Business

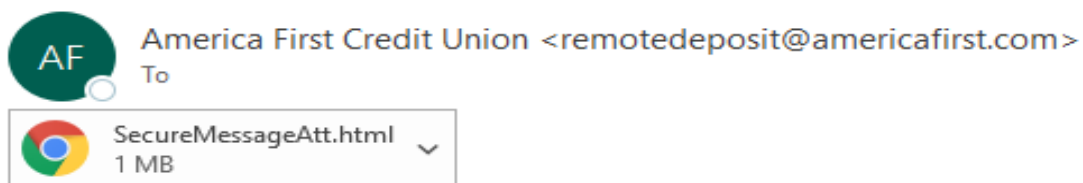# Remote Deposit

# Quick Start Guide

1. *Client Installation*

Before beginning the installation, and if you are going to be scanning on this machine, make sure the scanner is not plugged in yet. If the scanner is plugged in, it will still set up the software, but your scanner may not work properly after installation. To install and access the system from your computer, you should have received your customer information email from remotedeposit@americafirst.com via SecureMail. It will look similar to the following two images:

[securemail]Remote Deposit Customer   is ready!

AF   America First Credit Union <remotedeposit@americafirst.com>
      To

      SecureMessageAtt.html
      1 MB

AMERICA FIRST

This is a secure message.

Click here by 2021-09-10 13:17 MDT to read your message.
After that, open the attachment.

More Info

Disclaimer: This email and its content are confidential and intended solely for the use of the addressee. Please notify the sender if you have received this email in error or simply delete it.

Secured by Proofpoint Encryption, Copyright © 2009-2021 Proofpoint, Inc. All rights reserved.
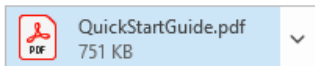
-----Original Message-----
From: America First Credit Union <remotedeposit@americafirst.com>
Sent: Wednesday, August 25, 2021 10:38 AM
To:
Subject: Remote Deposit Customer   is ready!

Congratulations, your Remote Deposit account is ready to receive deposits!

To prepare your computer to access Remote Deposit, please go to:

https://www.americafirst.com/brd/Install

Authorization Key: 1C9E-B707-B72B-4AB6-99BB

Once you have finished with the install you will need the following credentials to access the site.

Username:
Password:

Thank you,
America First Credit Union

The email contains your username, password, and authorization key. If your password is not included in the email you will need to contact your Administrator to get it.

Once you have received your authorization key and account information you are ready to begin the install wizard. You will need to click on or copy and paste the URL path from your email into your browser to begin the wizard. The install wizard will take you through each step of the install process.
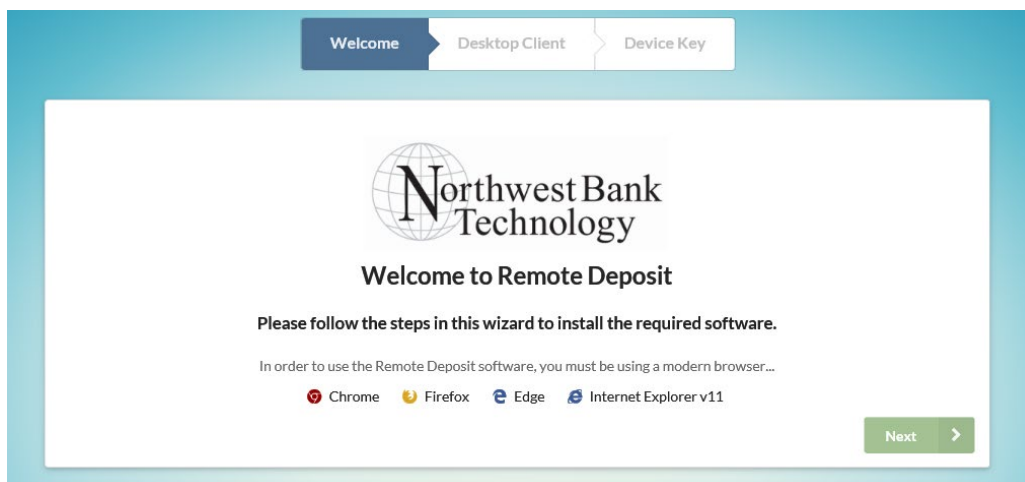

