

Quick Start Guide - Online Banking Service Center

Stop Payments

Alerts

ATM/Debit Card Services

Quicken/QuickBooks

Account Nicknames

Profile Information

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Mobile Banking



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Service Center

The service center allows you to place stop payments, add alerts, process ATM and Debit card requests, and edit your profile and security information. The Service Center link is located on the home page in the upper right corner of the menu bar.

Account Services <u>Deposit Accounts</u> Stop Payment on a Check <u>Alerts</u> Create a New Alert Change Current Alerts View Alert Activity	Card and Online Services <u>Card Services</u> Freeze/Unfreeze Your Card I Have Travel Plans Replace My ATM/Debit Card <u>Online Banking Services</u> Quicken® / QuickBooks® Manage Account Nicknames Agreements/Disclosures
My Profile <u>My Information</u> Change Email Address Change Address Change Phone Number User Activity <u>Security Information</u> Change User ID Change Password Change Security Information	Mobile Banking <u>UniBank Mobile Banking</u> Visit your App Store to download the UniBank Mobile App. Click the links below to download our Mobile App now!  

Account Services

Stop Payment on a Check:

Click on [Stop Payment on a Check](#) link located in the Account Services menu.

Fill out the necessary fields.

Click on Submit to verify Stop Payment details. Click on Continue to proceed.

Request a Stop Payment

Stop Payment Account:
:x3062

Stop Payment Type:
 Single Check
 Range of Checks


* Check Number:
555

Check Amount:
500.00

Payee:
Test Stop Payment

Reason:
Check Lost

You will receive an acknowledgement at the top of the page stating your stop payment was created successfully. You will also have the ability to print the stop payment confirmation screen.

 A stop payment for check 555 has successfully been placed on RELATIONSHIP 3062. A \$25.00 fee will be assessed.

ALERTS

Alerts allow you to Create, Change or View Alert activity.

Creating an Alert-

Click on create an alert from the menu box.

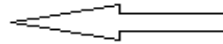
Click on the appropriate radio button

Click Add Subscription.

▼ Add Notification Subscription

Please select an alert type:

- ACH Return Available
- ACH Whitelist Alert
- Any Account Activity Alert
- Available Balance Below Limit
- Available Balance Daily Snapshot
- Current Balance Above Limit
- Current Balance Below Limit
- eNotices Alert
- Insufficient Funds Charge Alert
- Large Check Cleared Alert
- Large Debit Card Purchase Posted
- Large Electronic Check Posted
- Large Electronic Deposit Posted
- Large Withdrawal Posted
- Reminder Alert
- Secure Message Alert
- Specific Check Cleared



Add Subscription

Enter required information on add notification subscription page and click submit.

▼ Add Notification Subscription

Large Electronic Check Posted

Account:

:x123456789

Amount:

100000.00


Email Addresses/Phone Numbers

:test@unibank.com

Mobile Device for Push Notifications (You must first register in your mobile banking app)

Submit Cancel

You will receive an acknowledgement at the top of the page stating your notification was created successfully.

 Your notification was created successfully.

ALERTS

Change or View an Alert-

Click Change Current Alerts or View Alert Activity from the menu box.

Active alerts will be displayed.

▼ Current Alerts

Description	Created Date	
Notify me when an electronic check in excess of \$50,000.00 posts to xx6789	03/02/2020 3:36:35 PM	 
Notify me when an electronic check in excess of \$100,000.00 posts to xx8901	03/02/2020 4:19:22 PM	 



Edit the current alerts by selecting the **pencil icon** located on the right side of the screen. Enter required information and click update.

▼ Add Notification Subscription

Large Electronic Check Posted

Account:

xxx6789

Amount:

50000.00

Email Addresses/Phone Numbers

: test@unibank.com

Mobile Device for Push Notifications (You must first register in your mobile banking app)

Update

Cancel



Your notification was updated successfully.



Delete current alerts by selecting the **trash basket icon** on the right side of the screen.

Card and Online Services

Card Services:

Provides the ability to freeze/unfreeze specific cards, notify UniBank of travel plans or replace ATM/debit card*

***Please Note: Municipal customers must contact their Relationship Manager or Municipal Support Team for a new Debit Card application.**

Freeze/Unfreeze

Click freeze/unfreeze from the Card and Online Services Menu. A list of current cards will be displayed. Click the Deactivate or Activate Tab to process your request.

