

# 2014 Self Service Channel Custom Branding Options



**It's Me 247**  
Online Banking

**It's Me 247**  
Mobile Web Banking

**It's Me 247**  
Mobile App Banking

**It's Me 247**  
Online Banking  
Community

**CU\*ANSWERS**  
A CREDIT UNION SERVICE ORGANIZATION

# It's Me 247 Online Banking Branding Concepts

Custom **It's Me 247** Theme, Custom Logo, Custom Photo Album

The image displays three overlapping screenshots of the It's Me 247 Online Banking interface for Success Credit Union, each with a different branding theme: blue, green, and pink.

**Blue Theme (Top):** Features a yellow excavator image. The header includes "It's Me 247 Online Banking", "SUCCESS CREDIT UNION", and navigation links like "Info Center", "My Accounts", "New Accounts", "Pay Bills", "eStatements", "MoneyDesktop", "Go Mobile", and "Contact Us". The account summary shows a "PLATINUM MEMBER" status.

**Green Theme (Middle):** Features a building image. The header includes "It's Me 247 Online Banking", "Success Credit Union", and navigation links. The account summary shows a "PLATINUM MEMBER" status.

**Pink Theme (Bottom):** Features a pink rose image. The header includes "It's Me 247 Online Banking", "Success Credit Union", and navigation links. The account summary shows a "PLATINUM MEMBER" status.

**Account Summary Data (Pink Theme):**

Account	Name	Available Balance	Actual Balance	Last Transaction	Accrued Dividends
000	Ownership Share	\$1994.00	\$1994.00	1/7/2012	\$0.00
001	Checking	\$7853.00	\$7853.00	3/14/2012	\$0.00
002	Money Market	\$2703.00	\$2703.00	5/21/2012	\$0.00
003	Shopping	\$1456.35	\$1456.35	7/5/2012	\$0.00

Account	Name	Available Balance	Actual Balance	Accrued Dividends	Maturity Date
300	12 MONTH VARIABLE	\$79.53	\$4525.87	\$16.25	3/15/2014
301	3 MONTH CERTIFI	\$0.00	\$10,000.00	\$71.39	11/3/2013

Account	Name	Regular Payment	Amount Due	Due Date	Balance
300	30 YR FIXED MORT	\$1,109.50	\$1,109.50	8/4/2013	\$183,950.15

Account	Name	Regular Payment	Amount Due	Due Date	Balance
**3405	MASTERCARD CLAS	\$70.42	\$61.23	12/4/2012	\$1,950.91

**Footer:** Includes the "It's Me 247 Online Banking" logo, contact information for Greyscale Credit Union (5949 28th Street, Grand Rapids, MI 49503, Phone: 616-439-6000), Equal Housing Lender and Opportunity Lender logos, and an NCUA logo with text: "Your savings federally insured to at least \$250,000 and backed by the full faith and credit of the United States Government. NCUA a U.S. Government Agency."

Our graphic designers have some creative freedom and will strive to give each custom theme some unique flair.

Disclaimer: This site contains links to other sites on the internet. We, and your credit union, cannot be responsible for the content or privacy policies of these other sites. Use the internet with care, we don't know what you'll stumble across. \* Copyright © 2007-2011 • CU\*Answers • All Rights Reserved

## ■ Introduction

For years, members who use the **It's Me 247** online banking channel have enjoyed features that allowed them to personalize the site to their preferences. The very name, **It's Me 247**, was targeted at making every individual member feel like they were the central focus.

But options for customizing the online channel were relatively limited when it came to identifying the credit union. The assumption was that the member came from the credit union's site, and would remember that. There's no doubt that this allowed for quicker development of the CUSO's self-service channel, at amazing price points.

With the look-and-feel upgrades to **It's Me 247** in January of 2013, we launched a new platform to improve navigation and also allow for credit union-level customization. In this booklet you will find our 2014 options for branding and customizing online banking and future mobile solutions to fit your credit union's unique style and brand. From making your logo the marquee on every page, to creating a unique color scheme and uploading custom photo albums, your credit union can now take advantage of the next evolution for our self-service channel solutions.

## ■ Custom It's Me 247 Online Banking Desktop Theme

Brand it to your own corporate colors. Pick your corporate colors using an HTML color picker. This works best when you pick a darker base color and a lighter accent color.

