



Select Business™
Mobile Guide for iPhone

Welcome

The purpose of the Select Business™ Mobile Guide for iPhone is to describe how a business should manage the Select Business system from an Apple® iPhone so that that business can remotely scan and deposit checks into Demand Deposit Accounts provided by the Financial Institution.

If you should have any questions about the instructions in this guide, please contact RDC Support:

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Email: support@rdcselect.com



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Getting Started

You may access and use Select Business™ through your Apple® iPhone mobile device, in addition to using a desktop computer. This User Guide outlines how to create and manage deposits to your associated Select Business account through your iPhone.

▶ Before you use your mobile device

Before you can log in on your mobile device, confirm that you have already been set up in Select Business with one or more locations, accounts, and roles through your financial institution, as you will not have access to the mobile version of Select Business if you are not already a registered user of the desktop version. Also confirm that you have been assigned a username and set your password, according to the email you received directing you to log in by computer and change the temporary password. When this is complete, you must install the Select Business mobile app on your smartphone.

App Installation

▶ Download the Select Business mobile app to your iPhone

1. Open the App Store on your iPhone.
2. Search for the app by its name (assigned by your financial institution).
3. Follow the download instructions to download and install.

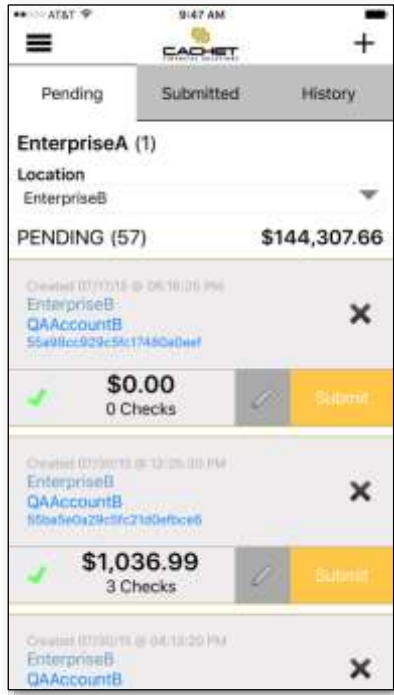
Logging In

Tap the launch icon on your device's homepage to open the login screen. Type your assigned user name and your password. This is the same username and password you use for the desktop version of Select Business. Then tap the orange **Sign In** button.



The Home Page: Pending Deposits

The Home page pictured below opens displaying three tabs of check deposit information: Pending, Submitted and History, all of which will be discussed on later pages. Tap the + sign in the upper right corner to create a new deposit.



☰ is the System Menu icon.
 + is the Create New Deposit Icon.

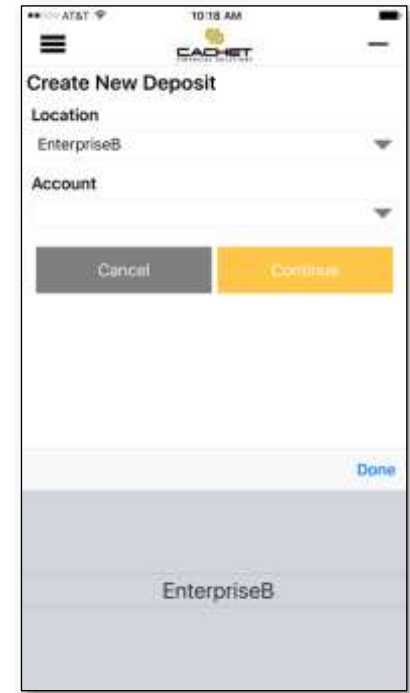
Creating Deposits

New Deposits

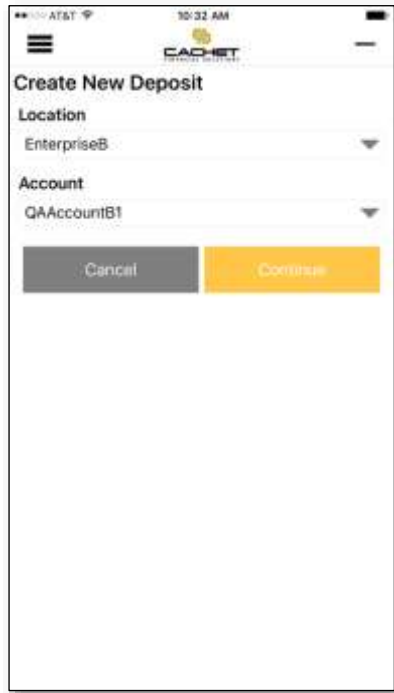
Location and Account Settings

The first step in creating a new deposit is choosing the location and associated account to which the deposit is being made. This is particularly important if there is more than one location or more than one account from which to choose.