The first section is to install and verify the software client. Click on the "Next" button to move forward.
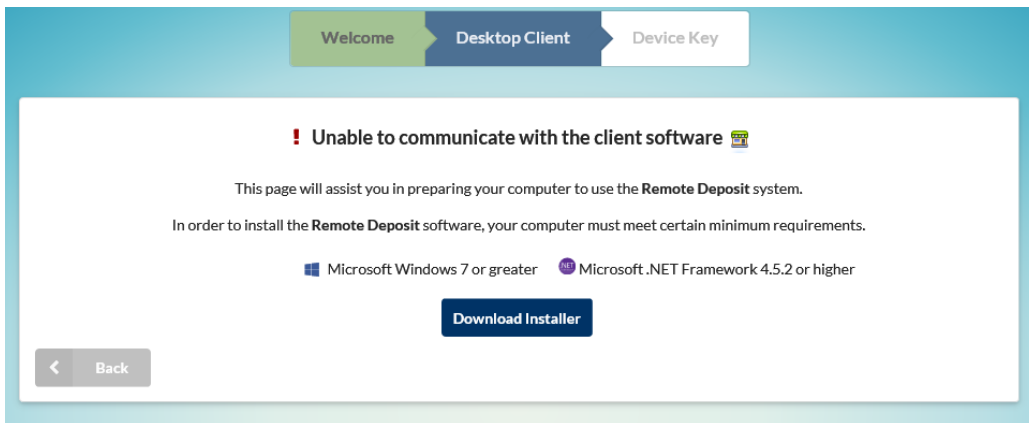
This page will verify any existing client you may have installed or offer you a download link to install the client for a new installation. This page will automatically check for the client to be running so once installation is complete you should see the below screen.
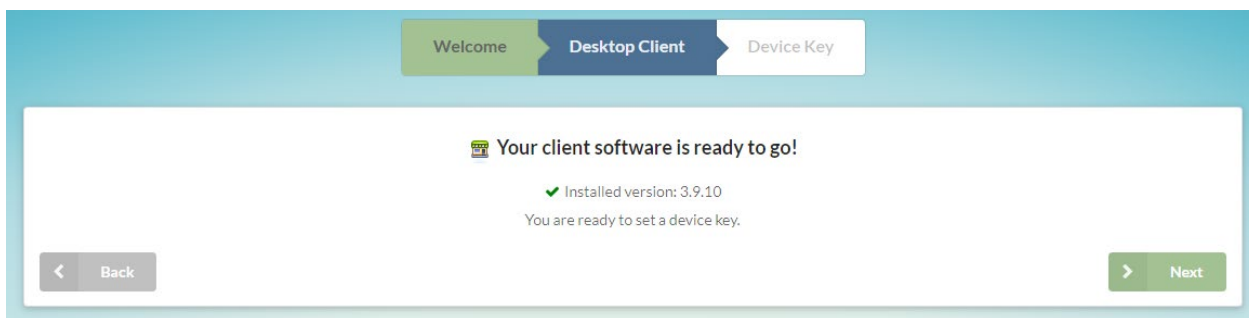

