⚙ CUPublisher
Mobile Alerts

Create and schedule mobile app alerts

INSIDE THIS GUIDE:

This guide describes the CU Publisher product Mobile Alerts! This product allows you to create and schedule pop-up alerts for your mobile app. Mobile alerts can be configured to display upon launching the app or various features.

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Mobile Alerts Overview

The Mobile Alerts product allows you to create, schedule, and delete mobile alerts. When accessing Mobile Alerts, you'll view a list of all configured alerts, sorted by active, scheduled, and inactive alerts.

From the main screen, you can create new alerts, edit existing alerts, view a calendar of your scheduled and active alerts, and toggle CUA global alerts.

List Columns

Mobile Alerts Main Screen – List View (Default)

Each alert in the list displays a status icon, the alert title, the enabled platforms, the timing, the start and end time/date, the apps the alert is enabled in, and the alert trigger.

There are three options for the status icon. The green check indicates enabled scheduled alerts. The purple check indicates enabled persistent alerts. The red X indicates disabled alerts. Note: there may be inactive alerts with a green check as they are still enabled but have passed the scheduled end date.

Hovering over the eye icon will display a tooltip pop-up with the alert title and content. To view a true preview of what members will see in the mobile app, select to edit the alert and view the preview displayed on the right side of the screen. You have the option to preview the alert for different devices.

The Platform column displays IOS (apple) and Android (robot) icons. If the icon is orange, the alert is enabled for that platform. If the icon is grey, the alert is disabled for that platform.

The Timing column displays whether the alert is scheduled or persistent. Scheduled alerts have the option to display over one-time period or recur weekly.

The start and end date (or day of the week if recurring) and time display in the Start and End columns.

The Apps column displays the mobile apps for which the alert will be displayed, with options for **It's Me 247**, **BizLink 247**, Pay Anyone, and Loan Pay.

The Triggered On column displays the reason the alert is triggered and if it occurs every time the trigger is performed or once on the first trigger.

Selecting the gear icon allows you to edit the alert. See *Alert Creation/Modification* page 5.

Calendar View

The view of the main screen can be toggled between a list view or calendar view of the alerts. To view the calendar view, select the calendar icon.
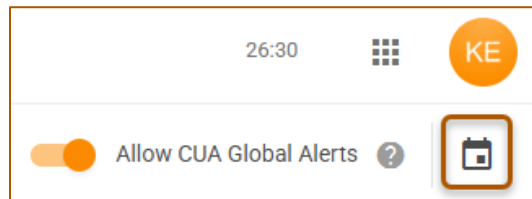
The calendar view shows scheduled alerts. Persistent alerts will be displayed only on today's date. The calendar view does not show any persistent alerts that have been disabled.

