CUPublisher

CU Info

Update information about your credit union

INSIDE THIS GUIDE:

This guide describes the CU Publisher product CU Info! This product allows you to configure information about your credit union in one place for display in various CU Publisher products.

Last Revision date: March 6, 2026

Find other Reference Materials page on our website: https://www.cuanswers.com/resources/doc/cubase-reference/

Start your online help journey here:
https://help.cubase.org/cubase/Welcome.htm

Table of Contents

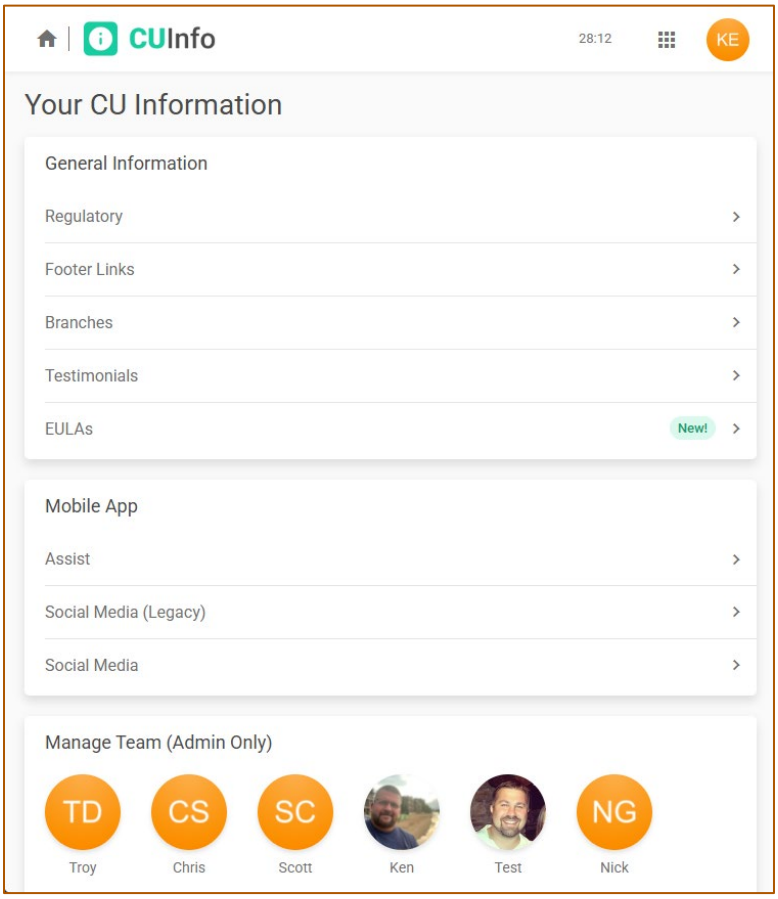
The CU*Answers Internet Retailer Support Center team is here to assist at any time. Find us, contact us, and learn more via *The Store* | *The Website* | *Email*

CU Info Overview

The CU Info product allows you a single, central place to edit information about your credit union that can appear in several locations, such as **It's Me 247**, **BizLink 247**, and MOP. CU Info allows you to edit general information and mobile app features. It's also another place to manage your CU Publisher users, if you are an admin.

This product is great for making your own updates to your credit union's information displayed in online banking. You'll be able to update information about your branches, social media, FAQs, member testimonials, regulatory statuses, and end-user license agreements for your first- and third-party products/services.

CU Info Home Page



Regulatory

To update the information that will appear in the regulatory widget in **It's Me 247** online banking, select **Regulatory** from the home page.

Regulatory

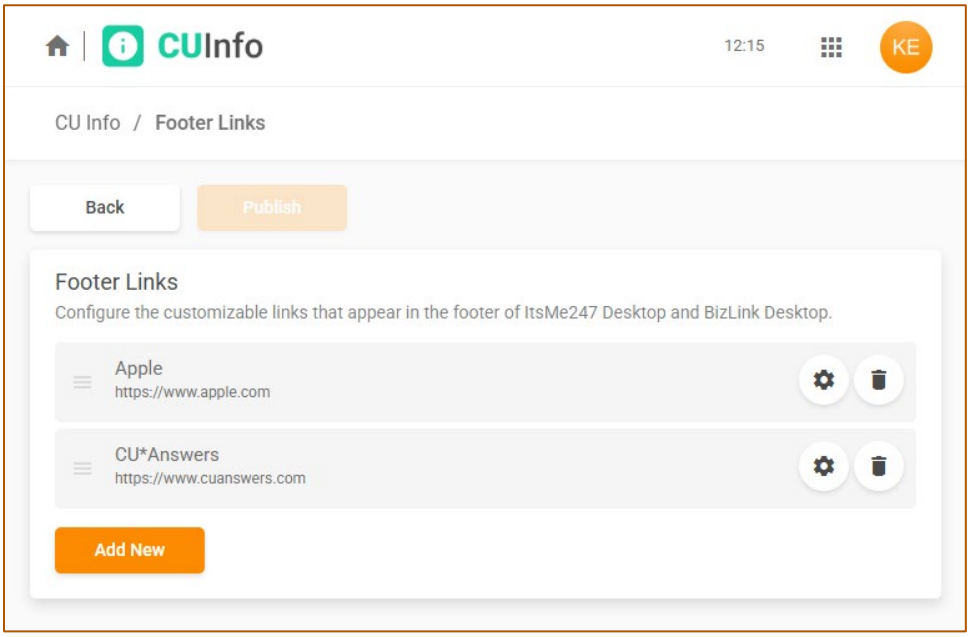
From here, you'll be able to select the regulatory items associated with your credit union. You'll be able to configure the figures of coverage for the NCUA, ASI, ASI Excess, and ESI. A preview will appear on the right displaying the information configured.