On the *Create New Deposit* screen seen at right, touch the down arrow at the end of the Location or Account information boxes to activate the gray area at the bottom of the screen with a spinner list of choices. Tap the location and account to which you want to make your deposit. Tap **Done** when you are finished.



If you do not have appropriate access permissions for the location or account you've chosen, a popup error message displays. Click **OK** to dismiss the error message and choose another location or account.

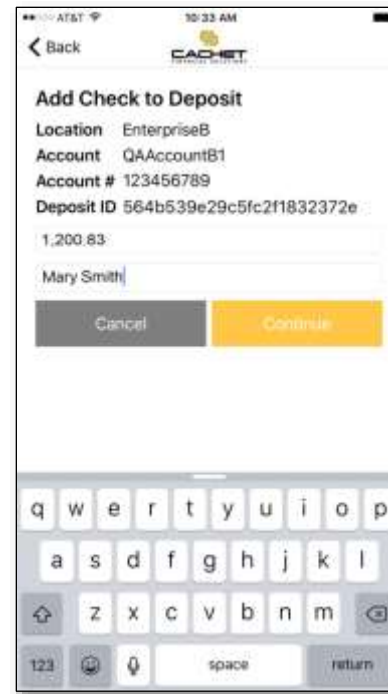


When the location and account are selected, tap the orange **Continue** button to open a summary page that tracks deposit information.



Adding a Check to a Deposit

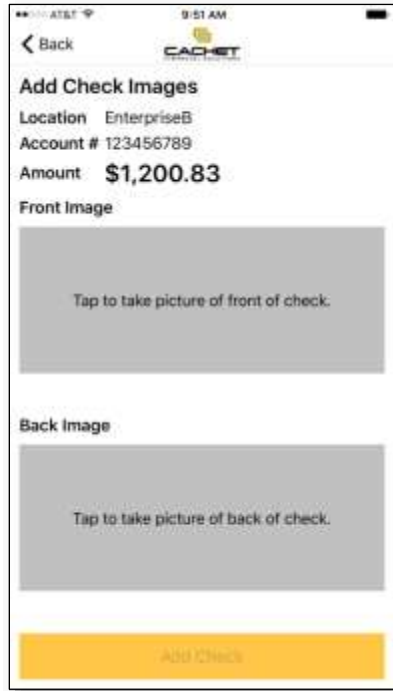
This summary page is empty when first displayed. To add a check and create a deposit, tap the orange **Add Check** button to open the *Add Check to Deposit* screen, seen below.



Using the keypad, enter the amount of the check and any notes, and then tap the **Continue** button.

Taking Pictures of Checks

The next step is to take pictures of the front and back of the check using the camera in your smartphone.



Tap the top gray box to activate the camera to take a picture of the front of the check. The screen changes as seen below. Compose the shot carefully:



1. Place the check on a background that is a smooth, solid color that contrasts with the check.
2. Ensure there is sufficient lighting.
3. Ensure the entire check fills the frame without obstructions and that all edges can be seen.
4. Hold the phone as steady as possible.
5. Take the picture.

The picture displays for your approval, as seen at left. You may tap to "Use Photo" or tap "Retake" to try again.

When you tap "Use Photo," the photo fills the Front Image box on the *Add Check Images* screen.

Repeat the process to take a picture of the back image. When you are finished, both pictures fill the screen as shown on the next page.