### How it Works

Once you have approved your new color theme, you can set this theme to become the default theme for any member who has not selected their own personal theme. That is, any member still using the theme you selected at conversion, will now be using your custom corporate theme. In addition, all members may elect to change to use your theme as their own. Finally, all new members will receive your custom theme as the default.

All monitors render colors a little differently, so your choices will not look exactly the same on every single computer. Also, we recommend you stay away from browns, as they tend to get muddy and unattractive on certain displays.

*CU\*BASE Help is available for showing you how to set the default theme for It's Me 247 Online Banking members. See <http://help.cubase.org/cubase/#UPPHOTO-01.htm> for details.*

Also, make sure you notify your membership first. Many members use the color theme as a security feature.

Once you sponsor a color theme for **It's Me 247** Online Banking, it becomes available for every credit union in the network. Thanks for contributing to everyone's success!

Because your sponsored theme becomes available network wide, CU\*Answers will choose a creative name for your theme based on the colors.

### What You Get

Custom primary color for main elements.

Custom accent color for icons and other elements.

Custom colors may be applied to elements on the **It's Me 247** Online Membership and Loan applications. Note, there are circumstances where the applications do not have enough information to be able to determine the credit union's default theme.

*Our graphic designers have some creative freedom and will strive to give each custom theme some unique flair.*

### Costs

One time set up.....	\$2,000
Monthly Maintenance .....	\$0

## Blue Steel Default Theme

Accounts	Name	Available Balance	Actual Balance	Last Transaction	Accrued Dividends
000	Ownership Share	\$2,775.00	\$2,775.00	2/7/2012	99.99
002	Boosters Club	\$1,256.00	\$1,256.00	6/7/2012	0.00

Accounts	Name	Regular Payment	Amount Due	Due Date	Balance
001	2nd Share Draft	\$2,013.00	\$2,013.00	3/12/2012	\$2,013.00
002	Booster Club	\$1,256.00	\$1,256.00	6/7/2012	\$1,256.00
003	Basic Share Draft	\$1,252.00	\$1,252.00	3/12/2012	\$1,252.00
004	Secondary Share	\$2,256.00	\$2,256.00	1/28/2012	\$2,256.00

## Custom It's Me 247 Online Banking Theme (Green and Navy)

Custom primary color for main elements.

Custom accent color for icons and other elements.

Account	Name	Available Balance	Actual Balance	Last Transaction	Accrued Dividends
000	Ownership Share	\$1994.00	\$1994.00	1/7/2012	\$0.00
001	Checking	\$7853.00	\$7853.00	3/14/2012	\$0.00
002	Money Market	\$2703.00	\$2703.00	5/21/2012	\$0.00
003	Shopping	\$1456.35	\$1456.35	7/5/2012	\$0.00

Account	Name	Available Balance	Actual Balance	Accrued Dividends	Maturity Date
300	12 MONTH VARIABLE	\$79.53	\$4525.87	\$16.25	3/15/2014
301	3 MONTH CERTIFI	\$0.00	\$10,000.00	\$71.39	11/3/2013

## Custom It's Me 247 Online Banking Theme Loan Application (Green and Navy)

Custom primary color for main elements.

Custom accent color for other elements.

Success Credit Union

Logout

Start **Loan Info** Personal Info Co-Applicant Your Finances Auth Request Quote Selection Confirm

Quick Loan Application

This application should take only a few minutes to complete.

Have the following information available before you start: your Social Security Number, employer name and phone number, and annual income amount.

Please select a loan type

Personal Loan

If you are already a member of the credit union, please sign in using your online banking login information.

Member Number/Username:

PIN/Password:

Login

Note, there are circumstances where the online applications do not have enough information to be able to determine the credit union's default theme.

## ■ Custom It's Me 247 Mobile Web Banking Theme

Apply the colors you selected for your **It's Me 247** custom desktop theme to mobile web too.

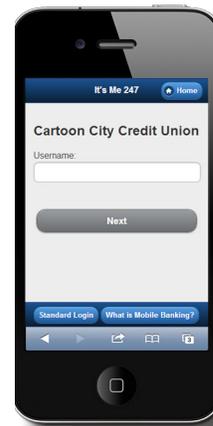
### How it Works

Once you have approved your new color theme, this theme will become the default theme for your **It's Me 247** Mobile Web.