If updates are published to the regulatory widget, you will need to go publish the widget in IM247 Mobile and IM247 Desktop for the changes to display. For mobile, simply access the IM247 Mobile product, select the Home Tab Widgets section, and choose **Publish**. If you are not subscribed to IM247 Mobile, you will need to reach out to *irsc@cuanswers.com* to request the update. For desktop, access the IM247 Desktop product, select Regulatory section, and choose **Publish**.

Footer Links

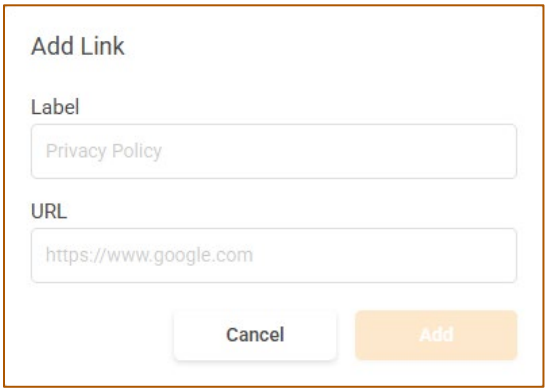
From the home page, select **Footer Links** to customize the links that will appear in the footer of **It's Me 247** desktop and **BizLink 247** desktop.

Footer Links



Use the gear icon to edit an existing link. Use the trashcan icon to delete a link. Select **Add New** to configure a new footer link.

Footer Links > Add New



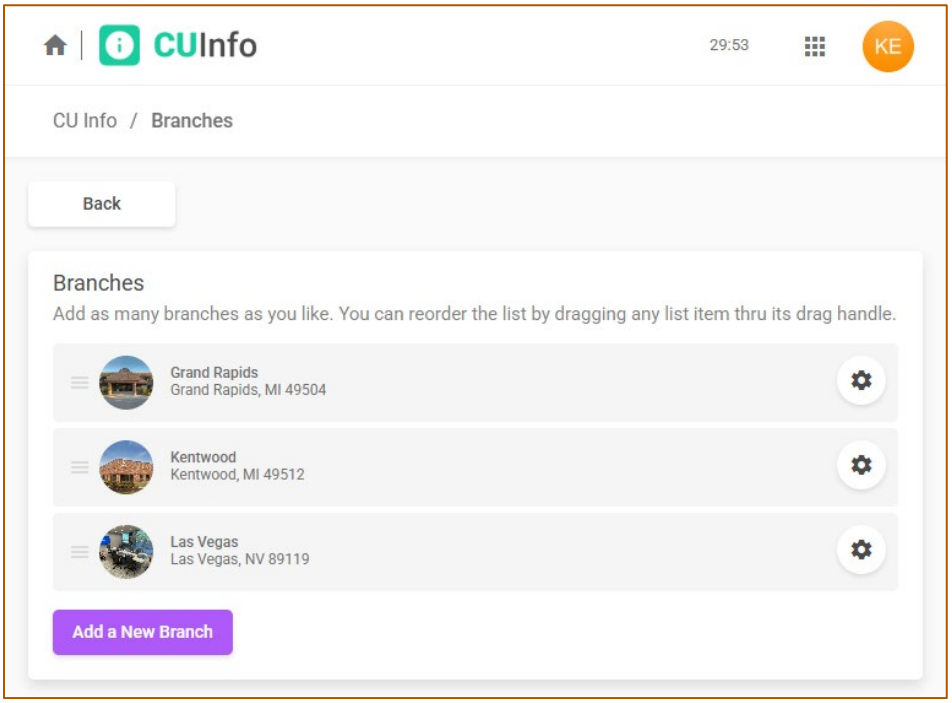
Add a *Label* and a *URL*, then select **Add**. You will need to select **Publish** to publish the changes to the footer links.

