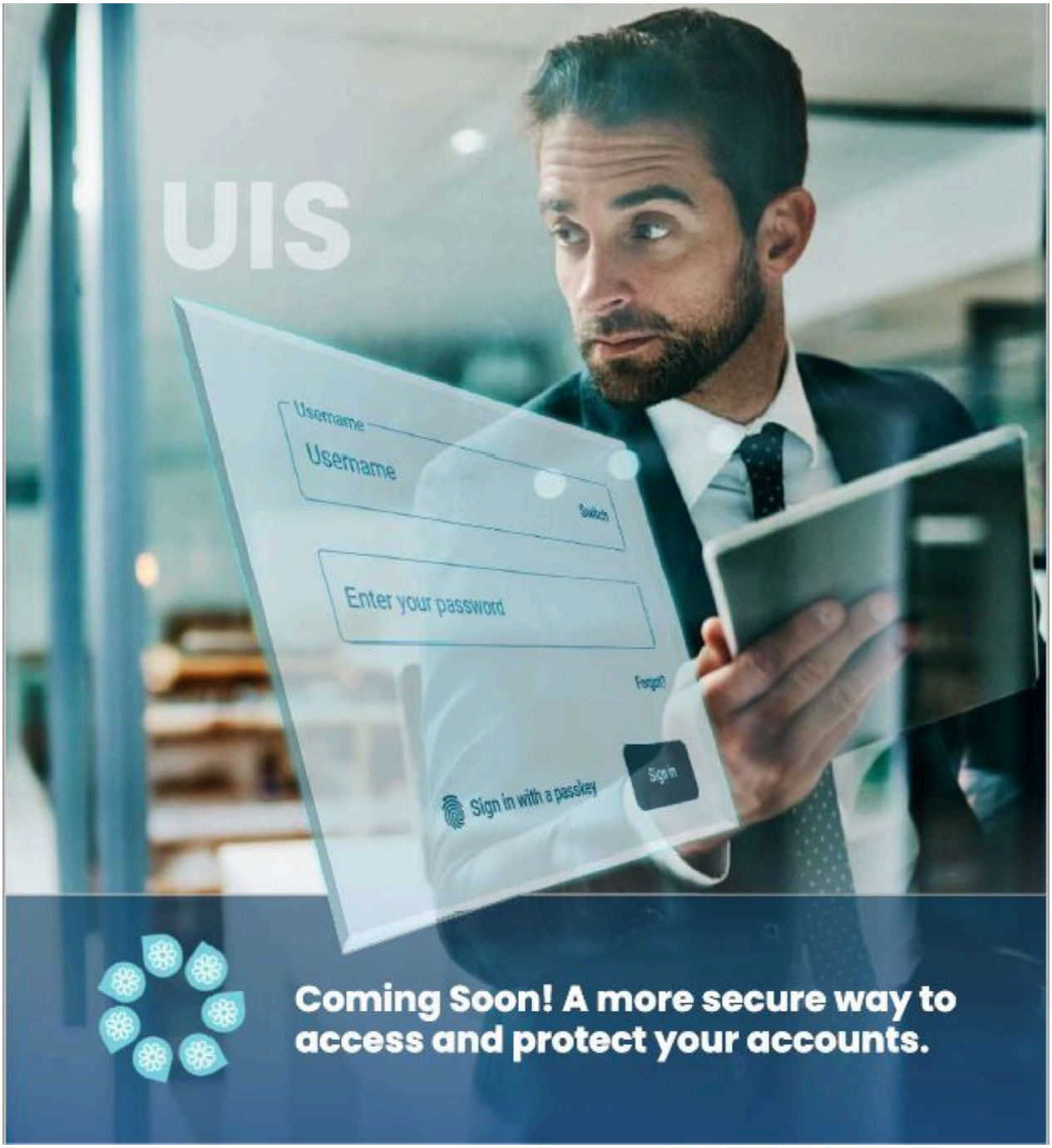
Treasury Management

Unified Identity Service (UIS) Enrollment Reference Guide



