

Quick Start Guide – Online Banking Service Center Menu

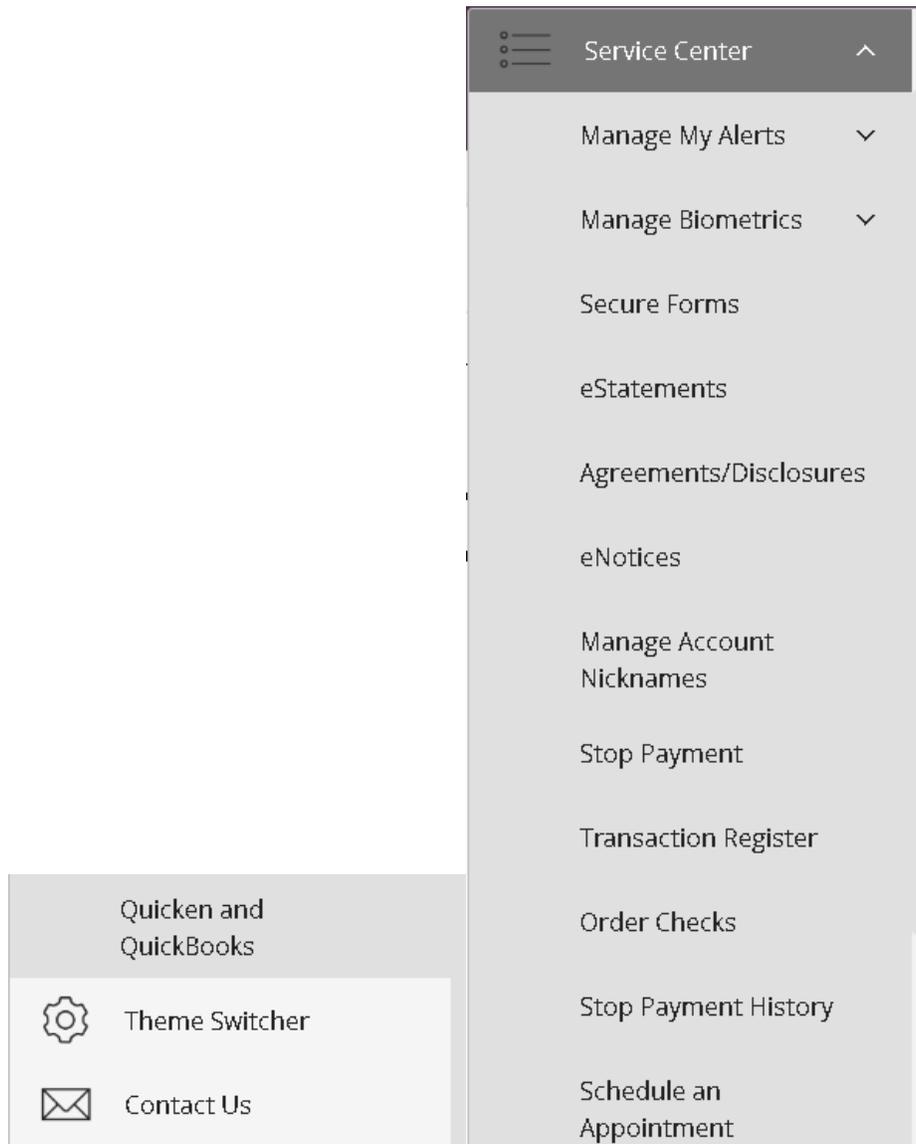
UNIBANK

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SERVICE CENTER

The Service Center allows you to place stop payments, add alerts, process ATM and Debit card requests, manage your fingerprint/faceID, and add nicknames to accounts. The Service Center link is located on the home page User ID menu dropdown.



Service Center – Alerts

Alerts allows you to Create, Change or View Alert activity

Creating an Alert –

- Click **Manage My Alerts** from the menu box.
- Next click **My Alerts**.
- Click on the appropriate radio button.
- Click **Add Subscription**.

Add/Edit 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
- Card Alert
- 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/Edit Notification Subscription page, then click **Submit**.