Freeze/Unfreeze My Card



A message will appear at top of screen confirming changes were made successfully.

 The status of your card has been successfully changed

Travel Plans

Click on I Have Travel Plans in the menu. Enter required information and hit submit.

▼ Submit Request

Travel Notification

Enter the Debit Card Number of the card you wish to use, dates you are traveling and enter the Trip Destination including any countries you may travel through on the way to your destination.

Card Number:*


Start Date:* MM/DD/YYYY

End Date:* MM/DD/YYYY

Trip Destination, including any stops:*

Submit

Cancel

 Your form has been submitted successfully.

Replace ATM/Debit Card

Click Replace ATM/Debit Card from the Card and Online Services Menu.
Enter the required (*) information and Click Submit.

▼ Submit Request



Debit Card Replacement Request Form

* Fields are required

Preferred Method of Contact:* Phone E-mail

Select the account associated with the card that needs to be replaced:*

xxx123456789

Last 4 Digits of the Cardholder's SSN:*

1111

Reason for Replacement:* Damaged Lost Stolen

Thank you for reaching out to us Angela. We will contact you within 2 business days of this request. We hope you have a wonderful day!

Submit

Cancel



Your form has been submitted successfully.

Quicken/QuickBooks

We are happy to provide you with two options to assist you in downloading your account data to your Quicken® program. UniBank has the following connection options for your Quicken software:

Quicken®/QuickBooks® Web Connect and **Quicken®/QuickBooks® Direct Connect**

Select Quicken/QuickBooks from the online services menu or from the Quick Links menu on the Home Page.

Complete self- enrollment by selecting software type and clicking Enroll.

▼ Direct Connect Self-Enrollment


Choose 'Quicken' if you use personal software such as Quicken. Choose 'QuickBooks' if you're a QuickBooks user.

Quicken®

QuickBooks®

Enroll

You will receive a confirmation that you are now authorized to access your accounts with the software.

 You are now authorized to access your accounts with business financial management software.

Return to the Quicken/QuickBooks from the online services menu to complete download. Select Account, Number of Days and Software type, then hit Download.

▼ Web Connect Download

Account:

x>123456789 ▼

Download:

30 Days 60 Days 90 Days 120 Days Other

Software:

QuickBooks ▼

Download

Manage Account Nicknames

To adjust account Nicknames, click on Manage Account Nicknames from the Online Services Menu.

Choose account and enter nickname in the appropriate box.

Click on Save.

***Please Note: Nickname will display for all users under the specific Organizations profile.**

▼ Manage Nicknames

Account	Account Name	Nickname
x3062	Muni Rel MMDA Acct	<input type="text" value="NEW NICKNAME"/>
x3706	Muni Payroll/Payable	<input type="text" value="NEW NICKNAME 2"/>

Agreements and Disclosures

Contact your Relationship Manager to request a copy of your specific Account Agreements & Disclosures.

My Profile

My Information:

Click on the appropriate option to update Email, Address, Phone Number or review specific User Login Activity.

Change Email Address

Click on change email address from the My Profile menu.

Your current email address will display.

Enter new email address and confirm new email address.

Click the update button.

▼ Change Email

Current Email:

test@unibank.com

New Email:

testing@unibank.com

Confirm:

testing@unibank.com

Update

Cancel

You will receive a confirmation message that your email address has been updated

 Your email address has been updated.

My Profile (continued)

Change Address

Click on change address from the My Profile menu.

Your current address will display.

Enter new address.

Click the update button.

▼ Address Change

Mailing Address:

Address Line 1:

Address Line 2:

City:

Country:

State:

ZIP Code:

You will receive a confirmation message that your address has been updated successfully.



Your address information has been updated successfully. Your updated address will appear upon your next login.

My Profile (continued)

Change Phone Number

Click on change phone number from the My Profile menu.

Your current phone numbers will display.

Add or Edit phone numbers.

Click the update button.

▼ Change Phone Number

Home Phone


Mobile Phone

Work Phone

Update

Cancel

You will receive a confirmation message that your profile has been updated successfully.

 Your profile has been updated successfully.

My Profile (continued)



User Activity

Click on User Activity from the My Profile menu.

The user activity report will allow you to keep track of any activity on your profile as well as any sub users for your organization.

