CUPublisher

IM247 Mobile

Customize your mobile online banking app

INSIDE THIS GUIDE:

This guide describes the CU Publisher product IM247 Mobile! This product allows you to customize every tab of your mobile online banking app. Customize the app to match your CU brand, add custom links, create banner ads, and more!

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IM247 Mobile Overview

When IM247 Mobile is first launched, you'll see your app with the icon, app version, and icons for the enabled platforms (IOS/Android). Select the app to move to the main menu screen.

The IM247 Mobile product is separated into 3 customizable sections: Colors & Branding, Layout & Menu, and Product Options. A preview of the mobile app will appear to the right of the customization menus. Customization options function very similarly for all sections of IM247 Mobile.

In the top of the navigation banner of IM247 Mobile, you can select **Analytics** to view information about the number of downloads and logins for your mobile app.

Opening in a separate tab, the Analytics page displays information in three sections: App Downloads, Logins, and Homepage Ads.

The App Downloads section displays a pie chart of the downloads for IOS and Android platforms, with the total number of downloads displayed to the right of the chart. Hovering over a section of the pie chart will show the number of downloads for the platform. The chart can be filtered to display the data from yesterday, over the last 7, 14, 28, or 90 days, or all time.

The Logins section displays a chart of boxes with days of the week on one axis and 2-hour segments of the day on the other axis. The darker the box is, the more logins there were during that time of the week. Hovering over a box will display the actual number of logins for that time of the week. The data in this chart can also be filtered by the last 7, 14, 28, or 90 days or all time. This information may be useful for planning to push changes to the app content during a low-traffic period.

The Homepage Ads section displays your homepage banner ads with a preview, the link type and link destination, the active platform(s), the number of revisions to the ad, and the total number of times the ad was selected causing the link to launch. This provides you with key engagement markers to track how successfully your ads are performing with your members. Selecting **Full Breakdown** will display stats for both active and deleted ads.

You may select **Print** to print the screen view. Please note, the login chart will not display the number of logins when printed.

Image Upload Requirements

Within IM247 Mobile, there are several options to upload your own images as banners or even credit/debit cards. IM247 Mobile requires specific image dimensions and formats for different image fields. Any images that do not match the required dimensions or format will not be uploaded.

Plastics images must be PNGs. All other images can be PNGs or JPGs.

Storefront Images

You can customize your app store images via Apple & Google Store Images (under Colors & Branding). IOS and Android have different image size requirements. To learn how to configure *App Store Images*, see page 10.

IOS

For the Apple app store, there are 3 different devices for which images may be set up. For iPhone 6.5”, up to four images of 1284px by 2778px may be uploaded. For iPhone 6.7”, up to four images of 1290px by 2796px may be uploaded. For iPads, up to four images of 2048px by 2732px may be uploaded.

Android

For the Google app store, phone images must be 1440px by 2560px. The feature graphic must be 1024px by 500px.

Banner Images

Banner image uploads appear in the Home Tab Banner Ads, Mobile Check Deposit, Card Controls, and eStatements sections of IM247 Mobile.

In order to support the tablet view, all banner images must be 3072px by 1200px. However, the image will not be resized for mobile view. As the width of the device screen changes, the cropping of the image will change. Despite the large size requirement, the important content of the image should be limited to the “safe area” of the smallest device viewport.

The “safe area” is 1410px by 1128px in the top center of the image. Every banner image upload field has the option to toggle on/off the *Safe Area Overlay*. When on, this overlay highlights the minimum screen size in green. The surrounding area highlighted in red is overflow. Use this overlay to ensure important content will be visible on all devices.

To remove a banner image, select **Remove Image**.

Learn more about Banner Ads.

Plastics Images

Images for your debit/credit card can be uploaded in IM247 Mobile via either the Card Controls section (under Product Options) or the Card Widget (under the Accounts Tab in Layout & Menu). Updating a card image in one feature configuration will automatically update the other. Card images must be a PNG of 450px by 282px.