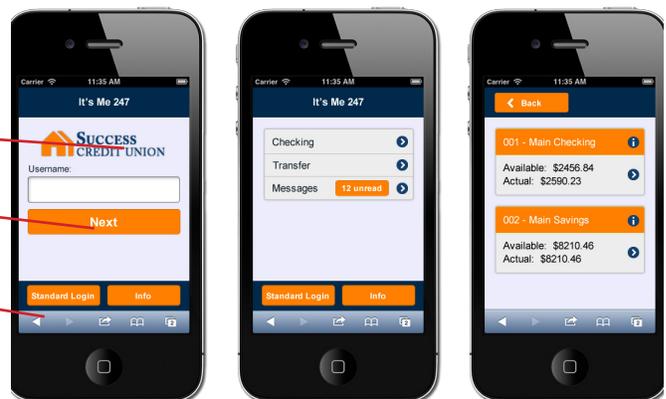
Since most mobile apps embed **It's Me 247** Mobile Web, your custom theme will automatically be updated through your mobile app provider.

An **It's Me 247** Mobile Web theme is selected by the credit union for all members. That is, **all** members will have the same color theme that the credit union chooses. Make sure you notify your membership prior to making this change.

Default Mobile Theme



Custom Mobile Theme  
(Orange and Navy)



### What You Get

Your logo<sup>1</sup>

Custom primary color selected

Custom accent color

<sup>1</sup> For certain Mobile App vendors, your logo will not be included in order to provide a more app-like experience for your members.

### Costs

One time set up.....\$1,600  
 Monthly Maintenance .....\$20/month

## ■ It's Me 247 Online Banking Desktop Logo Swap

Swap the placement of the **It's Me 247** Online Banking Logo and your credit union name.

### How it Works

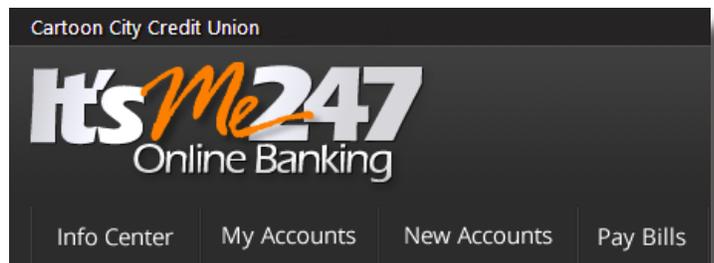
You must provide an Adobe Illustrator or EPS color version of your logo. This ensures we can create the proper format with transparency for the **It's Me 247** Online Banking. We will swap the location inside online banking of the **It's Me 247** logo with your credit union logo.

All themes have a dark grey or dark primary color background. Please provide your logo in a light color scheme so that it will render legibly on a dark background. Notice how the standard **It's Me 247** Online Banking logo is mostly white or light colored.

Submitted logos must be in true vector format, either Adobe Illustrator or EPS with all fonts converted to outlines.

*Our graphic designers will work to make your logo look good on as many themes as possible, however every combination cannot be tested.*

Blue Steel Default Logo



### What You Get

**It's Me 247** branding moved to top. This allows you to continue to use collaborative marketing and documentation.

Your logo and brand front and center

Your logo will also appear on the online loan application.

It's Me 247 Online Banking Logo Swap



### Costs

One time set up.....\$750  
Monthly Maintenance .....\$20/month

## ■ Custom It's Me 247 Online Banking Desktop Photo Album

Let your members choose a photo album that reflects your credit union's values and membership. Choose 1-6 photos to be incorporated into a custom photo album for your members. Note, you must have copyright permissions to use the photos you submit. Also, please note that photos must fit into the proper aspect ratio, that is, photo albums are wider than they are tall.

### How it Works

Once you have approved your new photo album, you can set this album to the default album for any member who has not selected their own personal album. That is, any member still using the album you selected at conversion, will now be using your custom album. In addition, all members may elect to change to use your album as their own. Finally, all new members will receive your custom album as their default.

Choose 1-6 photos for your album. Photos must be landscape orientation. Images must be JPG or PNG, min. 72 DPI, 400px wide by 100 px tall. Also note the focal point of your image should be on the right hand side. When published, the left hand side will have a fade in gradient to match the theme.

*CU\*BASE Help is available for showing you how to set the default photo album for It's Me 247 Online Banking members. See <http://help.cubase.org/cubase/#UPPHOTO-01.htm> for details.*

Also, make sure you notify your membership first. Many members use the photo album as a security feature.

