, there will be a new version of the CU\*Forms giving your credit union a new set of features:

- Search for members not only by account number but SSN and full name.
  - In CU\*Forms, click on the  button.



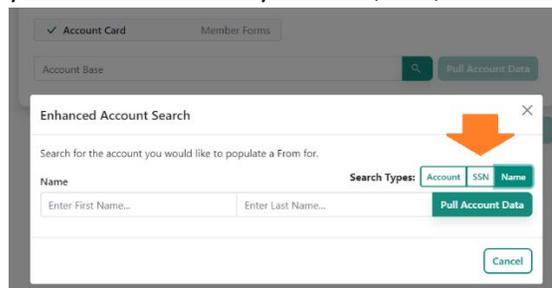
Account Number  
Select the account number you would like to use to populate these forms.

✓ Account Card Member Forms

Account Base  Pull Account Data

Populate Forms

- Change your search criteria by Account, SSN, or Name.



✓ Account Card Member Forms

Account Base  Pull Account Data

Enhanced Account Search

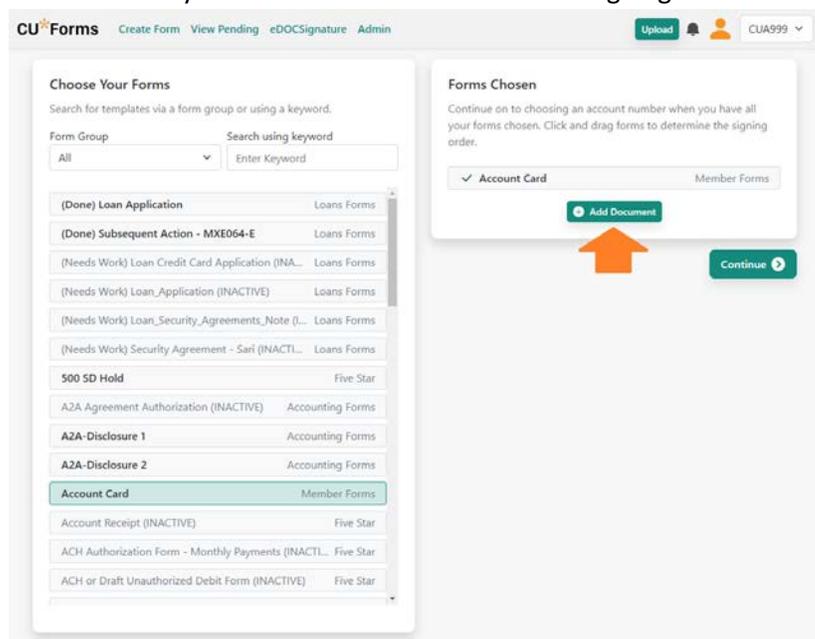
Search for the account you would like to populate a Form for.

Name Search Types: Account SSN Name

Enter First Name... Enter Last Name... Pull Account Data

Cancel

- Add reference or a signing document to your CU\*Forms signing process.
  - When selecting forms form creation, click the  button below the chosen forms to upload a document you would like to include with the signing event.



CU\*Forms Create Form View Pending eDOCSignature Admin Upload CUA999

Choose Your Forms  
Search for templates via a form group or using a keyword.

Form Group Search using keyword  
All Enter Keyword

(Done) Loan Application	Loans Forms
(Done) Subsequent Action - MXE064-E	Loans Forms
(Needs Work) Loan Credit Card Application (INA...	Loans Forms
(Needs Work) Loan_Application (INACTIVE)	Loans Forms
(Needs Work) Loan_Security_Agreements_Note (I...	Loans Forms
(Needs Work) Security Agreement - Sari (INACTL...	Loans Forms
500 SD Hold	Five Star
A2A Agreement Authorization (INACTIVE)	Accounting Forms
A2A-Disclosure 1	Accounting Forms
A2A-Disclosure 2	Accounting Forms
Account Card	Member Forms
Account Receipt (INACTIVE)	Five Star
ACH Authorization Form - Monthly Payments (INACTL...	Five Star
ACH or Draft Unauthorized Debit Form (INACTIVE)	Five Star

Forms Chosen  
Continue on to choosing an account number when you have all your forms chosen. Click and drag forms to determine the signing order.

✓ Account Card Member Forms

Add Document Continue

- In the Upload document panel, select the document you would like to upload, add a document name, and tell the document where it needs to be archived. The document will inherit indexes of other documents saved.

- On the document signing screen, easily add signing fields for manually filling or send them to the member for eSign. Simply click the **+ Add Field** or right-click and draw where you want to draw a box.

- If you are adding a box with **+ Add Field**, move it to the location, and double click on the to access settings. Change the field type to be your desired field like text or signature box. If you would like the member to sign in eSign, check the “Send for eSign” box.

**Edit Field** [X]

Field Name:

Field Type:

Signer:

**eSign**

Send for eSign:

Required for eSign:

- Request a document at the same time while sending CU\*Forms out for eSign.
  - Once you are finished filling your form and ready to send it for eSign, click on the  button to initiate the request from the signer. It is possible to have multiple requests from multiple signers.
    - Signer – Select the signer that needs to submit the document
    - Archive Table – where to save the document
    - Document name – name of the document in the archive
    - Request Text – helps the member know what document to upload.

**eSign Confirmation** [X]

Package Name:   Lock Signature Names

Name	Email	Notification Type	Auth Code
<input checked="" type="checkbox"/> John Doe	<input type="text" value="johndoe@email.com"/>	<input type="text" value="Email"/>	<input type="text" value="761012"/>

**Requested Documents**

Signer	Archive Table	Document Name	Request Text
<input type="text" value="John Doe"/>	<input type="text" value="Member_Forms"/>	<input type="text" value="Photo ID"/>	<input type="text" value="Please upload your Photo ID, Thanks!"/> <input type="button" value="Request a Document"/>

Send To Member  eSign Link