Branches

To configure information about your credit union branches, select **Branches** from the home page. This information can be accessed in **It's Me 247** where the branch info feature is linked.

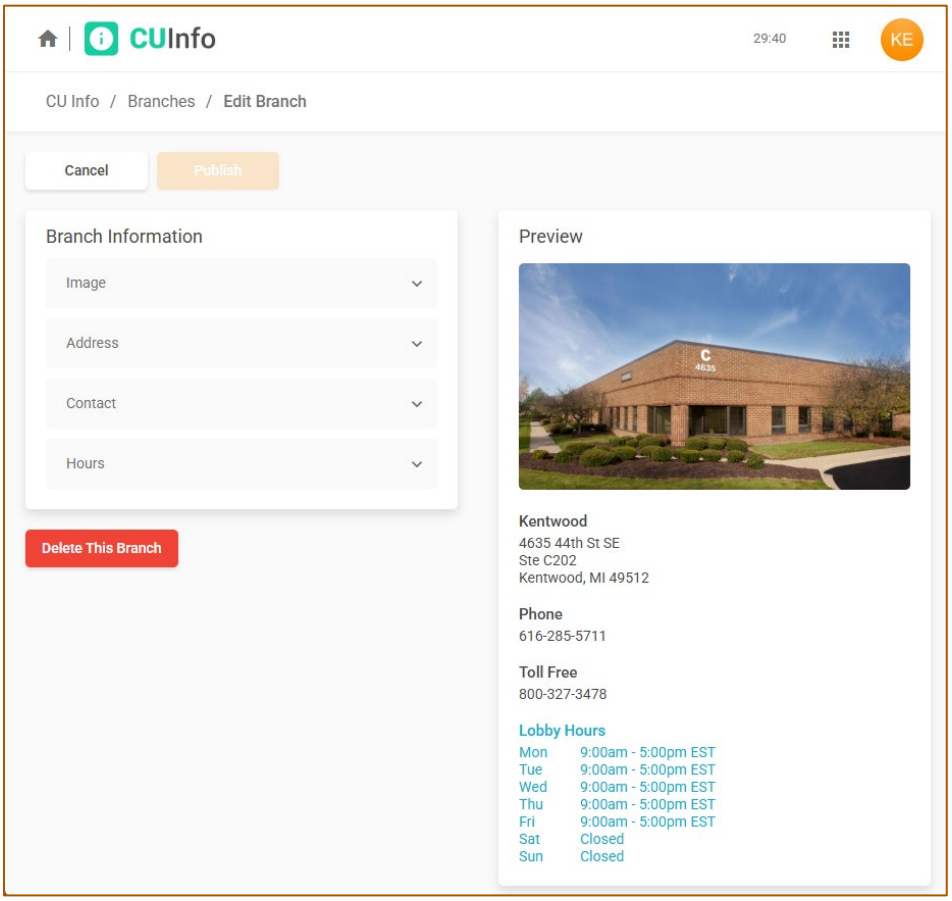
Select the gear icon to edit a branch's information. Rearrange the branch order by holding the hamburger icon and dragging.

Branches



Select **Add a New Branch** to add information about a new branch.

Branches > Add a New Branch



Here you may upload an image of the branch. (This must be a JPG or PNG. The recommended size is 640px by 380px.) You are required to enter information about the branch address, including the *Branch Name*, *Address* (*City*, *State*, *ZIP*), and *Timezone*.

You may also enter contact information for the branch, including phone numbers and emails. To delete a phone number or email, select the trashcan icon and **Delete**. Phone numbers can have a label, the phone number, and an extension. Emails can have a label and the email address.

