



Being an Internet Retailer with “It’s Me 247” Pages

Following is a listing of many of the pages in **It’s Me 247**. Use this to imagine the many “landing pages” to which your credit union could potentially link to from your website.

Consider how connecting to these pages can further develop your credit union’s Internet Retailer strategy to maximize the targeted exposure of your products and services. Use links to these pages as a vehicle to offer special pricing and discounts or to advertise services. Through the connection between your website and **It’s Me 247** create meaningful differentials between what is offered from other channels versus what you can offer via online banking.

Higher-Usage Pages

1. Account Summary	This is usually the home page for a member and lists the account they have with your credit union. Members check their account balances on this page.
2. ACH Transactions	Members view pending ACH transactions and create distributions.
3. Bill Pay Enrollment	Members not yet enrolled in bill pay use this page to enroll in the feature.
4. Bill Pay Dashboard*	*Offered for credit unions using It’s Me 247 (Payveris). This is command central for members using It’s Me 247 Bill Pay (Payveris). Members can set up payees, make payments, and view payment history.
5. Cast Your Vote	Members vote on online credit union ballots, for example board elections.
6. Certificate Detail	Members view the detail of the selected certificate. This is where the member can select the renewal option. This is also where a member can select to bump their rate to a higher rate for a “Bump Certificate” product.
7. Change Challenge Questions	Member can change the answers to their challenge questions and select a custom challenge question.
8. Change Password	Members can change their password.
9. Change Username	Members can change their username.
10. Check Funds Transfer	Members have the credit union send a check to a payee.
11. Check Stop Payment	Members place a stop payment on a check.
12. Check Withdrawal	Members withdraw funds in the form of a corporate check.
13. Cleared Checks	Members check if a check has cleared.
14. Contact Preferences	Members can indicate their preferred contact method, such as email. They can also elect to not receive education and third party communications.

15. Credit Score	Members view recent credit score(s). From this page, members can request assistance understanding their score and can access the loan rate board to apply for a loan.
16. Dividend/Interest Summary	Members view dividend and interest information for the current and previous years.
17. Downloads	Members download financial data from this page.
18. eAlert Subscriptions eAlerts/eNotices	Members enroll in balance eAlerts, loan payment due eAlerts, and ACH eAlerts. Members use the eAlerts page to enroll in eNotices.
19. eStatement Enrollment	Members not yet enrolled in eStatements use this page to enroll in the feature.
20. eStatement Options	Members can elect to enroll and unenroll from eStatements.
21. Loan Application	Members use these screens to apply for a loan online.
22. Loan Detail	Members view the detail of the selected loan account. This is where the member views the “Pay Now” and “Skip-A-Pay” buttons.
23. Login History	Members can view a history of the times someone logged into their account.
24. Membership Application	Members use these screens to apply for membership to the credit union.
25. Message Center	This may be the entry page for your member. Members view online banking messages including targeted emails advertising special offers.
26. Mobile Banking	Members can learn more about mobile banking.
27. My Overdraft Protection Options	Members select how the credit union should handle overdraft coverage.
28. Nicknames	Members can elect to give their accounts a nickname.
29. Other Accounts	From this screen members can view balance information of or “Jump” to other memberships they have with the credit union.
30. Password Change History	Members can view a history of the changes to their password.
31. Personal Information	Members update their personal information, including address, phone numbers, email address, and code word.
32. Promise Deposits	Members can enroll and enter checks using this free remote deposit option.
33. Qualified Dividends Status	Members view if they qualify for the higher rate on a Qualified Dividend product by viewing the status on required activity such as enrollment in eStatements and a certain number of debit card transactions.
34. Rate Board Certificates	Members view rates for certificate accounts. From this page members can open a new certificate.
35. Rate Board Loans/Credit Cards	Members view loan rates. From this page members can apply for a loan online.
36. Rate Board (Savings/Checking)	Members view rates for savings and checking accounts. From this page members can open a new savings or checking account.
37. Rate Board Detail Loan	Members view details on a specific loan product offered on the rate board. Here your credit union might advertise a lower rate for applying online or a special promotional rate for a credit card.
38. Rate Board Detail Certificate	Members view details on a specific certificate product offered online. For example, if this certificate product uses the “Bump Rate” certificate feature, this is where you would advertise this offering.
39. Rate Board Detail Savings/Checking	Members view details of a specific savings or checking product. For example, if this checking product has a Qualified rate, this is where the credit union shows the qualifications required to receive the higher rate.

40. Site Options	Members customize the look of online banking, including selecting the theme (color), photo album, and landing page.
41. Skip-Pay Details	Members view the details of a skip-pay program and can elect to select to skip a payment.
42. Statement Styles	Members can select their statement style, such as a larger print style. They can also elect to enroll in eStatements from this screen.
43. Text Banking Enrollment	Members elect to enroll in text banking and learn more about text banking.
44. Tiered Services How Do I Get My Points	Members view how their participation in the credit union affects their Tiered Service level. Here they view what actions, such as enrollment in eStatements affects their score. This page also provides links to other pages, such as “Apply for a loan” and “Enroll in eStatements Now!”
45. Tiered Services Instant Rewards	Members view the benefits of participation in in the credit union by viewing a breakdown of the benefits they receive, such as waived fees, etc.
46. Tiered Services Rewards History	Members can view a history of the accumulations of points by month. Here you can advertise special offers that members can receive for cashing in their points.
47. Transaction Detail	Members view transactions processed for the selected account. Members can view cleared checks from this screen.
48. Transfers Make a transfer/set up AFTs	Members use this page to transfer funds between sub accounts, to other accounts at your credit union, and to other financial institutions. Members also set up automated funds transfers (AFTs).

*This is not an exhaustive list of every page in **It's Me 247**. It is subject to change. This listing is intended to provide ideas for considering future direct connections between your website and **It's Me 247** features to which authenticated members could navigate.*