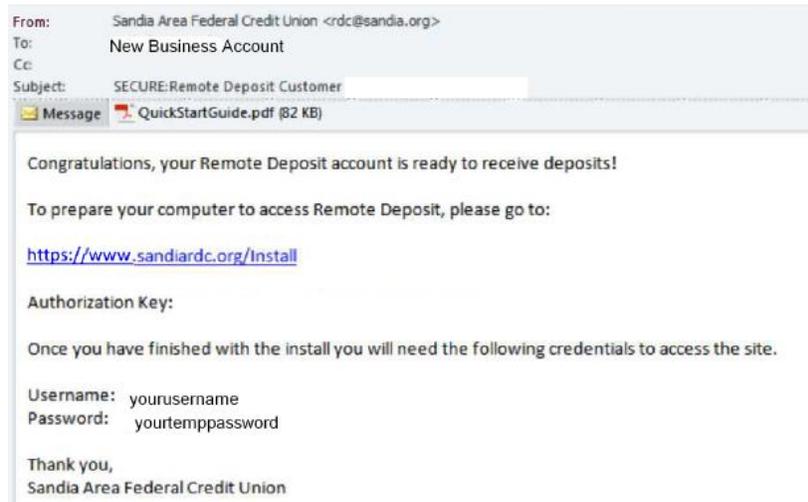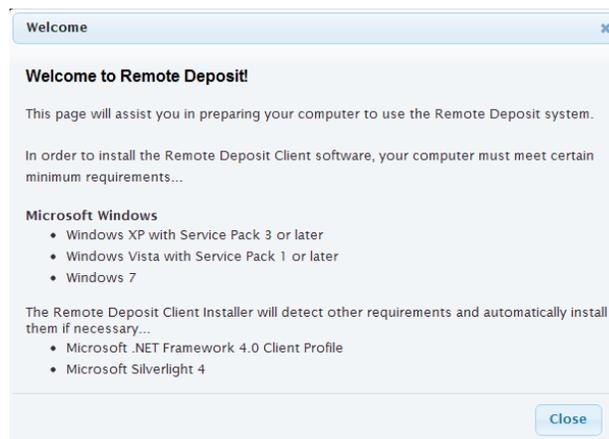# Remote Deposit

Quick Start Guide

1. *Installation*

Before beginning installation, if you are going to be scanning on this machine make sure the scanner is not plugged in yet. To install and access the system from your computer you should have received an information email from the credit union. It will look something like this:

Clicking on the link in the email will begin the installation process. You will see a small window showing the system requirements. After reviewing the requirements, close this window to see the install page.

The credentials.pdf included in the information email contains your username, password, and authorization key for Remote Deposit. If your password is not included in the email you can contact Member Services at 292-6343 ext. 5. Below is an example of the credentials pdf.

Credentials for Jared's Pet Shop

Username: jaredpets
Password:
Authorization Key: 6756-D87C-FF2A-4D7A-B51E-A441-6BEA-E7CB

Copy the key from the email you received and paste it into the authorization key box. The computer description is for reference only examples like "Accounting PC" or "Bob's Computer". You must have a valid key and a description before you can download the installer.

Install Remote Deposit Client

Click here to see the requirements again.

Authorization Key: ⓘ
6756-D87C-FF2A-4D7A-B51E-A441-6BEA-E7CB ✓

Computer Description: ⓘ
Jareds Machine

Your authorization key enables you to connect a scanner. Please select your scanner in the list below

☐ I will not be using a scanner with this computer.

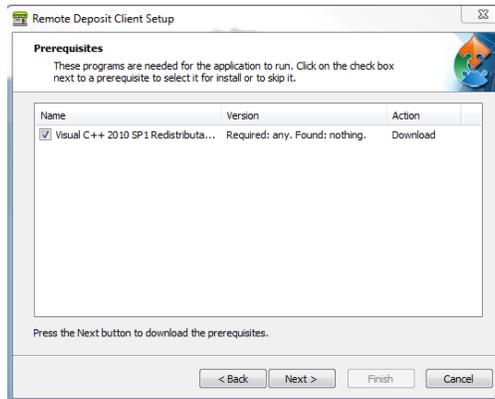|			
Burroughs SmartSource Micro	Burroughs SmartSource	Canon CR-135i / CR-190i	Canon CR-50 / CR-80
Panini I:Deal	Panini Vision X	RDM EC7000	

Download Installer

*note - The file that will be downloaded will have a very long name, please do not change the name of the file. It should look similar to: "Client~aHR0cDovL2xvY2Fsa4gzaro1MjY0Mi9JbnN0YWVxsP2tleT00R0MxOFlRSQ.exe"

