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UNIBANK

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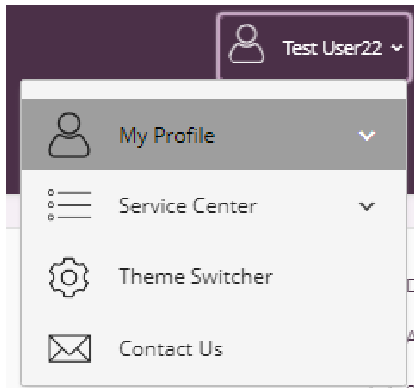
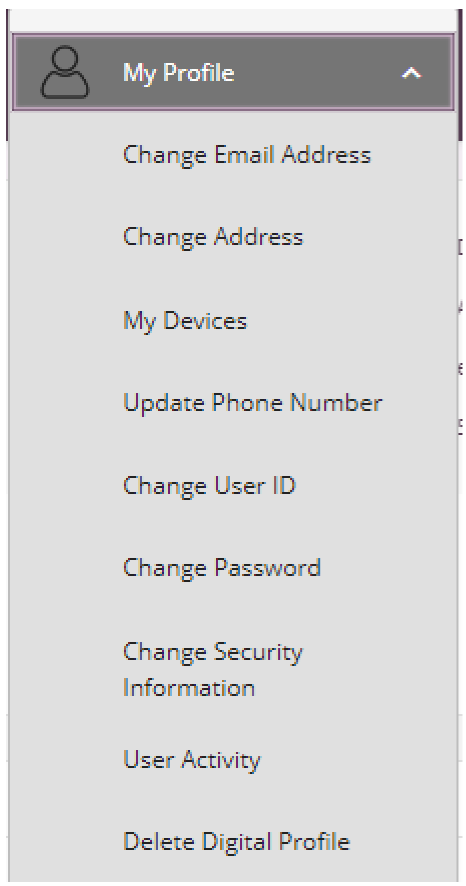
MY PROFILE

My Profile allows you to change your Email, Address, and User ID. You can also update your phone number, security information and view User activity. The My Profile link is located on the home page User ID menu dropdown.

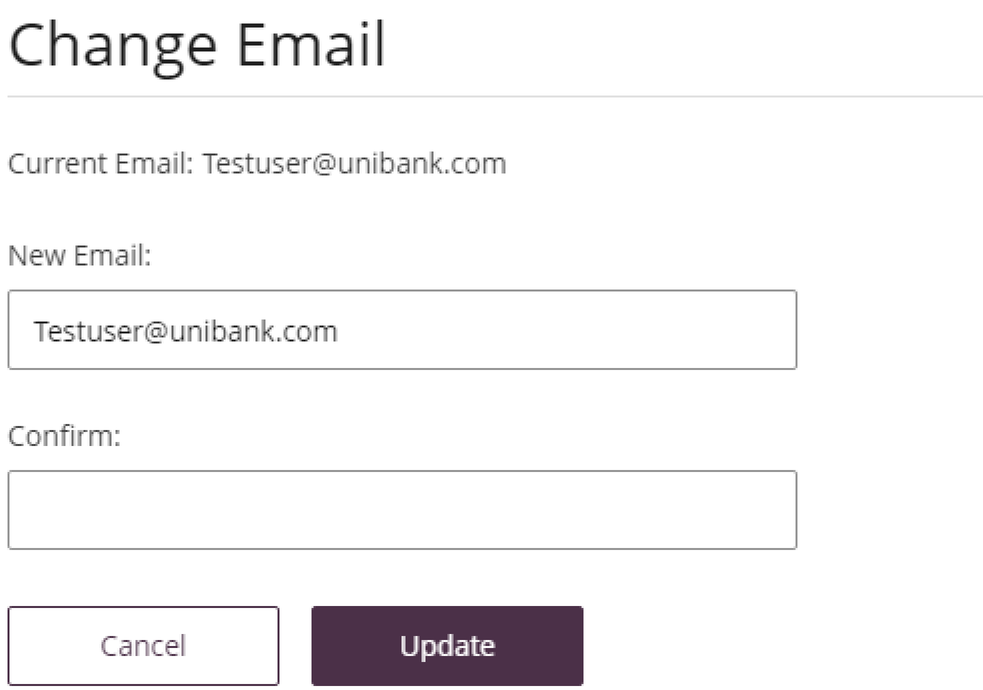




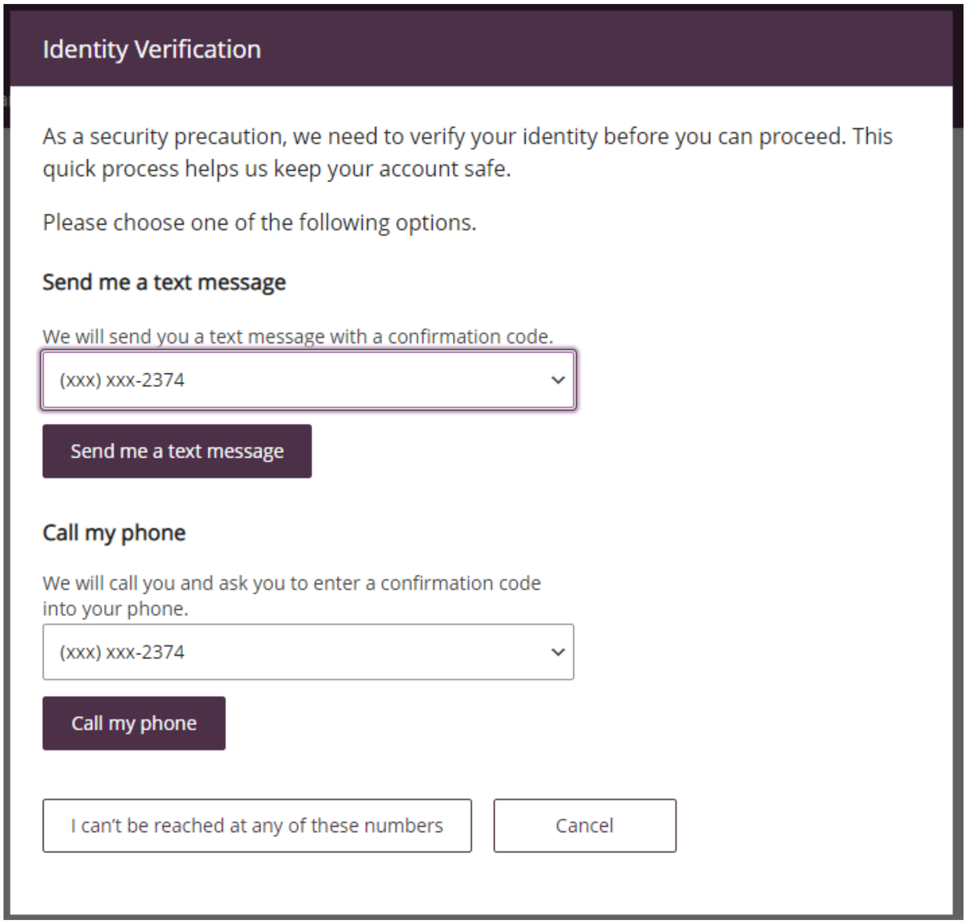
Click on the appropriate option to update Email, Address, User ID, Phone Number or review specific User Login Activity.

MY PROFILE – UPDATE EMAIL ADDRESS

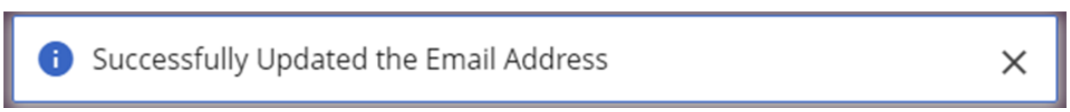
- Click on change email address from the My Profile menu. Your current email address will display.
- Enter new email address and confirm new email address.
- Click the update button.



For security purposes, you will then receive the Identity Verification screen and choose to receive either a text or a call to verify your identity.

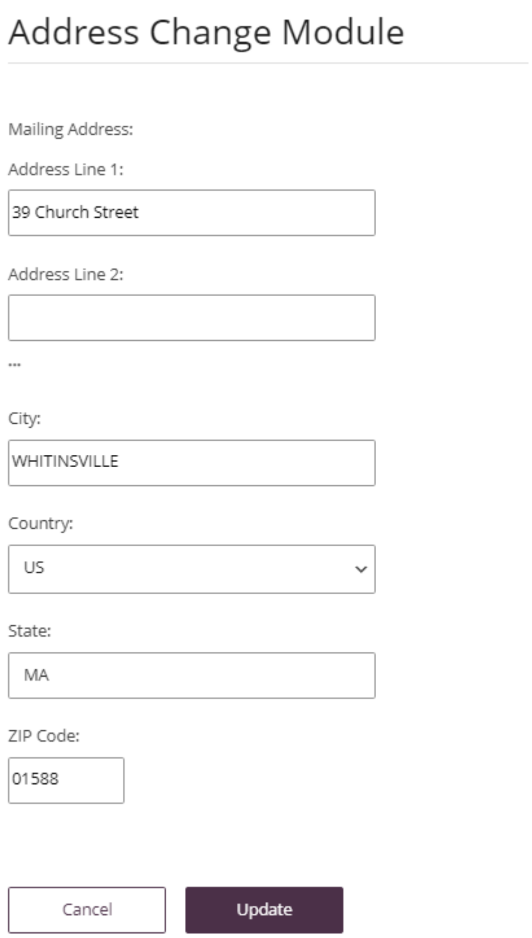


Once you have verified your identity, you will receive a confirmation message that your email address has been updated.

