⚙️CUPublisher

Form Generator and the Request Center

Customize Forms and Work Submissions

INSIDE THIS GUIDE:

This guide describes the CU Publisher products Form Generator and Request Center! Form generator is designed to help you style form appearances, create, group, and delete forms. Submissions of these forms are sent to Request Center to be worked.

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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

Form Generator and Request Center

Form Generator and the Request Center work in conjunction. If you are subscribed to Form Generator (or have set up custom forms), you will receive access to the Request Center product. Form Generator is on the setup side, whereas Request Center is on the support side. Form Generator involves the creation of custom forms; Request Center involves the working of those form submissions. Note: It's possible to request custom forms from the IRSC without subscribing to Form Generator; however, fees will apply.

The Form Generator product allows you to create custom forms which can be linked to, including in various areas of **It's Me 247** through the IM247 CU Publisher products:

- Loan product cards (see Loan Manager)
- Banner Ads
- Contextual Menus
- Mega Menu
- Widgets
- All mobile tabs

Forms can also be embedded in MOP/MAP and/or embedded as an iFrame on your website.

Popular forms include A2A setup, travel notification, online banking transfer control changes, and more. These custom forms are a great way to allow members to request changes online, without having to make time for a branch visit, allowing them more flexibility and higher satisfaction in banking with you.

All submissions of Form Generator forms are sent to the Request Center to be worked. Additionally, all form groups created in Form Generator will transfer over to Request Center, and any deleted form groups will also be removed from the Request Center. (See page 15.)

Form Generator Overview

Form Generator Home Page

The main landing page of Form Generator lists all forms. The left panel provides options to view forms categorized into groups, create new groups, create a new form, or customize form styling.

Within the main panel, you can search for forms in the list, including searching for form name, form ID, and timeline information. You also have the option to change the number of forms displayed in the listing to 15, 30, or all. The Timeline column displays who last saved edits to the form and when. The IM247 column is obsolete.

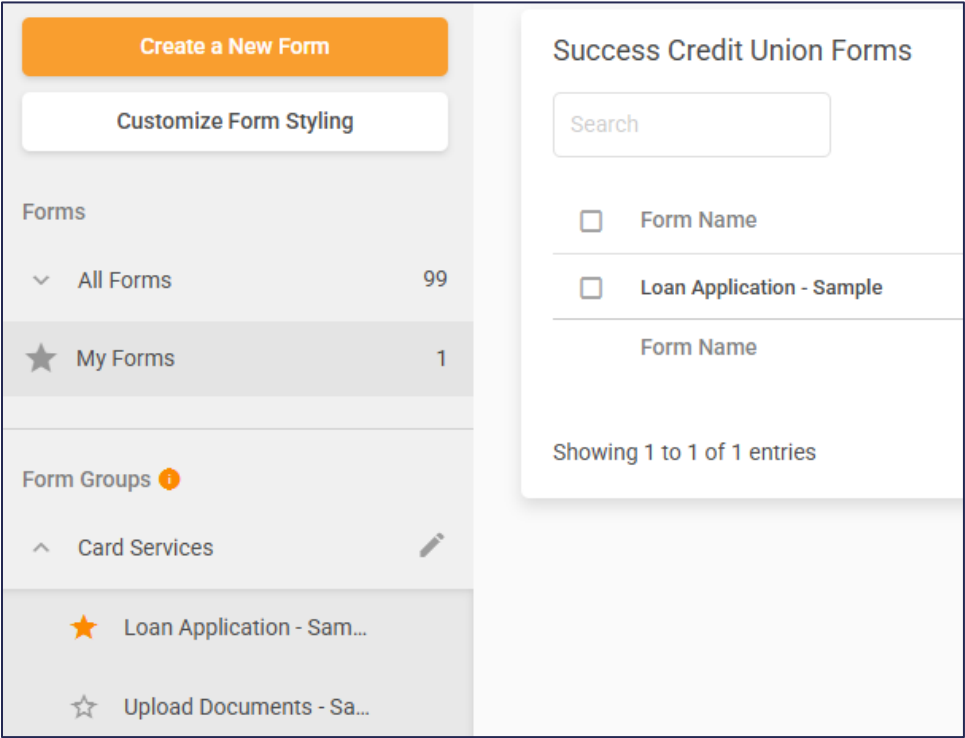Each form listed also offers the option to be duplicated by selecting the copy icon.

