

Release Information

Product	Release Date
CBX®	July 21, 2026
Released to the Following:	Keys to the Symbols:
• Online Credit Unions • Site-Four Credit Unions • Self-Processing Credit Unions	☒ You'll see it immediately. - You'll need to activate it. - You'll need to work with a CSR to set it up. - There may be related fees; contact a CSR.

Notes for This Release

Release Notes Revised 7/22/26

All projects will be available immediately, however, review the projects that will require activation or interaction with a CUSO representative.

Included in This Release

CBX Themes Now Available!

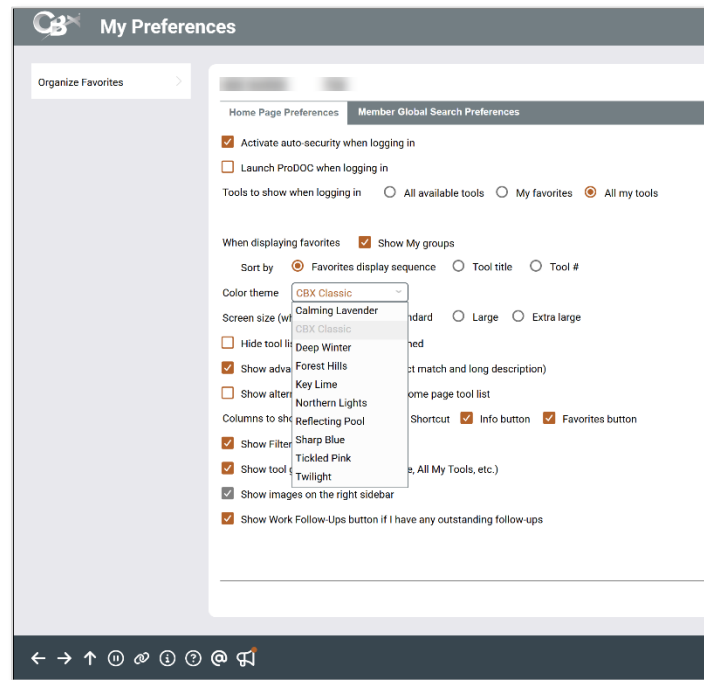
Project Number: 68115

Color and design themes are now available in CBX! Available themes include:

- Calming Lavendar
- CBX Classic
- Deep Water
- Forest Hills
- Key Lime
- Northern Lights
- Reflecting Pool
- Sharp Black
- Tickled Pink
- Twilight.

Select these the themes from the *Color theme* drop-down menu available on the My Preferences page. Access this page from the Star icon at the top of your navigation bar in CBX.

- NOTE: If you have dark mode enabled in your browser, you will still need to select a 'dark mode' styled theme (Deep Winter or Twilight) to override the original CBX theme.

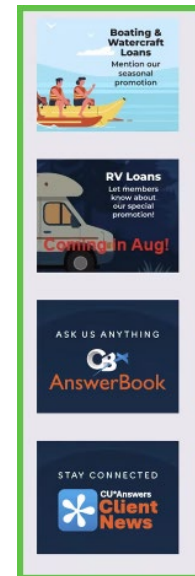
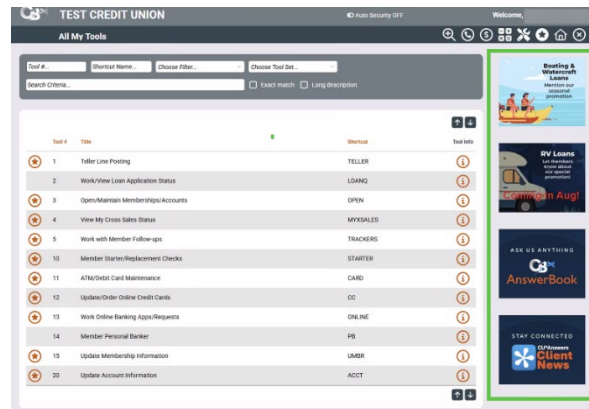


CU-Defined Images Now Available on the CBX Home Page

Project Number: 67614

Now you can add your own images (and associated URLs) to the right of the CBX Home page to promote to staff your credit union offerings. All four images can be set up on the Home page using CU*Publisher within CBX Manager.

If you don't have CBX Manager, refer to the store for this free feature! <https://store.cuanswers.com/product/cbx-manager/>) Contact the IRSC for more information. *Images that are not replaced will default to the standard CBX ones.*



Employee Security Updates to the CBX LOS

Project Number: 67343

Revised 7/22/26

This release will deploy enhancements to our employee security settings for the CBX LOS. These enhancements will allow you to control which employees are able to create or access loan applications for existing members, as well as which employees are able to book/create loan accounts.