Once you have verified that your client is installed and ready, you can click on the "Next" button to continue.
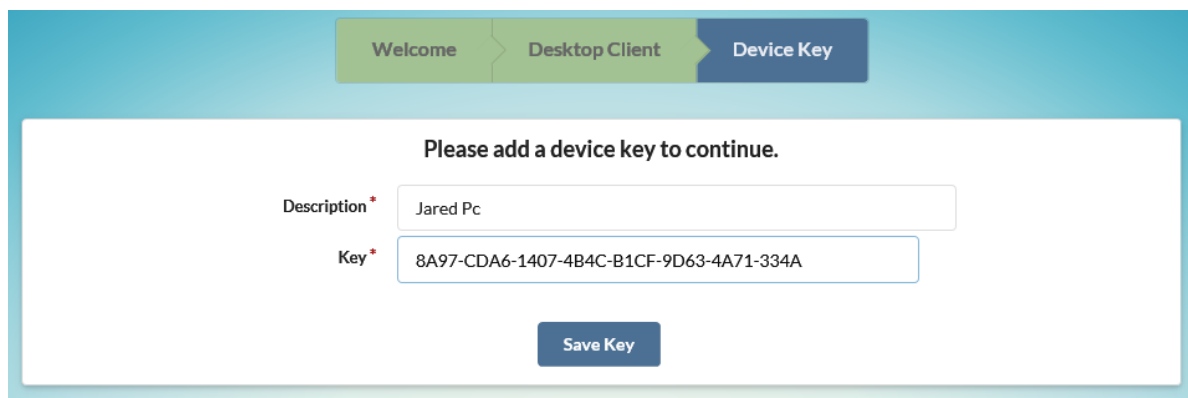

Here you can add a description for the PC and copy/paste the authorization key from your email into the "Key" section. Click "Save Key" once you have completed those fields.
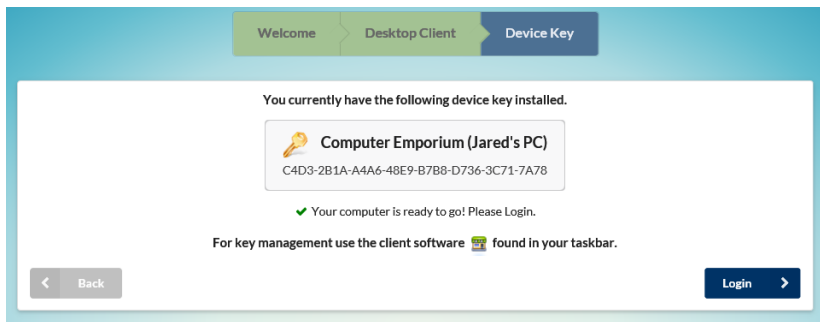
If you are a user that has a key that does not allow scanning, you are now finished and can click "Login" to continue. In most situations, you will be using a scanner so you will continue through the next steps to install and verify your scanner.
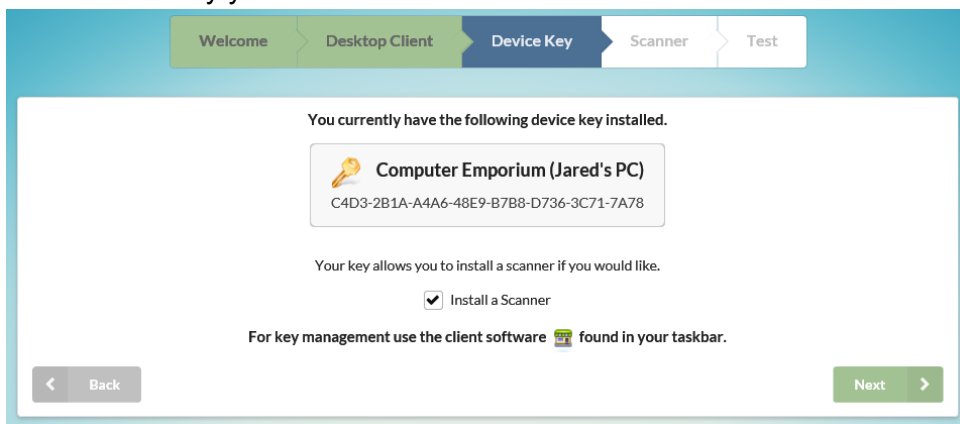