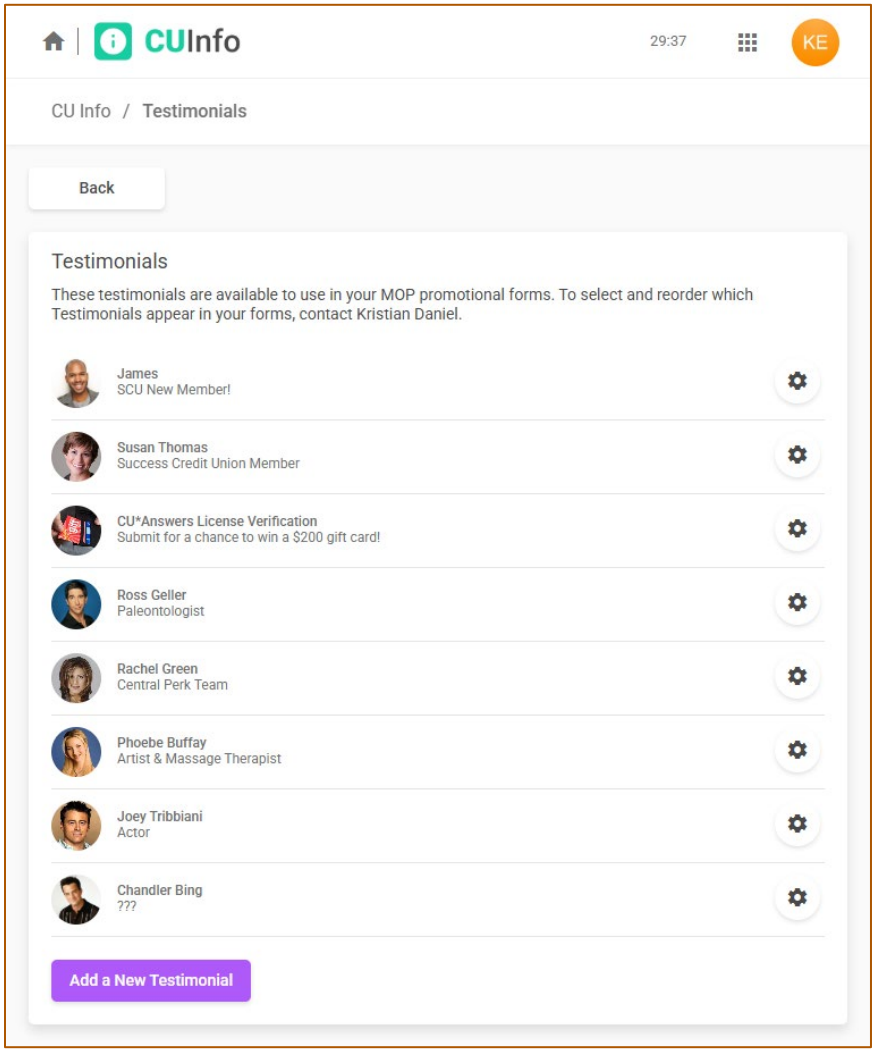
You may also add the hours of operation for the branch. Select **Add Hours Group**. Add a label for the hours, such as Lobby hours. Add the range of open hours for each day of the week. (If you close midday and reopen later, you can select **Add Hours** twice and input two ranges.) To delete an individual day range of hours, select the trashcan icon next to it and **Delete**. To delete the entire group of hours, select **Delete Hours Group** and **Yes** to confirm.

Select **Publish** to publish information about the branch. To delete information about a branch, select **Delete This Branch** and **Delete** to confirm.

Testimonials

From the home page, select **Testimonials** to configure testimonials for use in your MOP promotion sets. The testimonials configured here will appear as options to choose from within the CU Publisher product MOP Manager. These testimonials can also be updated through MOP Manager. If you do not subscribe to MOP Manager but have a configured MOP site and wish to change the testimonials, *contact the IRSC*.

Testimonials



Select the gear icon to edit an existing testimonial. Select **Add a New Testimonial** to add a new testimonial. Upload an image of the member. The recommended size is 300px by 300px JPG or PNG. (An image of a different size may be uploaded, but it will be resized, so a square image is best suited.) Add the member's name, their role, and a quote. Select **Publish** to add the new testimonial.