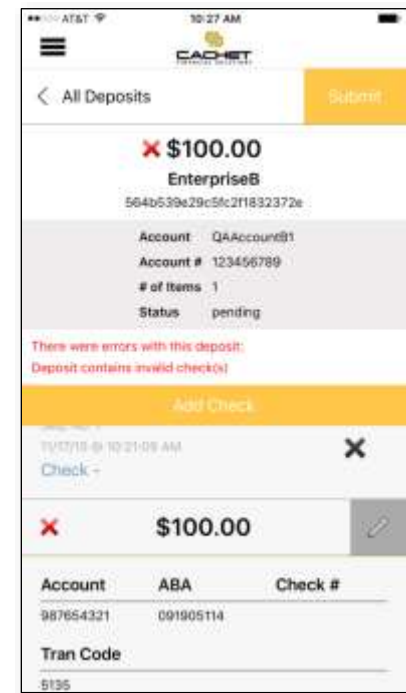
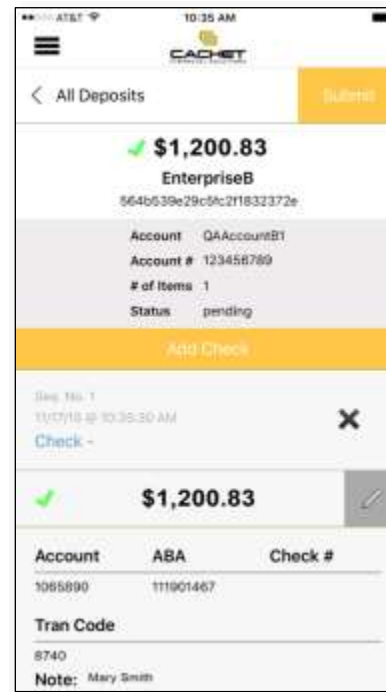
If the check passes verification, the orange **Add Check** button is now enabled. If the check does not pass, a popup error message asks you to retake the photo before you can proceed.

Tap the **Add Check** button to return to the deposit summary screen, where the check is shown as added to the deposit.

If the check is verified for submittal, it displays a green check next to the check amount. If there are errors, they are listed and the screen displays a red **X**.

Editing Deposits

From the summary screen, you can review the deposit, edit the deposit, add more checks to the deposit, or delete checks from the deposit. You can also submit the checks in the deposit for processing.




Review Deposits

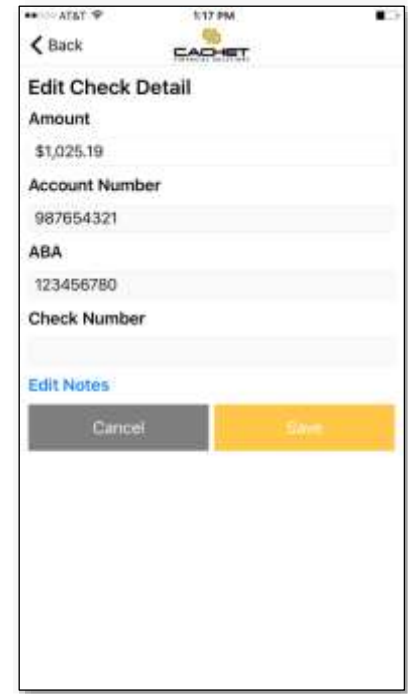
When there is more than one check added to a deposit, the lower portion of the summary screen scrolls so you can see all the checks in the deposit, in order of sequence. Each check in the deposit is listed by its account number, the ABA number, the Check # or Tran Code, and the amount of the check. To see more detail about a check, tap the blue “Check” link [Check -](#) to open a *Review Check* screen, as seen below.



Note that if there are errors, they are listed in red text.

