THE VERIFI ACCOUNT ACTIVATION GUIDE

Get Activated in 4 Easy Steps

1 Initiate Account Activation

Select the Accounts to run transaction validations through Verifi

2 Enable Service and Grant User Access

Enable the Verifi service and select users that will need access

3 Set up Verification Criteria

Establish the transaction criteria to be verified.

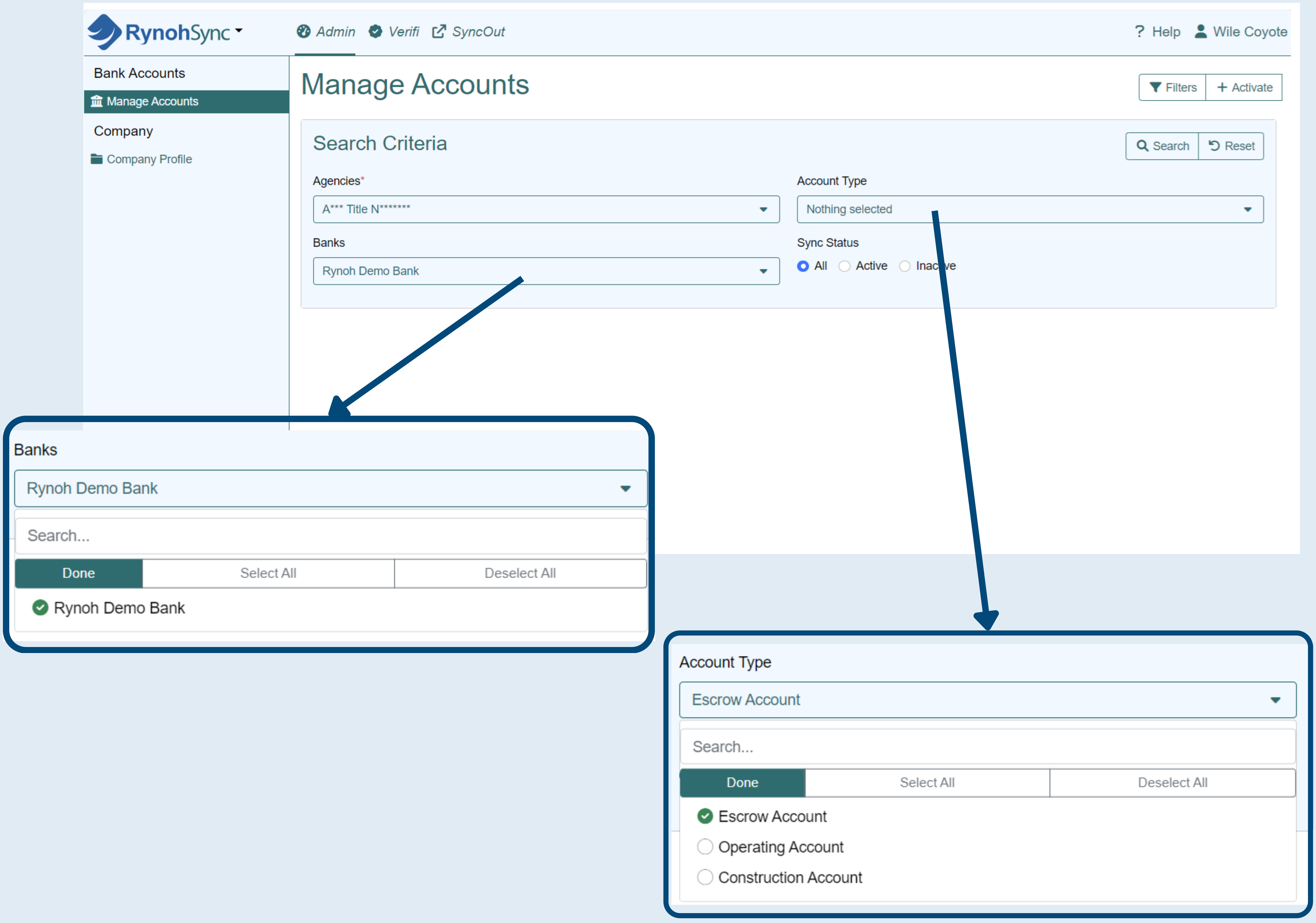
4 Enter Wire and Routing Info

Begin entering the routing and wire information on transactions to be verified.