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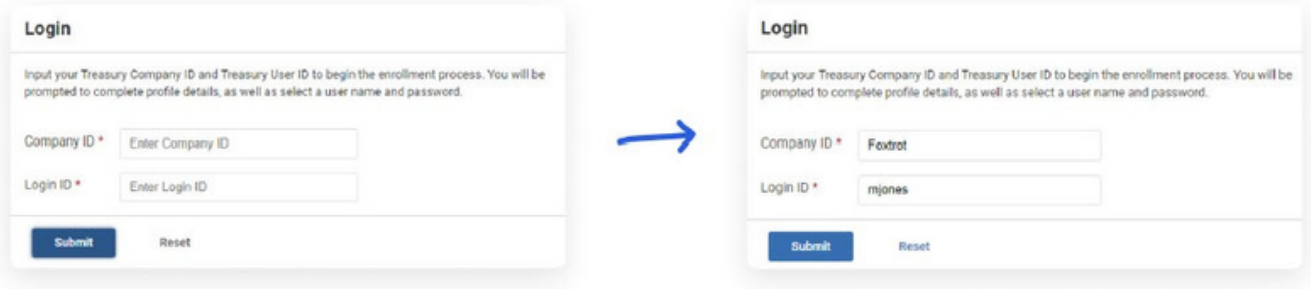
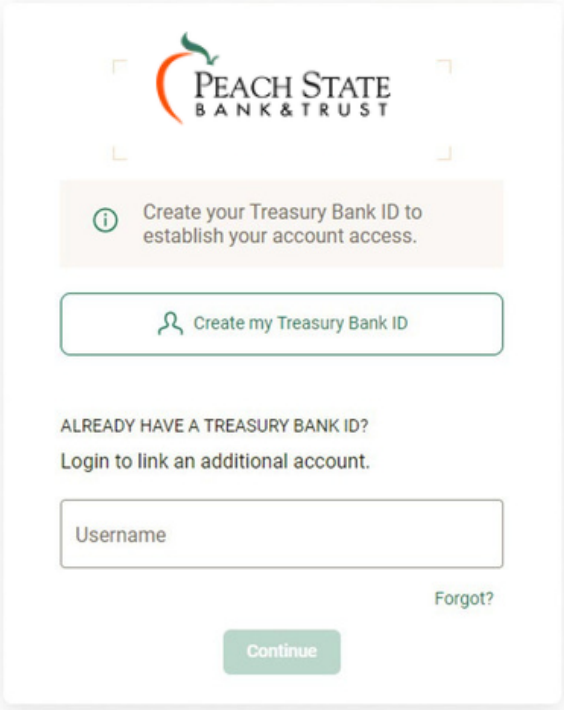
User Experience