The custom photo album for **It's Me 247** Online Banking will only be available for your credit union.

### What You Get

Your custom photo album in rotation

### How to Change Photos

If you wish to change the photos in your album, simply resubmit the form with the change box checked. Updated albums will be available with the next **It's Me 247** Online Banking release (approximately once a month).

*Your Credit Union must have copyright permissions to use any photos you submit. Also, photos must fit into the proper dimensions, that is, photo albums are wider than they are tall.*

Stock Nature Photo Album



Custom Western Photo Album



### Costs

One time set up.....	\$750
Monthly Maintenance .....	\$20/month
Album Photo Change fee .....	\$350

## ■ Custom PFM Branding

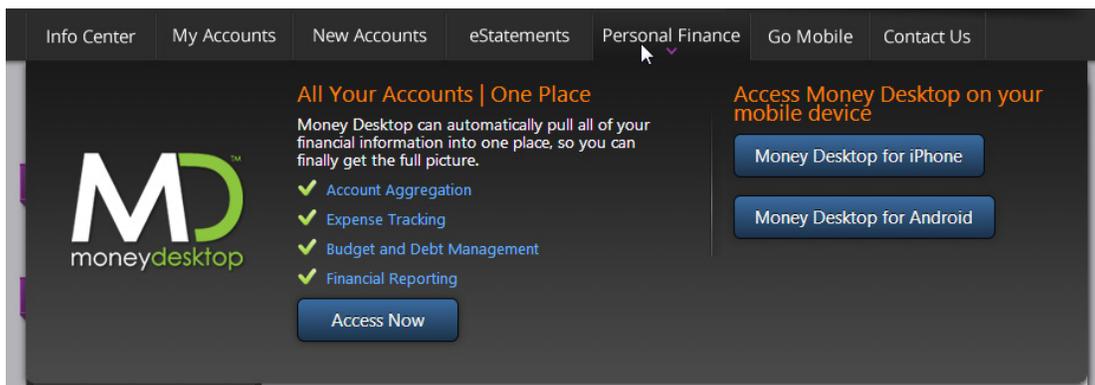
Custom brand your Personal Financial Management solution from Money Desktop. Money Desktop offer the ability to white label their product for your credit union. Carry this branding in to **It's Me 247** Online Banking. Contact your Money Desktop representative for details and pricing.

Note: Your PFM vendor may have fees for custom branding their PFM application. This product is for custom branding of **It's Me 247** Online Banking access points to your PFM vendor.

### What You Get

The Personal Finance navigation menu inside **It's Me 247** Online Banking will display your custom logo and custom name provided to us by Money Desktop. In addition, if mobile app URLs are provided, these links will be updated to your custom app. Money Desktop banners will also be removed from your OBC page.

**Contact Your Money Desktop Representative for more information and to get started**



### Costs

One time set up.....\$500

Note: This is for the It's Me 247 Online Banking customizations, Money Desktop may have additional fees or charges.

# It's Me 247 OBC Branding Concepts

Custom Logo, Custom Background Color, Custom Social Media Connections



## ■ Online Banking Community Logo Replacement

Replace the **It's Me 247** Online Banking Community Logo and your credit union name.

### How it Works

You must provide an Adobe Illustrator or EPS color version of your logo. This ensures we can create the proper format with transparency for the **It's Me 247** Online Banking Community.

The Online Banking Community mast area is white, please provide your logo in a dark or full color scheme so that it will render properly on a white background. Our graphic designers will work to make your logo look good.

### What You Get

**It's Me 247** branding moved to the bottom of the page This allows you to continue to use collaborative marketing and documentation.

Your logo and brand front and center on the OBC

Default Theme OBC



OBC with Logo Swap



### Costs

One time set up.....\$750  
 Monthly Maintenance .....\$20/month

# FREE Options!

- OBC Custom Background Color
- OBC Custom Website Links
- OBC Custom Social Media Links

These customization options are all available today for free! Simply complete an OBC Customization form and fax or scan and email it in. The form is available online at [http://cuanswers.com/pdf/im247/OBC\\_Customization\\_Form.pdf](http://cuanswers.com/pdf/im247/OBC_Customization_Form.pdf).

Set your credit union's home page, contact page, newsletter page and rates page URLs so your members can easily click back to your website from the OBC.