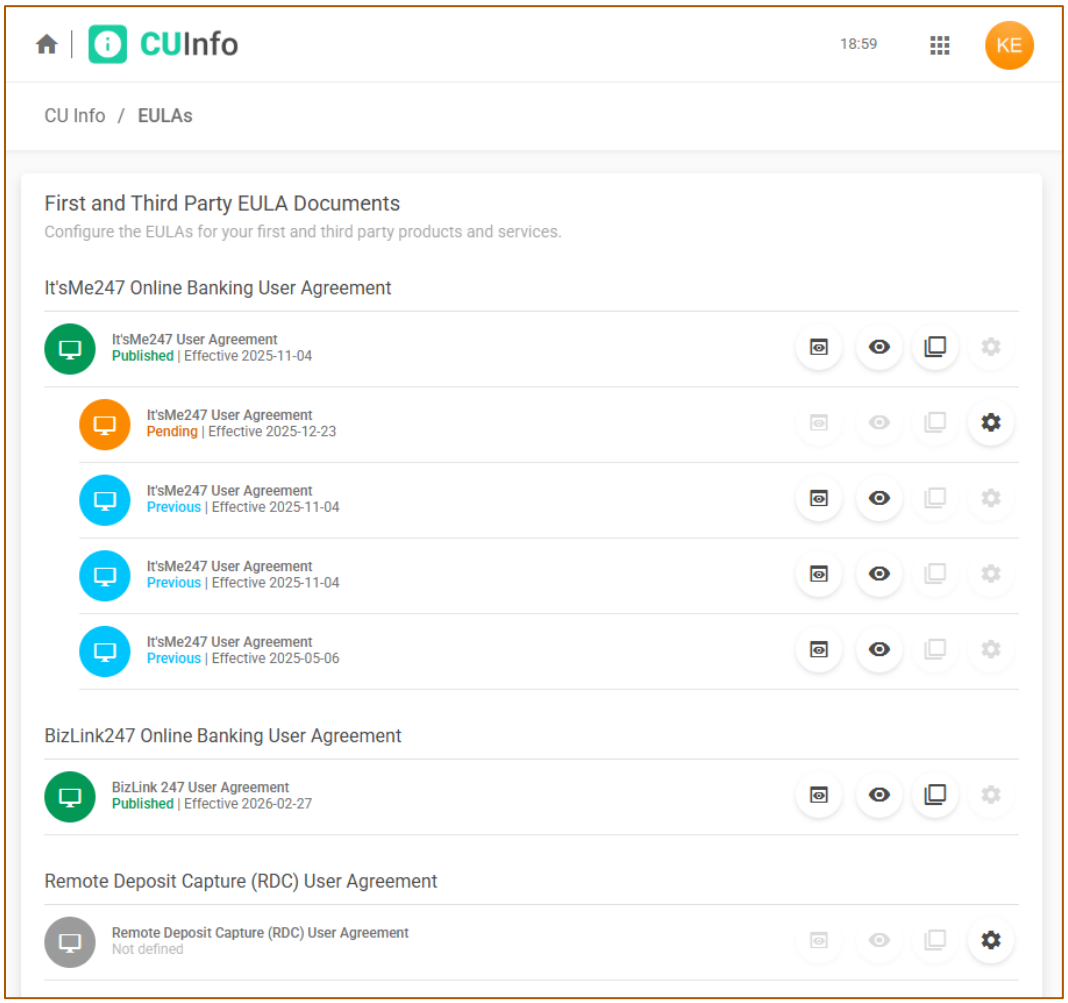
To delete a testimonial, select the gear icon to edit it, then select **Delete Testimonial**. Select **Delete** again to confirm.

EULAs

To configure the EULAs for your first- and third-party products and services, select **EULAs** from the home page. You'll be able to configure and view previous version of your EULAs for **It's Me 247**, **BizLink 247**, remote deposit capture (RDC), Paymentus bill pay, Paymentus P2P, Payrailz bill pay, Payrailz P2P, iPay bill pay, and Zelle T&C Tips.

Each EULA has buttons to preview the EULA in OLB, view the EULA in CU Info, duplicate the EULA, or edit the EULA. You are able to delete pending EULAs by selecting the gear icon and **Delete** (twice to confirm). Published and previous EULAs cannot be deleted.

EULAs



To define a EULA or change the pending, select the gear icon. To add a new EULA when a EULA is published, select the duplication icon.

From the EULA edit screen, you will add the Title for this section of the EULA. The Product Name will already be filled in for you. Under Sections, check the boxes to add pre-written EULA content. You may select the eye icon to view the HTML of the pre-written content.

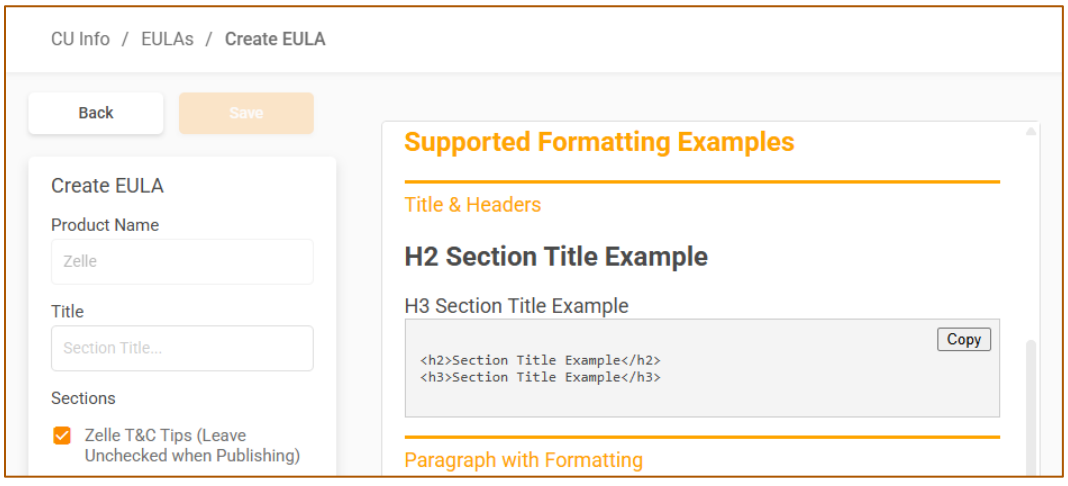
> ***Do NOT check the Zelle T&C Tips box when publishing a Zelle EULA.*** *This exists only to provide tips for writing EULA content with HTML formatting in the Addendum Content field.*

When a Sections box is checked, a Custom Inputs section will appear with additional fields to complete. (See below for descriptions of the custom input fields and in which EULAs they will appear.) You will need to complete these fields to replace the blanks in the pre-written EULA content.

