

# Quick Start Guide - Navigation, User Setup, Exporting Data, and Customization

**UNIBANK**

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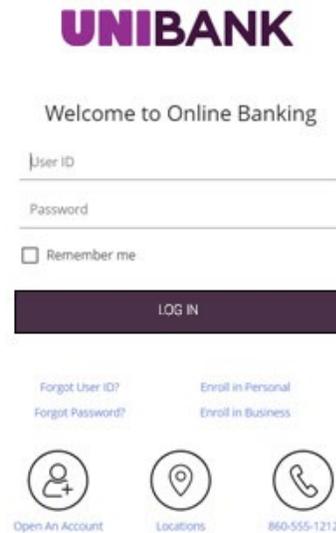
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## Logging On

When you launch the application, the first screen you see is the logon screen.

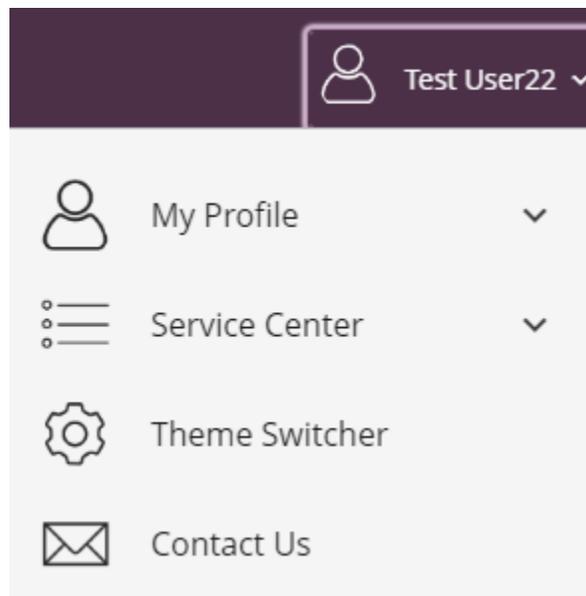
- Enter your User ID and password then click Log In.

After logging in, you will land on the home page which provides access to all areas of the system.



The image shows the UNIBANK online banking login interface. At the top is the UNIBANK logo in purple. Below it is the text "Welcome to Online Banking". There are two input fields: "User ID" and "Password". Below the password field is a checkbox labeled "Remember me". A dark purple button with the text "LOG IN" is centered below the inputs. At the bottom, there are three links: "Forgot User ID? Forgot Password?", "Enroll in Personal Enroll in Business", and three icons with labels: "Open An Account" (person with plus), "Locations" (location pin), and "860-555-1212" (phone).

## User ID Menu



The image shows a user ID menu. At the top, there is a dark purple header with a user icon and the text "Test User22" followed by a dropdown arrow. Below the header is a light gray menu with four items: "My Profile" with a person icon and a dropdown arrow, "Service Center" with a list icon and a dropdown arrow, "Theme Switcher" with a gear icon, and "Contact Us" with an envelope icon.

The User ID Menu allows you to manage your information in one convenient location.

The Service Center menu allows you to:

- Stop payments on a check
- View Stop Payment History
- Create and Manage Alerts
- Manage ATM/Debit Cards
- View eStatements
- Access Quicken/QuickBooks
- Manage Account Nicknames
- Manage Users, Export User Entitlements and Review User Activity

The My Profile menu allows you to:

- Manage Profile
  - Update Information (Email address, Mailing Address, Phone Number, User Activity)
  - Security Settings (User ID, Password, Security Questions)

Contact Us allows you to send Secure Message to UniBank.

## Users

Select Service Center, then Users. Existing users will display in a list.



Edit a user by selecting the [pencil icon](#).



Edit user entitlements by selecting the [key icon](#).



Delete a user by selecting the [trash icon](#).

