UBT Business

Get to know UBT Business

Welcome to UBT Business! This handy online banking tool is your hub for all things business banking. Below, we've gathered some information about the kinds of tasks and transactions you can do within UBT Business as you kick the tires and check under the hood of your new banking platform. Let's dive in!

Logging in

Here are some things you can do when you first log in to UBT Business:

- Log in as a first-time user to set up your credentials and secure access code (new multifactor authentication)
- Accept disclaimers
- Log in as a returning user using established password or token. *Note: After the first time, tokens will not be needed at login and will instead be used to authorize money movement.*
- Reset a forgotten password and log in with the new password

Home

Once you're logged in, there are a number of actions you can take from the **Home** page of UBT Business, including:

- View your accounts, balances, and nicknames and verify they are correct
- Set up groups for your accounts and move accounts into them
- Access the specific details of your individual account
- Change the nickname and settings of your account
- View the total assets, balances, and allocation percentages of your asset accounts
- Navigate additional menu options to get familiar with the new platform

Account Details

Here's what you can do from the **Account Details** page:

- View transactions and details
- View check images
- Make a quick transfer to another account
- Search, filter, sort, and export transactions

Send Money

Try the following actions for sending money:

- Make a one-time, scheduled, or recurring transfer between your checking and savings accounts
- Make a payment to a loan account
- Send a domestic or international wire
- Send money to another UBT customer (person or business)
- View and manage any of these transactions you’ve made in UBT Business

Receive Money

On the flip side, here are some things you can try with receiving money:

- Make a deposit remotely with Desktop Teller
- View and manage any of these transactions you’ve made in UBT Business

Risk & Reporting

From the **Risk & Reporting** page, there are several actions you can take:

- Access Positive Pay
- Add a stop payment
- View reports of online business banking activity
- View your wire activity
- View and manage stop payments you’ve made within UBT Business

Settings

Manage your account the way you want from the **Settings** page, including:

- Sign up for paperless statements
- View your account statements and notices
- Change your username or password
- Manage your secure access code
- Change which accounts and/or features you see on the Home page

Messages and Connect

Communication is key, so be sure to check out the following on the **Messages** and **Connect** pages:

- View and send secure messages
- Set up and manage balance and transaction activity alerts for your accounts
- Find resources to get additional help or find a UBT location

This is just a jumping-off point as you get to know your new UBT Business banking platform. Should you have any questions as you explore the ins and outs of UBT Business, don't hesitate to ask! You can reach our Business Support team at **402.473.8542**, or reach out to your relationship manager directly. Thank you as always for your business!