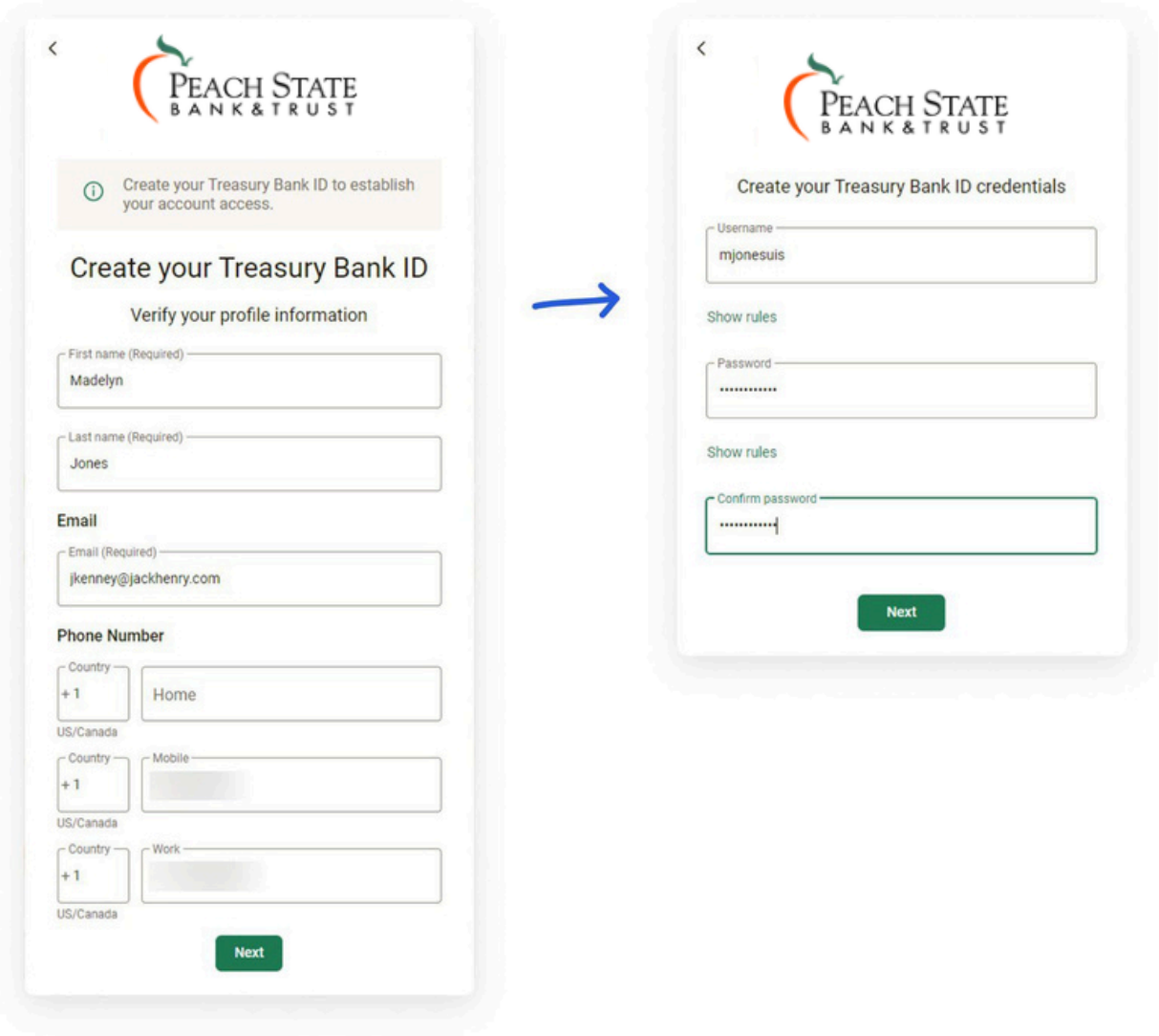
1. Active users that have logged in 45 days prior will receive an enrollment email.
2. The Digital ID enrollment link will direct users to enter the Company ID and Login IDs currently used for online access. Action must be taken with 7 days of being issued. Once the link is clicked, enrollment must be completed within 45 minutes.