## Users

| Name ↑      | User Type               | User ID | Status | Last Login             |   | User Type     |
|-------------|-------------------------|---------|--------|------------------------|---|---------------|
| Test User22 | Business User (Manager) | test22  | Active | 09/21/2022 9:16:22 AM  |    | Administrator |
| Test User33 | Business User (Manager) | test33  | Active | 09/15/2022 12:54:21 PM |    | Administrator |
| Test User44 | Business User           | test44  | Active | 09/20/2022 4:35:02 PM  |    | User          |

[Add User](#)

# Account History

**UNIBANK** Test User22 | Print | Logout

Accounts Transfers Positive Pay Manage My Money Cards ACH Wires

**MUNI PAYROLL ACCOUNT** Details Alerts eStatements Settings

x5802

\$20.00 Available Balance | \$20.00 Current Balance

### History

Search | Download

| Date ↓       | Description ↕                     | Type ↕     | Amount ↕ | Balance |
|--------------|-----------------------------------|------------|----------|---------|
| Posted       |                                   |            |          |         |
| > 09/21/2022 | Internet Transfer to x5810 CK -   | Withdrawal | \$1.00   | \$20.00 |
| > 09/21/2022 | Internet Transfer from x5810 CK - | Deposit    | +\$1.00  | \$21.00 |
| > 09/07/2022 | Internet Transfer from x5810 CK - | Deposit    | +\$1.00  | \$20.00 |
| > 09/07/2022 | Internet Transfer from x5810 CK - | Deposit    | +\$4.00  | \$19.00 |

To view Account Details, click on Details and then the details will display in a pop-up.

**Account Details** ✕

Account Nickname  
**MUNI PAYROLL ACCOUNT**

Change Account Nickname

Account Name  
**Muni Payroll/Payable**

Account Number  
**x5802**

Show Full Account Number

Routing Number  
**211372378**

Date Opened  
**08/22/2022**

Interest Rate  
**0.04%**

Current Balance  
**\$20.00**

Close

## Exporting Data

Account history can be exported using the Download feature.

To export data:

- Click on the Download link located on the account activity page and an Export box will pop-up.
- Choose the criteria for the information you would like to download.
- Select the format you would like. Options include BAI2, CSV, PDF and Excel.
- The Export file will be downloaded by clicking the Download button.

☑ MUNI PAYROLL ACCOUNT Details

x5802 Alerts

\$20.00 Available Balance | \$20.00 Current Balance eStatements

Settings

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### History

🔍 Search | [Download](#) 

| Date ↓       | Description ↕                     | Type ↕     | Amount ↕ | Balance |
|--------------|-----------------------------------|------------|----------|---------|
| Posted       |                                   |            |          |         |
| > 09/21/2022 | Internet Transfer to x5810 CK -   | Withdrawal | \$1.00   | \$20.00 |
| > 09/21/2022 | Internet Transfer from x5810 CK - | Deposit    | +\$1.00  | \$21.00 |

Account  
**x5802 | MUNI PAYROLL ACCOUNT**

Add Other Accounts

Transaction Type

Date

Description

Amount  Amount Range

Check Number

Download As  
 BAI2  CSV  PDF  Excel 

\*Quicken/QuickBooks can be accessed in the Service Center.

## RSA Tokens

An RSA token is required to enable the user to access the Wires and ACH menus of UniBank's Online Banking system. Your token, together with a PIN, will allow you to securely access both the ACH and Wire functions of our Online Banking system.

If your organization has multiple users, each user should have a unique token.

When ACH or Wire tab is selected, you will need to enter your 4-digit PIN followed by the 6-digit token value that is being displayed on your token at that time. (NOTE: the token value will change every minute. There is a time countdown indicator on the left-hand side of the display.)



### RSA Token Security Prompt

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To protect the security of your information, your financial institution requires authentication of your identity before allowing access to this feature. Please enter token PIN followed by the 6 digit token code.

Pass Code:

Cancel

Submit

## CONTACT

For assistance, please contact your Relationship Manager or UniBank at 800.578.4270.