

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

UNIBANK

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Logging On

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

1. Enter your User ID and then click Continue.
2. The second screen will prompt you to enter your Password. Select Log In.
NOTE: If you pre-registered prior to March 4, 2020, please remember to use the password you established as part of the pre-registration process.

If you DID NOT pre-register, you will need to enter a temporary password the first time you log in to Online Banking. The temporary password will be the last 4 digits of your organization's Tax ID Number (TIN) and the zip code of the organization.

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

The image displays two screenshots of the UNIBANK login interface. The first screenshot, titled 'Please enter your User ID', features a text input field with 'TestUser' entered, a 'Remember my user ID' checkbox, and a blue 'Continue' button. Below the input field is a 'Forgot your password?' link. At the bottom, there are links for 'Register - Personal', 'Sign In Problems FAQ', and 'Supported Browsers'. The second screenshot, titled 'Secure Login', shows the 'User ID' field with 'TestUser' and the 'Password' field. It includes a 'Forgot Your Password?' link and two blue buttons: 'Log In' and 'Back'. Both screens have a dark purple header with the 'UNIBANK' logo.

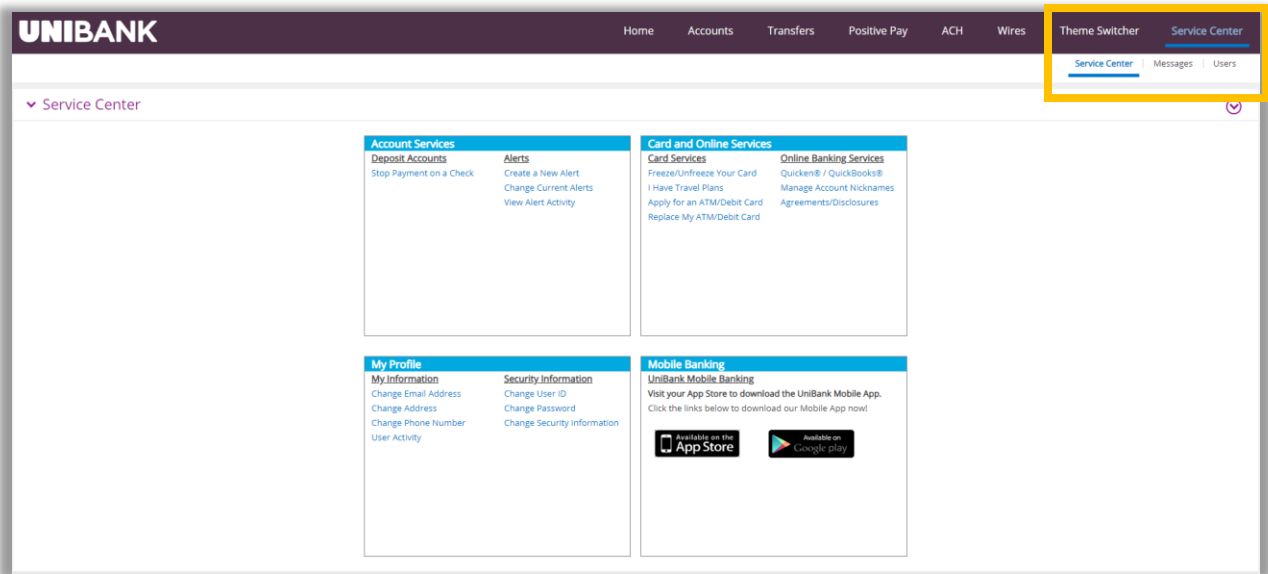
Service Center

The Service Center allows you to manage your information in one convenient location.

