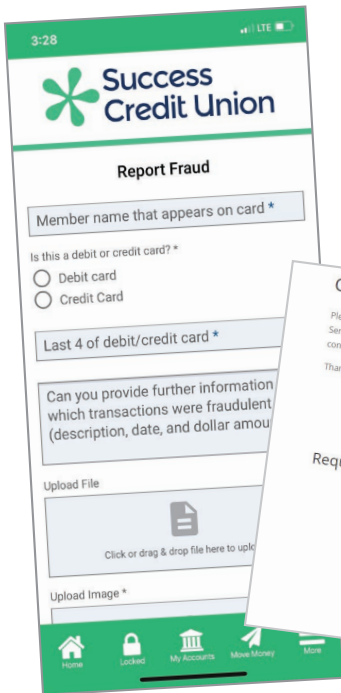


Custom Online Form Generator

Is your credit union looking to capture secure data from your member via a custom online form?

Credit unions will work with IRSC and create custom online forms to be listed from your credit union website, mobile app, or from a banner within It's Me 247 desktop, as well as It's Me 247 Mobile Web. Some examples of custom online forms include letting a member request an appointment, request to have their credit card limit increased, upload a copy of their drivers license, notify the credit union of travel, or even complete a custom online loan application.



Create custom online forms for your:

- Website
- Mobile App
- It's Me 247 desktop
- It's Me 247 Mobile Web



Why couldn't we do this previously? Previously we did not allow websites to capture secure data (account number, SSN, etc.) from a member due to Reg. P, with the new custom online form generator this is all sent and stored securely. The Form Generator and Request Center were built specifically for this purpose.

Get Started Today! Contact Internet Retail Support Center

6000 28th Street SE | Grand Rapids, MI 49546
(800) 327-3478 | irsc@cuanswers.com | irsc.cuanswers.com

What can be included within a custom online form?

The credit union provides what you would like listed within each form, including titles, subtitles, as well as fields of the data you are looking to capture from this member. Listed below are some examples of what your credit union can request of the member.



- 1. Radio Buttons** – creates a list of options for the member to select from. Only one option can be selected at a time from these lists.
- 2. Checkbox** – creates an option for the member to select or pass. Group these together to allow members to select multiple items from a list.
- 3. Drop Downs** – creates a drop down menu for members to select from. Allows users to select one option and hides other options from view when not in use.
- 4. Forced Format Input** – creates an input that must be filled in a specific way to continue. Use for dates, money amounts, email, phone, SSN, state, or ZIP code.
- 5. Attachments** – lets the member upload documents to the form submission (accepted file types: .pdf, .docx, .doc, .odt, .rtf, .txt).
- 6. Image Upload** – lets the member upload image files to the form submissions. Files can be added from a file selection or via drag and drop from the desktop.

If you are not sure where to get started, check out the Forms Gallery via the IRSC online store, or contact IRSC for further information. https://lc18.info/custom_forms_irsc



**INTERNET
RETAILER**
SUPPORT CENTER

NEW!

Request Center

Form Name	Applicant	Assigned	Status	Timeline	Submission Date
Travel Alert	Kristian Daniel			Request submitted 5 days ago	Tue, Jun 5, 2018 1:14 PM EDT
Report Fraud				Request submitted 1 week ago	Wed, May 30, 2018 10:21 AM EDT
Travel Alert	Kristian Daniel			Request submitted 1 month ago	Mon, Apr 30, 2018 9:55 AM EDT
Travel Alert	Kristian Daniel			Request submitted 1 month ago	Tue, Apr 24, 2018 3:43 PM EDT
Travel Alert	Kristian Daniel			Request submitted 2 months ago	Thu, Apr 5, 2018 2:39 PM EDT
Sample FOM Form				Request submitted 2 months ago	Wed, Apr 4, 2018 2:43 PM EDT
Sample FOM Form				Request submitted 2 months ago	Wed, Apr 4, 2018 1:19 PM EDT
Sample FOM Form				Request submitted 2 months ago	Wed, Apr 4, 2018 1:13 PM EDT
Travel Alert	George Costanza			Request submitted 2 months ago	Wed, Apr 4, 2018 12:24 PM EDT
Travel Alert	Kristian Daniel			Request submitted 2 months ago	Tue, Apr 3, 2018 12:51 PM EDT
Travel Alert	Kristian Daniel			Request submitted 2 months ago	Mon, Apr 2, 2018 4:58 PM EDT
Travel Alert	Kristian Daniel			Request submitted 2 months ago	Mon, Apr 2, 2018 4:56 PM EDT
Travel Alert	Kristian Daniel			Request submitted 2 months ago	Mon, Apr 2, 2018 4:49 PM EDT

Request Center 29:45

Back Edit Form Data Request submitted 2 months ago ● New Request

Input Request	Data
APPLICANT	George Costanza
FORM	Travel Alert
SUBMISSION DATE	Wed, Apr 4, 2018 4:34 PM UTC
First Name *	George
Last Name *	Costanza
Account Number *	55564654654654654654654654
Enter Email *	m@m@gmail.com
Cell Phone Number *	615-555-1234
Trip Start Date *	12/22/2555
Trip End Date *	05/04/5454
Will you be driving or flying? *	Flying
What countries/states will you be traveling to? *	Bangladesh
Is this a debit or credit card?	Credit Card
Last 4 of Card *	9999

Request Center lets your credit union work requests from custom online forms created from CU*Answers Forms Generator product.

Once your custom online forms are public facing your credit union will need access to work these requests, which could include amounts from a credit card increase request, images from a voided check, or a PDF a member uploaded from a custom loan application.

Within the Request Center your credit union can assign to team members, assign a form status (assigned, working, completed), or export form data (select one or multiple form submissions).

Each team member can then request Form Notifications, this will notify the email address the user has registered for each request submitted through the form.

The credit union will first need to deploy a custom online form to gain access to Request Center.

Contact IRSC to get started

irsc@cuanswers.com | irsc.cuanswers.com

CU*ANSWERS
A CREDIT UNION SERVICE ORGANIZATION



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