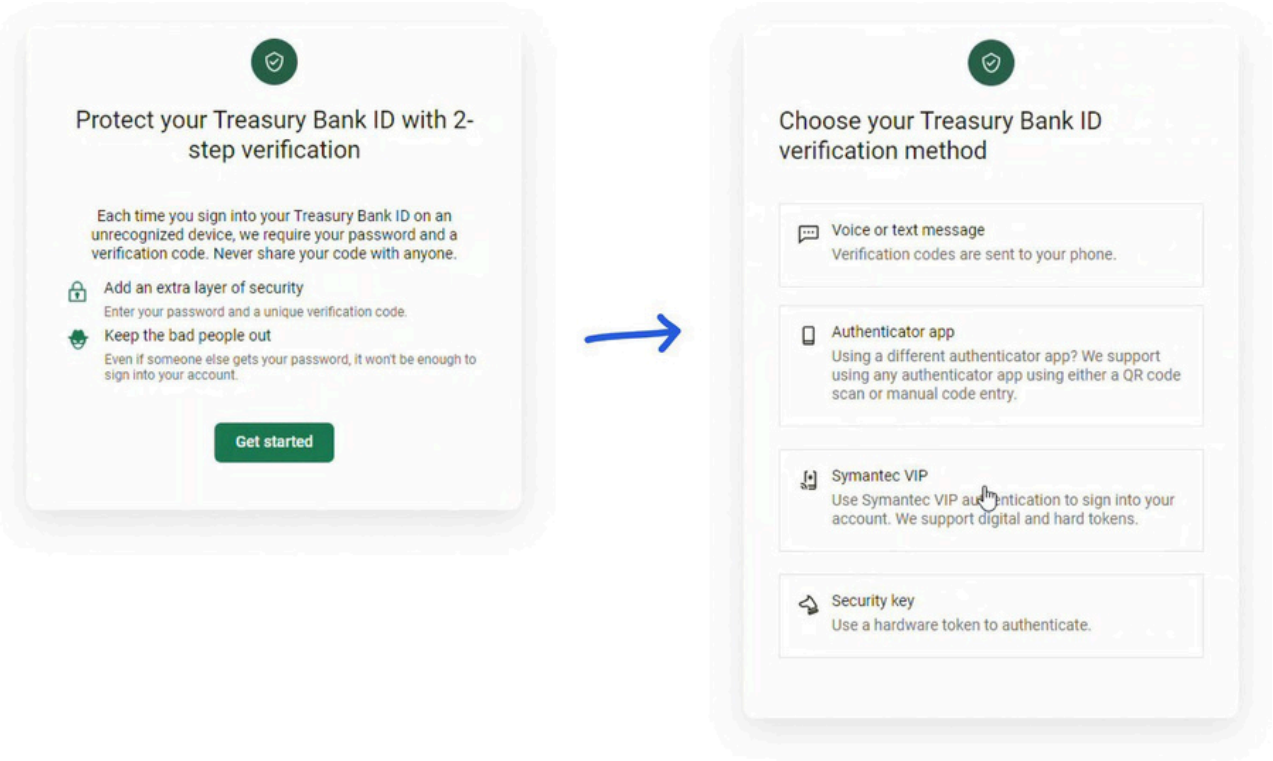
3. Users will be prompted to creat their Treasury profile and Digital ID.



- Step 1 of User ID: Users will complete & verify profile information.
- Step 2 of User ID: Users will create their credentials. This Username/Digital ID and Password will be used for subsequent logins.



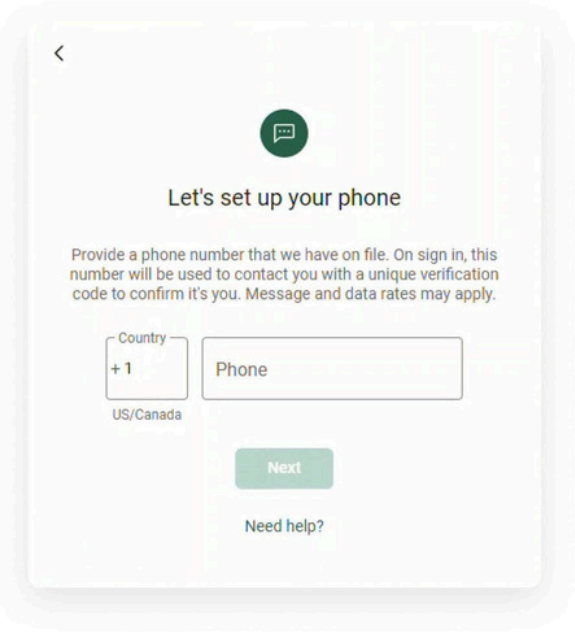
4. Users will protect their accounts with 2-step verification and choose their prefferred method.



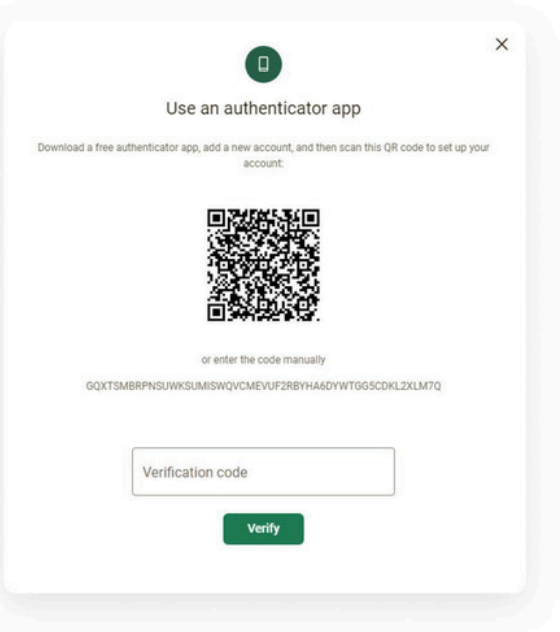
2-Factor Verification Methods

Users will have the option to choose from 4 different verification methods: voice or text message, authenticator app, Symentic VIP, or a security key.