Click on "Next" to continue with scanner setup.
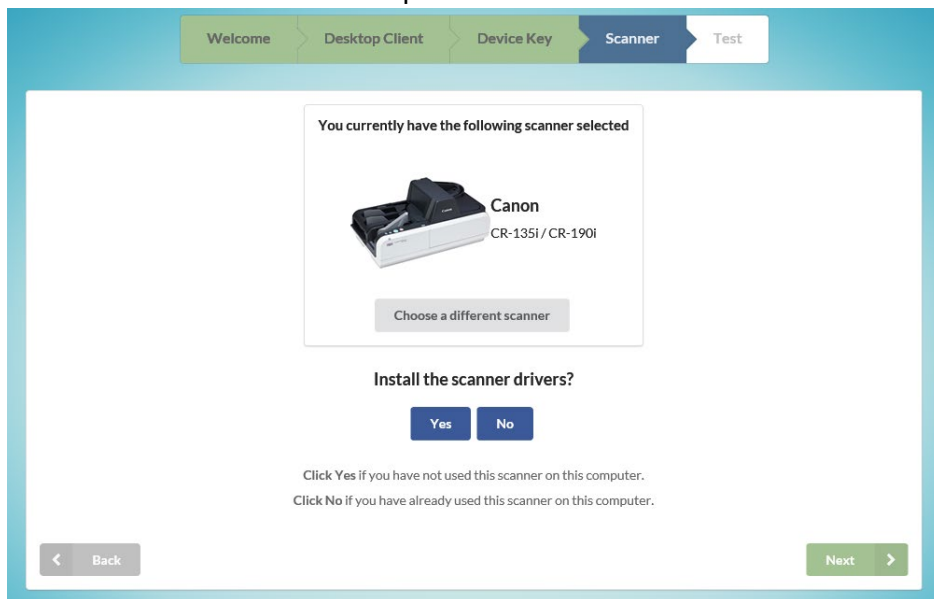
If you already have a scanner installed on your pc, the wizard should detect and identify that scanner for you. If you are not going to be using this scanner, you can click on "Choose a different scanner" to select and install the correct scanner.
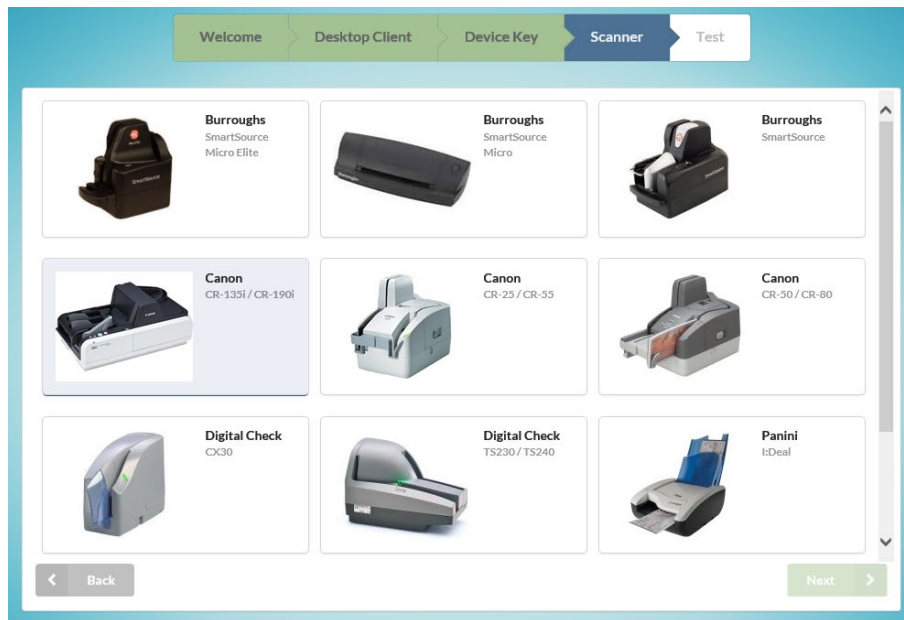
If you do not have a scanner installed, you will be shown a list of available scanners to install on your system.
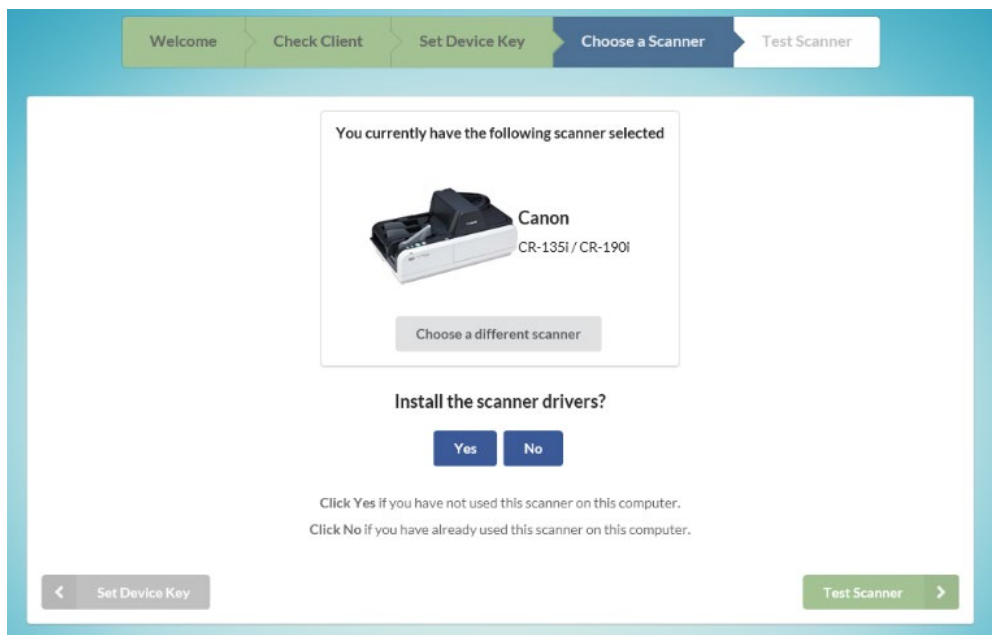