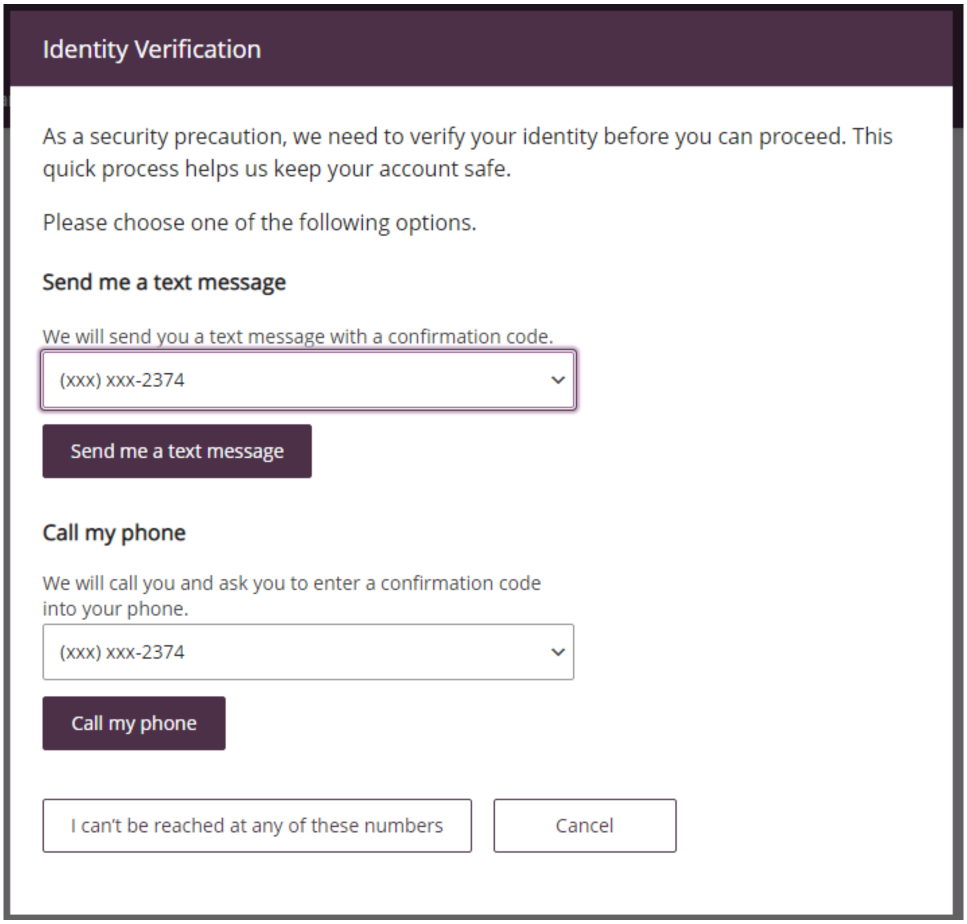


MY PROFILE – UPDATE ADDRESS

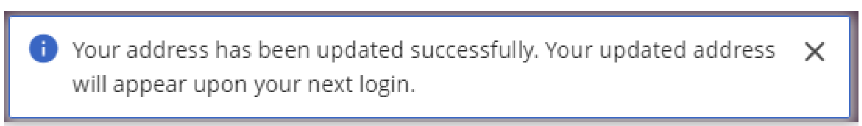
- Click on change address from the My Profile menu. Your current address will display.
- Enter new address.
- Click the update button.



For security purposes, you will then receive the Identity Verification screen and choose to receive either a text or a call to verify your identity.

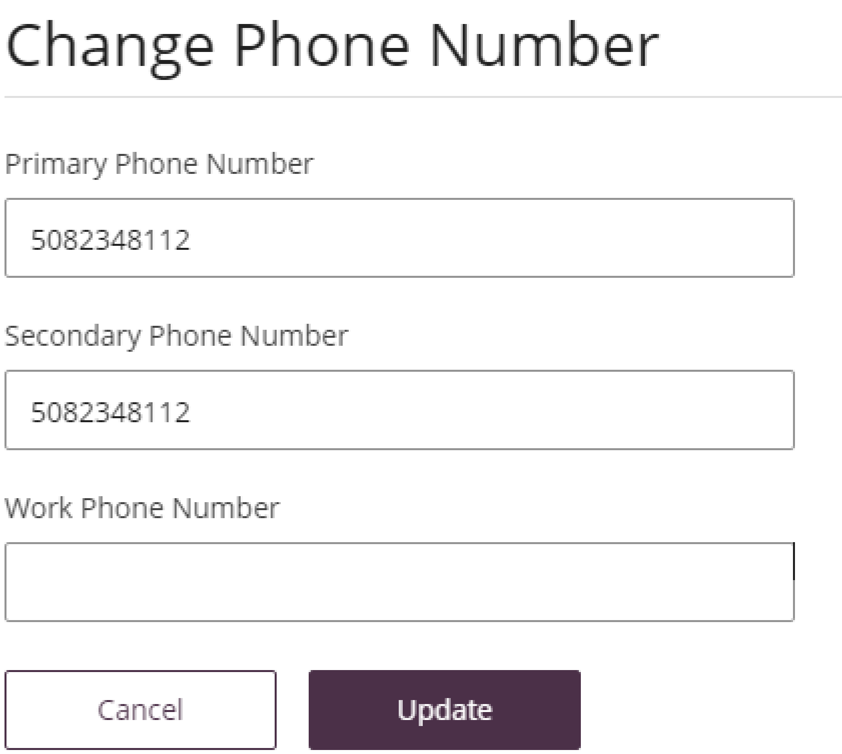


Once you have verified your identity, you will receive a confirmation message that your email address has been updated.

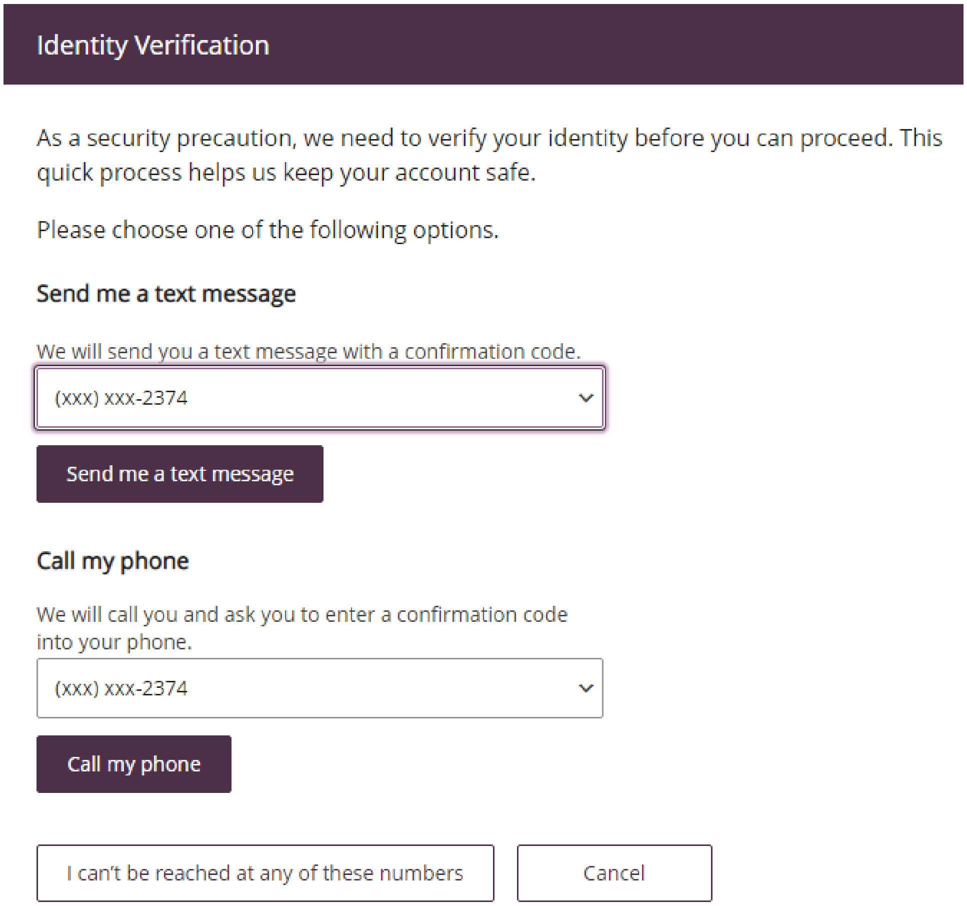


MY PROFILE – UPDATE PHONE NUMBER

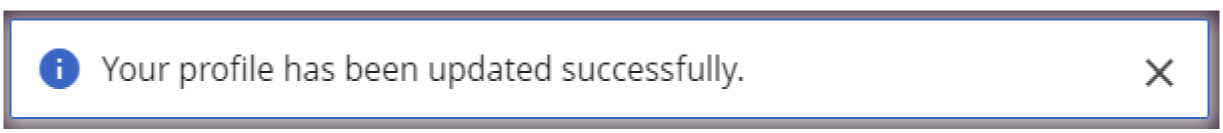
- Click on update phone number from the My Profile menu. Your current phone numbers will display.
- Add or Edit phone numbers.
- Click the update button.



