

USB BUSINESS ONLINE BANKING REFERENCE GUIDE

THE WELCOME PAGE

A NEW LOOK TO THE SAME GREAT FEATURES!

The **Favorites** icon provides quick and easy access to services or pages that are viewed most often

» You can select up to five favorites which are available in any screen by selecting the star icon

The screenshot shows the Union Savings Bank online banking interface. At the top left, the Union Savings Bank logo is visible. A star icon is highlighted with a green box and an arrow pointing to it. The navigation menu includes Welcome, Reports, Money Movement, Account Services, and Administration. The user is logged in as Jill, with a last login time of Sep 25, 2020, 10:50:29 AM ET. The main content area features sections for Approvals, Exceptions, Accounts Summary, Alerts and Messages, and Saved Reports. A green button at the bottom right says "Got Questions? We can help +".

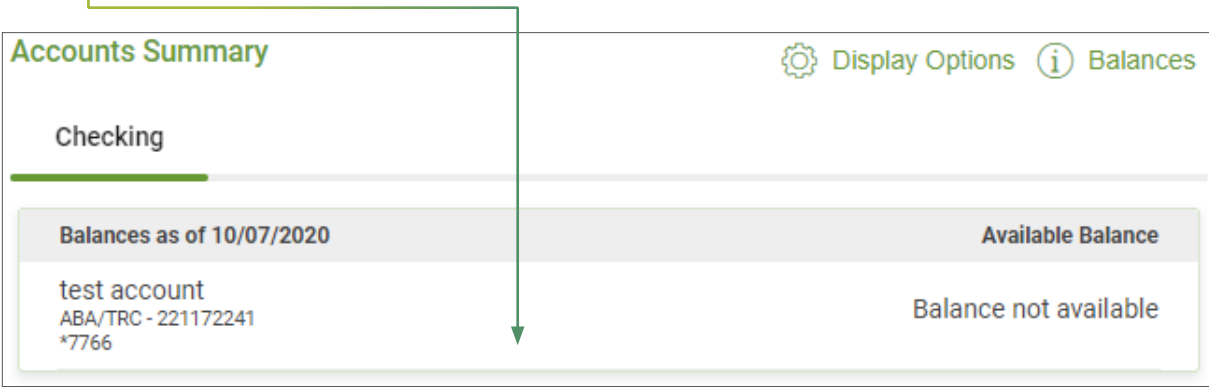
- » Click the  icon
- » From the **Multi-Select** dropdown choose your favorites
- » Click **Update**

The screenshot shows the Favorites selection dialog box. It features a star icon at the top, a "Favorites" title, a "Selected 0 of max 5" indicator, a "Multi-Select" dropdown menu, and "Update" and "Cancel" buttons.

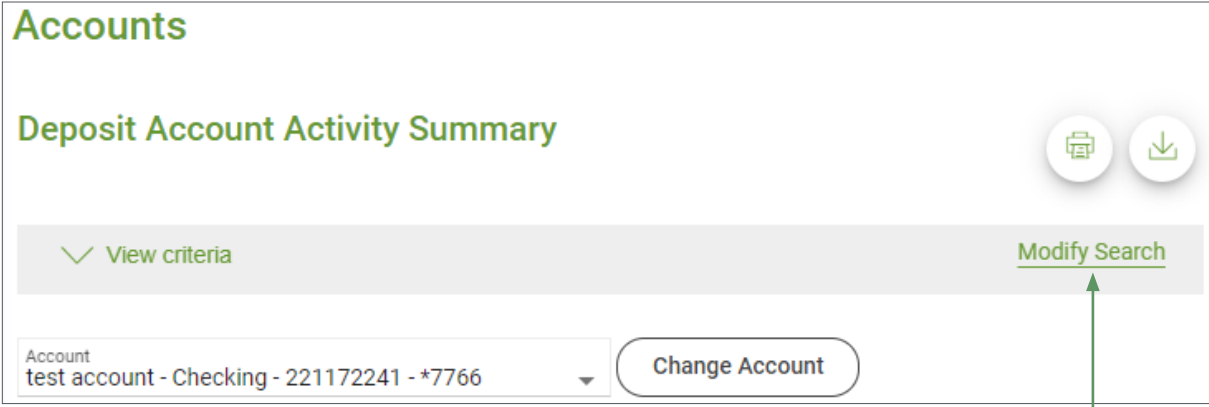
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From the Welcome Page the **Accounts Summary** section displays a list of your accounts along with account balances