▼ User Activity Report

Date Range:

Custom ▼ From: 06/05/2020  To: 07/06/2020 

User:

All Users ▼

Action:

All Actions ▼

Run Report

User	Date	IP Address	Action	Details
JSMITH1 (JSMITH)	07/6/2020 5:35 PM	10.167.195.205	Login	
MJOHNSON70 (MJOHNSON)	07/6/2020 5:35 PM	10.167.195.205	Attempted Login	

Security Information:

Provide the ability to update User ID, change Password and Security Information.

Change User ID

Click on change User ID in the My Profile menu.

Your current User ID will display.

Enter New User ID and Confirm User ID.

Click the update button.

▼ Change User ID

Your user ID and password are used to log in to this site. This page allows you to change your user ID. Your user ID is not case sensitive.

Existing User ID:
SJOHNSON

New User ID:

SJOHNSON01

Confirm User ID:

SJOHNSON01

Update

Cancel

You will receive a confirmation message that your User ID has been changed.

 Your user ID has been changed to SJOHNSON01.

My Profile (continued)

Change Password

Click on Change Password My Profile menu.

Enter your current password.

Enter new password and confirm new password.

Click the update button.

▼ Change Password


Current Password:

New Password:

Confirm Password:

Update

Cancel

 Your password has been changed.

Mobile Banking:

Visit your App Store to download the UniBank Mobile App!



Messages

In the Service Center sub-menu click on Messages

To send a secure message through the Service Center, click on Compose New. Select the appropriate Category, Account (if applicable), and enter a Subject, Message and attachment if available. Check off the box to receive notifications regarding the message. Click on Send.

Inbox					Compose New
Subject	Tracking ID	Created	Last Updated ^	Category	
My Subject Line Here	648760597	02/28/2020 10:57 AM	02/28/2020 10:57 AM	General Inquiry	

Message Detail

Category: General Inquiry

Status: New

Account (if applicable): — Select an Account —

Subject: My Subject Line Here

Message: My Message Here.

Add Attachment




Send notification on receiving a response to this message.

A confirmation will appear on the upper section of the screen to alert you the message was sent.

Message was sent successfully. When contacting us regarding this message, please use Tracking ID: 648760597

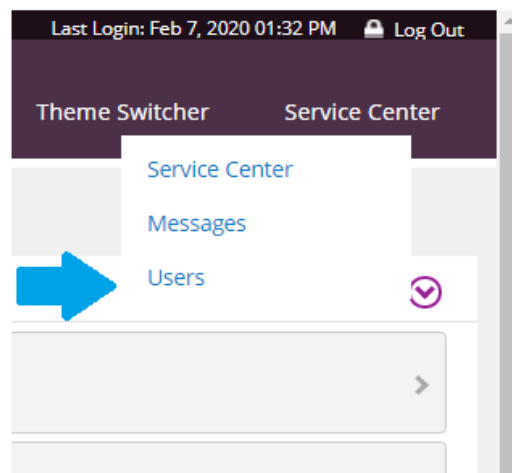
Users

In the Service Center sub-menu click on Users:

-  Edit User Details by selecting the **pencil icon** located on the specific user profile. You can also unlock a disabled user from this screen.
-  Edit User Entitlements by selecting the **key icon** location on the specific user profile.
-  Delete users by selecting the **trash basket icon**. You will be prompted to verifying you would like to delete the specific user. Click on OK or Cancel.

Adding a User

From the Online Banking home screen, click on the Service Center, then click on Users.



Click on [Add User](#).

Name	User Type	User ID	Status	Last Login	User Type
AMY ADAMS	Business User	AADAMS	Active	02/07/2020 1:54:49 PM	User
JOHN JONES	Business User (Manager)	JJONES	Active	02/27/2020 4:12:32 PM	Administrator

[Add User](#)

Adding a User

Enter necessary User Details.

Click on Save.

User Details

* User ID: RHARRIS

Reset Password

Status: Active Disabled Locked

Personal Information

Title: _____

* First Name: ROBERT

Middle Name: _____

* Last Name: HARRIS

Suffix: _____

Birth Date: _____

Social Security Number: _____

Contact Information

* Email Address: RHARRIS@TESTEMAIL.CC

* Home Phone: (508) 887 - 1157

Mobile Phone: () - -

Work Phone: () - - ext. _____

Home Address

Address Line 1: _____

Address Line 2: _____

City: _____

State: _____

ZIP Code: _____

[Save](#) [Cancel](#)

After saving user details, entitlements can be selected. Depending on the type of access you wish to give the user, click on the box next to the specific access which will expand entitlement options.