- In **Tool #517 Employee Type Code Configuration:**
 - For an employee to be authorized to create/access loan applications for existing members, the *Allow Account Inquiry & Allow Account Maintenance* checkboxes are both required to be checked.
 - For an employee to be able to book/create a new loan, the bottom check box *Allow Posting to Account* is required to be checked. This checkbox works together with the 'loan underwriting' special security feature, meaning both boxes would need to be checked for an employee to be able to book/create a loan account.
- NOTE: Review your Employee Type Codes configuration for insiders (**Tool #517**) as this may impact work though **Tool #2** (as well as now **Tool #53** and **Tool #394**). *Remember Tool #517 is used for all employee IDs.*
- If you need an override to **Tool #517**, use **Tool #327 Employee Security**, for example with a board member account.

Please keep in mind: the Allow Account Inquiry and Allow Account Maintenance checkbox controls will only allow/prevent employees from handling existing member loan applications. These settings do not apply towards non-member loan applications.

☒ **Account Suffix Lookup Added to Tool #492 Member Account Adjustment (Full)**

Project Number: 66887

We added an account suffix lookup to **Tool #492 Member Account Adjustment (Full)** (Shortcut: *adjust*).

☒ **New Option to Remove Employee Security Tool Assignments**

Project Number: 62933

Thank you Day Air Credit Union for your Idea form. We added an option to remove an employee from a tool assignment on the *Employees Assigned to Tool* screen from **Tool #327**. Selecting Remove Employee Assignment adds an easier way to remove tool assignments and enhance the user experience when maintaining employee security within CBX.

☒ **Query Account Number for Authenticate Me Activity**

Project Number: 67755

Thank you Greater Metro Federal Credit Union for your Idea form. We expanded the VMBPACTAUD (MemberPass Activity Audit File) table to include the account base associated with the authentication request. This allows clients to easily identify the account that was accessed when the Authenticate Me feature was used.

☒ **New Record Added to Existing Automated Query Audit Report (PRUNAQ)**

Project Number: 67547

This project was recalled 7/22/26.

Now credit unions will see a new record on the existing Automated Query Audit Report (PRUNAQ) when a Query is not run during automated query processing due to an error. This entry will provide details on the query and why it did not run. The report is placed in the DAILYxx OUTQ for review. For a sample, refer to the Automated Reports and Queries booklet, available on the CBX reference page.

Database Changes

Running Your Custom Queries

If a file listed below is included in any of your custom reports or inquiries, you must refresh the Query definition, **or your Query MAY NO LONGER RUN:**

1. In **Tool #100 CU*BASE Report Builder (Query)**, choose **2=Change** and enter your Query name, then use Enter to proceed
2. Select **Choose Files**
3. Use Enter  to move through these screens until you're back to the **Report Builder - Main Menu**
4. Use **Exit** 
5. Select ☒ **Save query definition** and Run **Interactively** then use Enter 

NOTE: If the field changes from a numeric to an alpha-numeric field, you will need to add 'single quotes' around the Selection Criteria.

Updating Your Automated Queries

If you ever remove or add a file to a Query definition of a Query that you have automated, your Query **MAY NO LONGER RUN** unless you also **update the Query automation configuration** as follows:

1. Access **Tool #758 Report Automation – Custom Rpts/Files**
2. Select the Query and use **Edit**
3. Make the necessary changes and use **Add/Update** to save

NOTE: You do not need to do this if all you do is tweak a selection parameter such as modifying a date.

New Database Tables

For details on the formats and available values for specific table columns, refer to **Tool #332 Database Search Assistant**.

Table	Description	Purpose	PS #
DIRVENDOR	Logs direct payment vendors	Log all available vendors for all CUs	65336

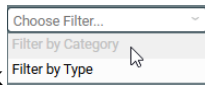
Changed Database Tables

For details on the formats and available values for specific table columns, refer to **Tool #332 Database Search Assistant**.

Table	Description	Changes Made	PS#
VMBPACTAUD	Logs Authenticate Me activity	Added member account number	67755
DIRVNDCFG	Stores parameters for vendor integrations	Added direct payment vendors column	65336

Tool Changes

Attention Credit Union Security Administrators: With each new release, review the brand-new tools being introduced and assign them to the appropriate employees once the release goes live. To find the new tools introduced in the most recent release:

From the Home Page

1. Click
2. Choose **_NEWTOOLS**
3. Click Select

TIP: Remember you won't see them listed under **My Tools** until you've been assigned access to them!

In Employee Security

1. Launch **Tool #327 Employee Security**
2. Click **All Tool Assignments**
3. Click the Categories  button
4. Choose **_NEWTOOLS**
5. Click Select

New Tools Since the Last Release

Tool #	Tool Title	Short Description
1395	View Direct Payment Vendor Configuration	View vendors allowed to be used for various direct payment applications
5539	Direct Payment Vendor Configuration	OPER: Configure vendors allowed for direct payment applications

End