From the list of forms, you can add forms to a group (or remove them from all groups) by selecting the checkbox next to the form(s) and selecting the **Add to Group** button. Select the group to add the form(s) to or select to remove the form(s) from all groups.

To create a new form group, simply select **New Form Group...**, enter a Group Name, and click **Publish**. New groups created in Form Generator will also appear in Request Center. Submissions for these forms will be filtered in Request Center into these groupings.

To delete a form group, select the pencil icon next to the form group listed and select **Delete Group**. The group will also be removed from the Request Center. Deleting a form group will not delete the forms within. You'll need to individually delete the forms first, if that is your goal. (See Form Deletion on page 14.)

Along with custom form groups, forms can be added to the group titled "My Forms". On the left panel of the screen, select the dropdown next to a group or next to All Forms and select the star icon next to a form to add it as a favorite under My Forms.

My Forms

Custom Form Styling

Form Generator allows for three customizable form styles. The form style applied to a form is based on how it was accessed. Styles can be customized for the CU website, the mobile app, and custom locations. Style cannot be customized for web/desktop online banking as it will use IM247 branding.

Unlike the other two customizable styles, which are automatically applied based on how the custom form is embedded, the custom style can be applied only by linking to the URL of the custom style preview, accessed through the eye icon next to the form on the main screen. (See Form Style Preview.)

To customize form styles, select **Customize Form Styling** and select a delivery channel to customize. The customized style changes for a form channel can be removed by selecting **Reset to Defaults**. Changes can be saved by selecting **Publish**.

Each of the three channels has seven sections of customization options.
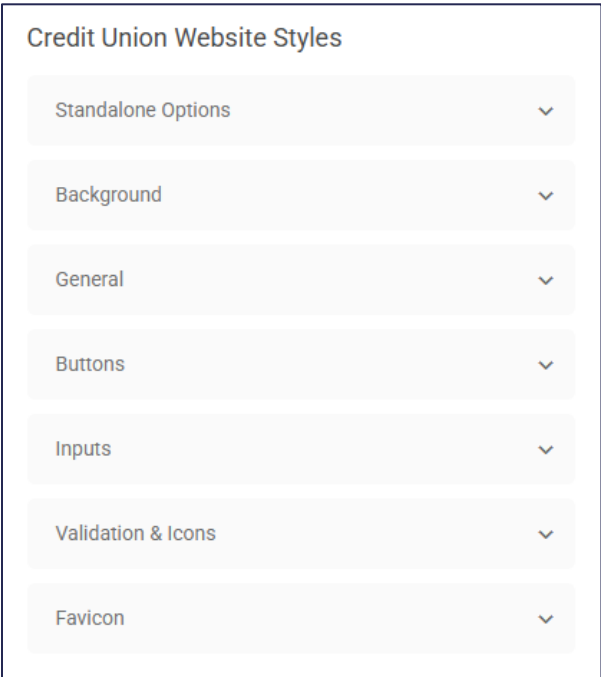
Standalone Options

The Standalone Options allow you to customize the form header, including adding a logo image, logo background, and accent bar. The logo background can be set as transparent. This header will appear at the top of the form page, except in online banking or the mobile app.

Background

The Background section allows you to customize the background of the form. You can either set a transparent background, which will override all other background settings, or set a background image and/or color.

Below, a color is chosen; however Transparent Background is checked, which overrides the color.

If a background image is used, the Background Wrapping field affects how it is displayed.

