User guide

Remote Corporate Capture Pro
Simply Deposit Research Guide

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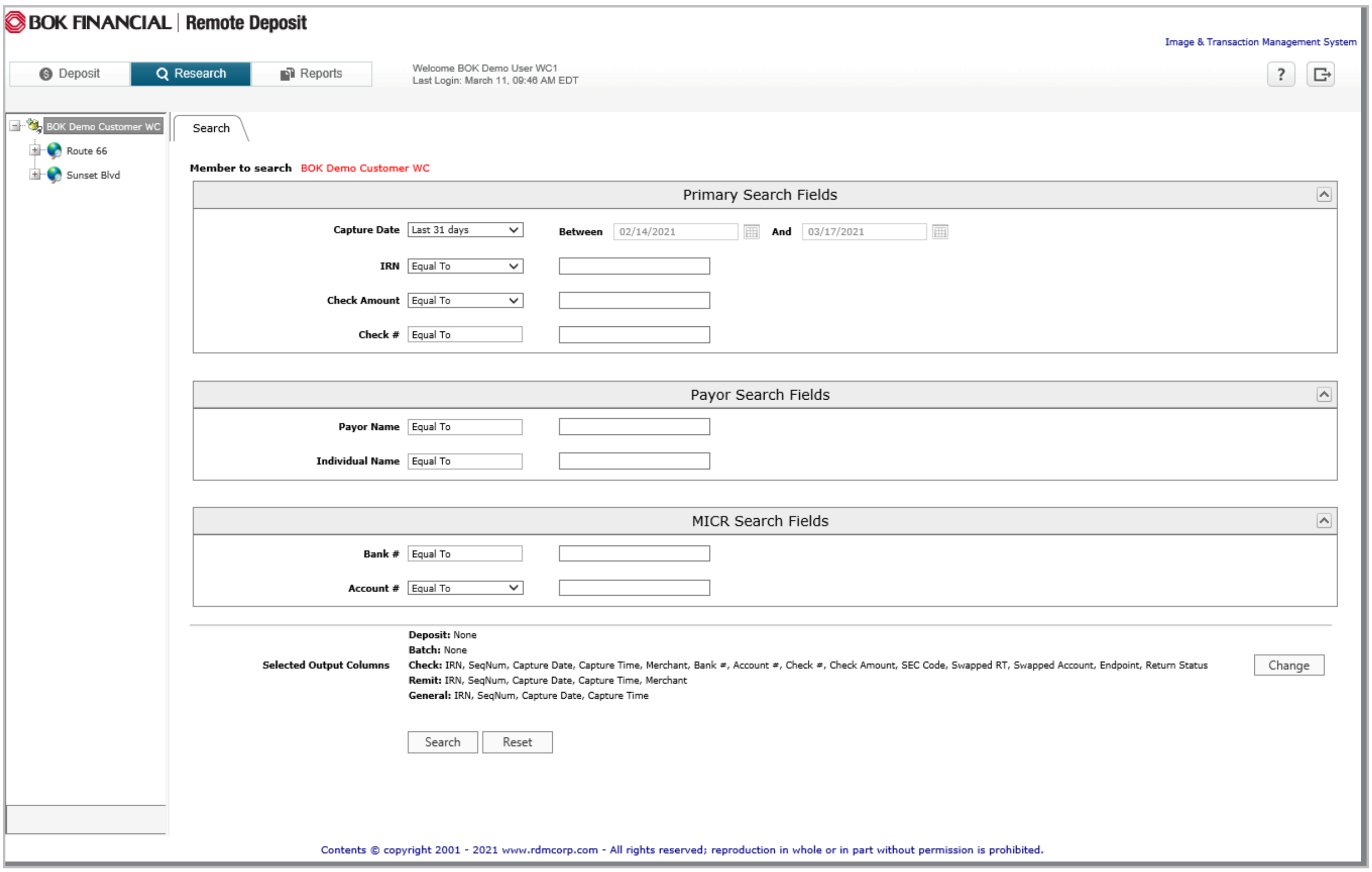
Research Tab Overview

Searching for item images using the Research tab

You can use the Research tab to search for any checks, remittances and general documents that were submitted as a deposit.