Custom Input Fields	***Applicable EULA Section***	***Description***
Effective Date	**It's Me 247**, **BizLink 247**	The effective date of the EULA
Decline URL	Savvy Money	The URL where members can opt-out of Savvy Money services
CU Name	**BizLink 247**, Additional Disclosure for RDC, Paymentus Bill Pay & P2P	The name of your credit union
CU Phone	Paymentus Bill Pay & P2P	The phone number where members can contact the credit union
CU Address	Paymentus Bill Pay & P2P	The address where members can contact the credit union
CU State	Paymentus Bill Pay & P2P	The state the credit union is located
Time Cutoff	Paymentus Bill Pay & P2P	The business day cutoff time (transactions after this cutoff are considered next business day)

Use the addendum fields to write the EULA or add more information to the end of the pre-written content, if selected. The *Addendum Title* will appear as a link at the top of the EULA, which redirects users to the addendum content upon selection. Write the additional EULA information in the *Addendum Content* field using HTML formatting. (For HTML formatting tips and examples, view the information in the Zelle T&C Tips EULA section.)

EULAs > Zelle > Zelle T&C Tips

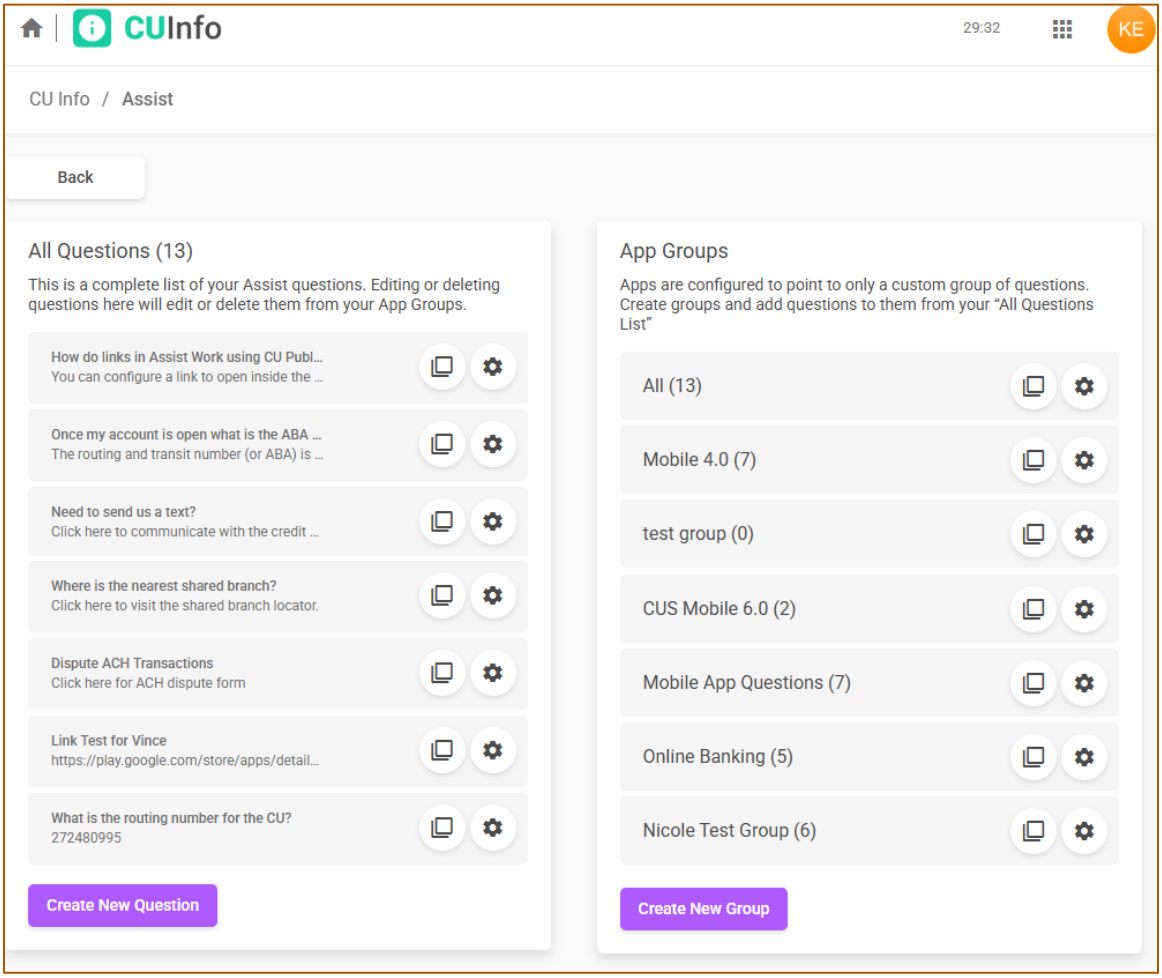


Add an *Effective Date* for when the EULA should take effect. Select **Save** to save any changes and set the EULA as pending. Select **Publish** to have the EULA be published and take effect on the configured effective date. You will need to confirm by typing 'publish' in the input field and selecting **Publish** again. Once a EULA is published, it cannot be deleted/removed.