The Service Center allows you to:

- Stop payments on a check
- Create and Manage Alerts
- Manage ATM/Debit Cards
- Access Quicken/QuickBooks
- Manage Account Nicknames
- Manage Profile
 - Update Information (Email address, Mailing Address, Phone Number, User Activity)
 - Security Settings (User ID, Password, Security Questions)
- Send Secure Message to UniBank
- Manage Users, Export User Entitlements and Review User Activity

Service Center



User Setup

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



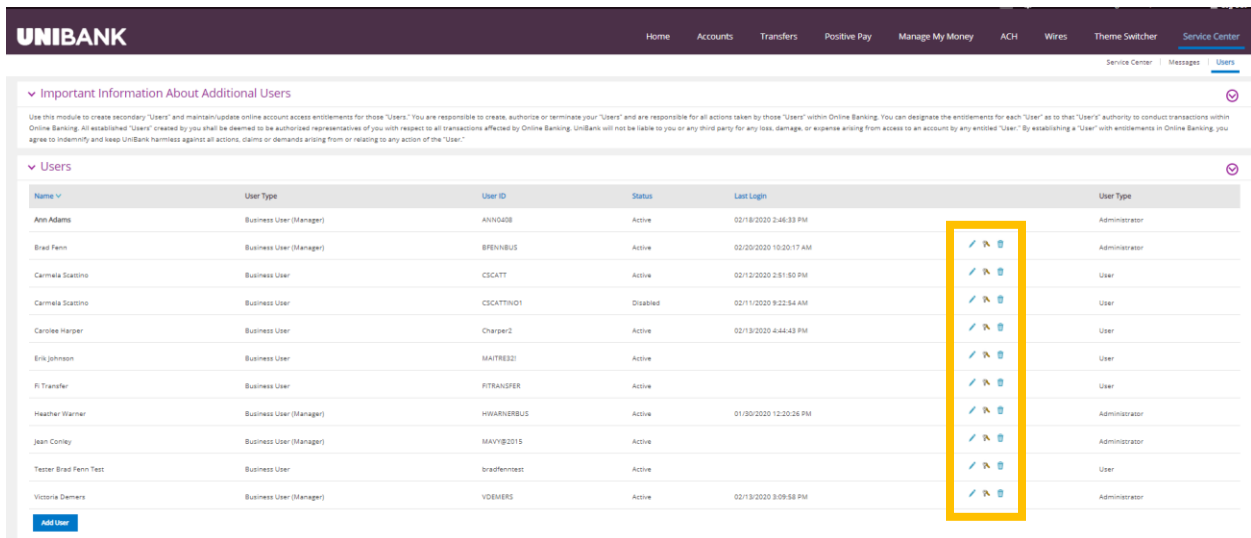
Edit a user by selecting the **pencil icon**.



Edit user entitlements by selecting the **key icon**.



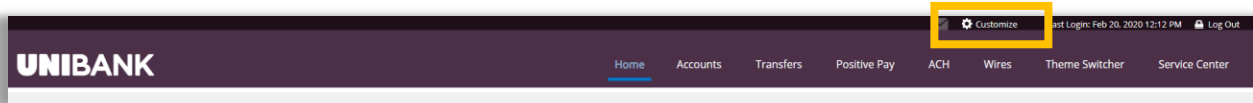
Delete a user by selecting the **trash icon**.



Tile Customization and Layout

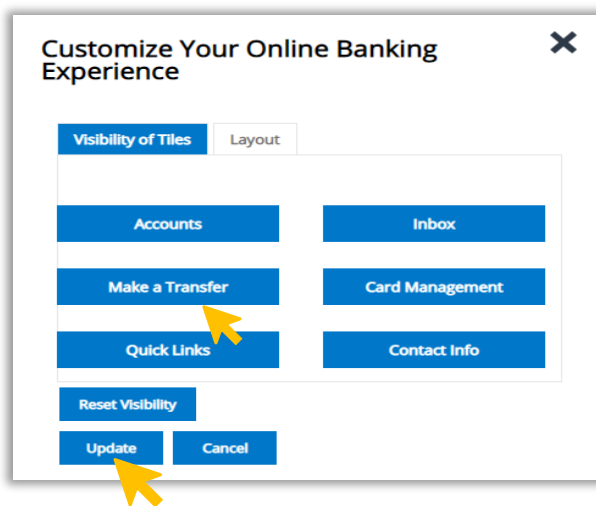
Tiles, sometimes known as widgets, provide options for customization that allow you to efficiently access the Online Banking tools that are most important to you. Customization is available on any page in the system.