For security purposes, you will then receive the Identity Verification screen and choose to receive either a text or a call to verify your identity.

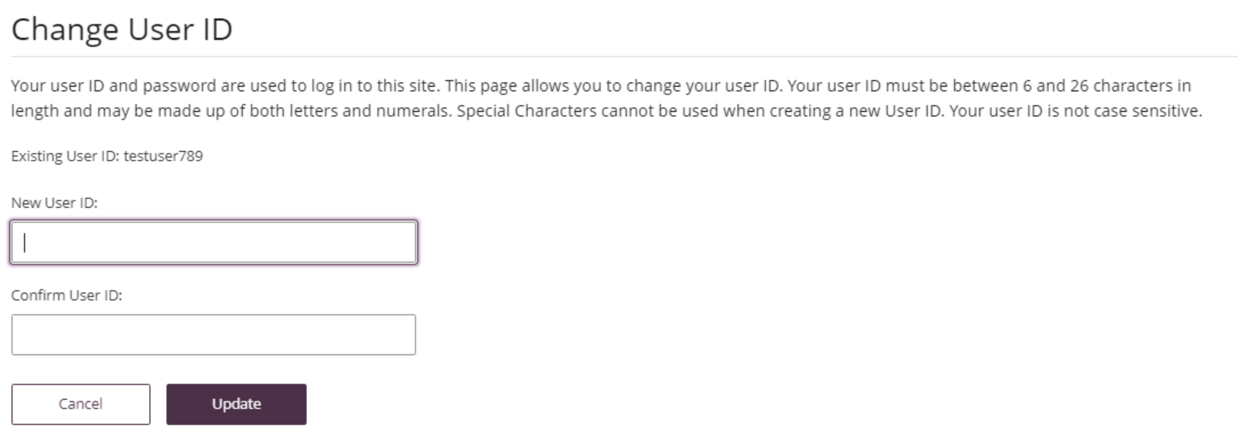


Once you have verified your identity, you will receive a confirmation message that your phone number has been updated.

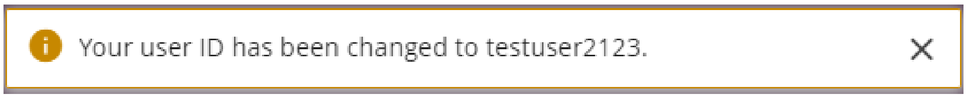


MY PROFILE – CHANGE USER ID

- 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.

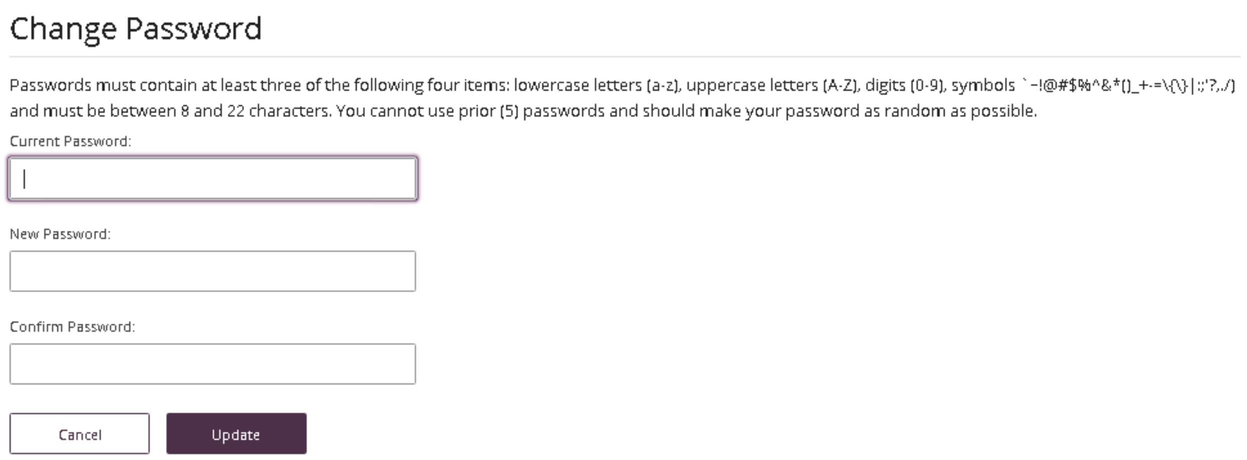


You will receive a confirmation message that your User ID has been changed.



MY PROFILE – CHANGE PASSWORD

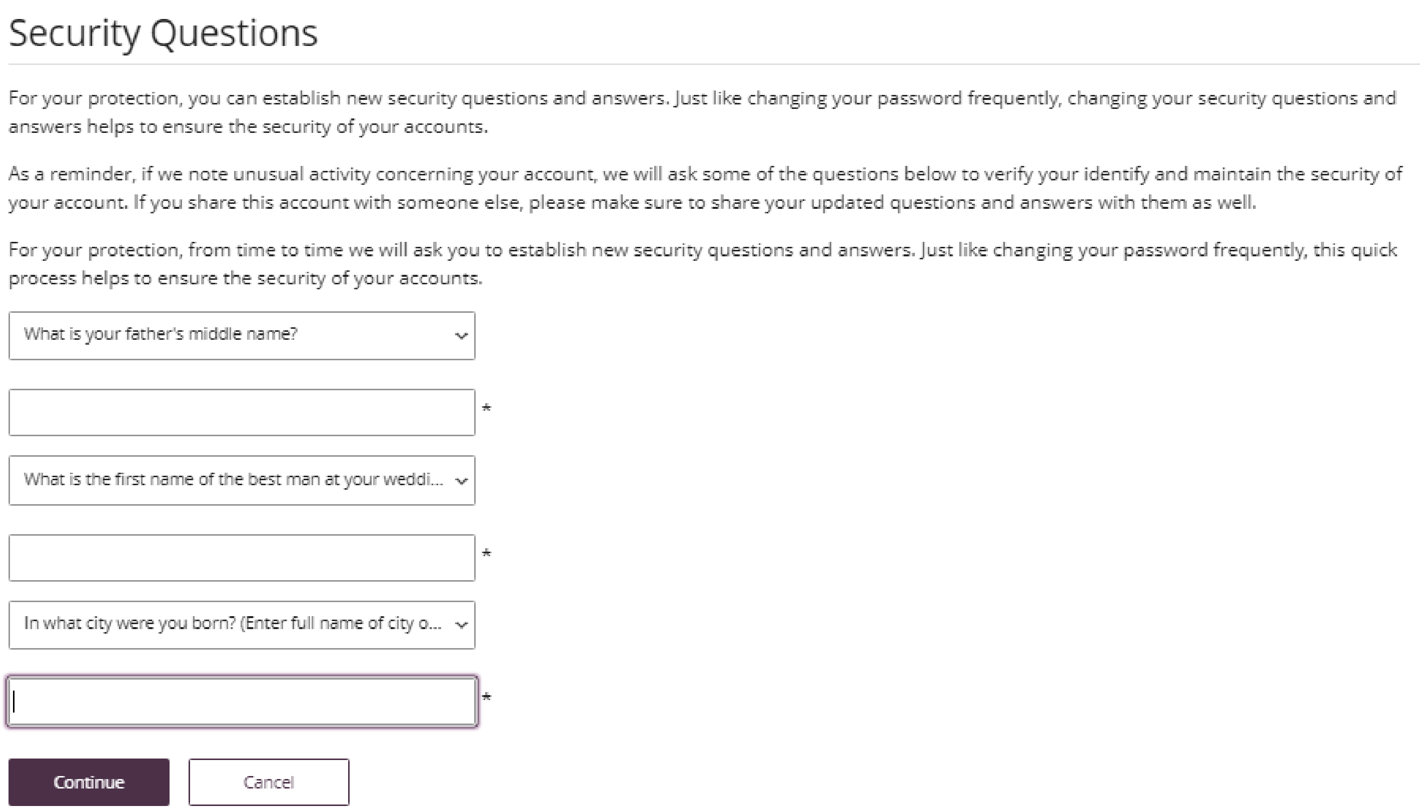
- Click on Change Password My Profile menu.
- Enter your current password.
- Enter new password and confirm new password.
- Click the update button.



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

MY PROFILE – CHANGE SECURITY INFORMATION

- Click on Change Security Information My Profile menu.
- Choose your security questions.
- Enter new answers.
- Click the update button.


Security Questions

For your protection, you can establish new security questions and answers. Just like changing your password frequently, changing your security questions and answers helps to ensure the security of your accounts.

As a reminder, if we note unusual activity concerning your account, we will ask some of the questions below to verify your identify and maintain the security of your account. If you share this account with someone else, please make sure to share your updated questions and answers with them as well.

For your protection, from time to time we will ask you to establish new security questions and answers. Just like changing your password frequently, this quick process helps to ensure the security of your accounts.

What is your father's middle name?

*

What is the first name of the best man at your weddi...

*

In what city were you born? (Enter full name of city o...

