QUICK START GUIDE
REMOTE DEPOSIT CAPTURE (RDC)

First Business Bank

LOGGING ON

- URL: https://netimagelr5.fidelityifs.com/directlinkclient/login/800853#/
- An explanatory email will be sent to you with a username & password
- You will need to set up challenge questions & reset your password.
  - Password requirements: minimum length of 8 characters and include a mixture of uppercase and lowercase characters, numbers (0-9) & special characters.

SCANNER INSTALLATION

- First Business Bank will contact you to schedule a time to install your scanner.
- Please make sure you are logged in as an Administrator or that a member of your IT Team is available to login to your PC as an Administrator to complete the installation.

HOME PAGE

Please refer to these helpful tips to navigate the Remote Deposit Capture app:

- House Icon – Will return the user to the home page at any time.
- Open Deposits Tab – View all open deposits that have not yet been completed. Select a deposit from this screen to continue working on it.
- Recent Deposits Tab – View recently completed deposits and click specific deposit to view the details.
- User Settings – (Upper right hand of the screen) Change display name, email, password, manage phone numbers, and reorder locations/accounts on screen.

CREATING A DEPOSIT

- Select a Location, Account, and Enter Amount of the Deposit, then click on "Create Deposit."
- Place items in the scanner and select "Capture."
- Each item will be added to the "Items" list below the capture screen. You can sort this list by clicking on a column header. View an item by selecting it from the list.
- Click "Next" when finished to move on to Correcting Items.
- You will be automatically prompted, based on the allowed edits, to correct any issues found. (The bank can specify which fields of the MICR line, if any, can be edited.) Click on "Accept"when finished editing.

RESEARCH

- Available dependent on the appropriate user role you select during original setup. The user role also affects if you can research only deposits for the locations/accounts to which you have access or all deposits.
- Select dates and add additional fields as needed to filter the search results. To remove an added field, click on the "x" button to the right of the line.

- To save the query for future use, select the menu icon (3 vertical dots) and choose to Save (only saves for the user creating the query) or Save to Merchant (saves the query for all users under the merchant). If you will be exporting the results, you can specify export options, such as number formats and delimiters, below the search pane. You will need to set up challenge questions & reset your password.
- You may view an item in the list by simply clicking on it and can sort the results by clicking the column header. (Advanced Sort: Click the first column to sort by, then hold the Shift Key and select each subsequent column header in the order you want to sort the data. i.e. First click on Account Number, hold the Shift key, then click on Amount. This will sort by account number and then by amount.)
- Click on the menu icon (3 vertical dots) to select which columns are displayed, export the results as displayed, print selected items, print the deposit detail, print the deposit image of selected item, or to view the items that make up that deposit.

REPORTS

- All reports are in PDF format.
- Report information restricted to the locations/accounts each user has access to and is only available for the time specified in the merchant setup (typically 365 days).

ADMINISTRATION

- This section is used to add new users, edit existing users, or remove users.
- The left pane shows the list of users already setup in RDC and provides options to filter the list by entering in search information. To add a new user, click the "+" next to the search box.
- The user name (Login ID), full name, email address, phone number, default scanner, and one or more user roles must be selected. Next, choose any locations the user needs access to and the accounts to which they have access. To choose a role, click on the "More" option (3 horizontal dots). Click on the menu icon (3 vertical dots) when opening the locations/accounts options to view the option "Select All".
- You can change the order in which the locations/accounts are displayed by numbering them accordingly (users can manage this themselves, so it is optional).
- To edit an existing user, select the user and edit any information necessary that displays. The menu icon (3 vertical dots) in the upper right side of the screen allows you the option to disable.

HAVE ANY QUESTIONS?

If you have questions, please call Treasury Management at 608-232-5938 or email us at TMSupport@firstbusiness.bank.