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



To Edit/Delete an Alert

Active alerts will be displayed under Current Alerts

Current Alerts		
Description	Created Date	
Notify me when an insufficient funds fee is charged to	05/19/2023 1:47:45 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/Edit Notification Subscription

Insufficient Funds Charge Alert

Account:

Email Addresses/Phone Numbers Add or Edit Email/Phone

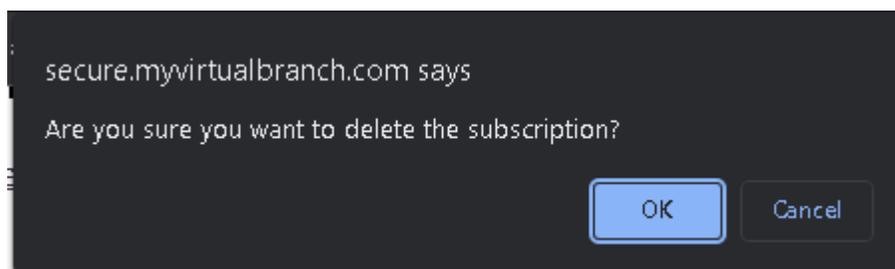
maxine.mouse@

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

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



 Delete current alerts by selecting the trash basket icon on the right side of the screen. Acknowledgement message will appear confirming the deletion of the alert subscription, click **OK**.



Service Center – eStatements

- Click **eStatements**.
- Under Statement Delivery Preferences, click hyperlink in second paragraph to review **Electronic Statement Agreement** and obtain Disclosure Acceptance Code list at bottom of disclosure.
- Enter Disclosure Acceptance Code in box, click **Accept & Update Preferences**.

Statement Delivery Preferences

Your current account statement delivery method is listed below. To update your delivery method select All Paper, All Electronic, or you can select the desired Enrollment Preference for individual accounts from the drop down menu.

In order to confirm your changes to your Enrollment Preference, click [HERE](#) to read the ELECTRONIC STATEMENT AGREEMENT. When reading the Electronic Statement Agreement, please locate the Disclosure Acceptance Code at the top of the page, enter the code into the box below, and select 'Accept & Update Preferences' button. By completing this process you will agree to the terms and conditions of this Agreement as well as your ability to view eStatements.

* Disclosure Acceptance Code

Account

Enrollment Preference

x0689 - Free Checking

Paper

Accept & Update Preferences

Service Center – Manage Account Nicknames

- To adjust account nicknames, click **Manage Account Nicknames** from the Service Center menu.
- Choose account and enter nickname in the appropriate box.
- Click **Save**.

Manage Nicknames

Account 	Account Name 	Nickname
x0689	Free Checking	<input type="text" value="TEST"/>

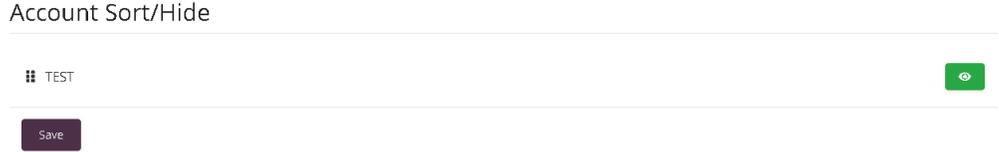
You will receive an acknowledgement at the top of the page stating your delivery preferences was updated successfully.



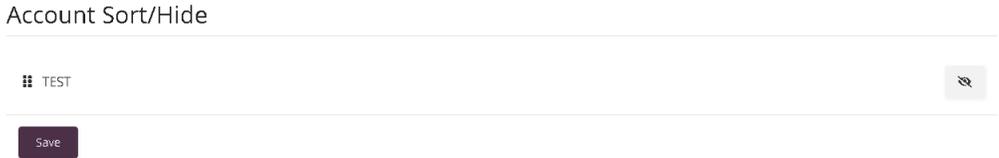
Service Center – Sort/Hide Accounts

- To hide an account or change the order in which your accounts are listed, click on **Manage Nicknames** from the Service Center Menu.
- Click the green eye button to hide an account, this will change the button from green to gray. Click **Save**.

Account will show in list of accounts.



Account will no longer show in list of accounts.



- To reorder accounts, click on an account and drag to place in the order you would like to see your accounts shown.

Service Center – Stop Payment

Stop Payment on a Check:

- Click **Stop Payment** from the Service Center menu.
- Fill out the necessary fields.
- Click on Submit to verify Stop Payment details.