You can view the scanned image or images for an item, and any associated data you choose to include in your search criteria.

Standard searches in the Research tab: In the Research tab standard search, you can create a search based on some basic item criteria, such as Capture Date, IRN - Image Reference Number, check amount, payor data or MICR data.



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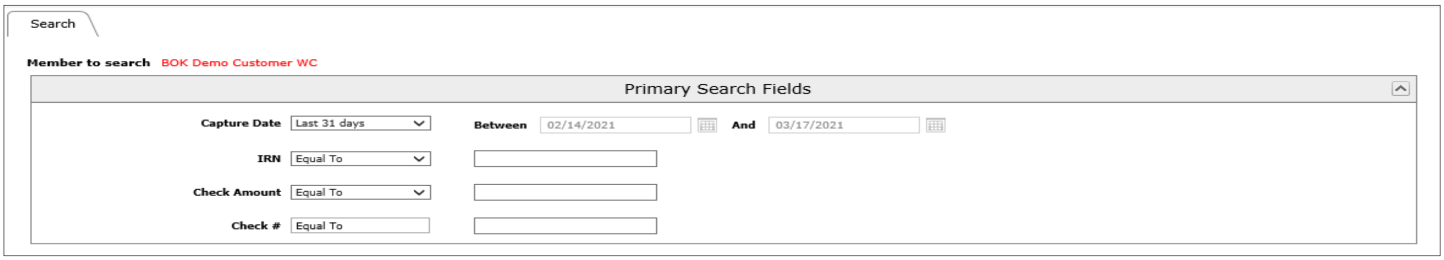
Run a Standard Search

How to Run a standard search from the Research tab:

1. From the home page, click the ‘**Research**’ tab.
2. In the ‘**Primary Search Fields**’ section, do one of the following:
   - In the ‘**Capture Date**’ drop down list, select an option for the date or dates that you want to use to search for your item(s):
     - The ‘**Between**’ and ‘**And**’ fields will automatically change to specify a date range that includes the selected ‘Capture Date’, including the current day.
     - **Equal To** - In the Capture Date field, enter the exact calendar date that the item or items you want to find were scanned into the system, in the format MM/DD/YYYY. Click the calendar ( ) to open a date picker.



     - **Greater Than** - In the Capture Date field, enter the calendar date after which the item or items you want to find were scanned into the system, in the format MM/DD/YYYY. Click the calendar ( ) to open a date picker.
     - **Between** - In the Capture Date Between and And fields, enter a range of dates where the item or items you want to find were scanned into the system, in the format MM/DD/YYYY. Click the calendar ( ) to open a date picker.
   - (Optional) To use an ‘**IRN’** value to search for your item(s), in the ‘IRN’ list and corresponding data entry field, select an option and input an IRN value.
     - **Equal To** - The system will search for the exact IRN value you enter in the IRN field.
     - **Like** - The system will search for all items with an IRN that matches the search string entered in the IRN field. You can use wildcard characters in your search string, such as ‘%’, which represents a sequence of characters or ‘_’, which represents a single character.
   - (Optional) To use a ‘**Check Amount**’ value to search for your item or items, in the Check Amount list and corresponding data entry field, select an option and input a check amount.
     - **Equal To** - The system will search for any checks that have the exact check amount you enter in the Check Amount field.
     - **Greater Than** - The system will search for any checks that have a check amount greater than the amount you enter in the Check Amount field.
     - **Less Than** - The system will search for any checks that have a check amount less than the amount you enter in the Check Amount field.
     - **Between** - The system will search for any checks that have a check amount between the values you specify in the Check Amount fields.
   - (Optional) To use a ‘**Check #**’ to search for your item(s), in the Check # data entry field, enter the exact check number of the check you want to find.