- » Click an account to view Deposit Account Activity Summary options

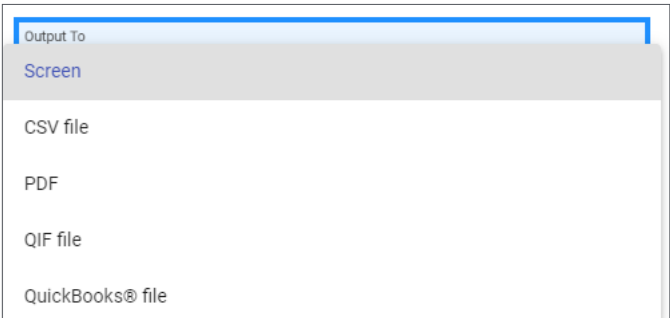


The **Deposit Account Activity Summary** allows you to view up to 18 months of account activity in three month increments. Search by date range, transaction types, or detail option (Detail option includes transaction details)




Click **Modify Search** for more advanced search options

- » For example: You have the ability to choose your preferred data export option shown below



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Clicking **Display Options** allows you to select which accounts are displayed and in what order

- » To change the order, click and drag  four way arrow to desired location
- » Click **Save** to save your changes

Display Options

Checking Investment Loan

Select which accounts you want displayed on the Welcome page. Reorder accounts by dragging each to the desired order location.

Choose Account **Order Accounts**

Account
Digital Services Test Checking - 221172241 - *9378, Usb Digital test 1 - 221172241 - *9847, Usb Digital test 2 - 2...

Save **Cancel**

1	Digital Services Test Checking - 221172241 - *9378	+
2	Usb Digital test 1 - 221172241 - *9847	+
3	Usb Digital test 2 - 221172241 - *7500	+
4	Usb Digital test 3 - 221172241 - *0235	+

Approvals can be accessed from the upper right corner of any screen

- » Click the link for quick access to all your approvals for transfers, payments and users

Approvals

Transfers Transactions Templates Scheduled Requests Issues Files

Approvals - Transfers


Internal Transfers

From Account	To Account	Amount	Entered By	Entry Date	Approval Status
There are no requests available to transmit.					

Multiple Account Transfer

Template	Amount	Effective Date	Entered By	Entry Date	Approval Status
There are no requests available to transmit.					

The **Alerts and Messages** pane displays messages or alert text

Thanks for banking with us. We're glad to be working with you. 

Alerts and Messages

 ...

You have received no alerts or bank messages within the last seven days.

[View All](#)

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» Click **View All** to be brought to the Communications page and view received messages and alerts

Communications

Mail and Alerts Sent Mail Forms and Documents Manage Alerts Contact Us

Received Mail and Alerts

Received messages will be automatically deleted after 90 days.

<input type="checkbox"/>	Date	Status	Type	Sent From	Subject
<input type="checkbox"/>	08/25/2020 10:41:10 AM (ET)	Unread	Alert	Bank	Password Changed

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Delete

Reports offers multiple reports and allows users to view up to 18 months of data in three month increments. Please note, Loans will only show if you choose to enable your loan accounts online.

Reports Money Movement

- Accounts
- Loans
- Statements and Documents

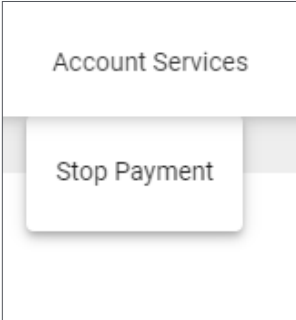
Money Movement lets you schedule requests, transfer money, manage loans and pay an unlimited number of bills. Please note Loans and Bill Pay will only show if you choose to enable them.

Money Movement Account

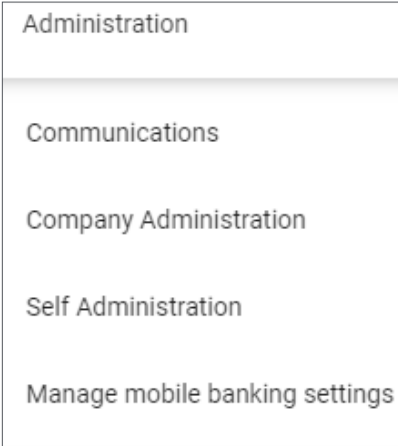
- Scheduled Requests
- Transfer Money
- Loans
- Bill Pay

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Accounts Services is used to place stop payments along with managing existing stops



Administration allows access to Communications, Company Administration, Self-Administration functionality as well as managing mobile banking settings. Please note, "Manage mobile banking settings" will only display if you use our Mobile Banking App.



The **Got Questions? We can help panel** can be found at the bottom of every page