Repeat
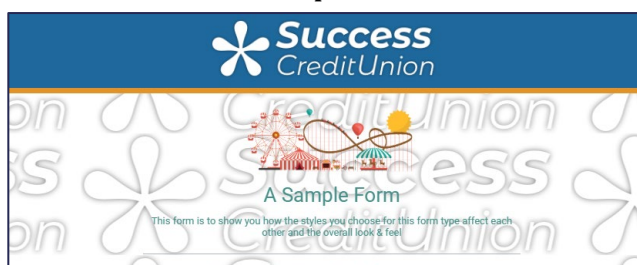
Repeat-Y
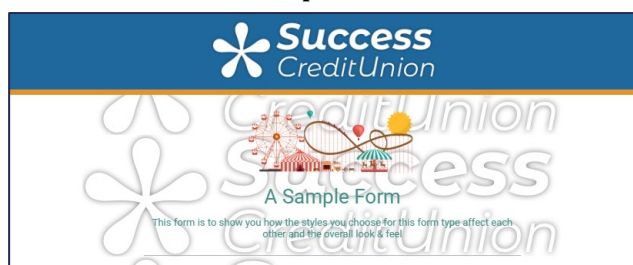
Repeat-X

Repeat-None
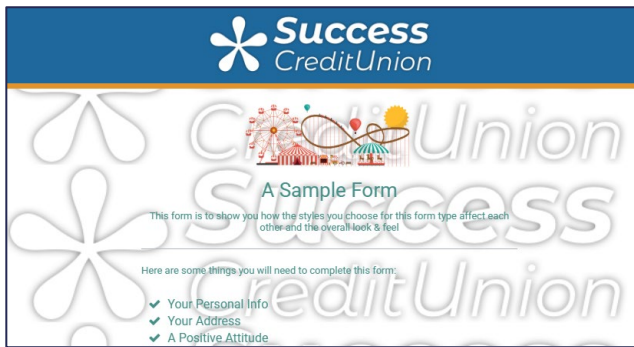
Contain	Cover
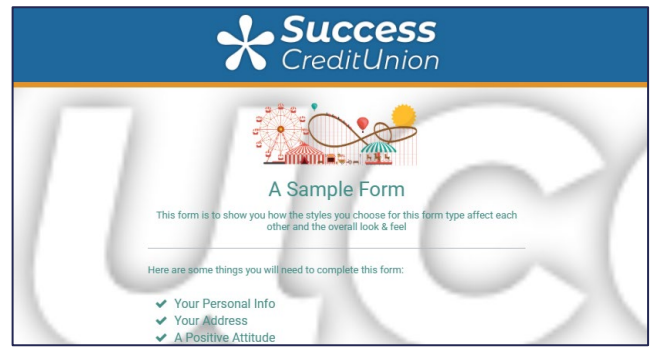
General

The General section allows customizations for the font, headings, and page sequence indicators.

Along with customizing fonts, you can also customize a background color for headings (and correspondent font color for these headings). This header block style will be applied only to Label fields with the square icon selected.

The font selected in this section is applied to all text on the form. The Header Font Color is applied to all non-input capable text field elements on the form (unless it is a label with the block style selected, in which case the Header Block Font Color would be applied). Input fields use the font color configured in the Inputs section.

Buttons

The Buttons section allows customization of the form buttons, including the Continue and Back buttons and any external links.

The button color, text color, hover button color, border thickness, corner roundness, shadow weight, and the color of the button while selected are all configurable.

 Note: the text color will not change when the button is hovered or selected. Be sure to pick colors with appropriate contrast to the button text color.

Buttons

Button Color

#f0f4fa

Button Hover Color

#48679a

Button Select Color

#bd49aa

Button Border Color

#616161

Button Text Color

#000000

Button Border

Normal

Button Corners

Rounded (Small)

Button Shadows

Heavy Shadow

Normal

Continue

Hover

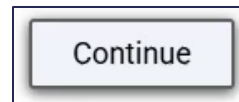Continue

Select

Continue

Inputs

Inputs

Border Color

#7d7d7d

Border Thickness

Normal

Corners

Rounded (Large)

Background Color

#d0d0d0

Background Color (in focus)

#ffffff

Input Text Color

#757575

Input Text Color (in focus)

#a224cf

Label Text Color

#124e78

Label Text Color (in focus)

#0e8a31

Required Asterisk

#ec1045

Input Shadow

Heavy Shadow

The Inputs section allows style customization for the input-capable form fields.