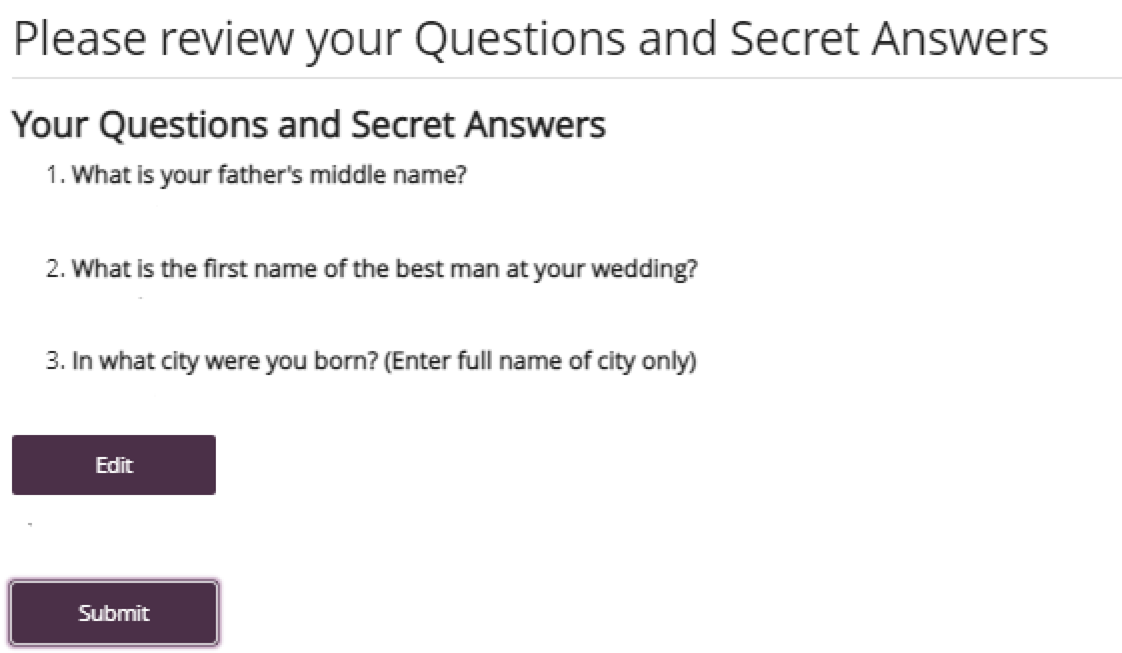
*

Continue

Cancel

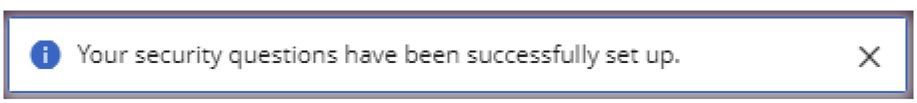
After clicking the update button, you will be directed to the Review Questions and Secret Answers page.

You can either Edit your answers or Submit.



To protect your account, you will be asked to re-enter your password.

You will receive a confirmation message that your security questions have been changed.



MY PROFILE – USER ACTIVITY

Click on User Activity from the My Profile menu.

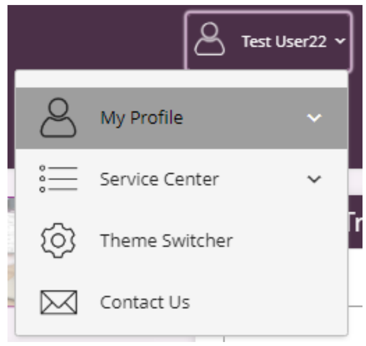
The user activity report will allow you to keep track of any activity on your profile.

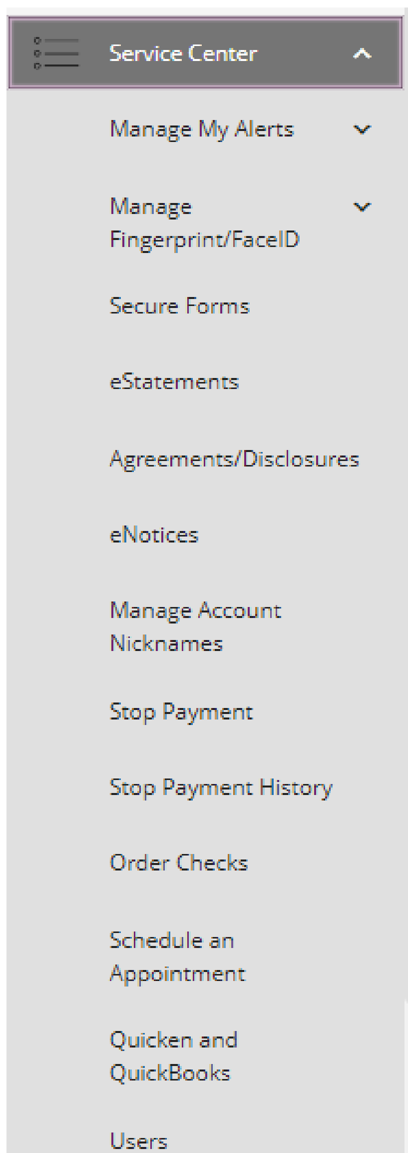
User Activity

Date	Action
09/20/2022 11:52 AM	Logged in
09/16/2022 3:38 PM	Logged out
09/16/2022 3:37 PM	Logged in
09/16/2022 1:39 PM	Logged in
09/16/2022 1:12 PM	Logged out
09/16/2022 1:04 PM	Changed Login Name
09/16/2022 1:03 PM	Logged in
09/16/2022 1:03 PM	Logged out

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 User ID menu dropdown.



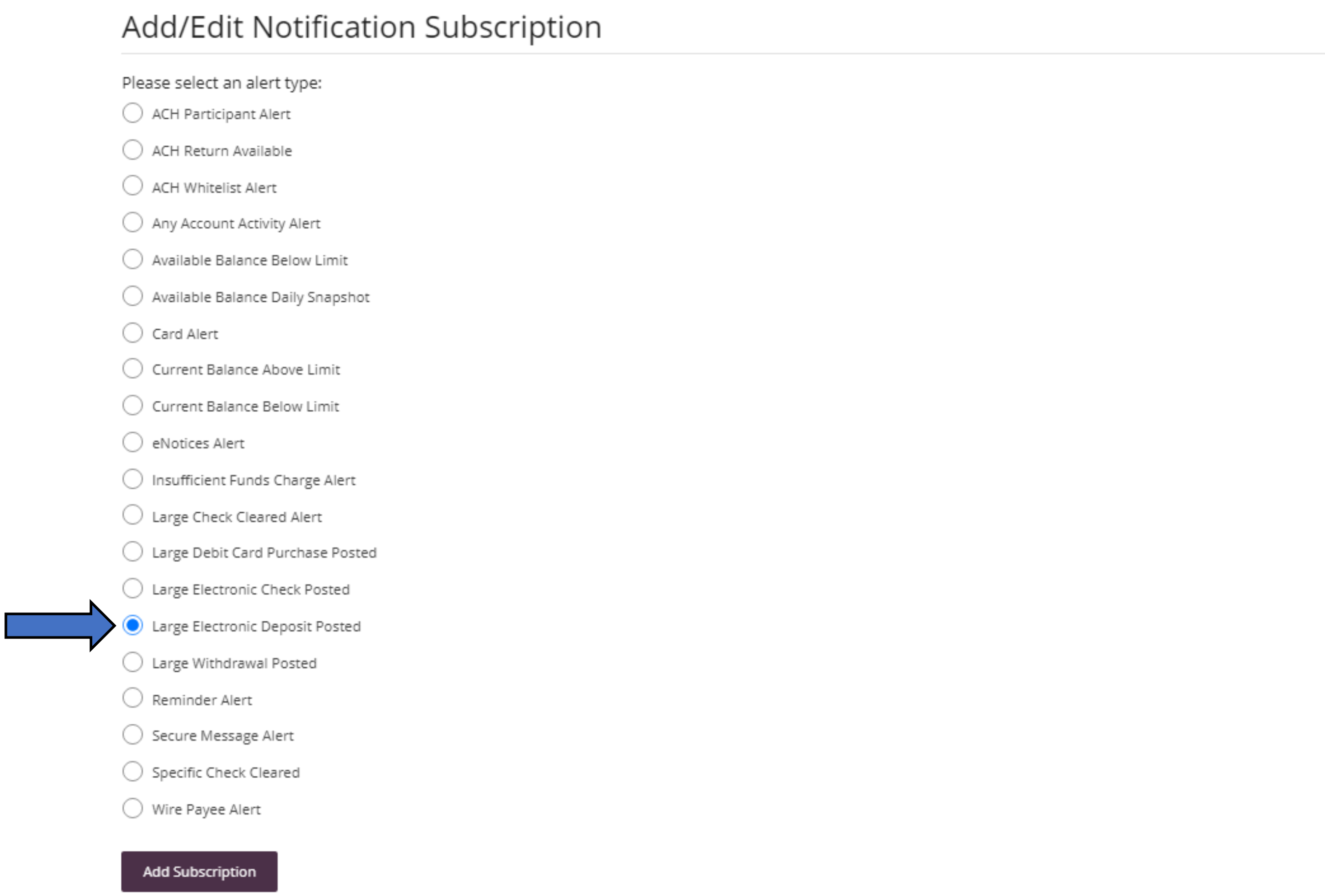


SERVICE - ALERTS

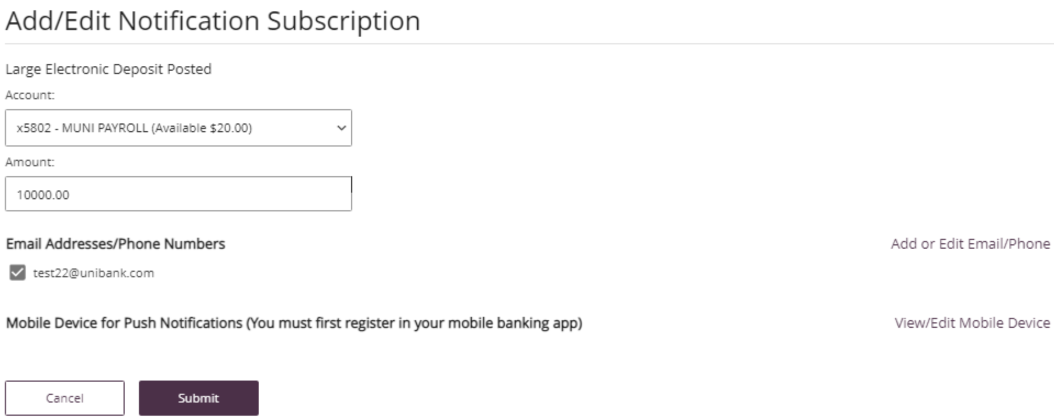
Alerts allow you to Create, Change or View Alert activity.