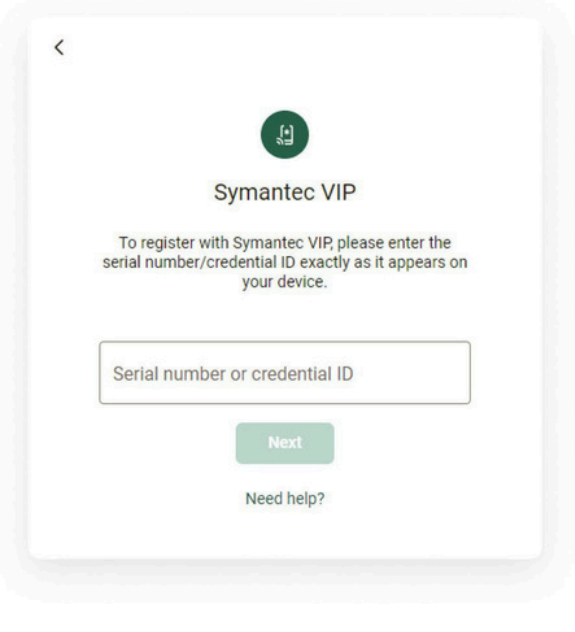
Voice or text message



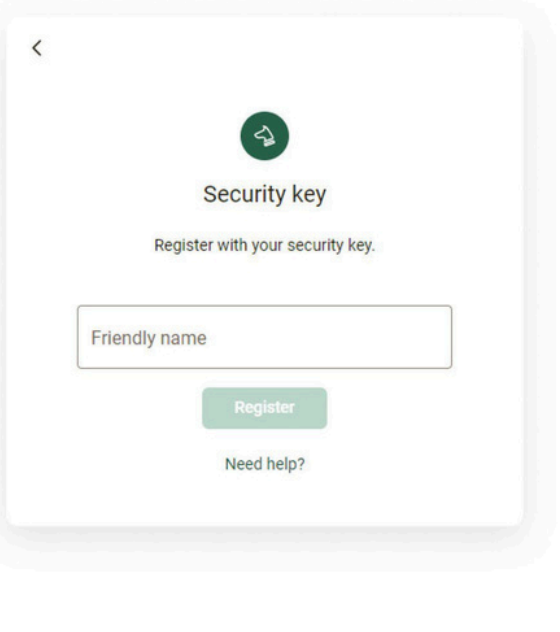
Authenticator app



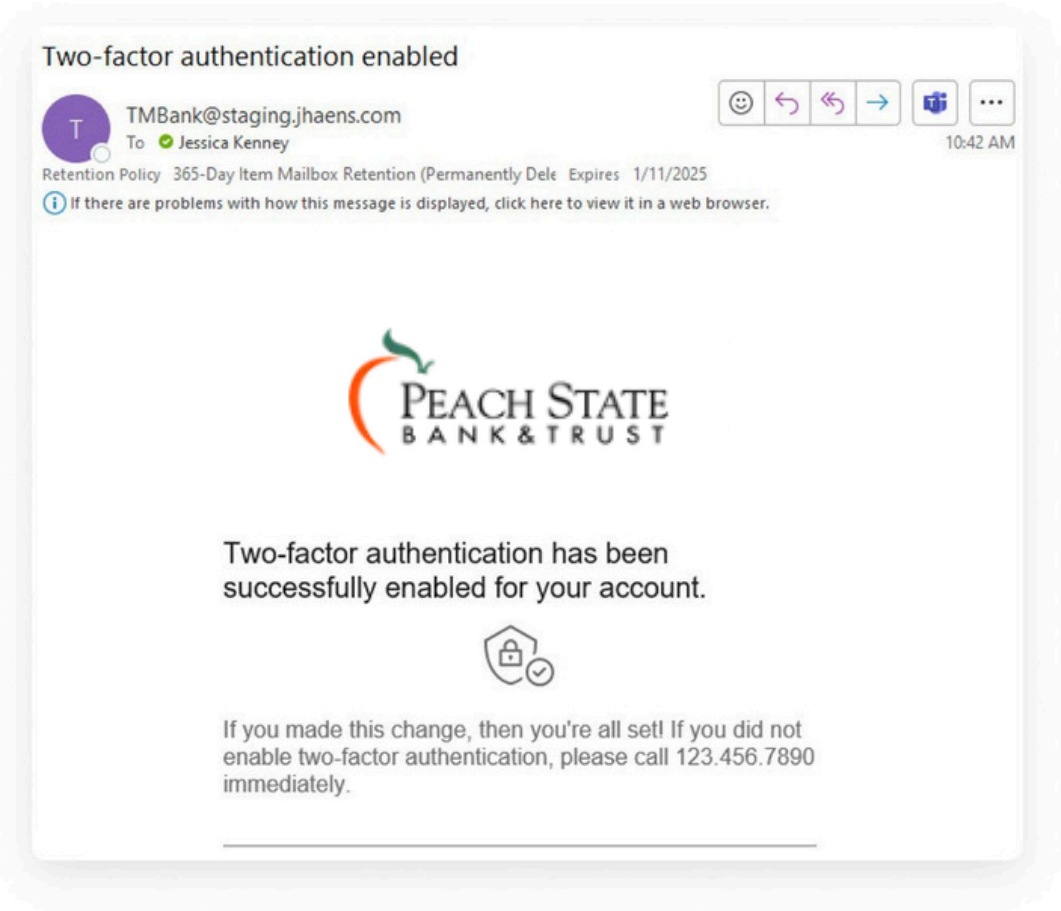
Symantec VIP



Security key



5. When complete, user receives an email confirming 2FA verification setup.



Frequently Asked Questions

Can a user keep their existing username?
It is possible that the user's existing LoginID can be used again, however usernames now need to be unique across the entire database. In many cases a new username will have to be chosen.

What if the user logs into multiple companies?
During migration, each user will receive an email to create their Digital ID. If the same email address is tied to more than one user, whether a different company or the same company, each will receive an individual email. The first email link clicked on will take the user through the steps outline above. When they click the link in the second (or third) email, they will be able to use the "Already have a Treasury Bank ID?" login to link an additional account. Upon entering their Digital ID their accounts will be linked together under that Digital ID. Upon subsequent logins the user will get to chose which company they want to access.

What are the new rules for creating a username?
Usernames must be between 4 and 64 characters in length.
Usernames can contain letters (a-z), dashes (-), underscores (_), apostrophes (‘), and periods (.) and can begin or end with non-alphanumeric characters except periods (.) and spaces.