The border (color, thickness, corner roundness, shadow), background and text colors (selected and unselected), and asterisk color can be customized. The options labeled "in focus" refer to the appearance of the field when it is selected.

The Background Color will only appear when the field is unselected and unfilled.

When the field is selected, the border color will change to match the Input Text Color (in focus) style. Also, the label text will appear above the input border box, making room for the user to enter text within the border box. The required asterisk will also appear next to the label text above the box in the same color as the text.

Once a field is filled in (even if it is no longer selected), the label text and asterisk will still appear above the input box with the Label Text Color (in focus) style, and the background color will keep the style of the Background Color (in focus).

The shadow can be selected to display outside the border box or within the border box (inset).

Address:

Street Address Line 1 *

123 Home St ✓

Street Address Line 2

Apt 2 ✓

City *

Validation & Icons

The Validation & Icons section allows the customization of the icon (and its color) that appears when text is entered in an input-capable field. The validation icons will appear in input-capable fields to indicate they have been filled-in. For any forced format fields, if the input does not match the expected format, the fail icon will display.

Validation & Icons

Success Icon

check

Success Color

#f08700

Fail Icon

warning

Fail Color

#ff0000

Displayed in order below, the options for the success icon include check, smile face, or check circle.

✓   ☺   ✓

Displayed in order below, the fail icon options include warning, sentiment dissatisfied, arrow back, error outline, error, or clear.

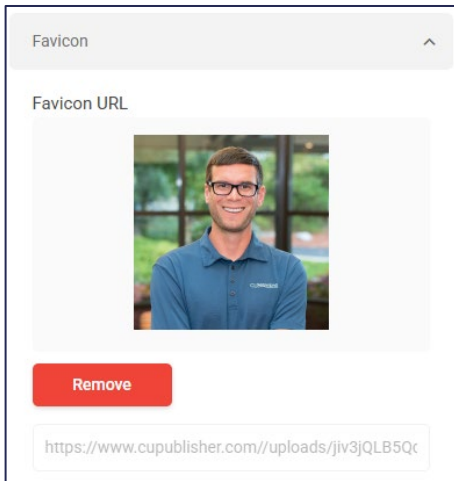⚠   ☹   ←   ⊙   ❗   ✕

Favicon

The Favicon section allows you to upload an image to display next to the form page title in the browser tab.

The URL field is not editable and will be filled in automatically after uploading. The favicon will appear in the web tab, as shown below.
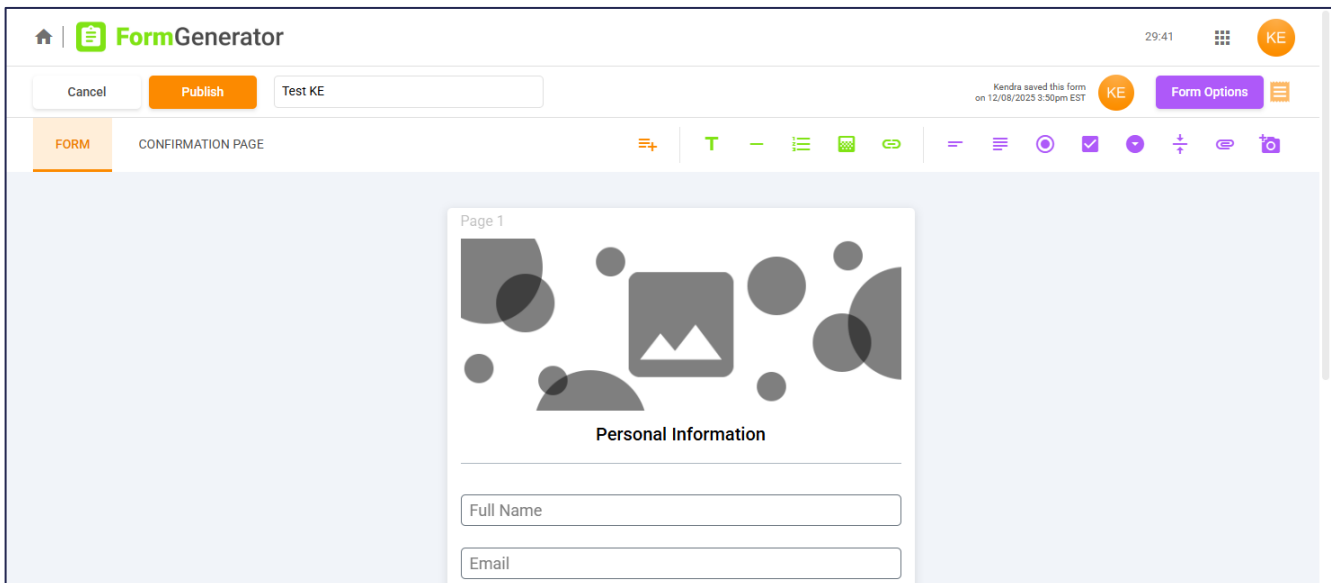
For the mobile app style, this section is ineffective as forms are displayed directly in the app without opening a browser window.

