DIY 1CLICK OFFERS CHECKLIST

If this is your first campaign:

- You will need a form configured for members to eSign in online banking.
- Please note this is a **DIFFERENT** form than your loan note in the core.
- You can configure these forms in CU Forms, please reach out to Lender*VP to get started on this process.
- Alternatively, the Lender*VP team can configure these forms on your behalf for $100 per form.
- The Lender*VP team strongly recommends that you test your form before your offers go out by sending a test offer to a staff member to verify all fields are populating and the document signs and saves correctly.

After your form is configured:

- Lender*VP recommends that you build a new product and security code specifically for 1Click Offers.
  - Verify that the category you use for this product is set to **ALLOW ONLINE DISBURSMENTS.**
- Build the necessary queries needed to generate a list of the members you wish to target with your campaign.
  - The first column in the file created by the query **MUST** be the member account numbers and **MUST** have the header ACCTBS. The system **WILL NOT** send offers if this is incorrect.
  - Review the list of members produced by these queries.
- When creating the files for your offer we recommend that you use unique filenames for each tier and each campaign. Our best practice for naming is OCMMDDYY_X where MMDDYY is the date of the offer, and X is the tier for the offer. For example, offer 3 for a campaign launched February 20th, 2026 would be named OC022026_3.

After your form is configured: *(cont.)*

- Tool #447 List Generator is not recommended for this process. If you choose to use the tool, please be aware it will not automatically remove accounts with duplicate social security numbers. Potentially resulting in duplicate offers sent to members with multiple accounts.
- Before you run your batch flood to your membership, it is important to run a test offer. This is done in a similar manner as defining your offer, but instead of running the offer for a batch of members, make the Query for just a single employee account or a group of employees. Sending a test offer helps to ensure that all key data elements are correct as well as your disclosures.
- Be sure to test with the **EXACT** same offer that you plan to send to members, with the same product, rate, tiers, and form.
- When testing an offer, Lender*VP recommends at a minimum you review the following items in both the offer itself and on your disclosure:
  - Interest Rate
  - Loan Amount
  - Term
  - Disclosure
  - Late Payment Verbiage
  - Collection Cost Verbiage
  - MLA verbiage

Key things to remember for different offer types:

- Credit card offers:
  - You **MUST** have online credit cards in the core in order to send 1Click Credit Card Offers.
- LOC offers:
  - If you use percent for payment calculation at your category level, you **MUST** reach out to Lender*VP.
- 1Click Unfunded offers:
  - You **MUST** have your dealers configured in the core in tool #245 *Configure Dealer Info for Indirect Lending.*
  - Only one dealer is configurable per offer at this time. A future enhancement will allow multiple dealerships to be added to a single offer.
- Once offers are sent out, the system will generate a ONECLCKLN report in the user's spool file which will list every recipient of the offer, for further validation.