After you have input your key, a green checkmark will indicate that it is valid. If your key is able to attach a scanner, a list of scanners will then appear for you to choose which you will be using on this machine.
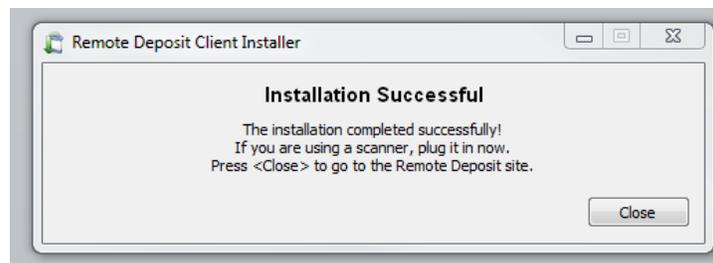
After selecting your scanner another check box may appear to include scanner drivers for your download if they are available. If your scanner drivers are already installed on this machine you do not need to check the box.

If you are not using a scanner on a machine check the "I will not be using a scanner" box, click "download installer" to continue.

During the install a window will pop up showing any software pre-requisites your machine may need to install. Any software in this list is required to run the remote deposit client and must be installed on your machine.

Click next to install the prerequisites, if you selected a scanner driver to be installed it will also run during this process. Once installation is completed you will see this window.

Clicking on close will open remote deposit and direct you to the sign on page. Enter your username and password that was included in your credentials document. If you are using a scanner make sure it is plugged in and turned on before signing in. Bookmarking this page is recommended as you will be returning to this site for any future deposits.

When you sign on for the first time, you may be asked to choose a new password before you continue on to remote deposit.

2. *Making Deposits*

When you sign into remote deposit you will be directed to the Deposit page. It will look similar to this page:

Note that you will see your own Business Name, and Username in the appropriate fields

The deposit accounts list shows eligible accounts. When making a deposit be sure that you select the correct account.
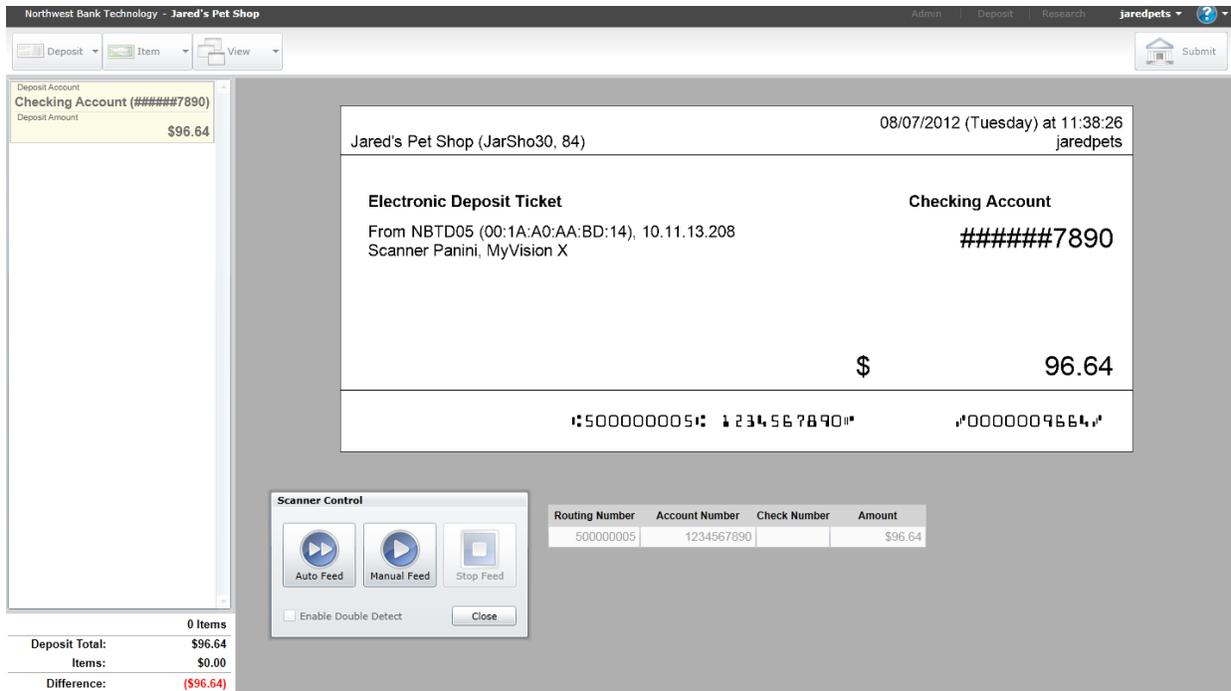
 Add up all items to be deposited and enter the amount into the Deposit Total box. This is used to make sure that all items you are depositing are accounted for when balancing.

Once you have the account selected and the total is entered click the New Deposit button. This will take you to the capture screen.