Editing a Deposit

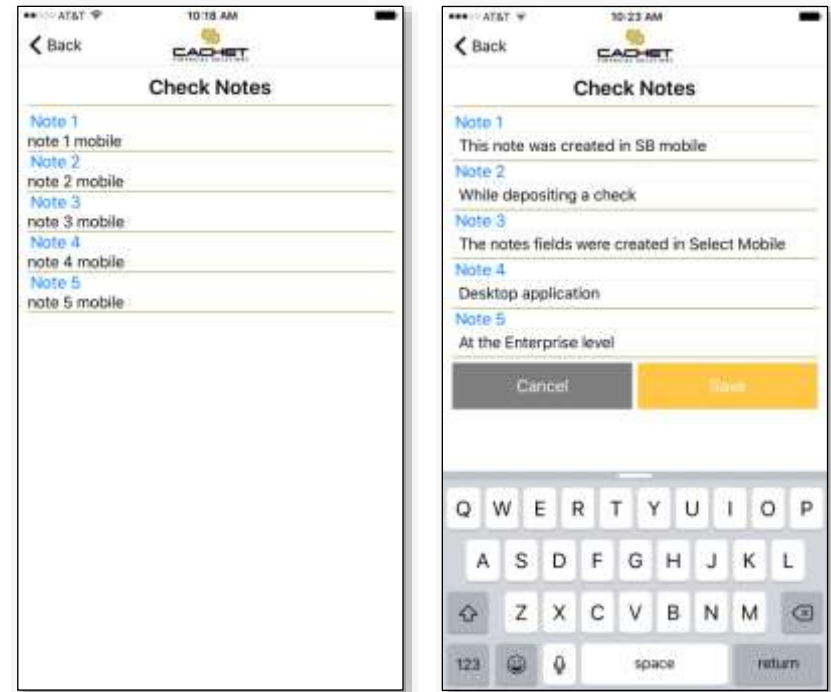
To the right of the amount of a listed check is an Edit (pencil) icon  to open the *Edit Check Detail* screen, seen at right, to make changes. Tap a field to activate the keyboard. Not all fields are editable. Tap the **Save** button to save your changes. A confirmation popup message confirms your check edit has been saved.



Editing Deposit Notes

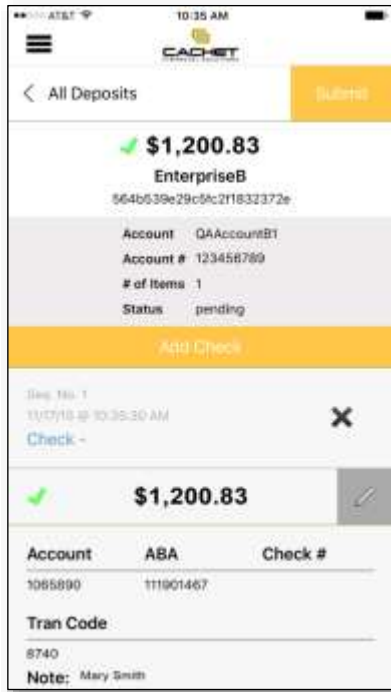
From the *Edit Check Detail* screen seen on the previous page, touch the Edit Notes link to open the *Check Notes* screen, seen at right, to edit any notes associated with this deposit. At least one note is available by default; your Financial Institution may configure up to four notes with customized labels, and they do so at the Enterprise level in Select Business, not in the mobile app. If the user has the appropriate permissions, each Notes field is editable.

Tap a Note field to activate the keyboard for that field, then type a new note. When finished, tap the **Save** button, which saves the Note with other information about this check.



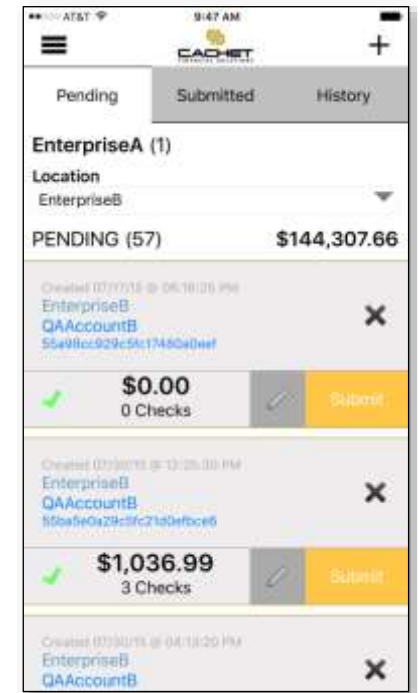
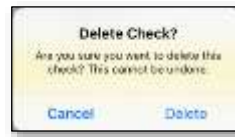
Adding a Check to a Deposit

If the deposit has not yet been submitted, you can add additional checks to it. From the summary screen for that deposit, tap the orange **Add Check** button to open the *Add Check to Deposit* screen. Refer to the image in the New Deposits section, page 8, for more information.