Creating an Alert-

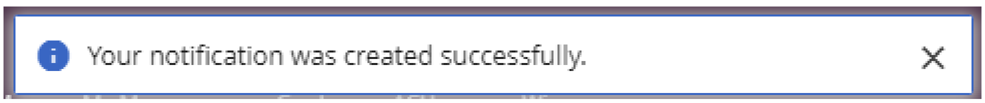
- Click on create an alert from the menu box.
- Click on the appropriate radio button.
- Click Add Subscription.



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



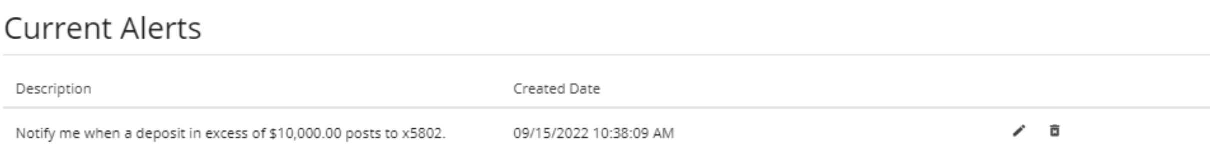
You will receive an acknowledgement at the top of the page stating your notification was created successfully.



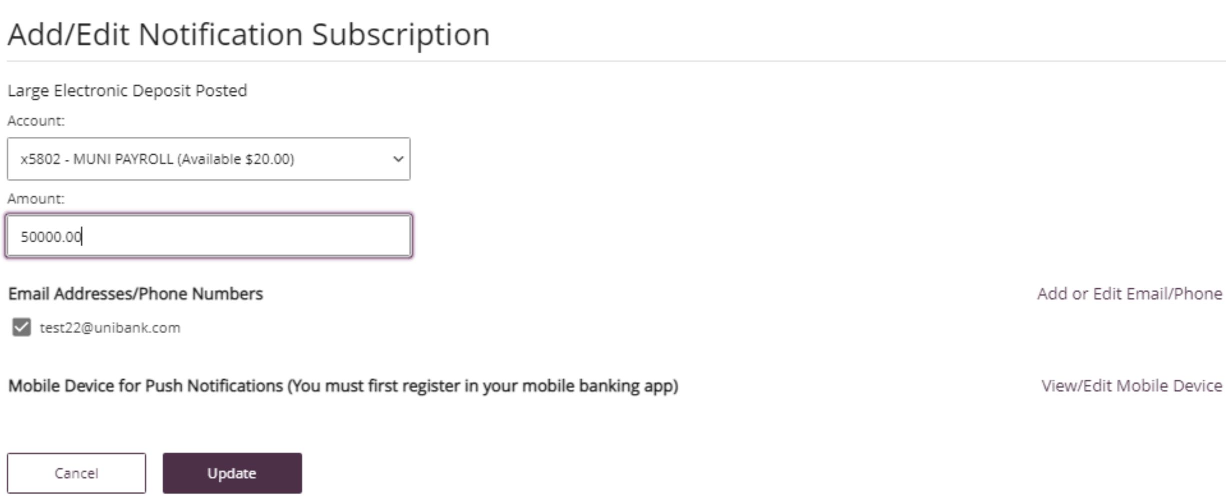
SERVICE CENTER – MY ALERTS

Change or View an Alert

Active alerts will be displayed.



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



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

Your notification was created successfully.

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

SERVICE CENTER – SECURE FORMS

Provides the ability to 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.

Secure Forms List

ATM/Debit Card Forms

Debit Card Replacement Request Form	Please utilize this form to inform us that your card is damaged beyond repair, lost, or stolen and needs to be replaced.
Debit/ATM Card Application	Request a Debit/ATM Card linked to a current checking account.
Travel Notification	Let us know about your travel plans and Debit/ATM Card use by using this form.

Replace ATM/Debit Card

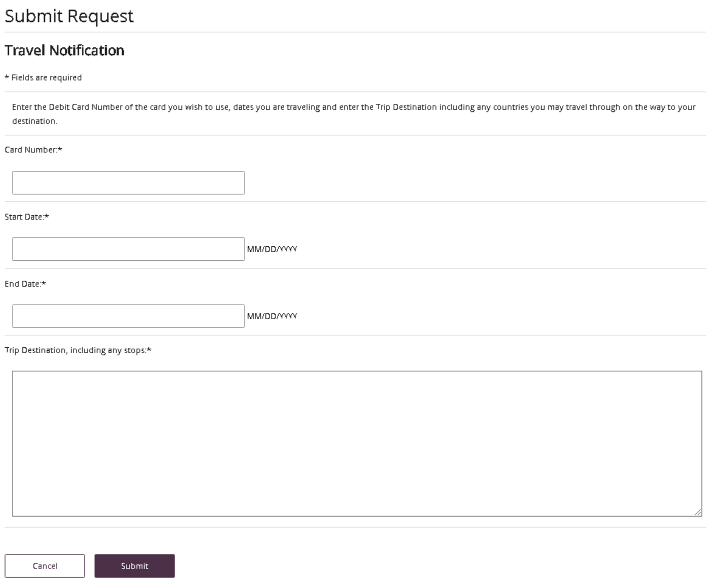
*Please Note: Municipal customers must contact their Relationship Manager or Municipal Support Team for a replacement Debit Card.

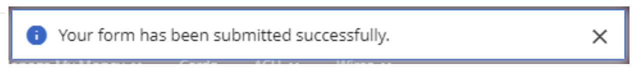
Debit/ATM Card Application

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

Travel Plans

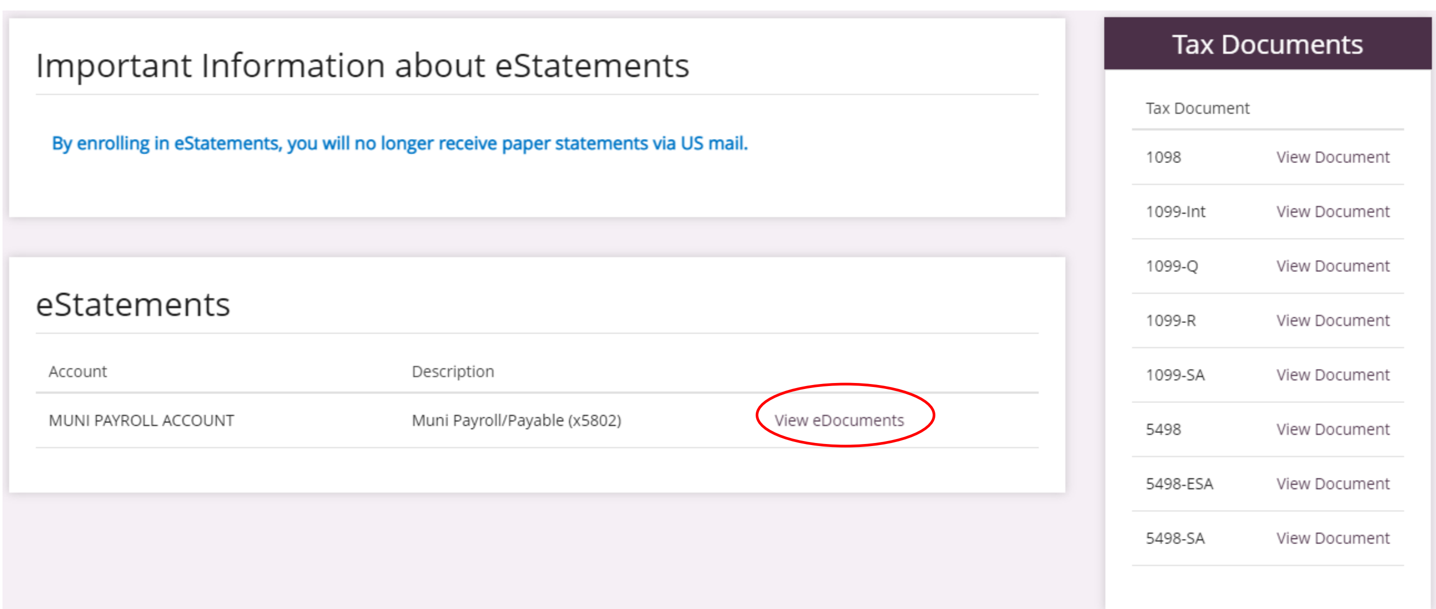
Click on travel Notification in the menu. Enter required information and hit submit.





