

CU*Forms Update Coming February 13th, 2025

On February 13th, 2025, there will be a new version of CU*Forms giving your credit union a new set of features.

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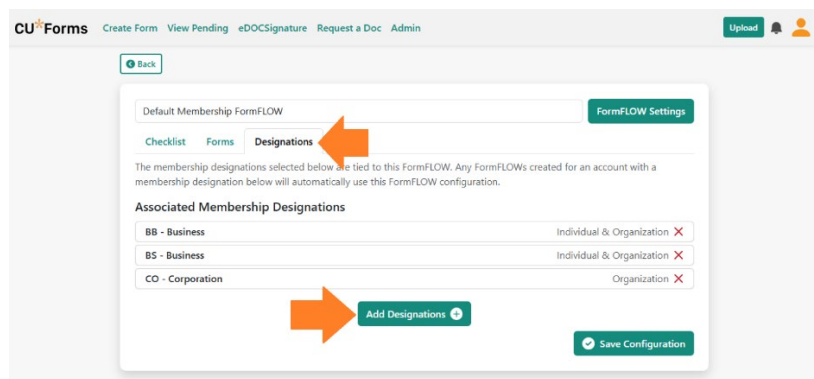
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Auto-Selection of FormFLOW by Membership Designation

To help your credit union’s workflow, you can now tie membership designations to membership FormFLOWS. When CU*BASE launches CU*Forms FormFLOW, it will automatically select the correct FormFLOW and not the default.

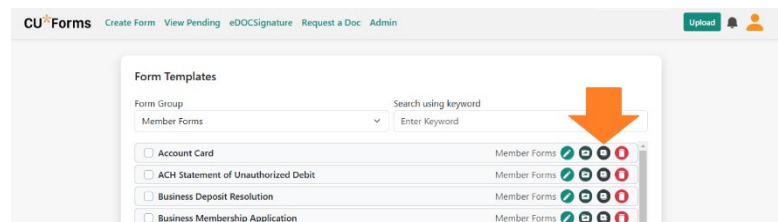
NOTE: If a “Designation” is not configured, it will still use the default FormFLOW.

To add this setting, go to “FormFLOW” – “Membership” under “Admin” and select the FormFLOW that needs to be updated. Under the new “Designations” area, click “Add Designations” and add the membership designations that should use this FormFLOW in the future.



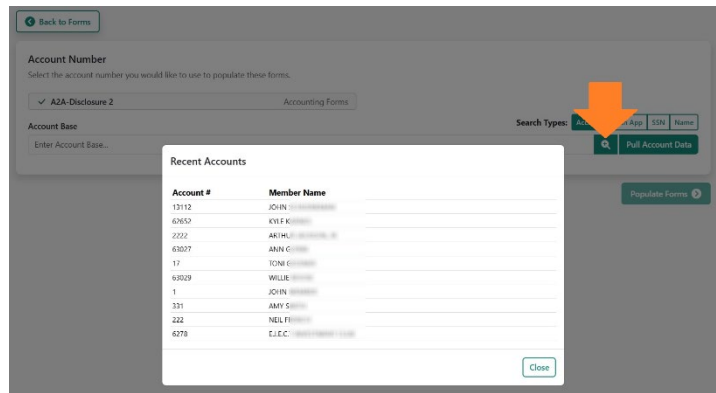
Duplicate Template Feature

If you need to build a template similar to an existing form, simply duplicate your existing form and make any necessary changes to the copy. You can do this in the “Form Template” creation/edit page under “Admin”.



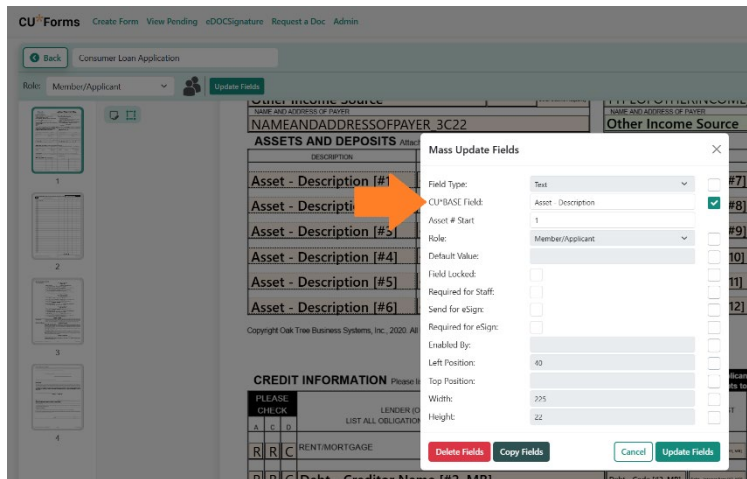
Enhanced Member Search

Now access the last 10 Accounts from CU*BASE when searching for accounts in CU*Forms. When you select the magnifying glass located to the left of the Pull Account Data button, the last 10 accounts you viewed in CU*BASE will be listed.



Mass update CU*BASE Fields

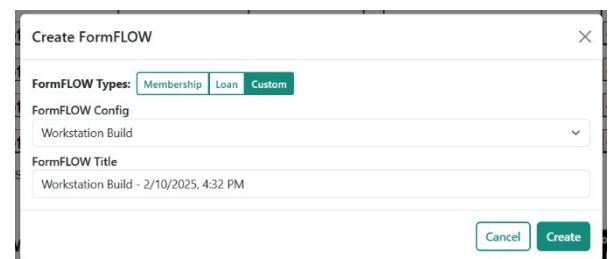
To assist the process of programming your credit unions forms, we have added the ability to mass update CU*BASE fields. You can use the select fields tool to select multiple boxes, then select the proper CU*BASE field that will be applied. Not only will CU*Forms update the CU*BASE field, but the fields will also be automatically sequenced.



For example, if you have a loan form that requires a list of your member's asset-description, you can now program all asset-descriptions at once. To do so, you would use the select fields tool to select all the boxes, then fill in the proper CU*BASE field and starting number. Then when you select update fields, all the asset-description fields will be programmed in sequential order.

Custom FormFLOWS

A highly requested feature, you now can create custom FormFLOWS. Build a checklist for new hires or new PC builds and have a tracking document saved in iDocVAULT. To configure, go to *Admin / FormFLOW / Custom*, then create your new configuration just like you would for membership or loans. Additionally, these FormFLOWS do not need to be connected to an account number. Simply go to the "Create FormFLOW" button and select custom to get started.



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. These are most of the fields that we were missing to support loan applications and notes. We fully anticipated that we missed some, so please reach out to imaging@cuanswers.com if you find a field that you think we should add. Below is a full list of new fields:

- Loan - Collateral Insurance Agent Name
- Loan - Collateral Insurance Agent Company
- Loan - Collateral Insurance Agent Street Address
- Loan - Collateral Insurance Agent City, State ZIP
- Loan - Collateral Insurance Agent Phone Number
- Loan - Collateral Insurance Type
- Debit Card - Last 4 Digits