Remote Deposit Transition Guide

Important actions you will need to take to transition your Remote Deposit Capture Service:

- User must be an administrator on the computer before starting the transition guide.

- On **Friday, August 26th,** after processing the last deposit of the day on the Level One Remote Deposit Capture platform, load First Merchant's platform following the instructions below.

- **Monday, August 29th**, process first deposit on First Merchant's platform.

If you have questions, please call our Treasury Solutions team at 1.866.833.0050.

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1) Log in—First Time (Aug 29)

Individuals accessing RDC deposit through a website will connect through a designated link with a Login Name and password, as instructed.

Items needed to access Remote Deposit Capture:

- **Remote Deposit Capture URL**—Links to site login page
- **Entity Name**—Name of Company
- **Login Name**—Identifies user as authorized user for company
    - Identifies the Locations and Accounts user may access
- **Temporary Password**—Confirms identity of user as authorized for company
    - Identifies the Locations and Accounts user may access
- **Computer Activation Code** (If applicable)—Confirms computer is authorized to access Remote Deposit Capture sits

From the Login Page, input the following information:

1. Enter Entity Name (contained in email).
2. Enter Login name (current credential).
3. Enter Password (contained in email).
4. Click Sign In.
5. Enter Old Password.
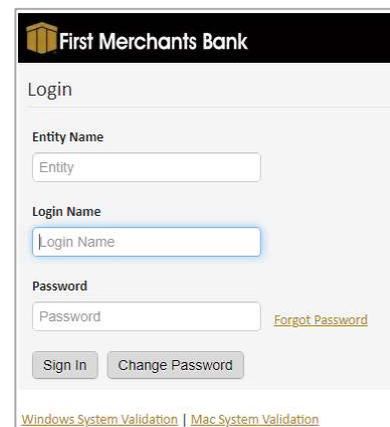
6. Enter New Password.

   - Minimum characters=8
   - Minimum uppercase characters=1
   - Minimum lowercase characters=1
   - Minimum numeric characters=1
   - Minimum special characters (symbol)=1
   - Maximum repeating charters=2

7. Enter New Password again for confirmation.

8. Click Save.

9. Password has been updated successfully message (similar to the one below) will appear.

> Your password has been updated successfully

2) Install Scanner Service

NOTE: If this is the first time the user is activating the workstation, they will be prompted to download the Remote Deposit Capture machine (scanner) service. This is needed to complete the activation process.

              Ensure your remote deposit capture machine (Scanner) is **UNPLUGGED** from your computer. If it is plugged in, Scanner Drivers may have difficulty installing properly.

1. Click to download the appropriate install scanner service package (Windows or Mac).

> **Scanner Installation**
>
> The local scanner service is not running. Please install / reinstall or start / restart the scanner service.
>
> Download Scanner Service Installation
>
> Download Windows Installer   Download Mac Package
>
> Ok
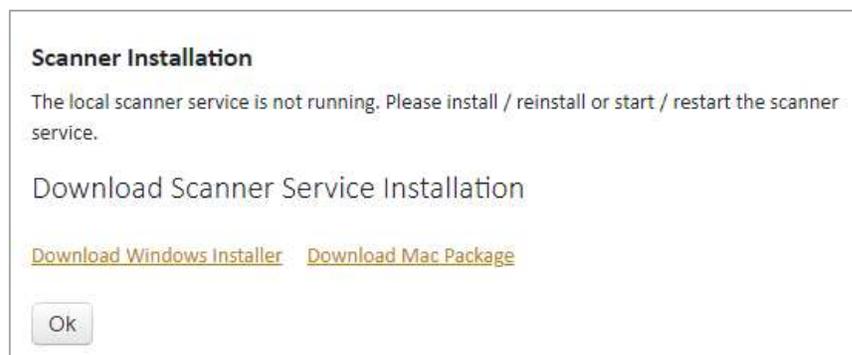
2. Click OK.

NOTE: The Mac installer will restart the Mono framework processes. If you click "ok" before those processes are fully running, you will receive the scanner installation pop up again. Please wait one minute and try again.

3) Computer Activation

1. Enter the computer activation key.

2. Click Submit.

3. The user will be redirected to the Remote Deposit Capture v4.1.1 home page and be logged in.

   NOTE: There is a slight delay on the Mac, but the application will automatically redirect to the home screen.
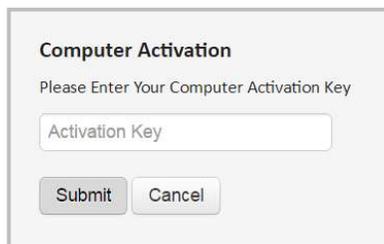
Computer Activation

Please Enter Your Computer Activation Key

Activation Key

[Submit] [Cancel]

   NOTE: RDC deposit v4.1.1 stores the MFA credentials in an XML file that is stored locally on the Machine. The name of the XML file is ComputerCredentials.xml.

4) Set Up Other Users

As the Administrator, you will need to add the other users that will need access to the Remote Deposit System. The instructions are also included in the Quick Start Guide.

Users are established for each individual who are provided access to the applications.

1. Select Admin.

2. Select Users.

3. Click Add User.
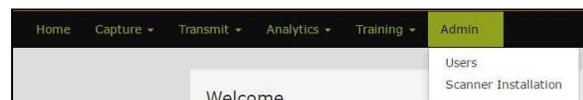
4. Enter the new user's information:

- Login/User Name

- Initials

- First Name

- Middle Initials

- Last Name

- Email address

- Password

- Check Active

- Account is Locked (optional)

- Change Password at next Login, this is checked by default and will require the user to enter a new password the next time the user logs into the application.

5. Click Add User or continue with User Roles.

5) Assign a Role to a User

1. Click Admin.

2. Click Users.

3. If the user exists, click the edit icon in front of the user's login name.

4. Click User Roles.

5. Check the appropriate role(s).

   NOTE: The tasks associated with the selected role(s) will appear in the User Tasks box at the right.

6. Click Update User.

   NOTE: The user becomes a member of this selected role and is able to perform all tasks assigned to this role.

NOTE: A user may be assigned to multiple roles. For example, a supervisor may be assigned to both the User and Administrative roles. When assigned to multiple roles, the user always receives the highest level of rights.

6) Assign Account Level Security

1. Click Admin.
2. Click Users.
3. If the user exists, click the edit icon in front of the user's login name.
4. Click Account Level Security.
5. Select the User Tasks from the list on the left.
6. Select the items for the locations/accounts at the right.
7. Update User.

EDIT USER

User Information
User Roles
Account Level Security

User Tasks	Select Access Rights For Capture Deposits
All	☑ (Select All)
Capture Deposits	▸ ☑ Demo Location 1
Export	▸ ☑ Demo Location 2
Reports	
Research	
Transmission	

Update User   Cancel

NOTE: The new user may now access the client application based on assigned rights.