Calendar View
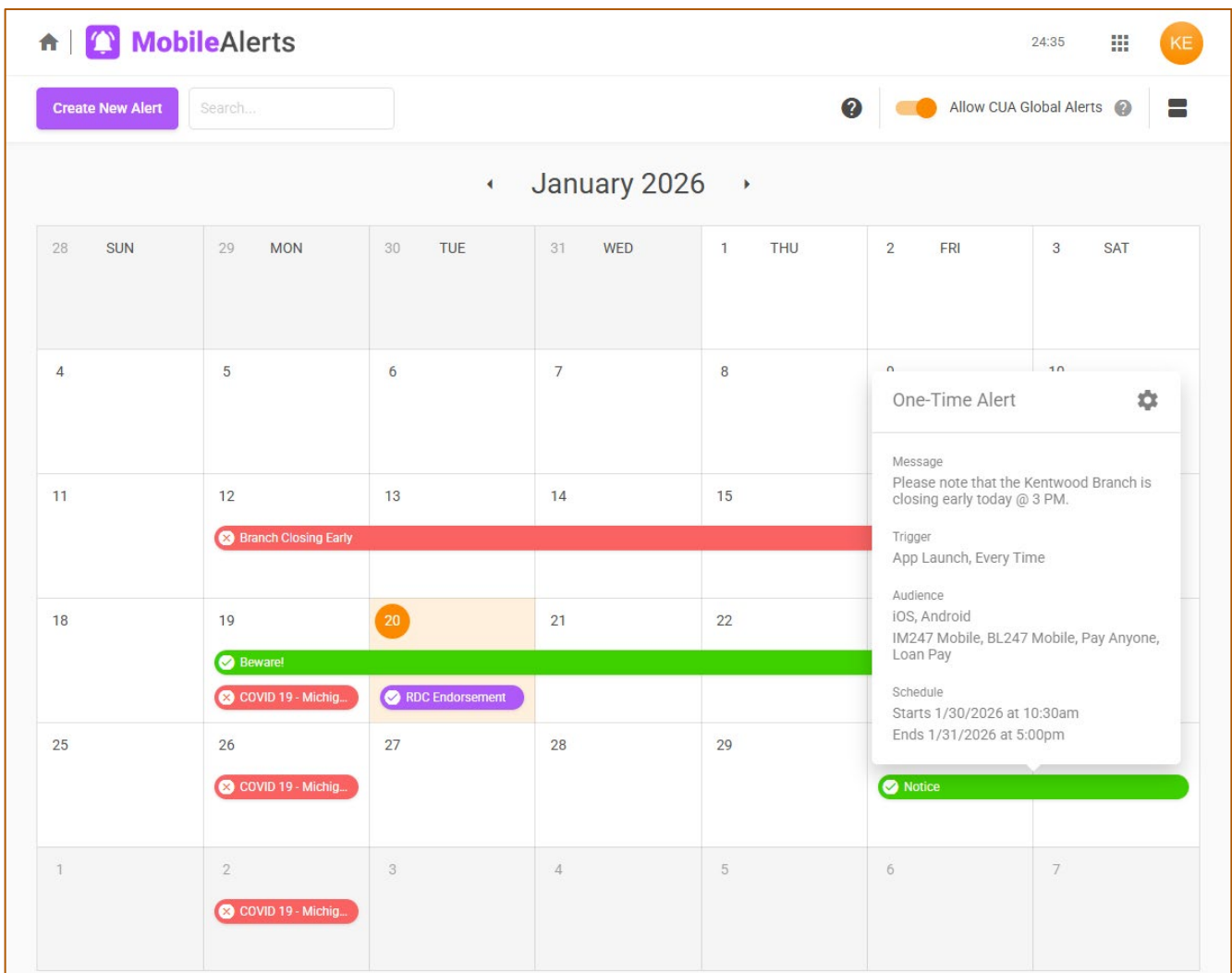
Selecting an alert displays a pop-up showing if it is a one-time, recurring, or persistent alert, along with the alert message, trigger, audience, and schedule. Selecting the gear icon allows you to edit the alert. See *Alert Creation/Modification* page 5.

Global CUA Alerts

There is a toggle option to allow or disable CUA global alerts. CUA global alerts include scheduled or unscheduled alerts from CU*Answers regarding mobile app maintenance and functioning. You can toggle off CUA global alerts if you wish to post your own maintenance alert. It is recommended global alerts are turned off only temporarily so any future and unplanned CUA maintenance alerts can be shown to users.

CUA alerts will be displayed to users before your credit union's configured alerts.

Alert Creation/Modification

To create a new alert, select **Create New Alert**. To edit an existing alert, select the gear icon next to it. There are four sections of an alert to be configured: content, trigger, audience, and schedule.

Creating/Editing an Alert

Content

The Content section includes the alert title, alert message, and an optional external link. If a More Info URL is added, a More Info button will appear on the alert pop-up to the left of the Close button.

Trigger

The Trigger section is where you'll specify when the alert is shown to users. For each trigger option, you can select to display the alert every time the action is performed or only the user's first instance.