Deleting a Check from a Deposit

If a deposit has not yet been submitted, you can delete a check from it. With the check you want to delete in view, tap the black **X** at right. A confirmation popup message asks you to confirm that you want to delete the check, and reminds you this cannot be undone.



Deleting Deposits

If a deposit has not yet been submitted, and you have the appropriate access permissions, you can delete the entire deposit. Tap the All Deposits or Back arrow in the upper left of your screen to return to the Pending tab.

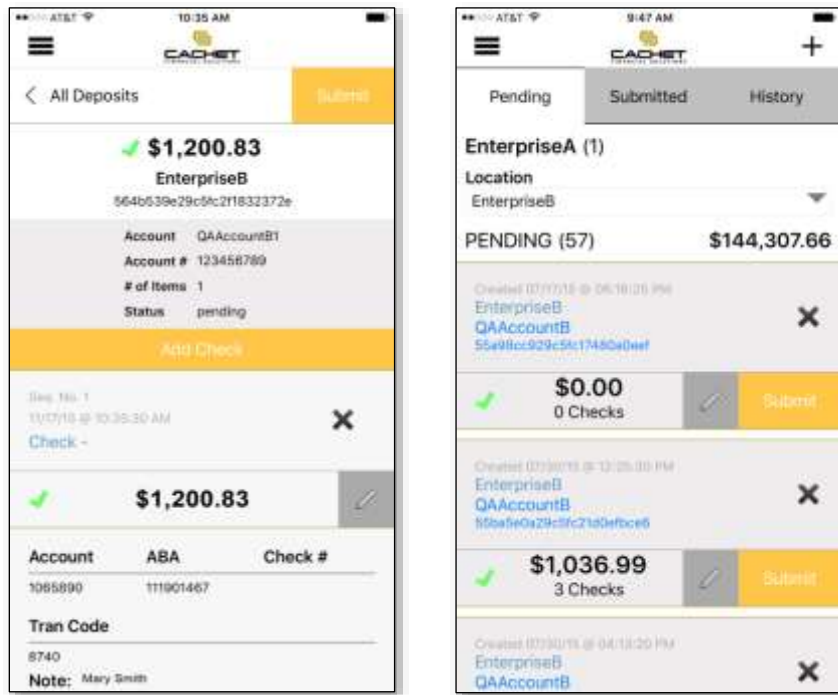
Find the deposit you want to delete in the list and tap the black **X** to the right of it. A confirmation popup message asks you to confirm that you want to delete the deposit, and reminds you this cannot be undone.

Submitting Deposits

► **To submit a deposit to your financial institution for processing**

When you are finished working on a deposit and all its member checks, and the deposit does not have scanning errors (indicated by the green checkmark) you can submit the deposit to your financial institution in one of two ways:

1. Tap the orange **Submit** button from that deposit’s summary screen. Or
2. Return to the Pending tab. Choose the deposit you want from the list and tap its orange **Submit** button.



When you submit a deposit, it is uploaded to your financial institution, and the deposit moves from being listed on the Pending tab to the Submitted tab.

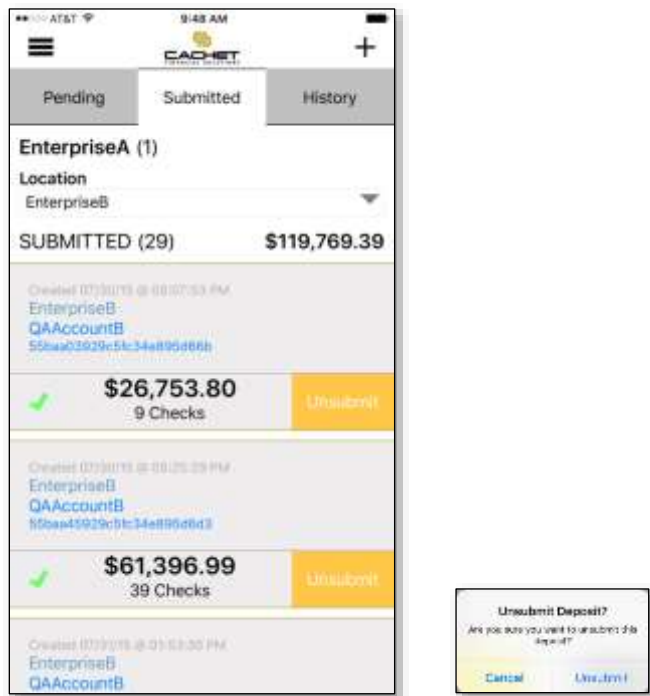
Unsubmit a Deposit

If you have the appropriate access permissions, you can “unsubmit” a deposit as long as it has not been processed.