If no images are uploaded, unbranded default images will be used.

Preview Limitations

While editing within IM247 Mobile, a preview of the mobile app appears on the right side of the screen. There is a dropdown below the preview allowing you to change the preview to different devices. Next to the dropdown, there's also an icon allowing you to view the preview in a separate window. However, these previews have limitations.

The previews display only the main tab menus and the contextual menus. The buttons and links will not work except for the account buttons and '+' icon on the Accounts tab, which will display the contextual menus. The Card Controls, eStatements, Assist, and Branch Info screens can be previewed only within the editor. These screens cannot be reached in the pop-out preview.

For the Mobile Check Deposit, the preview for the landing screen is available only in the editor after selecting one of the dropdown options in IM247 Mobile. The Tips, Select Deposit Account, and Check Deposit History screens cannot be previewed.

Menu Item Button Configuration

Many of the configurable fields in IM247 Mobile include link buttons or menu items. These menus have the same configuration options (with a few additional options for specific features). All menu items are configured to have a Button Icon, Label, and Link Type. Button Icons are selected from the dropdown list. Some menu items also allow for a configurable description.

Link Type options include custom URL, custom mobile app, feature launch, and custom form. (Some menu item button configurations have additional Link Type options.) Additional fields will appear depending on the Link Type chosen.

Feature launch and custom form Link Types have a related dropdown field. The dropdown for the feature launch option lists all the available features that can be opened upon the click of the button.

A URL field appears for custom URL Link Types, along with an option to open the link within the mobile app.

Mobile app identifier fields appear for the custom mobile app Link Type.

To rearrange the order of links, select the hamburger icon (☰) and drag the link. Select the gear icon (⚙) next to a menu item link to edit it. From here, you may delete it by selecting the trashcan icon and confirming.

Colors & Branding

The Colors & Branding section of IM247 Mobile allows you to configure the coloring of your mobile app and the images displayed in app store listings. Different color schemes can be chosen for light mode and dark mode on devices. Note that any changes to these configurations will not go live until the mobile app is updated. An app update can be expedited by *ordering a Mobile App Branding Update via the store*.

App Colors

To configure the app color scheme, select **Light & Dark Colors**. You'll be able to set primary, secondary, and background colors for both light and dark mode. For more information on color guidelines, select the **Light & Dark Mode Color Guidelines** button.

Color	***Affects...***
Primary Color	The primary color appears as the background color for the header/footer. This color also appears in select text, including the icon of puck buttons and the balance numbers in the card and loan widgets.
Primary Font Color	This color appears as the font color for the header text as well as the outline of the profile picture.
Secondary Color	The secondary color appears as the fill color for buttons and the outline of unfilled buttons.
Secondary Font Color	This color appears as filled button icons/text, including home tab grouped links widgets' icons.
Background Color	The background color is the background behind widgets.

Color	*Affects...*
Background Font Color	This color appears for text directly on the background (i.e., not in widgets), such as on the Mobile Check Deposit screen.

Note: the main font color, widget background color, and links widget icon color (other than home tab grouped links widgets) cannot be configured.

Dark Mode Appearance Setting

The dark mode appearance setting must be enabled for any configured dark mode colors to take effect when a user's device is set to dark mode. To enable dark mode colors, select **Light & Dark Mode Appearance Setting**. Check the boxes to enable dark mode appearance in IOS and/or Android. Select **Publish** to save changes. When enabled, the dark mode colors will take effect when the device settings are set to dark mode or when the user manually changes their Appearance Settings to dark mode in the app.

Note that enabling dark mode will take effect immediately. If changes to the configured dark mode colors are needed, wait until those updates are published with an app update before enabling the dark mode appearance setting.

App Store Images

To configure app store images, select **Apple & Google Store Images**. Select the operating system for which you'll configure app store images. For each device size, you're able to upload up to 4 images (except the Android feature graphic). App store image uploads have specific requirements; see *Storefront Images* on page 6 to learn more.

