

It's Me 247 Request Center

DESIGNING YOUR OWN PAGE AND YOUR OWN RETAIL FORMS

- Create an audience of application builders
 - Watch the activity to find applications that work
 - Use those signals to move beyond this platform to direct native integration
- Create a web-based fulfillment center
 - CU-designed processes to go from a member app (for anything!) to services fulfilled
- Offer it via the IRSC and evolve it over time
 - To a self-service generator, then potentially all the way to a turn-key engine sold in an in-house format

Success Credit Union 25:33 Ken Vaughn - Log out

Form Generator 1.0
Success Credit Union > Form Generator

Create new forms

My Forms: 0

All Forms: 22

Create form group

It's Me 247 Live Forms (API) (1)

CU Website Live Forms (API) (1)

Custom (API) (0)

Mobile Apps

RWD Responsive Webpage

Search

Form Name	Form ID	It's Me 247	CU Website	Custom	Mobile App	RWD	Timeline
Summer Loan Survey v3	16						
Summer Loan Survey v2	11						
Skip A Payment Form 1	9						
Signature Loan v2	4						
Signature Loan v1	22						
Refer a Friend Form Winter 2016	3						
Quick Loan App Lead	7						
Personal Quick Loan Master	15						



**Let's watch another demo
Ken put together...**

We're here to help! Live Chat



Success Credit Union
Refer-A-Friend Program is back!
For Every friend you refer, you both can earn \$25!
[Refer Now](#)

Shared Accounts

Account	Name	Available Balance	Actual Balance	Last Transaction	Account Details

My Account

Susie Q. Member
Switch Account

Rewards

Platinum Member
Current Points: 235
Previous Points: 152
View Point Details

Quick Pay

Grand Rapids Parking
Pay Now or Schedule Payment

Messages

Refer-A-Friend? Earn \$25 each

My Account

Susie Q. Member
Switch Account

Rewards

Platinum Member
Current Points: 235
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Quick Pay

Grand Rapids Parking
Pay Now or Schedule Payment

Messages



REFER A FRIEND FORM | PLATINUM MEMBER

Refer-A-Friend Form

Know someone who deserves the credit union difference who uses a smartphone? Recommend Success Credit Union to a friend, and you'll each get \$25 when they open Member Share savings and checking accounts, and meet the active account requirement*. Your friend will receive a text with a custom message from you and a link you our mobile app where they can apply for membership.

*\$25 Referred Member Incentive. Referred member may not be a current or previous member and must be age 18 and older.

Easy Refer a Friend Form

Takes less than 1 minute...information is kept private and will only be used for this purpose.

First Name *

Last Name *

Mobile Phone *

Email *

Best way to contact them?

- Text
- Email

[Continue](#)