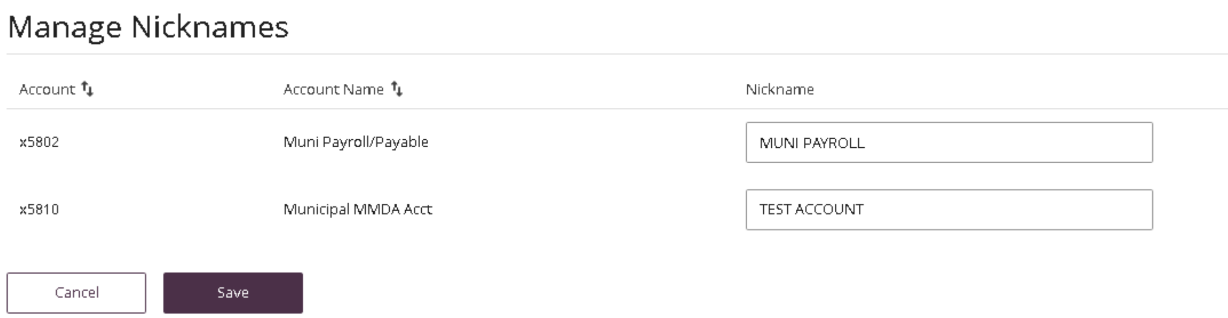
SERVICE CENTER – eSTATEMENTS

To enroll in eStatements select View eDocuments.   A new window will open to the Account eStatement Enrollment page. Follow prompts to complete enrollment.



SERVICE CENTER – MANAGE ACCOUNT NICKNAMES

To adjust account Nicknames, click on Manage Account Nicknames from the Service Center Menu.
Choose account and enter nickname in the appropriate box.
Click on Save.

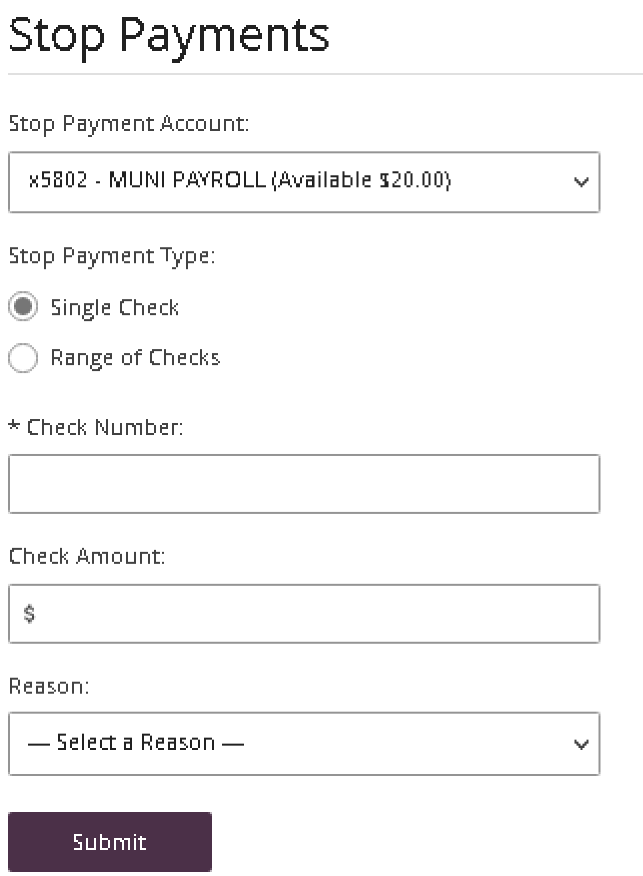


You will receive an acknowledgement at the top of the page stating your delivery preferences was updated successfully.

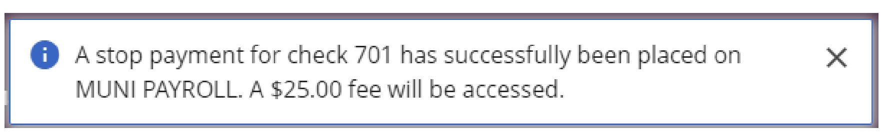
SERVICE CENTER – STOP PAYMENT/STOP PAYMENT HISTORY

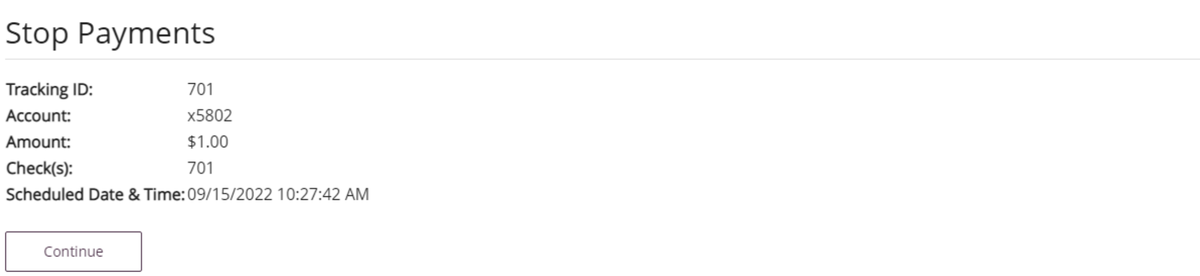
Stop Payment on a Check:

- Click on Stop Payment link located in the Service Center menu.
- Fill out the necessary fields.
- Click on Submit to verify Stop Payment details.



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.





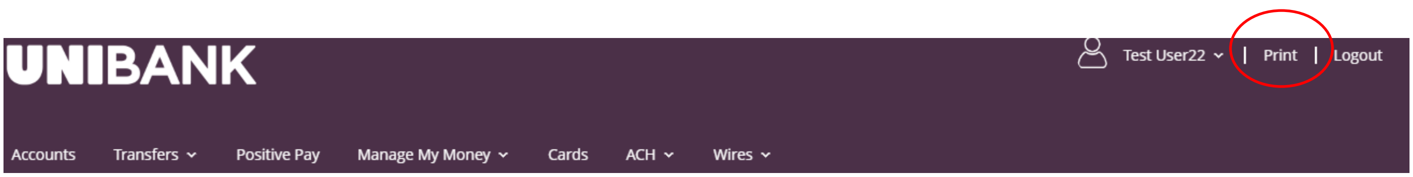
Click on Continue to proceed.

SERVICE CENTER – STOP PAYMENT HISTORY

Click on Stop Payment History link located in the Service Center menu and your stop payment history will be displayed. To print History, click on the "Print" link at the top right of the banner.

Stop Payment History

Account:	MUNI PAYROLL ACCOUNT - x5802
Date:	09/15/2022
Starting Check Number:	701
Ending Check Number:	701
Amount:	$1.00
Account:	MUNI PAYROLL ACCOUNT - x5802
Date:	09/13/2022
Starting Check Number:	151
Ending Check Number:	151
Amount:	$1.00



SERVICE CENTER – QUICKEN AND QUICKBOOKS

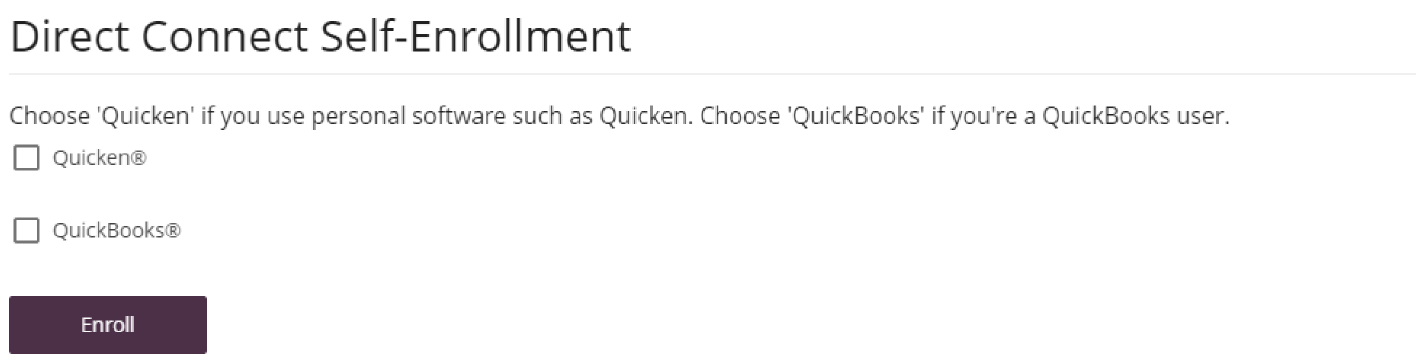
<u>Quicken/QuickBooks</u>

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:

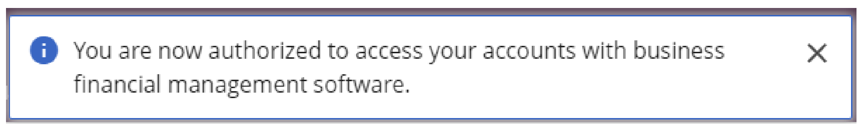
Quicken®/QuickBooks® Web Connect and **Quicken®/QuickBooks® Direct Connect**

Select Quicken/QuickBooks from the Service Center menu.