There's an option to view examples of financial storefronts by selecting **Storefront Examples**. You may also preview your own app storefront by selecting **View Preview**.

Select **Publish** to save your changes. The new app store images will go live with the next app update.

Note: The app store text cannot be configured by your credit union.

Layout & Menu

The Layout & Menu section allows configurations on the different tabs of the mobile app (except the deposit tab), along with banner ads and the contextual menus that appear when an account is selected. (Tabs are the options in the app footer: Home, Deposit, Accounts, Move Money, More.) Each of the configurable tabs supports *Menu Item Button Configuration* (see page 8).

Home Tab Banner Ads

The Home Tab Banner Ads section displays active and archived banner ads. The active ads rotate on the top of the home screen of the mobile app.

To reorder the appearance of active ads, select the hamburger icon (☰) next to the ad and drag it to change the order. To edit an existing ad, select the gear icon (⚙) next to it. To create a new banner ad, select **New Banner Ad**.

On the ad editor screen, you are able to upload an image. Learn about the image upload requirements for *Banner Images* on page 6.

You also have the option to attach a link to which users will be redirected when they click the image. This link configuration is similar to the *Menu Item Button Configuration*; however, there are two additional Link Type options: feature link and membership opening, which both have related dropdown fields. All Link Types, except no link and custom mobile app, show an additional configuration flag to allow the link to open within the mobile app. This flag will always be checked for feature launch and feature link.

You'll be able to select which OS platform(s) the banner ad should appear on (IOS and/or Android).

You're also able to schedule banner ads to appear over a configured period. You may set both a Start Date and End Date, only the Start Date, or neither. The ad will appear on the configured Start Date (or appear immediately if none is configured). The ad will expire following the configured End Date and will display greyed-out in the ad list with a red calendar icon. If no End Date is configured, the ad will be displayed indefinitely until manually archived or deleted.

Select **Publish** to immediately publish the ad. When editing existing ads, you may select **Archive This Banner** to archive the ad or **Delete This Banner Ad** to permanently delete the ad. Archived banner ads can be reactivated by selecting the up-arrow icon (↑) next to them.

Home Tab Widgets

The Home Tab Widgets section allows you to customize the widgets that appear on the home page of your mobile app. You may add 1 Mobile Alerts Widget, 1 Social Media Widget, 1 Regulatory Widget, and 1 Support Widget. Multiple Links and Grouped Links widgets are supported.

The order of the widgets on the home page can be changed by selecting the up and down arrows on the widget. Widgets can be removed by selecting the trashcan icon.

Many of these widgets (except for the Mobile Alerts and Social Media Widgets) involve *Menu Item Button Configuration*.

Links Widget

Add as many links as desired to a Links Widget by selecting **Add a Link**. Select the gear icon to edit an existing menu item button. To rearrange the order of links, select the hamburger icon and drag the link. Learn about the *Menu Item Button Configuration* on page 8.

Grouped Links Widget

The Grouped Links Widget is nearly identical to the Links Widget except that it allows you to categorize menu item buttons by grouping them and adding headings. The Grouped Links Widget also has a different appearance on the home tab than the Links Widget.

You can add several groups of links within the same widget. Select **Add a Link Group** to add a new section of links to the widget. Select the pencil icon at the top of a group of links to edit its heading. You can add as many menu item buttons as desired to a group of links. Learn about the *Menu Item Button Configuration* on page 8.

Mobile Alerts Widget

The Mobile Alerts Widget displays any active alerts configured in the *CU Publisher product Mobile Alerts*. (*Learn more about Mobile Alerts*.) If no alerts are active, the widget will display notifying the member there are no active notices.

You may select the gear icon to edit its heading. After selecting the gear icon for the Mobile Alerts Widget, you may also upload a header image. The image upload does not *require* a specific size; however, it is recommended to be a 260px by 200px PNG or JPG for the best clarity.