Once you select a scanner, you will be asked if you are already using it for another application. This is to verify if drivers need to be installed. If the scanner is already plugged in, then you should see it on the previous screen. Once you have completed this step, you can select "Test Scanner" to test the connection.
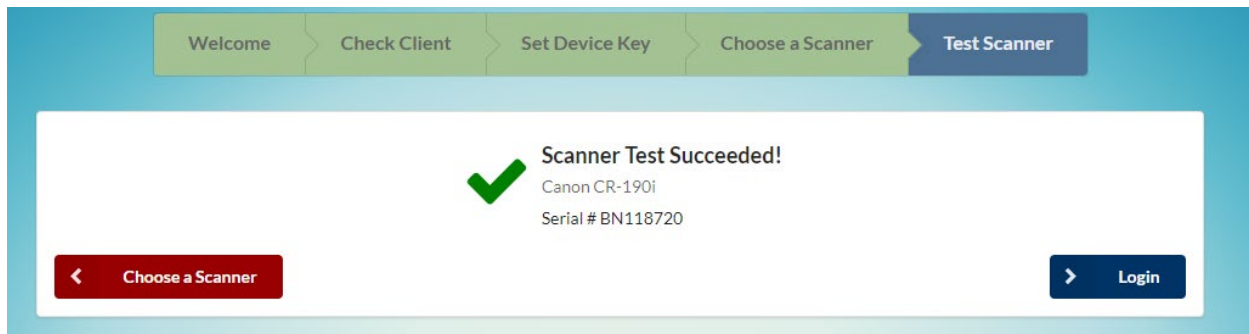
Once your scanner has been successfully tested you can select "Login" to complete the wizard and go to the login page.
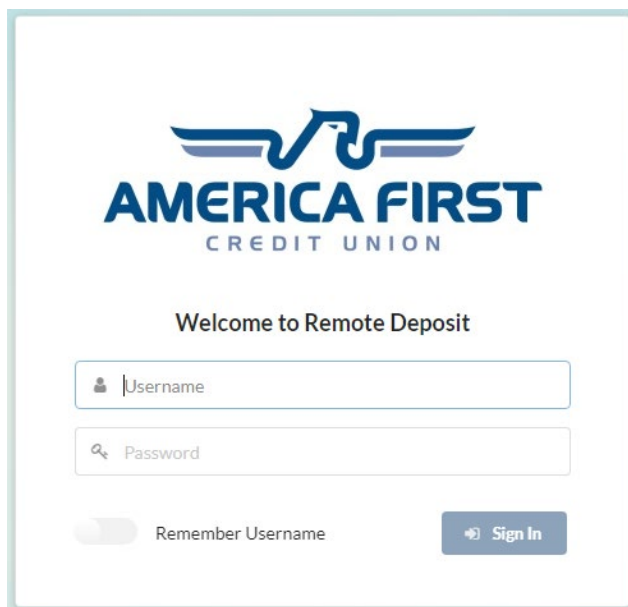
When you sign on for the first time, you will be prompted to choose a new password before you continue to remote deposit.