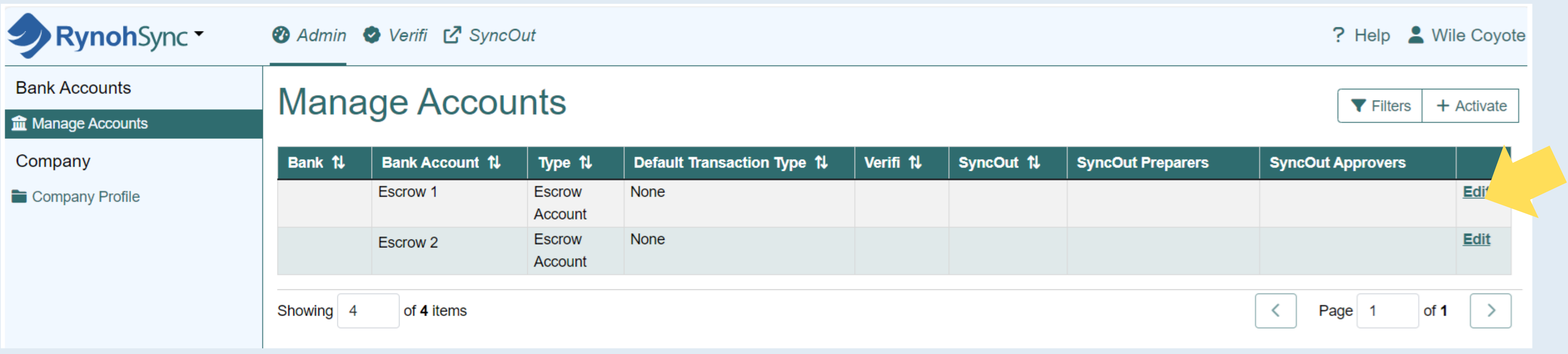
1 INITIATE ACCOUNT ACTIVATION

Select the Accounts to run transaction validations through Verifi

To setup and activate your bank account, go to the Manage Accounts page and select the Banks and Account Types in the Search Criteria.