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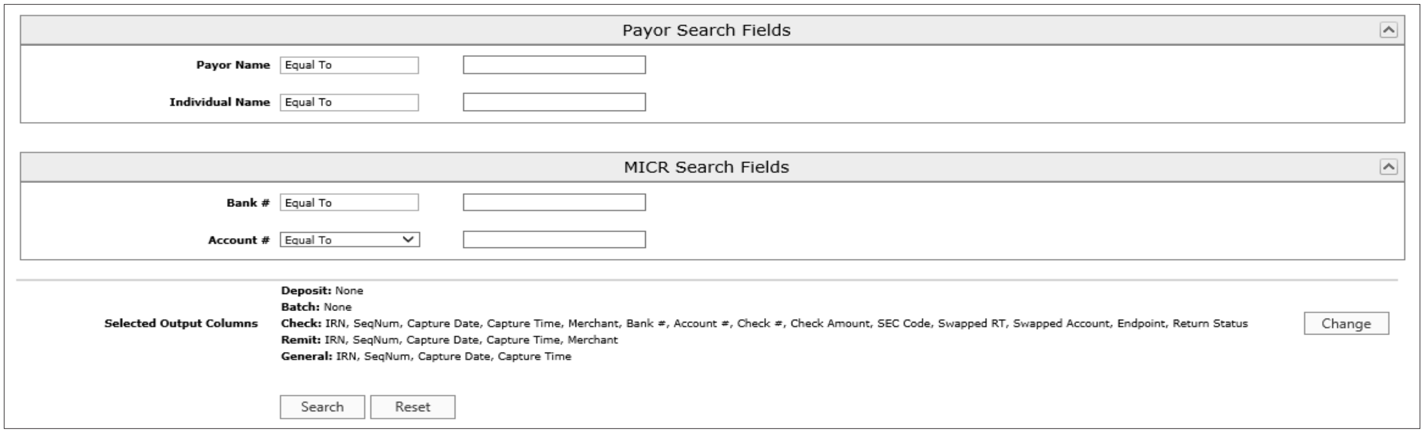
Run a Standard Search

3. (Optional) In the ‘**Payor Search Fields**’ section, do one of the following:
   - (Optional) To use the ‘**Payor Name**’ to search for your item(s), in the ‘**Payor Name**’ data entry field, enter the exact name of the check payor that is associated with a check’s MICR data, exactly as it appears in the system.
   - (Optional) To use an individual name to search for your item(s), in the ‘**Individual Name**’ data entry field, enter the exact value assigned to the payor by the Merchant, exactly as it appears in the system.



Note: Individual Name is the default label for the data field. The field may have a different name assigned, such as an account number or another way of identifying a Payor in the system.

4. (Optional) In the ‘**MICR Search Fields**’ section, do one or more of the following:
   - (Optional) To use the ‘**Bank #**’ to search for your item(s), in the ‘**Bank #**’ data entry field, enter the exact value of the bank number from the check or checks you want to find.
   - (Optional) To use an ‘**Account #**’ value to search for your item(s), in the ‘**Account #**’ list and corresponding data entry field, select an option and input an Account number.
     - **Equal To** - The system will search for the exact Account number value you enter in the ‘**Account #**’ field.
     - **Like** - The system will search for all items with an Account number that matches the search string entered in the ‘**Account #**’ field. You can use wildcard characters in your search string, such as ‘%’, which represents a sequence of characters or ‘_’, which represents a single character.

Tip: To clear all currently configured search options, click ‘**Reset**’.

5. (Optional) To change the information shown about items in your search results, click ‘**Change**’.
   - To include an output column in your search results, click its corresponding check box.
   - To remove a column from your search results, clear its check box.
   - (Optional) To clear all selected output columns except the default selections, indicated with an asterisk (*), click Defaults.
   - To save your output column selection, click ‘**Ok**’. To cancel your changes, click ‘**Cancel**’.
   - The first 10,000 results in your search will be displayed, click ‘**Search**’.

6. To start a new search, click ‘**New Query**’.

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