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

UNIBANK

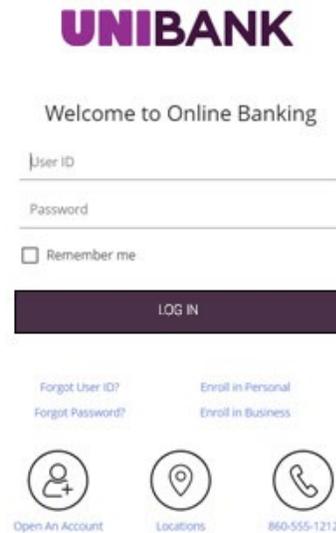## Table of Contents

Member FDIC/Member DIF

Logging On

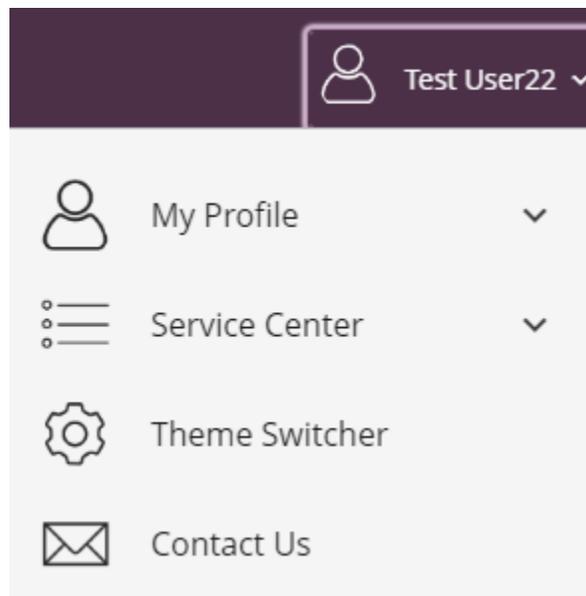When you launch the application, the first screen you see is the logon screen.

- 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.

User ID Menu

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

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

Member FDIC/Member DIF

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 | $20.00 | 📄 eStatements |
| Available Balance | Current Balance | ⚙ Settings |

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

All Transaction Types ▾

Date

Last 30 Days ▾

Description

◉ Amount ○ Amount Range

$ ✕

Check Number

✕

Download As

○ BAI2 ◉ CSV ○ PDF ○ Excel

Download

Clear

*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

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.