Use our online tool at [https://open.itsme247.com/obc\\_colors](https://open.itsme247.com/obc_colors) to assist in picking the proper HTML colors for your background.

Also, engage in social media with your credit union's Twitter, Facebook, Google+, LinkedIn and YouTube accounts.

The Online Banking Community includes Security Training and other information that allows you to fulfill auditor requirements.

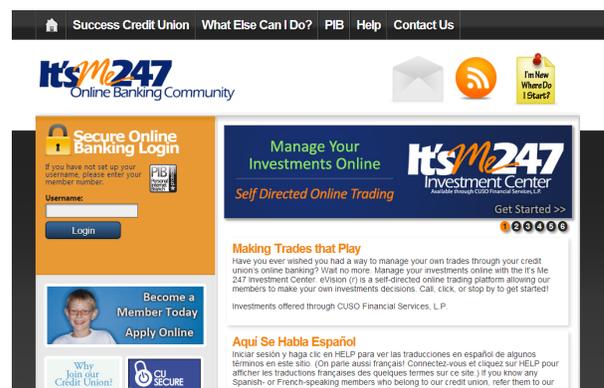
## What You Get

Custom website links back to your webpage

Custom HTML color

Custom links to your social media accounts

## Default Online Banking Community



## Customized Online Banking Community



## Costs

One time set up .....FREE!

# FREE Options!

## Direct Login Widget Options

The Direct Login Widget is provided to CU\*Answers clients as an alternative to an **It's Me 247** login link, button (200 x 51), or badge (125 x 125). Members are able to submit only their username via this field. Once a username is submitted, the **It's Me 247** direct login snippet will redirect the member to the Online Banking Community (OBC) landing page for their particular credit union where they can complete the login process.

The **It's Me 247** direct login snippet is provided to our clients for use on their credit union website under the following conditions and limitations:

- The **It's Me 247** direct login snippet is provided on an as-is basis. The contents and layout of the iframe cannot be altered, rearranged, or otherwise modified in any way.
- The "src" attribute of the snippet may only contain the text `https://www.itsme247.com/CUID/authentication/usernamewidget[fl|rb|rw|sqb|sqw]` where "CUID" equals the numeric online banking ID of the credit union, and "fl|rb|rw|sqb|sqw" equals the type of widget you'd like to use.
- Any page/section of the website that invokes the **It's Me 247** direct login snippet must be accompanied by a valid SSL Certificate and `https://` must be forced. There may be additional costs above and beyond "standard" hosting charges for SSL Certificate installation and maintenance. Contact your hosting provider for more information.
- The direct login snippet does not support mobile redirection, mobile visitors should use a hyperlink to `http://m.itsme247.com/CUID` (where "CUID" equals the numeric online banking ID of the credit union)
- Choose from one of these five styles – all styles have a transparent background (blue added to show white text):

Choose from one of these five styles - *all styles have a transparent background:*

1. Square with Black Text flexibly sized from 216px by 158px to 330px by 129px



2. Square with White Text flexibly sized from 216px by 158px to 330px by 129px



3. Wide Rectangle with Black Text (dimensions to be determined)



4. Wide Rectangle with White Text (dimensions to be determined)



5. Flex Design (a stripped down version with only the Username input field and the Login button in black - dimensions to be determined)



**All of these Direct Login Widgets will validate the username and redirect to the OBC for the Password and Security Questions.**

To request the **It's Me 247** direct login snippet for your credit union website, please email [web\\_services@cuanswers.com](mailto:web_services@cuanswers.com). Please include your name, credit union, primary domain, and hosting provider contact information with your request. Allow up to two business days for the CU\*Answers Web Services Team to process your request.

## Costs

One time set up .....FREE!

## Technical Details and Specifications

All logo files must be provided as true vector format in Adobe Illustrator or EPS format. Color logos only. All fonts must be converted to outlines. This allows us to use your logo with proper formatting and transparency. Logos not conforming to these specifications will be rejected.

All colors must be provided in HTML (hex) or RGB format. Use the online tool at <http://ws.cuanswers.com/self-service-branding> to assist in picking the proper HTML colors. Also note that every monitor displays colors differently. PMS color approximations are possible, but not guaranteed.

Photos provided must be in JPG or PNG format. Photo dimensions are 400 pixels wide by 100 pixels tall. Minimum of 72 DPI at actual size. Photographs must be landscape oriented and in proper 4:1 aspect ratio.