Usernames cannot contain more than one period (.) in a row, accented letters, ampersands (&), equal signs (=), brackets (<,>), plus signs (+), at signs (@), or commas (,).

What are the new rules for creating a password?
Passwords must be between 8 and 64 characters in length.
All ASCII and Unicode characters (including spaces) are supported for passwords.
Passwords must not match or contain your username and must not begin or end with a space. Passwords will not expire.

Can users lock themselves our with UIS at login?
Users can be locked with multiple failed 2FA verification attempts, with varying failed attempts based on the authentication method. Users cannot be locked out due to invalid password attempts.

Can the 'Don't ask for codes again while using this browser' feature be enabled with the UIS login?
Yes, it can be enabled. The 'remember this browser' feature is tied to the browser that is used during selection of the 2FA method. If a brute-force attack was attempted, or a login from a different browser was attempted, 2FA prompts would occur and access would not be granted until successfully validated using one of the established 2FA methods. Additionally, users that integrate with Intuit services (Quickbooks Online/QBO/Express Web Connect) will need to elect this feature for the third-party service to work successfully.

We're here for you every step of the way!

We hope that you are excited about this new enhancement

If you have any additional questions or concerns,

Please reach out - we're happy to help!

Call us at 770-536-1100 or email at
treasurymanagement@peachstatebank.com.

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