2. *Making Deposits*

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

Note that you will see your own Institution, Customer, and Username in the appropriate fields

In the "Make a Deposit" Section, the deposit accounts list shows accounts that are eligible for depositing. These accounts can only be setup by an Institution administrator. When making a deposit be sure that you select the correct account.

Depending on the type of work for the account you select. You will add up all items to be deposited and enter the amount into the Deposit Total box as well as the count of items if required. This is used to make sure that all items you are depositing are accounted for when balancing.
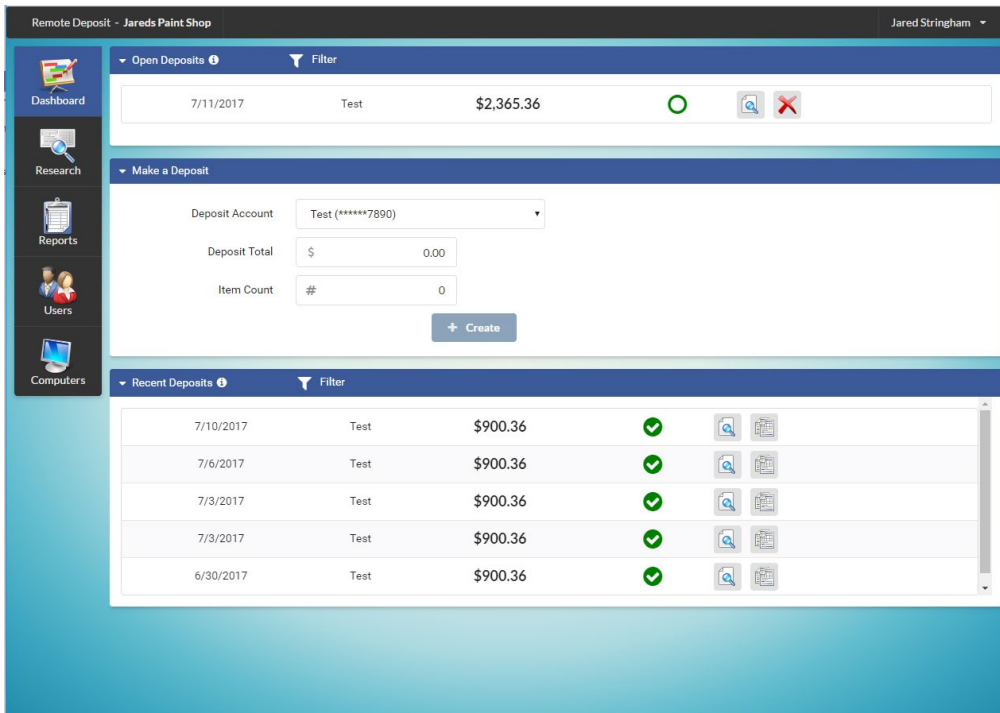
Once you have the account selected and the total is entered click the New Deposit button. This will take you to the capture screen.
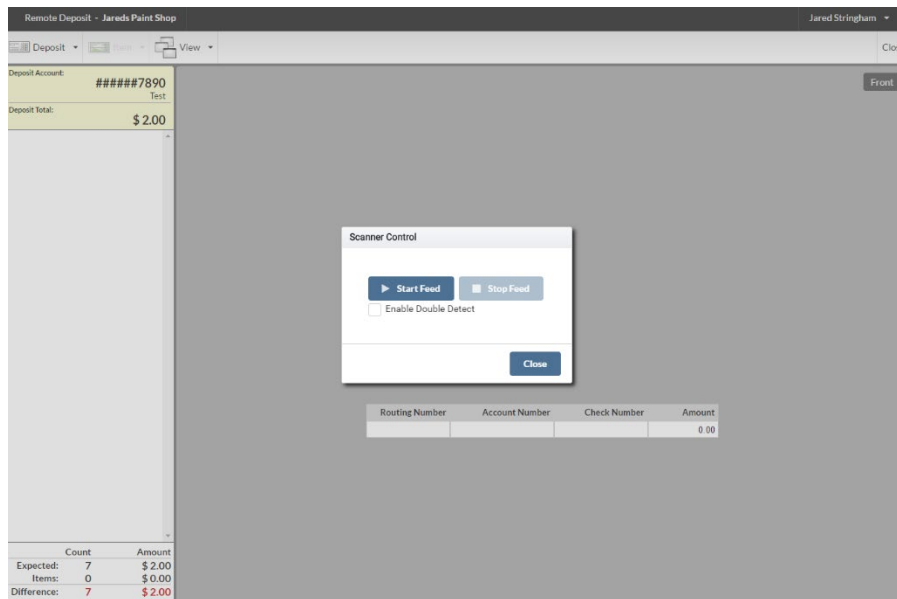