Social Media Widget

This widget cannot be edited. It contains the information configured in the CU Publisher product CU Info. Only the icons will be displayed; any configured labels will not be displayed.

Regulatory Widget

The text displayed in this widget is configured in the CU Publisher product CU Info. You can add up to four optional menu item link buttons. Learn about the *Menu Item Button Configuration* on page 8. These links will display as wide buttons at the bottom of the widget.

Support Widget

You may select the gear icon to edit the widget heading. You can configure the Support Widget to include up to 2 wide buttons and up to 3 round buttons. Learn about the *Menu Item Button Configuration* on page 8. All other information on the widget (the app version and app data reset option) is non-configurable.

Accounts Tab

The Accounts Tab section allows you to customize a few features of the mobile app's accounts tab.

The accounts tab will always display a list of the member's open accounts. The menus displayed when selecting an account from this list can be configured in the separate Contextual Menus section of IM247 Mobile.

The Welcome Widget section allows you to add menu item buttons that will appear when the plus '+' icon at the top of the accounts tab is selected. To add a menu item button, select the plus '+' icon and choose a Link Type. Learn about the *Menu Item Button Configuration* on page 8.

You then have the option to add several widgets below the list of accounts: the Card Widget, the Loan Widget, and the SavvyMoney Widget. Enabling the Loan Widget is as simple as checking the *Enable Loan Widget* box.

The SavvyMoney Widget can be enabled by checking the *Enable SavvyMoney Widget* box if you have SavvyMoney integration. (*Visit the store to integrate SavvyMoney*.) Users will be able to view their credit score as it's automatically updated weekly. They'll also have the option to manually refresh their score every 24 hours.

To enable the Card Widget, check the *Enable Card Widget* box. You have the option to upload images for your plastics. Learn more about *Plastics Images* on page 7.

Move Money Tab

The Move Money Tab section allows you to customize the entire Move Money tab of the mobile app. You'll be able to configure up to 3 menu items as puck buttons to appear as large, circular buttons at the top of the screen.

Along with the puck buttons, you are able to configure grouped links widgets. These groups do not support headings; however, the different group widgets are separated with background space on the screen. To add a new group of menu item links, select **Add Group**. The order of groups of menu item links can be rearranged by selecting the up and down arrows for the group. A group can be deleted by selecting the trashcan icon.

Learn about the *Menu Item Button Configuration* on page 8.

More Tab

Similar to the Move Money tab, the More tab is entirely customizable, with the option for 3 puck buttons and link groups. These groups do not support headings; however, the different group widgets are separated with background space on the screen. To add a new group of menu item links, select **Add Group**. The order of groups of menu item links can be rearranged by selecting the up and down arrows for the group. A group can be deleted by selecting the trashcan icon.

Learn about the *Menu Item Button Configuration* on page 8.

Contextual Menus

The Contextual Menus section allows you to customize the menu item links that appear when an account is selected on the Accounts tab. You are able to configure different menus for each account type: savings, checking, loan, credit card, certificate, 360 mortgage, escrow, investment, and OTB loan.

To add a menu item button to a contextual menu, select the plus '+' icon and choose the Link Type. Learn about the *Menu Item Button Configuration* on page 8.

Product Options

The Product Options section allows you to customize the mobile app a bit deeper.

Previewing the Product Options section is a bit more limited than the Layout & Menu section.

The Card Controls, eStatements, Assist, and Branch Info screens can be previewed only within the editor. These screens cannot be reached in the pop-out preview.

For the Mobile Check Deposit, you can only preview the landing screen configs in the editor after selecting one of the dropdown options. The Tips, Select Deposit Account, and Check Deposit History screens cannot be previewed.

Mobile Check Deposit

This section allows you to customize the Deposit tab of the mobile app, which displays the past 30 days of mobile check deposits and allows users to submit new deposits.

This tab supports a banner image. Learn how to configure the *Banner Images* on page 6.

You are also able to configure the feature itself, including the landing page text, 3 optional tips, the ability to display user limits, and the More Information pop-up on check deposit history.

