Financial Institution Client Resource Center

Q2 Integration Guide

Version 1.0
June 2022

Q2 Integration Process

This is how the process will work for deploying the Unifimoney integration to your environment:

- Once you have agreed with Unifimoney to move forward, Unifimoney will inform Q2 for their review and approval. If Q2 has any questions, they will reach out to Unifimoney directly.
- Unifimoney will have you sign a customer acknowledgement form.
    - This form tells Q2 that you agree with Q2 deploying the Unifimoney integration to your environment.
- Unifimoney will submit a deployment request via the Q2 developer portal and attach the customer acknowledgement form.
    - In the deployment request, Unifimoney will provide all the configuration requirements for the integration to work for you.
    - Q2 has a 10-day SLA for deployments.
    - Unifimoney will work with you on finding out what environment you want to deploy the integration to first and where you would like to access Unifimoney from within Online Banking. This would likely be through a navigation menu item that you have chosen.

Q2 Integration Process Continued …

- Q2 will deploy Unifimoney to you based on the instructions in the deployment request.
- Q2 will let Unifimoney know the deployment request has been completed through the ticket.
  - Q2 will give Unifimoney instructions on how to turn the integration on within Online Banking so that Unifimoney can communicate that back to you.
- Unifimoney will notify you that the integration is deployed and ready to be tested.
- Once deployment is working with Unifimoney you can grant access to a restricted list of pilot users.

Please connect with your account manager during the integration process should you come across any issues or have questions. Anna Piliposyan (Head of Operations) will be available to assist you for all your pilot integration questions, please send an email to Anna.Piliposyan@unifi.money