

User guide

Business Office Deposit
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.

The screenshot displays the BOK Financial Remote Deposit interface. At the top, there are navigation tabs for Deposit, Research, and Reports. The Research tab is active. The interface includes a search area with the following sections:

- Primary Search Fields:** Includes fields for Capture Date (Last 31 days), Between (02/14/2021 to 03/17/2021), IRN (Equal To), Check Amount (Equal To), and Check # (Equal To).
- Payor Search Fields:** Includes fields for Payor Name (Equal To) and Individual Name (Equal To).
- MICR Search Fields:** Includes fields for Bank # (Equal To) and Account # (Equal To).

Below the search fields, there are sections for **Selected Output Columns** and **Selected Output Columns** with a **Change** button. The **Selected Output Columns** section includes:

- Deposit:** None
- Batch:** None
- Check:** IRN, SeqNum, Capture Date, Capture Time, Merchant, Bank #, Account #, Check #, Check Amount, SEC Code, Swapped RT, Swapped Account, Endpoint, Return Status
- Remit:** IRN, SeqNum, Capture Date, Capture Time, Merchant
- General:** IRN, SeqNum, Capture Date, Capture Time

At the bottom of the search area, there are **Search** and **Reset** buttons. The footer of the page contains the text: "Contents © copyright 2001 - 2021 www.rdmcorp.com - All rights reserved; reproduction in whole or in part without permission is prohibited."



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.

The screenshot shows a search interface titled "Primary Search Fields". At the top, it says "Member to search BOK Demo Customer WC". Below this, there are several search criteria fields:

- Capture Date:** A dropdown menu set to "Last 31 days".
- Between:** A date field containing "02/14/2021".
- And:** A date field containing "03/17/2021".
- IRN:** A dropdown menu set to "Equal To" with an empty text input field next to it.
- Check Amount:** A dropdown menu set to "Equal To" with an empty text input field next to it.
- Check #:** A dropdown menu set to "Equal To" with an empty text input field next to it.

- **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.

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.

The screenshot displays a search interface with three main sections:

- Payor Search Fields:** Contains two rows of search criteria. The first row has 'Payor Name' with a dropdown set to 'Equal To' and an empty text input field. The second row has 'Individual Name' with a dropdown set to 'Equal To' and an empty text input field.
- MICR Search Fields:** Contains two rows of search criteria. The first row has 'Bank #' with a dropdown set to 'Equal To' and an empty text input field. The second row has 'Account #' with a dropdown set to 'Equal To' and an empty text input field.
- Selected Output Columns:** Lists several columns with checkboxes: Deposit: None, Batch: None, Check: IRN, SeqNum, Capture Date, Capture Time, Merchant, Bank #, Account #, Check #, Check Amount, SEC Code, Swapped RT, Swapped Account, Endpoint, Return Status, Remit: IRN, SeqNum, Capture Date, Capture Time, Merchant, and General: IRN, SeqNum, Capture Date, Capture Time. A 'Change' button is located to the right of this list.

At the bottom of the interface are 'Search' and 'Reset' buttons.

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**'.

