



Manage Locations



CLICK
Manage Locations



CREATE LOCATION
Create New Location button



FILL OUT
Location name
Location number



SELECT
One or several available accounts



CLICK
Add button



CONFIRM
Save button



SHOW SITES
Show All button



WARNING
If you accidentally deleted a location, wait 24 hours to recreate the location of the same name

Customize Fields



CLICK
Administration tab
Left side menu Custom Fields



CREATE



CLICK
Create New Custom Field button



FILL OUT & CHECK
Depending on your needs



FILL OUT THE MANDATORY FIELD

Locale label

In English

In French

Add Locale Label button



CONFIRM
Save button



ASSOCIATE



SELECT SEARCH CRITERIA
Account Number
Routing Transit



SHOW LIST
Show All button



SELECT ACCOUNT
Custom Field Assigned
Or Not Assigned

Copy or not an existing account's setup

Select account to copy



SELECT FIELD
Available Or Selected

Add button
 Remove button



CHANGE ORDER
Move Up button
Move Down button



CONFIRM
Save button



MODIFY



SELECT SEARCH CRITERIA
Custom Field Name



SHOW LIST
Show All button



SELECT FIELD
Custom field to modify



MODIFY
Depending on your needs



CONFIRM
Save button



Manage Users



CLICK
Manage Users

CREATE



CREATE
Create New User button



FILL IN

1. Information
2. Roles
3. Locations

Using Username initially created in



CONFIRM
Save button

EDIT



SHOW USERS
Show All button



SELECT
User to modify



CHOOSE EDIT

- Roles and Limits
- Locations
- Report Access
- Account Exclusions



MODIFY

- Add or Remove
- Check or uncheck
- Enter information in the override fields



CONFIRM
Save button

Preferences



CLICK
Administration Tab
Preferences Left side menu



SELECT
Depending on your needs

- Optional Fields
- Lists
- Reports

OPTIONAL FIELDS



CHECK & FILL OUT
1 to 3 Optional fields



CONFIRM
Save button



IMPORTANT
These fields will appear when new deposits are created.

LISTS



SHOW PAGE
Select page to customize



EDIT LIST

- Available Or Displayed
- Add button
- Remove button



CHANGE ORDER

- Move Up button
- Move Down button



APPLY
Apply button
Before modifying another page



CONFIRM
Save button
Once all changes are made

REPORTS



SHOW REPORT
Select report to customize



EDIT REPORT

- Available Or Assigned
- Add button
- Remove button



CHANGE ORDER

- Move Up button
- Move Down button



SORT COLUMNS
Select 1 to 3 sort columns



CHECK OR UNCHECK

- Ascending order
- Descending order



APPLY
Apply button
Before modifying another report



CONFIRM
Save button
Once all changes are made

User Help and Support

For more information, visit:
<http://www.desjardins.com/remote-deposit-capture-help>

You will find:

- User guide
- Training videos
- Job aid tools
- Links to Digital Check scanners models