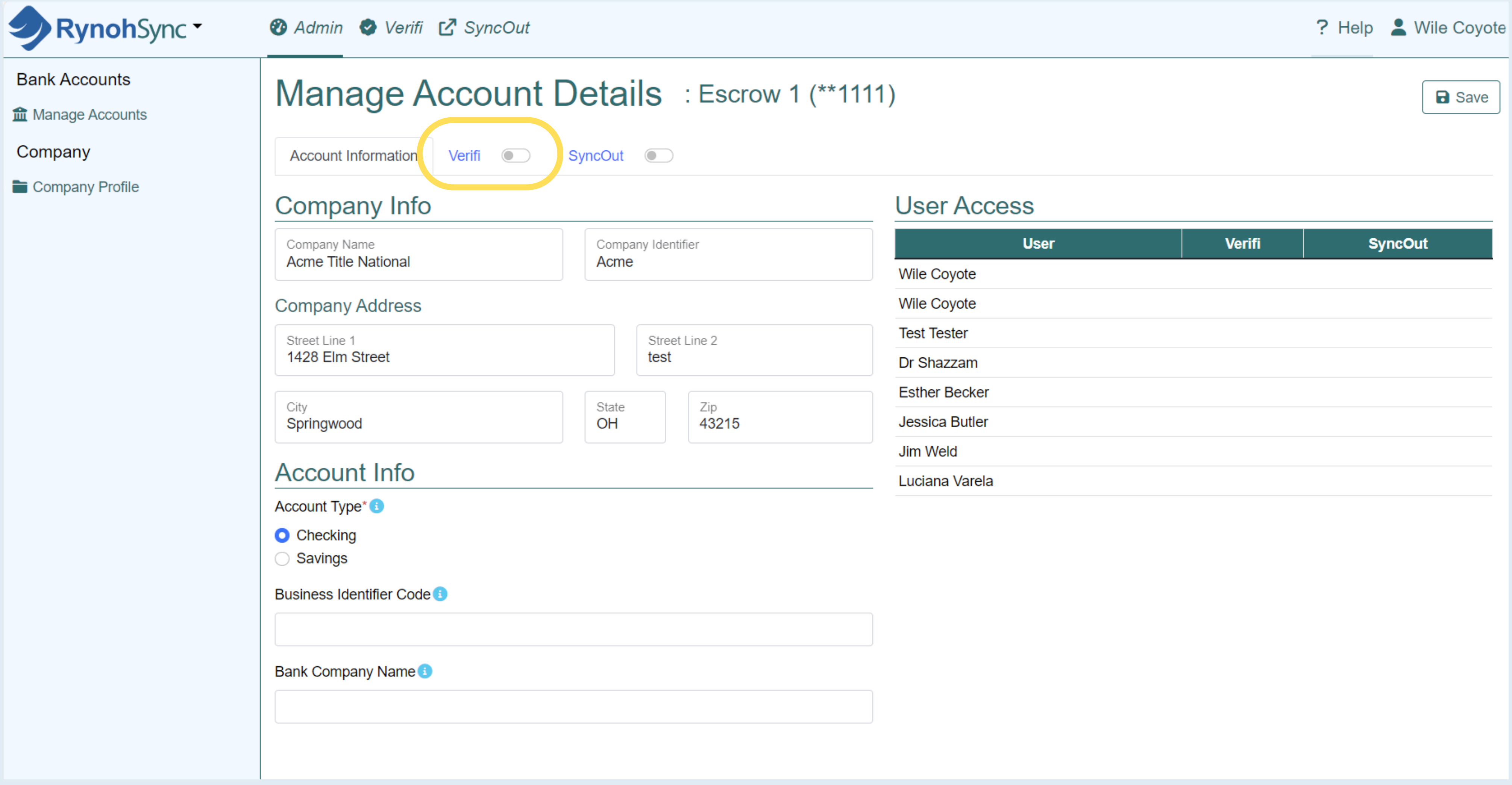
Once the Search Criteria is selected, click on Search to be directed to the Manage Accounts table. Click **Edit** on the account you wish to activate.



