

USB BUSINESS ONLINE BANKING PLUS 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 modal. 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.

USB BUSINESS ONLINE BANKING PLUS REFERENCE GUIDE

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

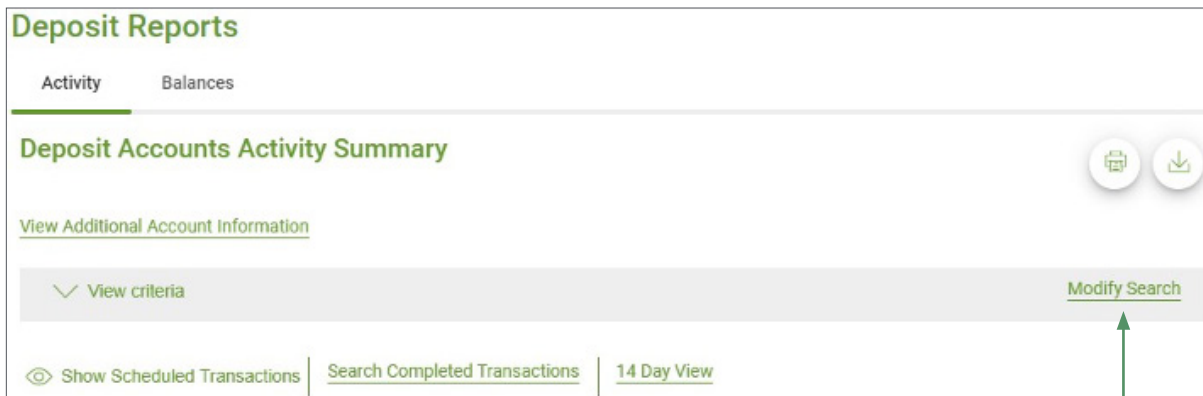
» Click an account to view Deposit Account Activity Summary options



The screenshot shows the 'Accounts Summary' page. At the top, there are links for 'Display Options' and 'Balances'. Below this, the 'Checking' account is selected. A table displays the account details:

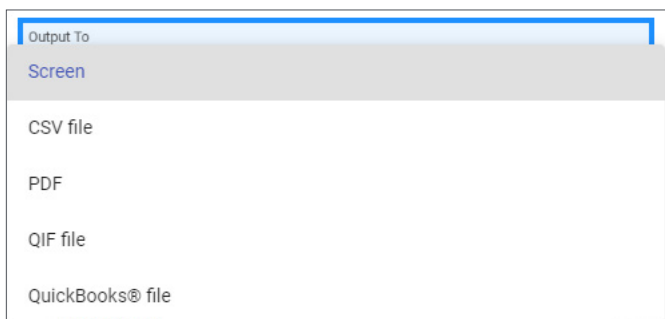
Balances as of 10/07/2020	Available Balance
test account ABA/TRC - 221172241 *7766	Balance not available

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)



The screenshot shows the 'Deposit Reports' page. The 'Activity' tab is selected. The 'Deposit Accounts Activity Summary' section is visible, with options to 'View Additional Account Information', 'View criteria', and 'Modify Search'. At the bottom, there are options for 'Show Scheduled Transactions', 'Search Completed Transactions', and '14 Day View'.

Click **Modify Search** for advanced search options, like the ability to choose your preferred data export option shown below




The screenshot shows the 'Output To' dropdown menu with the following options:

- Screen
- CSV file
- PDF
- QIF file
- QuickBooks® file

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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  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

1 - 1 of 1 |< < > >|

Delete

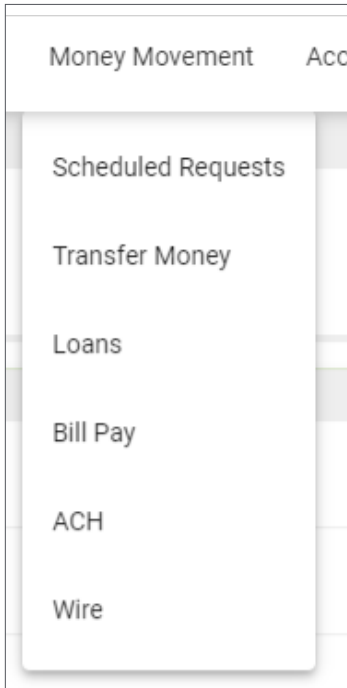
Reports offers multiple reports and allows users to view up to 18 months of data in three month increments along with the ability to view statements and documents. Please note, Loans will only show if you choose to enable your loan accounts online.

Reports Money Movement

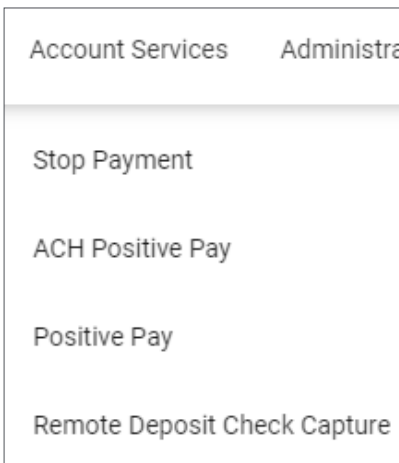
- Deposit Reports
- ACH
- Investment Accounts
- Loans
- Statements and Documents

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Money Movement lets you schedule requests, transfer money, manage loans, pay an unlimited number of bills, make ACH payments and initiate wire transfers



Accounts Services allows you to place and manage stop payments, upload and manually enter Positive Pay issues, run Positive Pay reports, manage exceptions, and access Remote Deposit Check Capture.



USB BUSINESS ONLINE BANKING PLUS REFERENCE GUIDE

The **Administration tab** allows access to Communications, Company Administration, Self-Administration, Service Administration functionality as well as managing mobile banking settings

Administration
Communications
Company Administration
Self Administration
Service Administration
Manage mobile banking settings

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

Got Questions? We can help ×

☎ 866.487.2226

✉ contactUSB@unionsavings.com