CUBG DASHBOARD OVERVIEW

Welcome to the CU Business Group Dashboard — your centralized platform for submitting, tracking, and managing service requests.

HOMEPAGE OVERVIEW

The Dashboard homepage serves as your launchpad for all services. At the top, you'll find navigation links to Submit a Service Request, view Active Service Requests submitted through the Dashboard, and visit our Servicing Portal. These allow you to quickly access your Dashboard requests, begin new ones, or manage payments and servicing actions.

Below the navigation, you'll see a set of quick navigation buttons that provide direct access to key features.

The homepage also includes a section for upcoming education events, such as webinars and training sessions.

SUBMITTING SERVICE REQUESTS

You can request a variety of services including underwriting, loan documents, annual reviews, third-party reports including collateral evaluations, and more.

To begin a new request, navigate to the Submit a Service Request page. You'll be guided through a few simple steps to begin submitting your request. After your initial selection is made, you'll be taken through the step-by-step process to enter the details for your request.

ACTIVE SERVICE REQUESTS

This section allows you to track the status of service requests submitted through the Dashboard. Requests are organized into tabs:

- **Unsubmitted**: Requests you have started in the Dashboard but have not yet submitted.
- **In Progress**: Requests that have been submitted through the Dashboard and are currently being worked on.
- **Complete**: Dashboard requests that have been finalized and closed.
- **All**: A full view of every request your credit union has created in the Dashboard.

Each request includes key details such as the request name, type (e.g., underwriting, documentation), who created it, the associated loan, its current status, and the date it was created.