Alert Trigger Options

Audience

The Audience section allows you to configure on which operating system(s) the alert will be shown (IOS or Android). You'll also be able to select which apps the alert will appear in (**It's Me 247** and/or **BizLink 247**). If the alert triggers when launching the app or biometric authentication, you will also be able to select to show the alert in Pay Anyone and/or Loan Pay.

Schedule

Use the Schedule section to configure the time frame during which the alert will display to members. The alert can be displayed persistently until disabled or limited to a schedule.

If limited to a schedule, the alert can display over a configured time period or recur weekly. If recurring weekly, select the day of the week and the start and end time during which the alert is displayed. Otherwise for a scheduled time period, select a start and end date and time.

Note: Once the end date/time of a scheduled alert passes, that alert will no longer be viewable to users. It will move to the inactive alerts list, but it will still display the enabled and scheduled green check icon until the alert is manually disabled.

Enable/Disable Toggle

For users to view configured alerts, ensure the toggle is set so the alert is enabled. If you'd like users to no longer see an alert, you can toggle off the alert to disable it. Disabled alerts will move to the inactive alerts list.
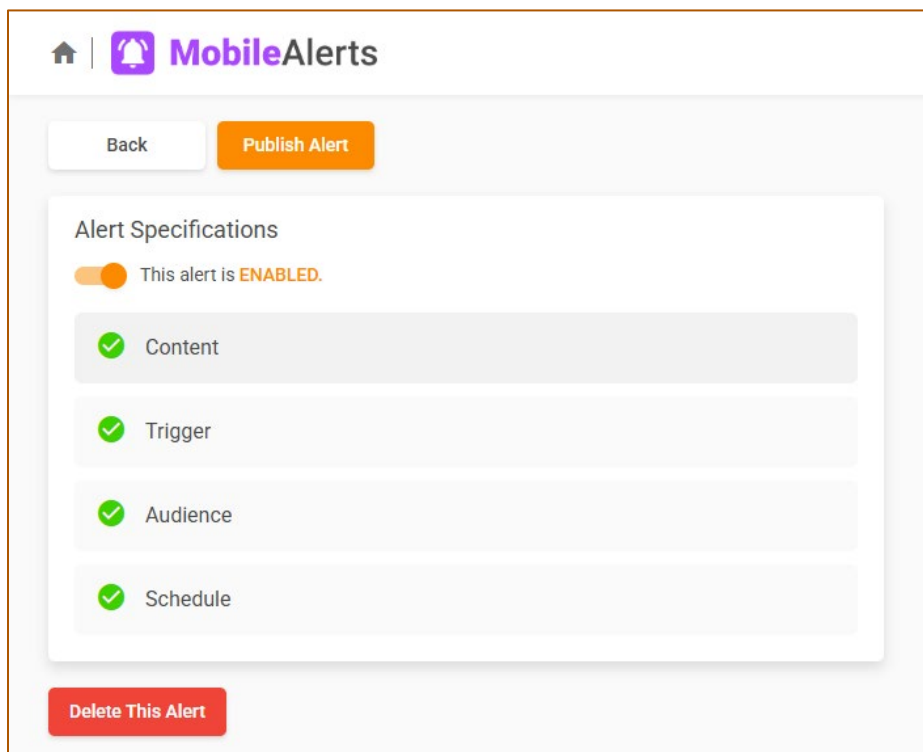

After configuring or editing an alert, select **Publish Alert** to save the changes.

Alert Deletion

To delete an alert, select the gear icon next to the alert you'd like to delete. At the bottom of the edit screen, select **Delete This Alert**. Select **Delete** again to confirm the permanent deletion of the alert.

If the alert is no longer relevant but may be needed at a later time, you may wish to simply disable the alert and re-enable it at a later time. Simply toggle the alert to disabled, and it will no longer show to members. See *Enable/Disable Toggle* on page 6.