You must have copyright permission for any photographs or artwork used. CU\*Answers may reject images where copyright is deemed questionable. At our sole discretion, CU\*Answers may also reject images for inappropriate content.

CU\*Answers will choose a name for your theme or photo album based on the colors or content. Themes will not be named after credit unions because they are available network wide to all members.

Because **It's Me 247** Online Banking is a valuable asset to every member in our cooperative, our graphic designers are allowed some creative freedom in order to keep the consistent quality our members expect.

All **It's Me 247** custom changes will coincide with an **It's Me 247** Online Banking release. Generally these happen once a month.

## Credit Union Intellectual Property Warranty & Indemnification

CREDIT UNION warrants that it owns or has the right to license the rights granted under this Agreement to use photographs and other materials, etc., that it has obtained any and all necessary permissions from third parties to license the photographs and other materials, etc., and that use of photographs and other materials, etc. by CU\*ANSWERS in accordance with the terms of this Agreement shall not infringe the copyright of any third party.

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CREDIT UNION shall indemnify and hold CU\*ANSWERS and its Affiliates, Officers, Directors, and Employees ("Authorized Users") harmless for any losses, claims, damages, awards, penalties, or injuries incurred, including reasonable attorney's fees, which arise from any claim by any third party including, but not limited to, claims for libel, invasion of privacy, commercial appropriation of one's name or likeness, copyright infringement, trademark, trade name or patent infringement, commercial defamation, false advertising, or any other claim whether based in tort or contract, or on account of any state or federal statute, including state and federal deceptive trade practices acts, arising out of the use of the [photographs and other materials, etc.] by CU\*ANSWERS or any Authorized User in accordance with the terms of this Agreement. This indemnity shall survive the termination of this Agreement. NO LIMITATION OF LIABILITY SET FORTH ELSEWHERE IN THIS AGREEMENT IS APPLICABLE TO THIS INDEMNIFICATION.

# 2014 Self Service Channel Custom Branding Options

## Quick Reference Sheet

### ■ Custom It's Me 247 Online Banking Desktop Theme

Provide primary color and accent color in HTML or hex format.

One time set up ..... \$2,000  
Monthly Maintenance..... \$0

### ■ Custom It's Me 247 Mobile Web Banking Theme

Provide primary color and accent color in HTML or hex format. Provide credit union logo in color, vector format (AI or EPS).

One time set up ..... \$1,600  
Monthly Maintenance..... \$20/month

### ■ It's Me 247 Online Banking Desktop Logo Swap

Provide credit union logo in light color. It will be placed on dark masthead of **It's Me 247** Online Banking. Vector format (AI or EPS).

One time set up ..... \$750  
Monthly Maintenance..... \$20/month

### ■ Custom It's Me 247 Online Banking Desktop Photo Album

Provide 1-6 photos for your album. Photos must be landscape orientation. Images must be JPG or PNG, min. 72 DPI, 400px wide by 100px tall. Also the focal point of your image should be on the right hand side. You must be the copyright owner or have copyright permissions.

One time set up ..... \$750  
Monthly Maintenance..... \$20/month  
Album Photo Change fee..... \$350

### ■ Custom PFM Branding

*Contact Money Desktop to get started.* Money Desktop will provide us your name, icon and app URLs.

One time set up ..... \$500  
Note: This is for the It's Me 247 Online Banking customizations, Money Desktop may have additional fees or charges.

### ■ Online Banking Community Logo Replacement

Provide credit union logo in dark color. It will be placed on light masthead of the Online Banking Community. Vector format (AI or EPS).

One time set up ..... \$750  
Monthly Maintenance..... \$20/month

### ■ OBC Custom Background Color, Website Links Social Media Links

Complete the form which is available online at <http://cuanswers.com>.

One time set up ..... FREE!

### ■ Direct Login Widget Options

*Details coming in 2014.* Must meet requirements for use. Use of the code snippet is free, but some requirements may incur additional costs from your hosting provider.

One time set up ..... FREE!\*

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Information & ordering is online at  
<http://ws.cuanswers.com/development/self-service-branding/>

For assistance, please contact CU\*Answers Web Services  
[web\\_services@cuanswers.com](mailto:web_services@cuanswers.com) or 616-285-5711x275

**Web Services**  
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