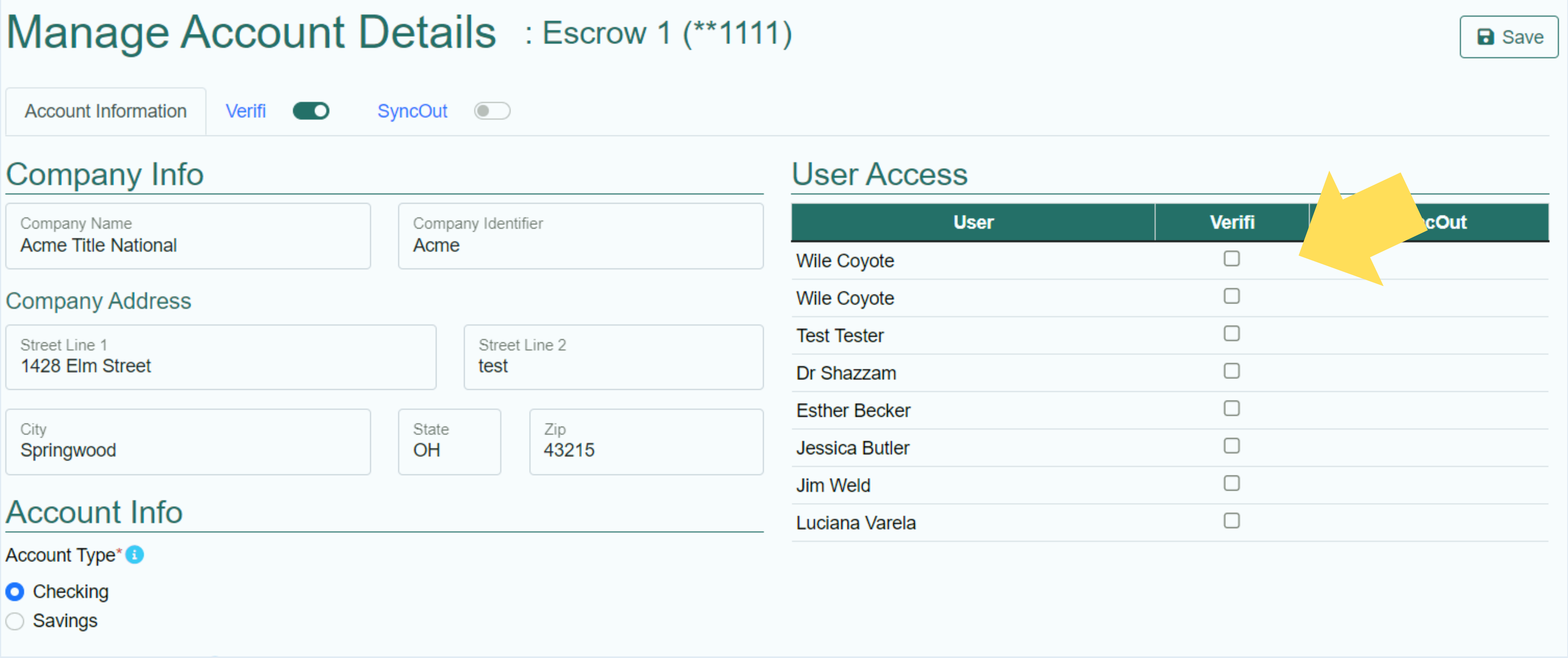
2 ENABLE SERVICE AND GRANT USER ACCESS

Enable the Verifi service and select users that will need access

From the Manage Account Details page, switch the Activation Toggle to on for the Verifi service.



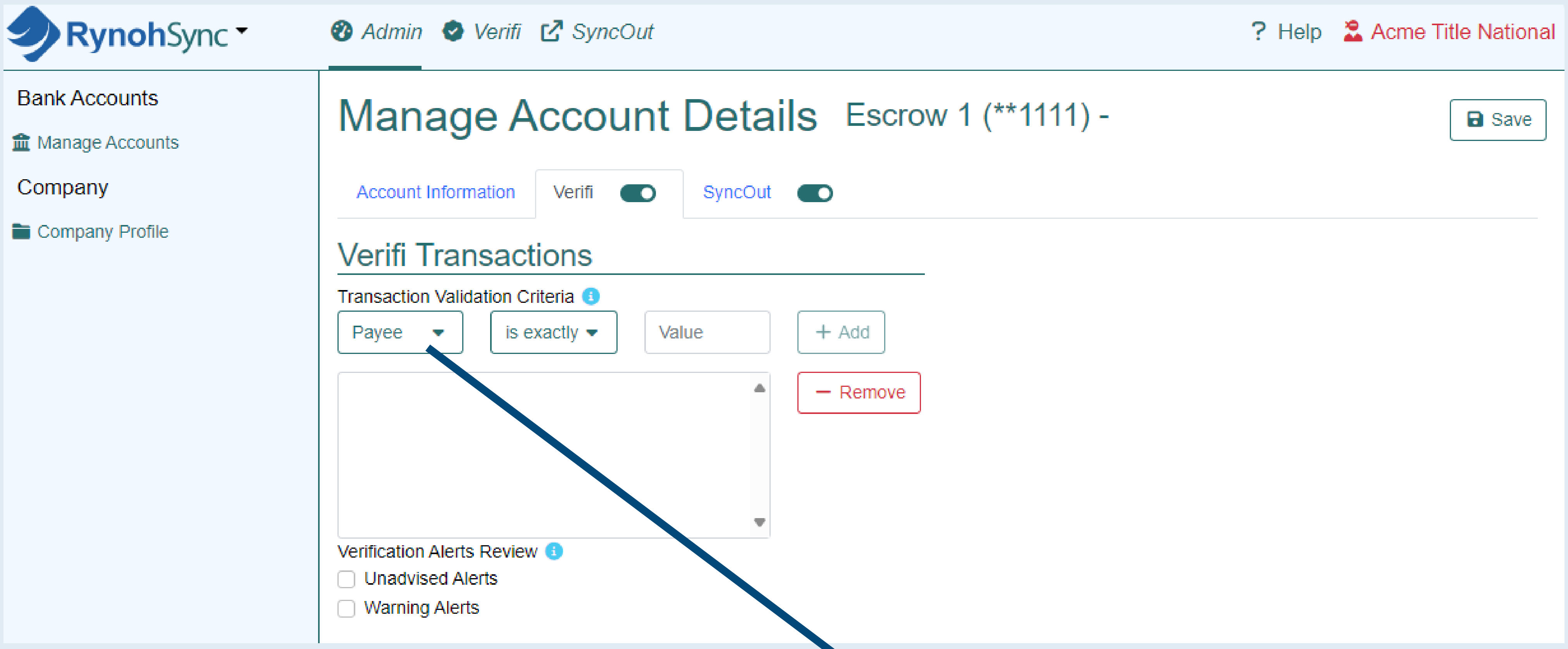
Once on, select the Users you would like to grant access to the Verifi platform.



