

# Preparation Readiness Checklist



We're excited for our upcoming upgrade to BankUnited TreasurySuite, our enhanced digital banking platform designed to deliver a more intuitive, secure and efficient experience for your business.

To ensure a smooth upgrade, we've established a two-week **preview period** where you'll have early access to BankUnited TreasurySuite. To help you and your team prepare for your **preview period**, please take a moment to review the Preview Preparation Checklist.

## Why does preparation for the *preview period* matter?

Preparing for the **preview period** helps your organization reduce risk, maximize the benefits of early access, align users, facilitate training, and ensure a seamless upgrade. This groundwork sets the stage for a successful upgrade and helps your business thrive in a rapidly evolving digital landscape.

### Preparation Period Checklist

Review Area	Action Items
<b>USER &amp; ACCESS VALIDATION</b>	<ul style="list-style-type: none"><li>• Review the Client Administration Guide</li><li>• Remove inactive users &amp; add any new users in BankUnited Lynx</li><li>• Validate email &amp; phone contact information for all users – perform any updates if necessary</li><li>• Confirm all users can log in and have correct entitlements</li></ul>
<b>TEMPLATE &amp; PAYMENT READINESS</b>	<ul style="list-style-type: none"><li>• Remove unused templates from BankUnited Lynx</li><li>• Avoid creating any future-dated payments in BankUnited Lynx (they will not migrate)</li><li>• Confirm accuracy of all existing payment templates</li></ul>
<b>TRAINING &amp; PREPARATION</b>	<ul style="list-style-type: none"><li>• Visit the BankUnited TreasurySuite Resource Page and review all training materials</li><li>• Encourage <a href="#">webinar training</a> attendance for all users</li><li>• Speak with your assigned BankUnited Upgrade Specialist</li></ul>

Review Area	Action Items
<p style="text-align: center;"><b>FINAL CHECKS BEFORE PREVIEW BEGINS</b></p>	<ul style="list-style-type: none"> <li>• Ensure users understand what will and will not migrate</li> <li>• Confirm all required tasks have been completed</li> <li>• Communicate internally to all users about the benefits of the two-week <b><i>preview period</i></b></li> <li>• Prepare questions for your Bank United Upgrade Specialist</li> </ul>

## Resources & Support

We're here to help every step of the way.

Explore the [BankUnited TreasurySuite Resource Page](#) for the latest updates, FAQs, tutorials, checklists, webinars, and eLearning.

Questions? Contact us at [ClientSuccess@BankUnited.com](mailto:ClientSuccess@BankUnited.com)

*This checklist is provided for general informational and planning purposes and is intended to assist with preparation for the upcoming platform transition to BankUnited TreasurySuite. Specific steps and timelines may vary based on your organization's needs.*