The electronic deposit ticket is created and displayed before you begin scanning. All of your business and deposit information is shown on this ticket. Be sure that all information is accurate before beginning a deposit.
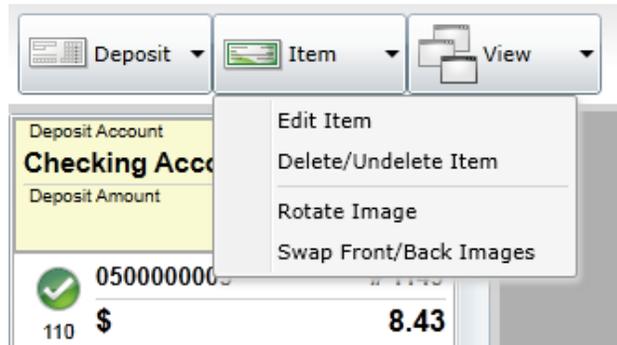
Once you have verified that the information is correct you can begin feeding items. Make sure you choose the correct feed. If your scanner does not have an auto feed you will have to manually feed the items one at a time.

When you have scanned all items close the scanner control box. You will then be able to view and correct any issues on the items.

 If an item needs any correction you will see a red exclamation mark next to that item. When an item is correct a green check mark will appear showing it is ready for deposit.

For options on a single item you must select that item then click on the item box in the upper left. This is where you will rotate or swap images or to edit an item after any initial corrections have been made.
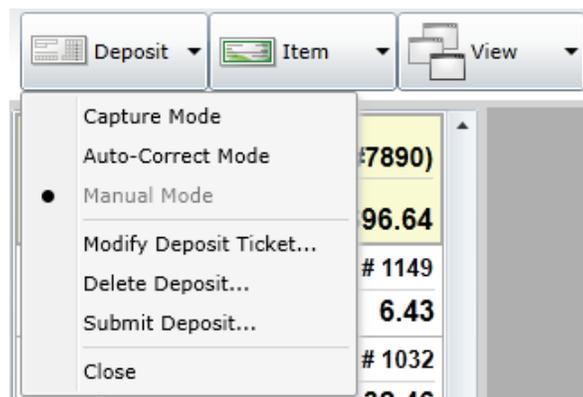

To see front or back of an image simply click the view button and choose which side you need to see.

Once all items are corrected be sure to check your totals in the lower left corner to make sure that the Deposit and Items totals match and there is a 0 difference amount.

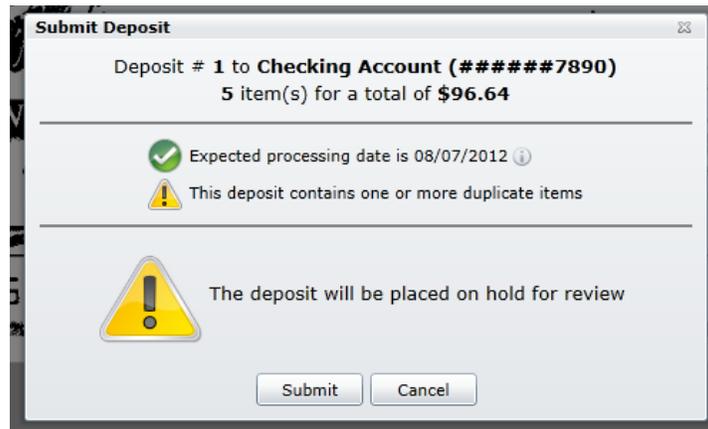If you click the Deposit button a menu will appear showing options for the whole deposit.

If you need to scan more items click on Capture Mode. If you need to change the total on your deposit ticket to match a corrected total select Modify Deposit Ticket. You can also submit or delete your deposit from this menu.
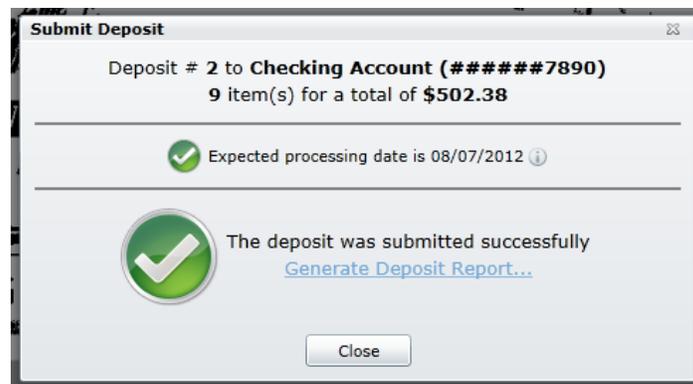
Once all items are correct and the totals are balanced the submit button in the upper right corner will activate and you may submit your deposit.

When you click submit, a window will show the status of the deposit. You will also see the expected processing date. If there is an issue with the deposit, it will be placed on hold until we have had a chance to review and approve it.

If your deposit is cleared without error you will see a large green check mark indicating your deposit was accepted and will be processed on the date shown in the submit window.

Clicking close on the submit window will take you back to the deposit creation page