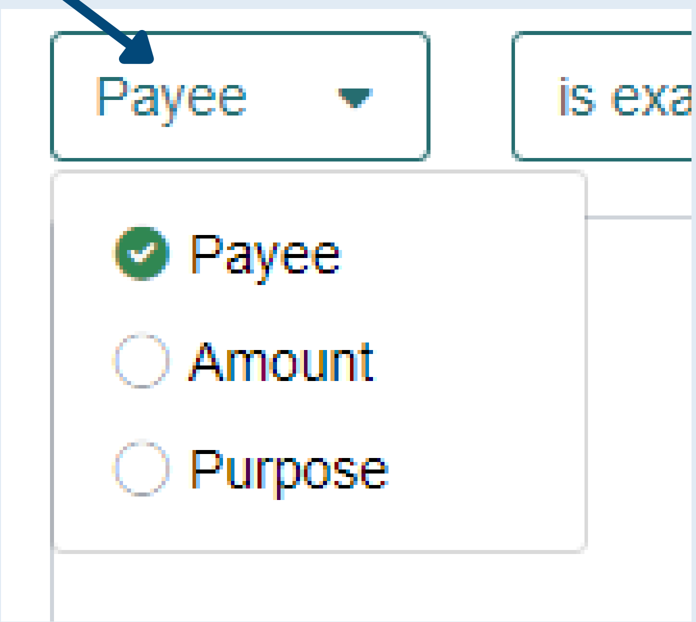
3 SET UP VERIFICATION CRITERIA

Establish the transaction criteria to be verified.

To complete set up, enter the criteria for the transactions you want to run through the validation service. Transaction Validation Criteria **MUST** be set up in order for the account to be activated. Only the transactions that meet the Transaction criteria, will be submitted for validation.



Criteria can be set up by:
Payee
Purpose
Amount



Once all criteria is selected, click Save.

Upon activation, the Rynoh adaptor will schedule the account and routing information to be pulled in from the TPS . This is scheduled for after hours. The validation will start the following business day.

4

ENTER WIRE AND ROUTING INFO

Begin entering the routing and wire information on transactions to be verified.

Once activated, the Rynoh adaptor will begin to pull in the routing and wire information from your TPS. Enter the wire information in the Edit Wire Screen in your TPS. The adaptor will pull in this information every polling cycle.

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