After updating the style customizations as desired, select **Publish** to save the changes. The configured styles will be applied to forms accessed from that form channel.

Form Creation/Adjustment

From the main landing page, you can select **Create a New Form** to create a new form from scratch. (You can also select to duplicate a form using the copy icon and then edit the fields and change the form name to create a new form.) From the main landing page, selecting a form name allows you to edit the form.

Edit/Create Form

The form editor screen can be described as three rows:

- The top row allows you to name the form, publish or cancel changes, view the form settings screen (see page 12), or download a PDF list of the elements (fields) in the form. This row also tells you who last saved the form and when.

    Select this icon next to Form Options to download the PDF element list. This PDF lists the element type, element ID, eDOC signature element ID, and element label for each element on the form.

- The middle row displays which part of the form is being edited (the form or the confirmation page) as well as the ribbon toolbar to make edits to the form itself.

- The last section of the screen displays the form. (Note: the form is displayed without styling as the configured form styling will be applied according to how the form is accessed.)

When creating a new form, the first step would be to edit the Form Name field. The name entered here will display in the browser tab (for web forms) for users to see. This name will not appear for mobile forms. If you'd like to add a title on the form itself, you will need to select the T (label) icon to insert a label at the top of the form.

After naming the form, begin configuring the form using the options on the toolbar ribbon.

Form Generator Toolbar
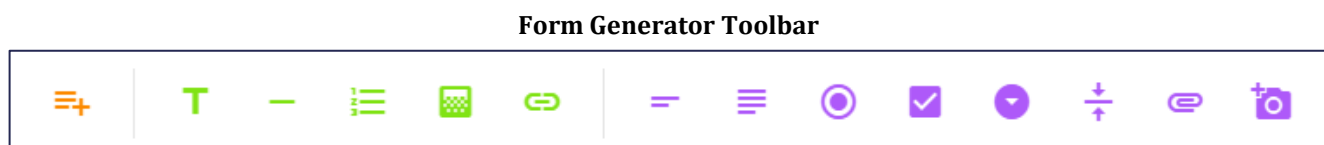
The orange icon adjusts the physical layout of the form. The green icons can be used to add information-only fields on the form. The purple icons can be used to add input-capable fields.

The options on the toolbar, from left to right, are as follows:

Section – This option allows you to create a new page in the form.

Label – To add text, such as headings or disclaimers, add a label to the form. Labels can be edited by font size, font weight, and text alignment. There is also an option to add the customized header block style to a label by selecting the square icon. Select the square with arrows icon to extend the bounds of the label field to the full width of the screen.
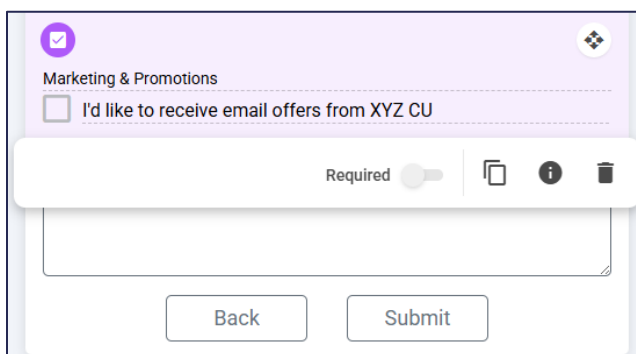
Font size | Font weight | Text alignment | Header block | Full width

Horizontal Line – Select this to insert a horizontal line on the form.