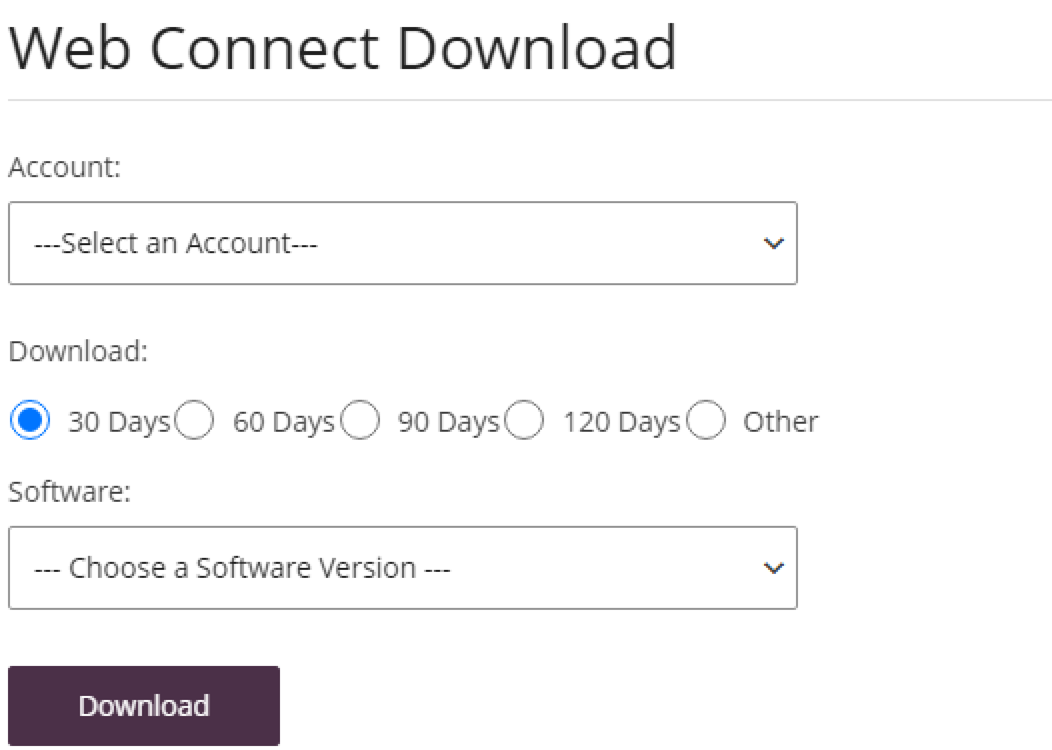
Complete self- enrollment by selecting software type and clicking Enroll.



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



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



SERVICE CENTER – 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.

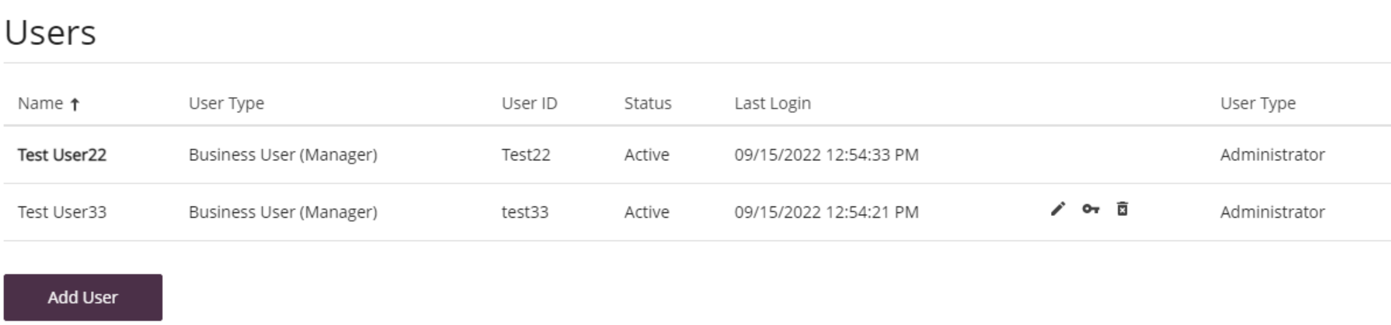
Edit User Entitlements by selecting the key icon location on the specific user profile.

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.

<u>Adding a User</u>

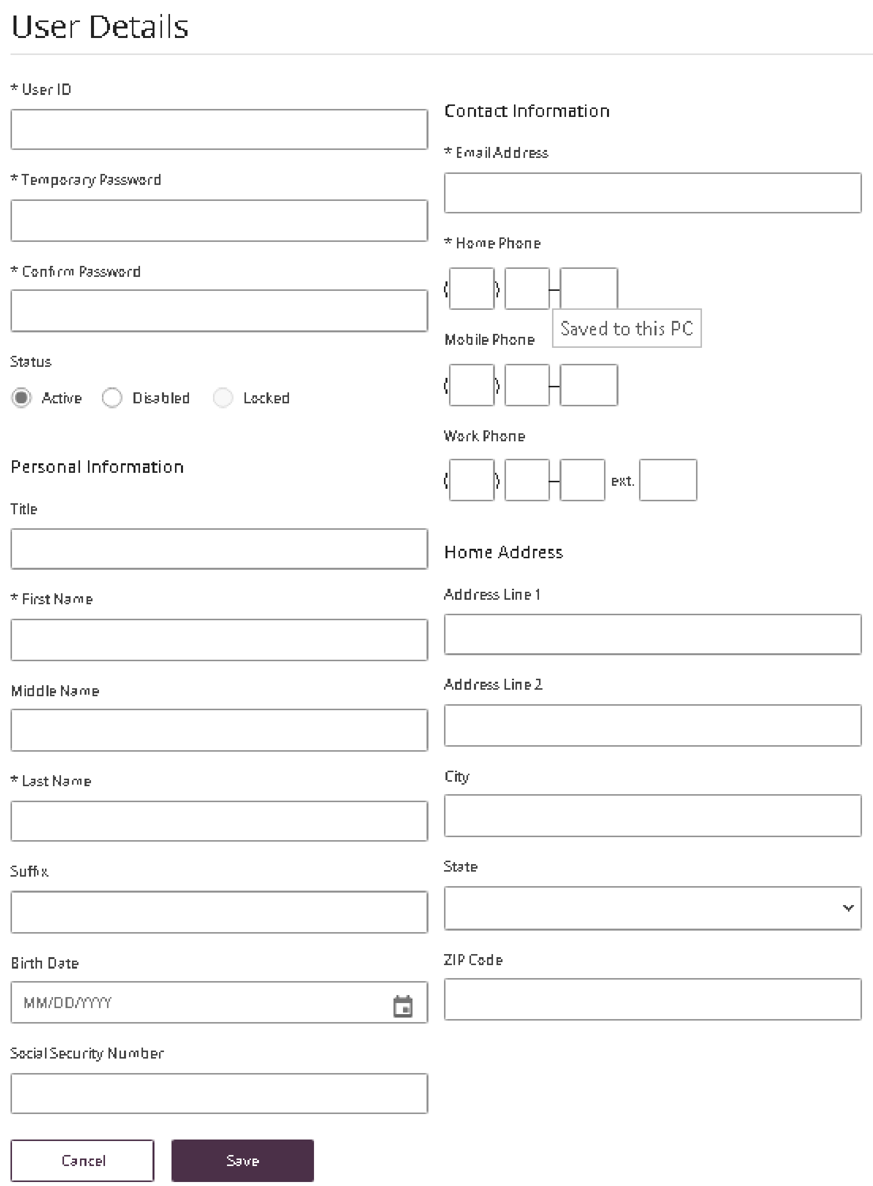
From the home page User ID menu dropdown, click on the Service Center, then click on Users.

Click on Add User.

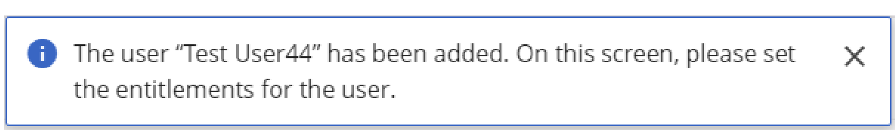


Users

Name ↑	User Type	User ID	Status	Last Login		User Type
Test User22	Business User (Manager)	Test22	Active	09/15/2022 12:54:33 PM		Administrator
Test User33	Business User (Manager)	test33	Active	09/15/2022 12:54:21 PM		Administrator



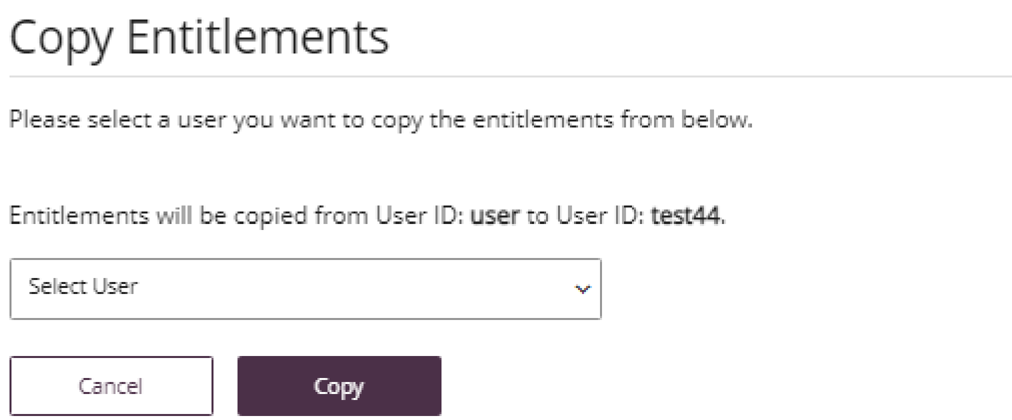
Enter necessary User Details.
Click on Save.