The electronic deposit ticket is created and displayed before you begin scanning. All your customer and deposit information are shown on this ticket. Be sure that all information is accurate before beginning a deposit.

Once you have verified that the information is correct you can begin feeding items through your scanner. 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.
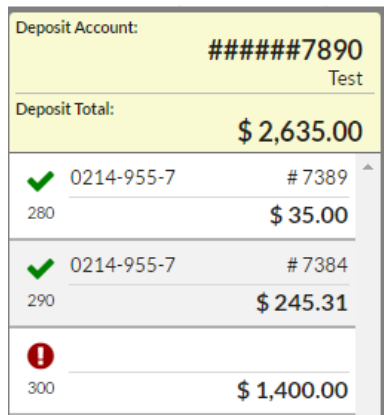
For options on a single item you must select that item then click on the item box in the upper left. This is where you will rotate or swap images or to edit an item after any initial corrections have been made.
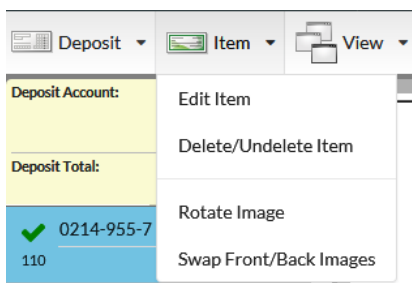

To see front or back of an image simply click the view button and choose which side you need to see.

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.

	Count	Amount
Expected:	7	$ 2,408.60
Items:	7	$ 2,408.60
Difference:	0	$ 0.00

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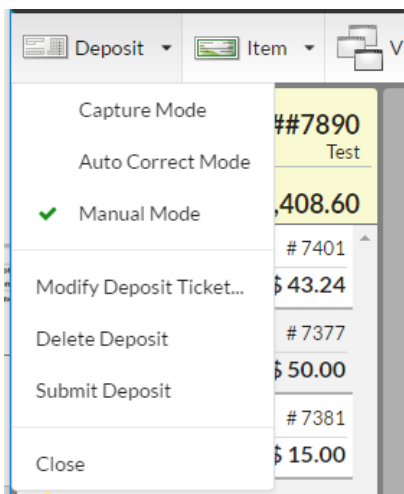

If you need to scan more items click on Capture Mode. If you need to change the total on your deposit ticket to match a corrected total, select Modify Deposit Ticket. You can also submit or delete your deposit from this menu.