List – Select this to add a list of items. The bullet icon can be changed to a checkmark, check box, filled check box, filled circle, or an open circle.

Image – Select this to add an image to the form. Drop or upload files, include an optional URL to which the user will be directed if they select the image, and change the image size.

External Link – The External Link option allows you to add a button link. Users will be redirected to the configured URL after selecting the button.

Short Text – Add a Short Text field to prompt users to input information up to the configured max number of characters. The size of this field is a single line. Change the placeholder text to the label of the field. This text will appear in the field until a user selects it and inputs text, at which point the label will appear directly above the field.

Large Text – Add a Large Text field to prompt users to input information up to the configured max number of characters. These fields should be used for long-form answers. Change the placeholder text to the label of the field. This text will appear in the field until a user selects it and inputs text, at which point the label will appear directly above the field.

Radio Group – Select this to add a question where users select one option from a list of choices. Add the question as the label.

Checkbox – Select this to add a single checkbox. Labels are supported but not required.

- **Dropdown Menu –** The dropdown field allows you to enter a dropdown label and several options the user can choose from.

- **Forced Format –** The forced format field allows you to enter a short text field with a required entry type. Choose from date, dollar amount, email, phone number, SSN, US state, or ZIP code.

- **File Upload –** This field allows users to upload a file to attach to the form.

- **Image Upload –** This field allows users to upload an image to attach to the form.

After adding a field to the form, you can click the 'i' icon to learn more about it. Each field has the option to be duplicated or deleted, and any input-capable field can be set as required.

The text of the Continue and Back buttons on each page section can be customized. For example, you may wish to change the Continue button on the last page to "Submit".

After configuring the main body of the form, you can configure the confirmation page that displays to users after the form is successfully submitted. Select the Confirmation Page and use the toolbar options to customize the page content.

After configuration, select **Publish** to save and update the form.

Form Settings

The settings icon next to each form listed on the main screen allows you to view/adjust the form settings, including staff instructions and options to embed the form in MOP/MAP or your website.

This settings screen can also be accessed within the form editor through **Form Options**.

Form Settings

From this screen, you can add special instructions or tips for staff who process these submissions in Request Center. This screen also provides the iFrame code if you wish to embed the form in your website.

MOP/MAP Embedment

You may wish to embed a custom form into your MOP or MAP site. Forms embedded in your MOP/MAP site will appear after the non-customizable MOP/MAP personal information form but prior to account creation/application submission. Embedding a form in MOP/MAP allows you to customize your MOP/MAP site to seek specific information, such as a code word, employer information, or document uploads. The style of embedded MOP/MAP forms will match the style of the MOP/MAP site, so it appears to users as one consecutive form.

If you don't have MOP Manager but have a MOP/MAP site, you'll need to email the IRSC team with the request. The **Email the IRSC** button will open a new email with the subject line already configured.

If you have MOP Manager, you can embed the form yourself within Promo Set Configurations. Select Personal Info Customization and choose the Embedded Form from the available list.

Form Deletion

The Form Settings screen allows you to delete a form. Deletion cannot be undone. To delete the form, select **Delete This Form**, then select **Delete** to confirm.

Form Style Preview

There are two ways to preview a form in a specific style: through the main page or through the style customization editor (select **Customize Form Styling** on the home page and select a form channel).

To preview a specific form while customizing styling, you can select the form from the dropdown list within the style editor. This method allows preview for only CU website, mobile, and custom styles.

From the main landing page, forms can be viewed with styling by selecting the eye icon and the desired style. Note: Any forms submitted via these links will be sent to the Request Center.

There are five view options: unstyled, **It's Me 247** (web OLB), CU website, mobile, and custom. The **It's Me 247** style preview displays slightly differently than the how the form will actually appear when embedded in web online banking. In web online banking, there will be no form header and external link buttons will appear as links. The shape and color of input fields may appear slightly differently, and block labels will use a grey background rather than black.