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.

<u>Entitlements:</u>

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.



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.

Entitlements for Test User44

Entitlement	Limit	☐
Accounts		☑
BAI2 Export		☑
Positive Pay		☐
Stop Payments		☑
ACH		☑
Maximum Transaction Credit	$ 10.00	10.00
Maximum Transaction Debit	$ 10.00	10.00
Maximum Batch Credit	$ 10.00	10.00
Maximum Batch Debit	$ 10.00	10.00
Number of Approvals Required		1

Accounts	All Entitlements	Stop Payments	View	ACH From	ACH To	eStatements	eNotices	Transfer From	Transfer To	Wires
Select All Accounts		☐	☐	☐	☐	☐	☑	☑	☑	☑
x5802 - TEST ACCOUNT	☐	☐	☐	☐	☐	☐				
x5810 - TEST ACCOUNT	☐	☐	☐	☐	☐	☐				

Cancel Save

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 Test User44

Please review the following changes.

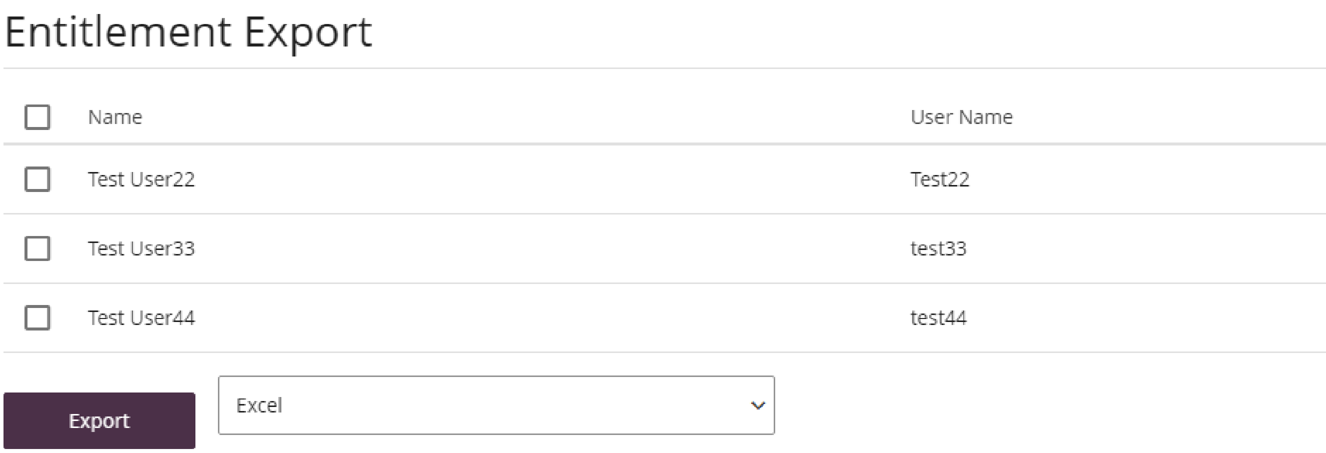
Entitlement	Limit	Old	New
Accounts			
Stop Payments			
Stop Payments			
x5802 - TEST ACCOUNT		✕	
x5810 - TEST ACCOUNT		✕	
View			
x5802 - TEST ACCOUNT		✕	
x5810 - TEST ACCOUNT		✕	
Transfers		✕	
Maximum Transaction Limit	$ 20000000.00	0.00	20,000,000.00
Maximum Daily Limit	$ 20000000.00	0.00	20,000,000.00

Cancel | Edit | Confirm

Exporting User Entitlements

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

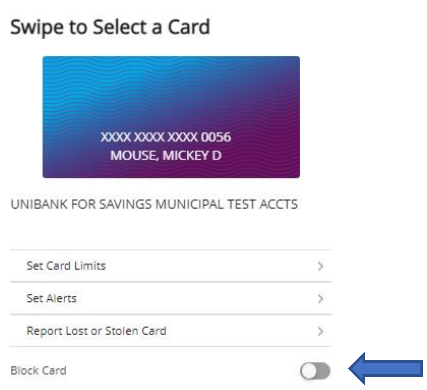
- Select Users under the Service Center Menu – Scroll down to Entitlement Export section and a list of current users will appear.
- Check the box of the individual user(s) you wish to export or to select all users, check the box next to Name.
- Select the export format (Excel or PDF) in the drop-down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



CARDS

Block/Unblock

Click "Cards." A list of current cards will be displayed. Click the Block Card toggle to process your request.

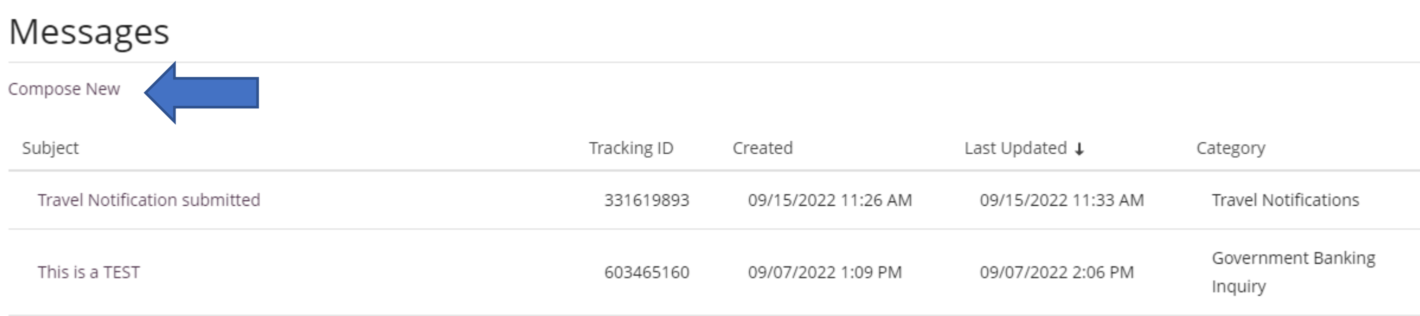


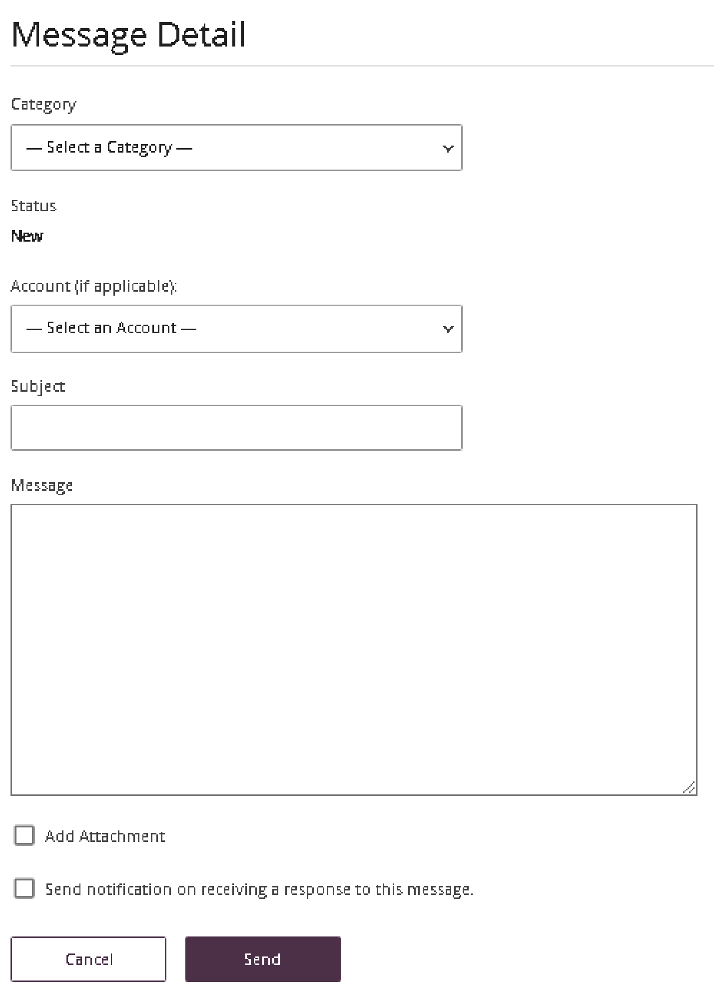
The Block Card toggle button will show purple when card has been successfully blocked.

Messages

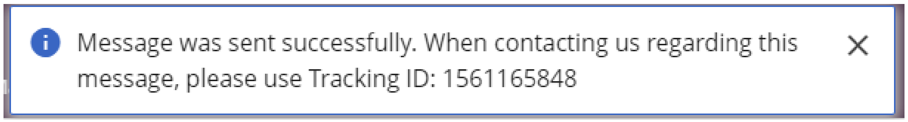
The Contact Us link is located on the home page User ID menu dropdown.

To send a secure message through the Contact Us, click on Contact via Secure Message. 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.





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



Agreements and Disclosures

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

Contact

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