DIY 1CLICK OFFERS CHECKLIST

If this is your **first campaign:**

- You will need a form configured for members to eSign in online banking.
- Please note this is a **DIFFERENT** form than your loan note in the core.
- Please attach this form to the store order. You can configure your own form in CU*Forms or Lender*VP can do that for you at a cost of $100 per form *(Cu*Forms and Enhanced Vault are both required)*. We then would reach out to you to test the form in your online banking platform.
- Please keep in mind, each time you do a new 1Click Offer, a new form may be required. Please contact the Lender*VP team for assistance.

After your form is **configured:**

- Lender*VP recommends that you build a new product and security code specifically for 1Click Offers.
  - Verify that the category you use for this product is set to **ALLOW ONLINE DISBURSMENTS.**
- Build the necessary queries needed to generate a list of the members you wish to target with your campaign.
  - The first column in the file created by the query **MUST** be the member account numbers and **MUST** have the header ACCTBS. The system **WILL NOT** send offers if this is incorrect.
  - Review the list of members produced by these queries.

After your form is **configured:** *(cont.)*

- Before you run your batch flood to your membership, it is important to run a test offer. This is done in a similar manner as defining your offer, but instead of running the offer for a batch of members, make the Query for just a single employee account or a group of employees. Sending a test offer helps to ensure that all key data elements are correct as well as your disclosures.
- Be sure to test with the **EXACT** same offer that you plan to send to members, with the same product, rate, tiers, and form.
- When testing an offer, Lender*VP recommends at a minimum you review the following items in both the offer itself and on your disclosure:

  - Interest Rate
  - Loan Amount
  - Term
  - Disclosure
  - Late Payment Verbiage
  - Collection Cost Verbiage
  - MLA verbiage

Key things to remember for **different offer types:**

- Credit card offers:
  - You **MUST** have online credit cards in the core in order to send 1Click Credit Card Offers.
- LOC offers:
  - If you use percent for payment calculation at your category level, you **MUST** reach out to Lender*VP.
- 1Click Unfunded offers:
  - You **MUST** have your dealers configured in the core in tool #245 *Configure Dealer Info for Indirect Lending.*
  - Only one dealer is configurable per offer at this time. A future enhancement will allow multiple dealerships to be added to a single offer.
- Once offers are sent out, the system will generate a ONECLCKLN report in the user's spool file which will list every recipient of the offer, for further validation.