

ENGAGE IMPLEMENTATION STEPS

Step 1: Create a .CSV file

Create a .CSV file that contains the nine required data fields (see next page). Please ensure that your field headers match the Header Field Name exactly and that you name your .CSV file in the following format: *CreditUnionName_FileDate_Engage*.

Step 2: Submit a test file for review

To ensure an accurate match within our automation system, we prefer to review a test file in advance. Please send a partial .CSV file that contains the Header Field Names along with at least one member record to TechSupport@HomeAdvantage.com. Please also include the IP address from which your credit union will be sending the final .CSV file so that we can authorize the address on our SFTP server.

Step 3: Complete your SFTP

Once your test file has been reviewed and approved by the HomeAdvantage team, you will receive final SFTP login instructions.

Step 4: Ongoing file maintenance

To coordinate Unsubscribe or Opt-outs, you can send a file with members to exclude from Engage emails and use the following file name format: *CreditUnionName_FileDate_Engage_OptOuts.csv*.

ENGAGE FILE FIELDS

If you have any questions about this process, please contact your Regional Account Manager or email TechSupport@HomeAdvantage.com.

Header Field Name	Field Description
First Name	<i>Member First Name</i>
Last Name	<i>Member Last Name</i>
Email Address	<i>Member Email</i>
Phone	<i>Member Phone Number</i>
Phone Type	<i>Phone Type*</i>
Address 1	<i>Street Address 1</i>
Address 2	<i>Street Address 2</i>
City	<i>City</i>
State	<i>State</i>
City	<i>Zip</i>

*Type of phone (mobile, home, office). Mobile is preferred.