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.
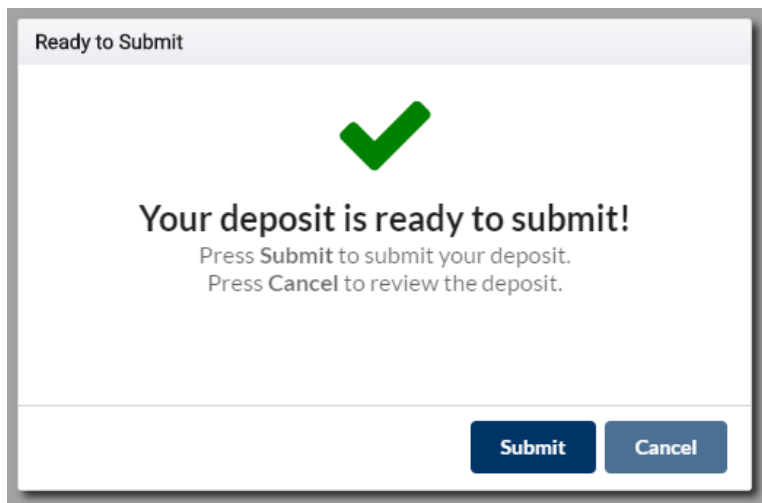
When you click submit, a window will show the status of the deposit. You will also see the expected processing date. If there is an issue with the deposit, it will be placed on hold until someone at your institution reviews and approves it.
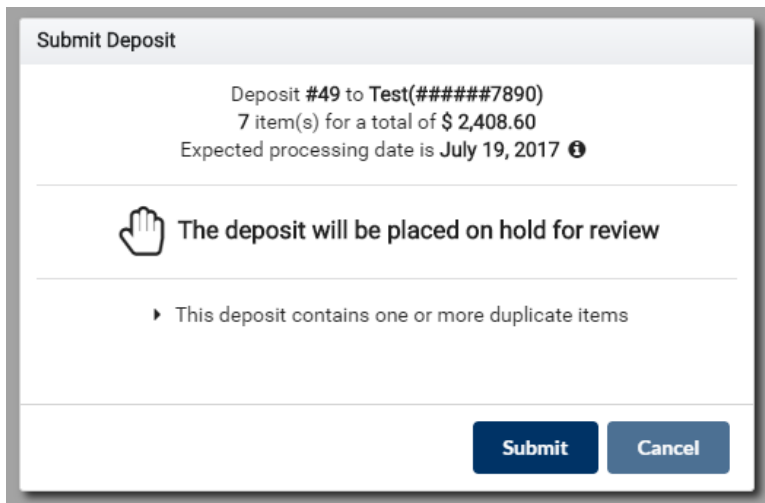
If your deposit is cleared without error you will see a large green check mark indicating your deposit was accepted and will be processed on the date shown in the submit window.
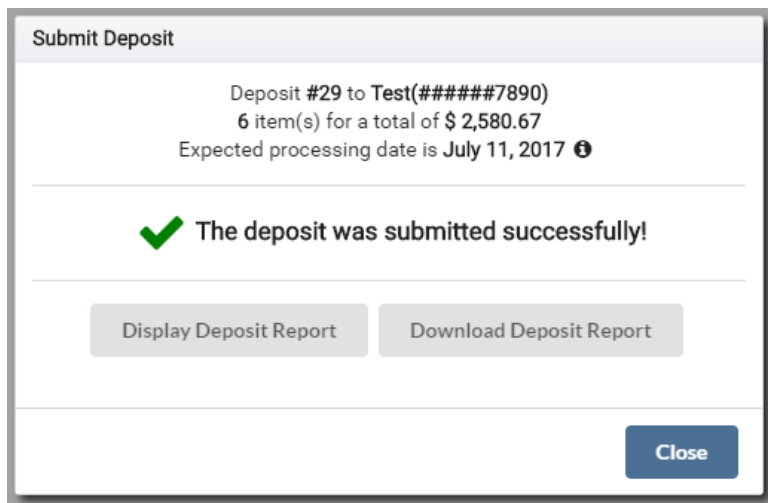
Clicking close on the submit window will take you back to the dashboard.