► To unsubmit a deposit

Find the deposit you want to unsubmit in the list on the Submitted tab, and scroll if necessary.

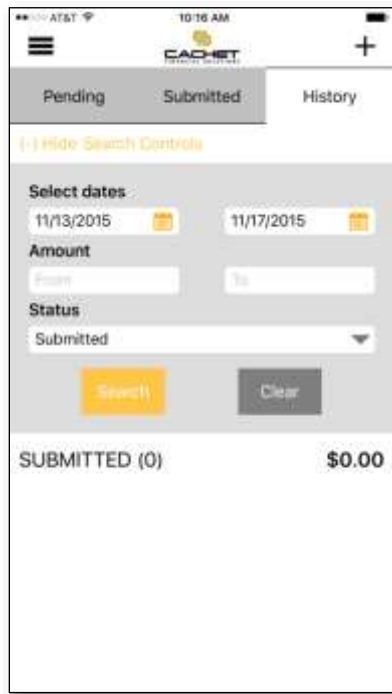
Tap the orange **Unsubmit** button beside the deposit. A confirmation popup message asks you to confirm that you want to unsubmit the deposit.



Check Search/History

The History tab lets you search for deposits that have been submitted or processed.

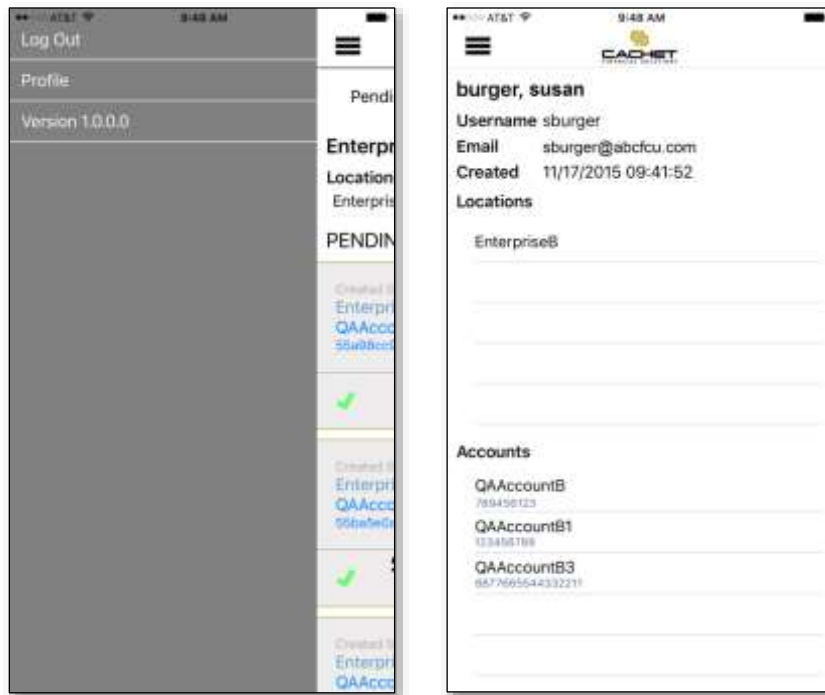
To enter search criteria, tap a field to begin typing a date range or an amount range, or choose a status (Submitted or Processed) from the drop-down list. Tap the orange **Search** button to conduct the search.



Search results will display in the lower portion of the screen. If the list is long, you can temporarily hide the search controls to expand the results list by tapping the orange link marked **(-) Hide Search Controls**.

Checking Your Profile

To view your profile, tap the menu icon to reveal a menu, and then tap **Profile** to open the page displaying your username, email, and the locations and accounts to which you have been granted access.



Note that this menu also lists the link to **Log Out** of the app.