Assist

From the home page, select **Assist** to add FAQs and create groups of these questions. These question groups can be accessed in **It's Me 247** where there are links to the assist feature (or if the assist feature is configured to display in IM247 Desktop).

Assist



To add an FAQ, select **Create New Question**. Enter the question in the *Question* field. Write the answer in the *Answer* field, using the buttons for formatting (see below). To add a link (web, email, phone, or SMS), highlight the text to be linked and select the appropriate button. Input the link (for web links, decide whether to open the link inside the mobile app) and select **Save**.

B - Bold text

I - Italic text

U - Underlined text

- Numbered list

- Bullet list

- Web link

- Email link

- Phone link

- SMS link

Select **Publish** to add the question. This question will automatically be added to the All question group. Questions can be duplicated by selecting the duplicate icon or edited by selecting the gear icon. To delete a question, select the gear icon and **Delete Assist Entry**. Select **Delete** again to confirm.

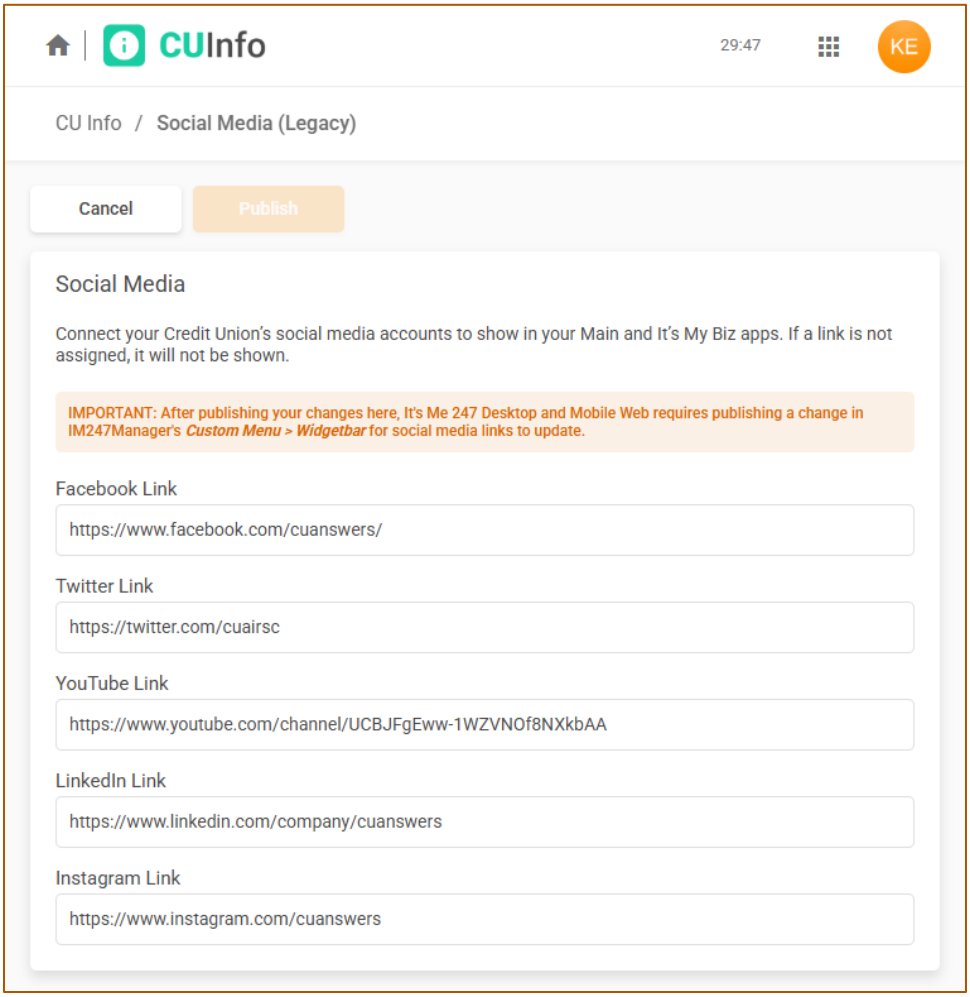
To create new question groups, select **Create New Group**. Enter the *Group Name* and select the questions to add to the list. You can reorder the list of questions by selecting the hamburger icon and dragging to rearrange. To add more questions to an existing list, select **Edit Question List** and check the boxes next to the questions you'd like to include. Select **Publish** to save the list of questions. Groups of questions can be duplicated by selecting the duplicate icon or edited by selecting the gear icon. A group can be deleted by selecting the gear icon and **Delete Group**. Select **Delete** again to confirm.