Entitlements:

If you want to enable Administrator access for the new user, check off the *Manager Users* box. **Important:** Administrators can Add, Edit and Delete other users.

Entitlements	
Manage Users	<input type="checkbox"/>

ACH and/or Wire access can be added to new users only if it is an existing function for the organization. To add ACH and/or Wire access or increase your limits, contact your Relationship Manager.

Please Note: When assigning entitlements for ACH and/or Wires, limits may be set equal to or lower than the current established limits.

After you have assigned ACH or Wire access to a user, please contact your relationship manager or support team to request an RSA Token.

Entitlement	Limit	<input type="checkbox"/>
Accounts		<input checked="" type="checkbox"/>
Deposit Checks		<input type="checkbox"/>
Merchant Capture		<input checked="" type="checkbox"/>
Positive Pay		<input checked="" type="checkbox"/>
Stop Payments		<input checked="" type="checkbox"/>
View RDC Images		<input type="checkbox"/>
ACH		<input checked="" type="checkbox"/>
Maximum Transaction Credit	\$ 1200000.00	1,200,000.00
Maximum Transaction Debit	\$ 1200000.00	1,200,000.00
Maximum Batch Credit	\$ 1200000.00	1,200,000.00
Maximum Batch Debit	\$ 1200000.00	1,200,000.00
Number of Approvals Required		0
Ach Ctx Report Access		<input checked="" type="checkbox"/>
ACH Pass-Thru		<input checked="" type="checkbox"/>
Number of Approvals Required		0
Approve and Reject		<input checked="" type="checkbox"/>
COCC ACH Pass-Thru Limits		<input checked="" type="checkbox"/>
Upload		<input checked="" type="checkbox"/>
ACH Returns Report Access		<input checked="" type="checkbox"/>
Approve and Reject		<input checked="" type="checkbox"/>
Authorized ACH Companies		<input checked="" type="checkbox"/>
Initiate		<input checked="" type="checkbox"/>
Maximum Daily User Credit	\$ 1200000.00	1,200,000.00
Maximum Daily User Debit	\$ 1200000.00	1,200,000.00
Maximum Daily Business Credit	\$ 1200000.00	1,200,000.00
Maximum Daily Business Debit	\$ 1200000.00	1,200,000.00
Recurring		<input checked="" type="checkbox"/>
Manage Batches & Participants		<input checked="" type="checkbox"/>
Batch Import		<input checked="" type="checkbox"/>
One-Time Approval for Recurring Batch		<input type="checkbox"/>

Accounts	All Entitlements	Stop Payments	View	ACH From	ACH To	eStatements	eNotices	Transfer From	Transfer To	Wires
Select All Accounts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
- ONLINE PAYMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>					
- ONLINE DEPUTY	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>					
- ONLINE SCHOOL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
- PAYABLES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					

Save Cancel

Entitlements

Review Entitlements.

Click Save to accept entitlements or Cancel if you do not want to grant the entitlements.

To Edit entitlements, click the Key Icon 

Make changes by checking/unchecking appropriate boxes.

Click Save.

Review the changes.

Click Confirm to accept changes.

▼ Entitlements for Jane Smith

Please review the following changes.

Entitlement	Limit	Old	New
ACH Whitelist		✗	✓
eStatements			
- ONLINE PAYMENT		✗	✓
- ONLINE DEPUTY		✗	✓
- ONLINE SCHOOL		✗	✓
- PAYABLES		✗	✓

Confirm

Edit

Cancel

Exporting User Entitlements

This feature will allow you to view and/or export the current entitlements for each user within the organization.

1. Select Users under the Service Center Menu – A list of current users will appear
2. Check the box of the individual user(s) you wish to export or to select all users, check the box next to Name
3. Select the export format (Excel or PDF) in the drop-down box and select export.
4. Exported document will be available to view/save and print.

The screenshot shows the Service Center navigation menu with 'Users' selected. Below, the 'Entitlement Export' section displays a table of users with checkboxes for selection. A dropdown menu is open, showing 'Excel' and 'PDF' options. Blue arrows point to the checkboxes for 'Name', 'JOE SMITH', and 'JIM JOHNSON'.

<input type="checkbox"/> Name	User Name
<input type="checkbox"/> JOE SMITH	JSMITH123
<input type="checkbox"/> JIM JOHNSON	JJOHNSON007

Export Format:

Options:

Contact

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