When using the eye icon to preview styles, you may use the preview's URL to link to that form browser window. When users select these links, a new browser window with the form will open. These links can be added to online banking using the IM247 CU Publisher products and selecting Custom URL instead of Custom Form when adding a link.

Request Center

All submitted form generator forms (including those submitted through preview links) will be sent to the request center to be worked. The Request Center lists the forms submitted, with options to view categorized lists. The requests assigned to your profile are listed under My Requests and categorized by status. The form groups created in form generator display as categories in the Request Center. Requests are also categorized as All Complete and Needs Attention.

Forms are listed with the form name, the applicant's name, the profile picture of who the request is assigned to, the status of the request, the timeline (the most recent activity on the request), and the submission date. The number of results can be filtered to 15, 30, or all.

From the list of requests, you can check the box next to a form and choose to delete the request, assign the request to a user (or unassign it), change the status of the request, or download the form request.
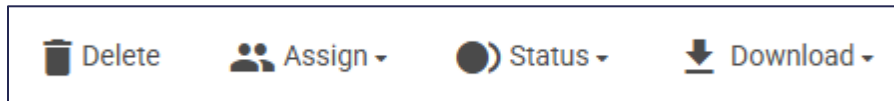
The status can be set to New, Assigned, Working, Pending, Complete, or Needs Attention. Requests can be downloaded as a CSV, XLSX, XLS, or PDF. Requests can only be assigned to one user at a time.

Working Requests

Select a request to view the data. Form information is displayed in a table with 2 columns: the field input request and the user-input data. Note the information-only fields will also appear as Input Request rows with the data left blank.

From the detail screen, the request status can be changed, and requests can be edited, assigned, downloaded, and/or deleted. Form data can be edited by selecting **Edit Form Data**, changing the fields, and selecting **Save Changes.** The data entered for a field input can be easily copied to your clipboard by selecting the copy icon next to the field row.

Back	Edit Form Data		⟲ Activity ▸

Ken set the request status to pending 3 weeks ago   👥 Assign ▾   ◑ Pending ▾   ⬇ Download ▾

Input Request	Data
ACCOUNT NUMBER	
APPLICANT	
FORM	Credit Card Preapproval - Sample
SUBMISSION DATE	Wed, Nov 12, 2025 3:18 PM EST
You have been pre-approved for a	
$1,000	
Success CU Visa credit card	
Name	asd
Phone	
YES! I would like to accept this offer	checked
YES! I would like to accept this offer, but would like to request an increased limit*	not checked
Limit Requested	123,123
Household Income	123,123
Housing Expense	123,123
No, I would not like this credit card.	checked
You can choose to stop receiving "prescreened" offers from Success CU by calling 555.999.1111.	
*Limit increase requests are subject to credit approval, income and employment verification. By selecting this option, you are agreeing to the terms & conditions and authorizing Success CU to obtain a credit report. By obtaining your credit report in this way an inquiry will appear on your credit report which will be available by other creditors. This inquiry may have an impact on your credit score.	

Instructions

Form Instructions are assigned in Form Generator inside the Form Options section of each form.

This is a test.

Delete This Form Request

If instructions were entered for the form on the Form Options page in Form Generator, they will appear at the bottom of the request.

From the detail screen of a request, the activity on the form can be viewed by selecting **Activity**. This timeline displays the submission date and lists when any updates/modifications were made and by whom.

Form Activity	
Updated by	25d ago
🧑 Ken	11/14/2025 10:55am EST
Updated by	25d ago
🧑 Ken	11/14/2025 10:07am EST
Submitted to	27d ago
Request Center	11/12/2025 3:18pm EST

Viewing Analytics

In the top right corner of the screens listing requests, there is the option to view **Analytics** of requests over the past month. The analytics screen displays a graph showing the number of forms received each day of the past month. Below the graph, the average number of forms submitted each day and each week are shown, along with the total number of forms received over the past month. Below that, a list shows

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how many submissions of each form were received over the past month. These analytics are for the past 30 days, not the past calendar month.

Request Center Analytics