Stop Payments

Stop Payment Account:

x0689 - TEST (Available \$0.35) ▾

Stop Payment Type:

- Single Check
 Range of Checks

* Check Number:

Check Amount:

\$

Payee:

Reason:

— Select a Reason — ▾

Submit

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 1 has successfully been placed on TEST. A \$25.00 fee will be accessed. 

Important Information About Stop Payments

To request that payment be stopped on a check that you have written, please complete the information below.

Submitting this request online represents authorization to UniBank to place a stop payment on the selected account and item. An online request to stop payment on a check or series of checks does not guarantee that the check will be stopped, as the item may have already been processed and posted to your account. You will be notified if there is a problem in placing the stop payment you have requested. **A \$25.00 fee will be assessed for each stopped check.**

Please note that you cannot use this function to stop payment on a payment processed through online "Bill Pay". To cancel or stop online "Bill Pay" transactions please contact us at 800-578-4270.

In requesting a stop payment, you agree 1) that you must notify us in writing to cancel this order if and when the reason for the stop payment ceases to exist; 2) that the closing of the account upon which this check is drawn will automatically cancel this order and 3) that this order expires and is no longer in effect six (6) months from the date that this order was placed unless you have already cancelled or renewed the stop payment order.

Stop Payments

Tracking ID: 1
Account: x0689
Amount: \$0.10
Check(s): 1

Scheduled Date & Time: 05/19/2023 2:25:46 PM

Continue

Click **Continue**.

Service Center – Stop Payment History

Click **Stop Payment History** from the Service Center menu. This will display any stop payment history for your account.

Stop Payment History

Account:	TEST - x0689
Date:	05/19/2023
Starting Check Number:	1
Ending Check Number:	1
Amount:	\$0.10

To print the Stop Payment History, click on the “Print” link at the top right of the banner.



Service Center – Quicken and Quickbooks

Quicken/Quickbooks

We are happy to provide you with two options to assist you in downloading your account data to your Quicken® program. UniBank as 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.

Direct Connect Self-Enrollment

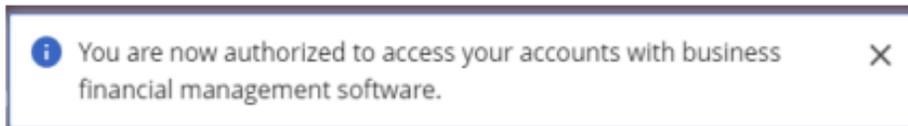
Choose 'Quicken' if you use personal software such as Quicken. Choose 'QuickBooks' if you're a QuickBooks user.

Quicken®

QuickBooks®

Enroll

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



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

Web Connect Download

Account:

Download:

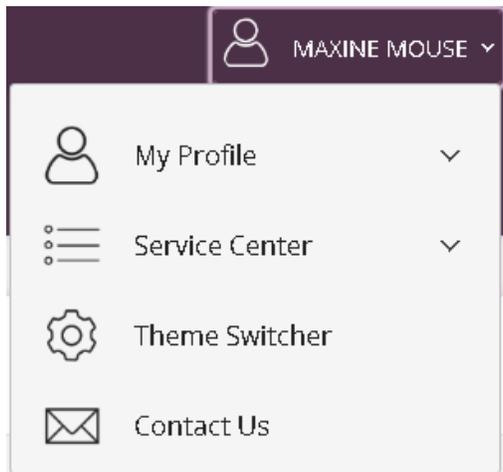
30 Days 60 Days 90 Days 120 Days Other

Software:

Messages

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



To send a secure message through Contact Us:

- Click on **Secure Messages and Attachments** under Contact Us via Secure Message.
- Click on **Compose New**.

Messages

Compose New



Subject	Tracking ID	Created	Last Updated ↓	Category
Travel Notification submitted	331619893	09/15/2022 11:26 AM	09/15/2022 11:33 AM	Travel Notifications
This is a TEST	603465160	09/07/2022 1:09 PM	09/07/2022 2:06 PM	Government Banking Inquiry

- 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 **Send**.

Message Detail

Category

Status

New

Account (if applicable):

Subject

Message

Add Attachment

Send notification on receiving a response to this message.

Cancel

Send

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: 1561165848



Contact

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