Social Media (Legacy)

If your credit union still uses the original layout in IM247/BL247 Desktop, select **Social Media (Legacy)** on the home page to update your social media links. You may add your social media URLs for FaceBook, Twitter, YouTube, LinkedIn, and Instagram.

For the changes to take effect in **It's Me 247** or **BizLink 247**, you will need to publish the widget in IM247 Desktop (via Widgets) or BL247 Desktop.

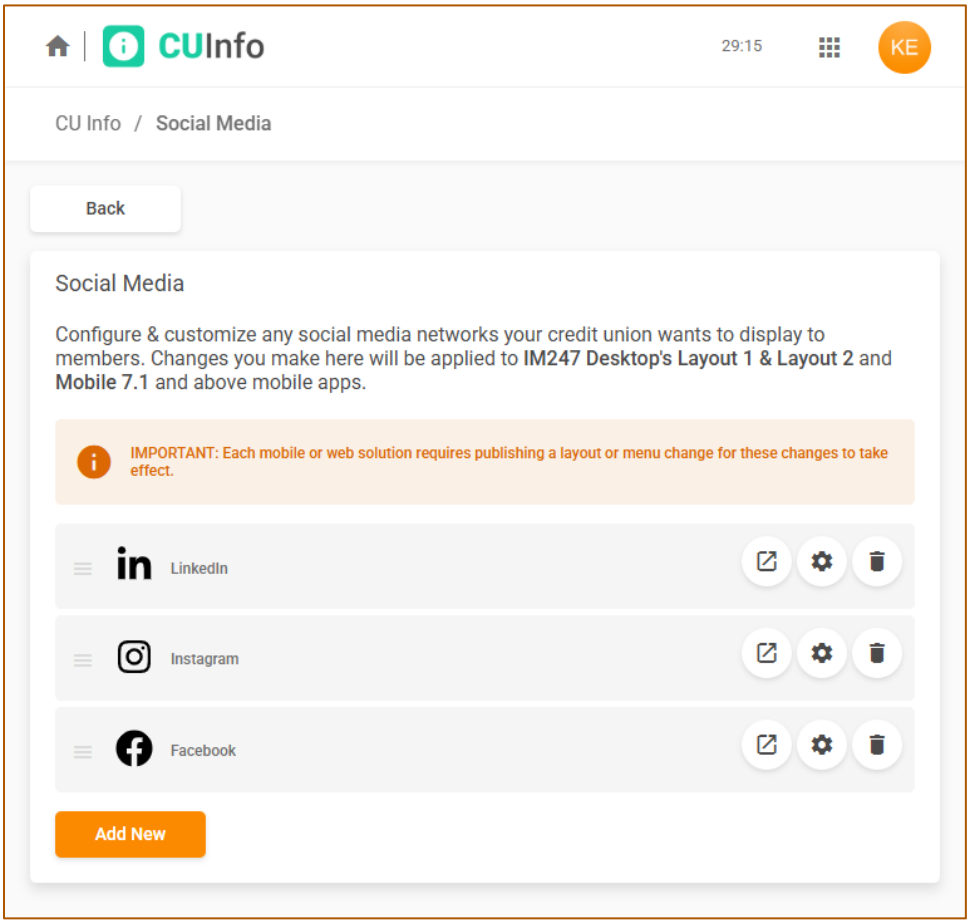
Social Media (Legacy)



Social Media

To customize the social media links that appear in your social media widget in online banking, select **Social Media** from the home page.

Social Media



You can rearrange the order of links by selecting the hamburger icon and dragging the item. Select the pop-out icon ( ) to open the link in a new tab. Select the trashcan icon to delete a social media link.

Select the gear icon next to an existing link to edit it. To add a social media link, select **Add New**. Add a label, choose the appropriate social media icon, and insert your social media link URL. Select **Save** to add the new link.

For the changes to take effect in **It's Me 247**, you will need to publish the widget in IM247 Mobile (via Home Tab Widgets) and IM247 Desktop (via Widgets) for the changes to display. If you are not subscribed to IM247 Mobile, you will need to reach out to *irsc@cuanswers.com* to request the update.

Manage Team (Admin Only)

CU Info offers another place for admins to edit CU Publisher profiles. This section displays the icons of CU Publisher users. Users will be able to manage their own profile, but only admins can edit other user's profiles.

Select a user to edit their profile. You're able to change the user's password. (It must include a capital letter, lowercase letter, and a number.) You can update the profile image, add a nickname, update the first and last name, title, email address, phone number (and extension), and time zone. After making changes, select **Update Profile** to save.

Manage Team > Profile