1. Select the  **Customize** option located at the upper section of Online Banking

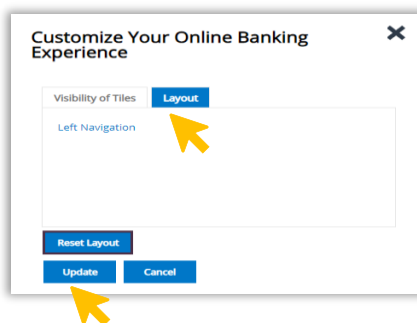


2. By default, all available tiles will be selected and highlighted in blue.
3. De-Select the tiles you would like removed from view on the page you are currently managing.
4. Select Update to save your selection.

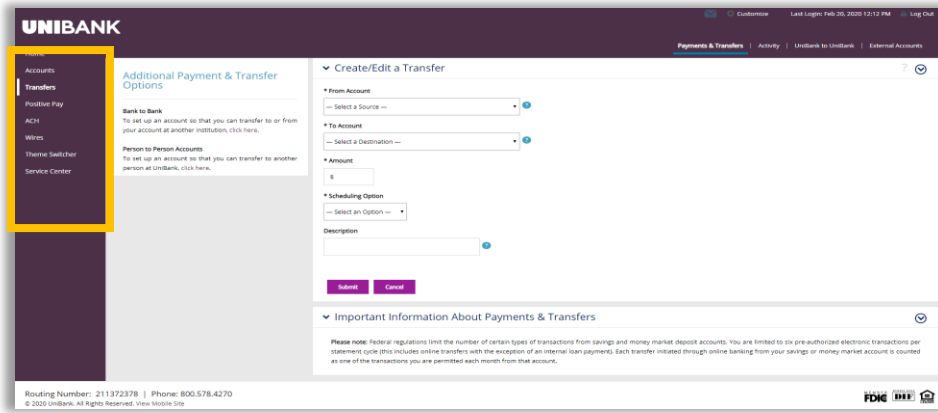
Tile Customization and Layout (continued)



5. Move tiles by dragging and dropping to a preferred location.
6. By default, the menu for Online Banking is located at the top of your screen. You can change the layout to view the menu on the left side of your screen.
 - a. Select  **Customize**.
 - b. Select Layout then Click Left Navigation.
 - c. To save this layout, select update.



d. The Menu will now display on the left side of your screen:

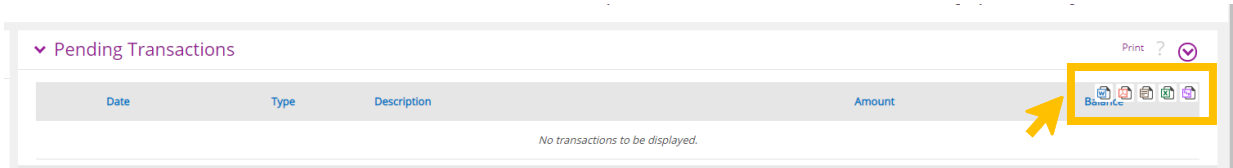


Exporting Data

Data from some lists in Online Banking can be exported.

To export data:

1. Hover your cursor over the grey header located at the top of the menu.
2. Select the format you would like. Options include Word, PDF, Text, Excel, or CSV.
3. The Export file will be downloaded upon selection of file type.



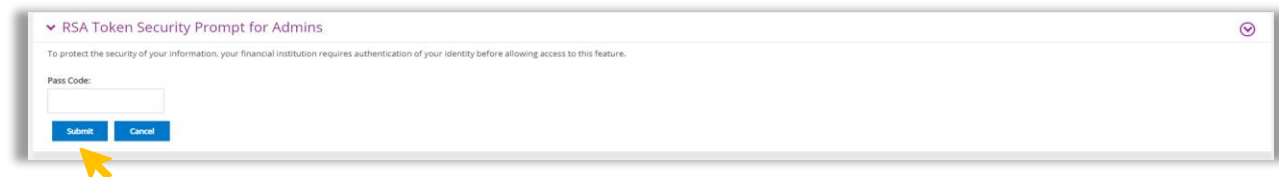
*Quicken/QuickBooks can be accessed in the Service Center.

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.)



CONTACT

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