Landing Screen Configuration

You are able to configure the various landing page options of this feature that will display to users depending on the feature's activation for that user: Feature Deactivated, User Unregistered, Registration Pending, Registration Accepted, and Registration Rejected.

Each screen configuration allows a heading and description. Several also include the option to configure text for a More Info pop-up (except the Feature Deactivated and Registration Accepted screens). The various landing page options display different text on the enrollment button. The Registration Accepted screen is what enrolled members will see every time they access the Deposit tab.

Feature Deactivated

User Unregistered

Registration Pending

Registration Accepted

Registration Rejected

Tips Screen

The Tips section allows you to configure the three optional tips that appear during the process of submitting a new mobile check deposit. If you do not configure text for a tip, the tip will display as an empty box.

Tip #1 appears after the user has taken a picture of the front-side of the check. Most credit unions use the *Tip #1* field to give instructions to users on how to capture the backside of the check.

Tip #2 appears when the user reviews the deposit, just before submitting it. You may find it useful to configure the *Tip #2* field to urge users to confirm the correct account was chosen.

Tip #3 appears on the submission success screen. The *Tip #3* field may be helpful to instruct members to keep their check until after the deposit has been reviewed.

Select Deposit Account Screen

The only configurable option on this screen is to enable the ability for members to view their mobile check deposit limits. If the *Show Limits Modal* box is checked, when submitting a new check deposit, the user will be able to view their mobile check deposit limits by selecting the '?' icon on the screen where they select their deposit account. These default limits are configured in CBX via **Tool #1655 *RDC Enrollment Configuration***. Individual limits can be adjusted via the RDC Enrollment option in **Tool #14 *Member Personal Banker***.

Check Deposit History

This section allows you to configure the information that will appear in the More Info pop-up, which enrolled users access by selecting a past deposit listed on the Deposit tab and selecting **More Info**.

Card Controls

The Card Controls section affects the card center feature. Members can access the card center by selecting a menu item button linked to launching the card controls feature.

This feature supports a banner image. Learn how to configure the *Banner Images* on page 6. Along with the banner image, you're able to customize a heading and description and the card preview images. Learn how to configure the *Plastics Images* on page 7. Select *Feature Header* to input the heading and description to appear above the card controls widgets.

The card controls feature includes two specialized actions, reporting cards lost or stolen and locking cards. Select *Report Card Lost or Stolen Card* to configure the text that will display in a pop-up. You can configure the page heading and a description containing the instructions for members to follow to report their card. Select *Hard Locked Cards* to configure the phone number which will be shown to members when their card has a warm/hot status in CBX.

You are then able to configure the menu buttons that display when a card is selected in the card center. Separate menus will display for debit and credit cards. Select a card menu to configure links. The menus will default with two groups of links. Groups cannot be added or readded if deleted. Use the '+' icon to add menu item buttons. Learn about the *Menu Item Button Configuration* on page 8. The card controls menu item buttons have an additional Link Type option of Feature Action. The two available feature actions to choose from are Lock Card and Report Card Lost or Stolen – Popup. When selected, each feature action option will display the coordinating information configured above.

eStatements

This section allows you to customize the top portion of the eStatements feature page, including a banner image, heading, and description. Learn how to configure the *Banner Images* on page 6. In the *Feature Heading* field, you may enter title text to appear directly below the banner image. In the *Feature Description* field, enter text up to 340 characters to appear below the banner image and heading.

Below the customizable portion, the eStatements feature page will display recent statements and buttons to view lists of past statements.

Assist

This section allows you to select the group of FAQs (which are configured in the CU Publisher product CU Info) to display in the assist feature.

App users would be able to reach this page by selecting a menu item button linked to launching the assist feature.

Branch Information

This section allows you to preview how the branch information configured in the CU Publisher product CU Info will appear in the mobile app.

App users would be able to reach this page by selecting a menu item button linked to launching the branch information feature.