

# THE VERIFI ACCOUNT ACTIVATION GUIDE

Get Activated in 4 Easy Steps

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## Initiate Account Activation

Select the Accounts to run transaction validations through Verifi

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## Enable Service and Grant User Access

Enable the Verifi service and select users that will need access

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## Set up Verification Criteria

Establish the transaction criteria to be verified.

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## Enter Wire and Routing Info

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

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# 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.

**RynohSync** Admin Verifi SyncOut Help Wile Coyote

Bank Accounts  
Manage Accounts  
Company  
Company Profile

## Manage Accounts

Filters + Activate

Search Criteria

Agencies\*  
A\*\*\* Title N\*\*\*\*\*

Account Type  
Nothing selected

Banks  
Rynoh Demo Bank

Sync Status  
☒ All ☐ Active ☐ Inactive

Search Reset

**Banks**

Rynoh Demo Bank

Search...

Done Select All Deselect All

☒ Rynoh Demo Bank

**Account Type**

Escrow Account

Search...

Done Select All Deselect All

☒ Escrow Account  
☐ Operating Account  
☐ Construction Account

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.

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Bank Accounts  
Manage Accounts  
Company  
Company Profile

## Manage Accounts

Filters + Activate

Bank	Bank Account	Type	Default Transaction Type	Verifi	SyncOut	SyncOut Preparers	SyncOut Approvers	
	Escrow 1	Escrow Account	None					Edit
	Escrow 2	Escrow Account	None					Edit

Showing 4 of 4 items

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# 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.

RynohSync

AdminVerifiSyncOut

HelpWile Coyote

Bank Accounts

Manage Accounts

Company

Company Profile

Manage Account Details : Escrow 1 (\*\*1111)

Save

Account Information

Verifi

SyncOut

Company Info

Company Name

Acme Title National

Company Identifier

Acme

Company Address

Street Line 1

1428 Elm Street

Street Line 2

test

City

Springwood

State

OH

Zip

43215

Account Info

Account Type\*

Checking

Savings

Business Identifier Code

Bank Company Name

User Access

User	Verifi	SyncOut
Wile Coyote		
Wile Coyote		
Test Tester		
Dr Shazzam		
Esther Becker		
Jessica Butler		
Jim Weld		
Luciana Varela		

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

Manage Account Details : Escrow 1 (\*\*1111)

Save

Account Information

Verifi

SyncOut

Company Info

Company Name

Acme Title National

Company Identifier

Acme

Company Address

Street Line 1

1428 Elm Street

Street Line 2

test

City

Springwood

State

OH

Zip

43215

Account Info

Account Type\*

Checking

Savings

User Access

User	Verifi	SyncOut
Wile Coyote		
Wile Coyote		
Test Tester		
Dr Shazzam		
Esther Becker		
Jessica Butler		
Jim Weld		
Luciana Varela		

## 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.

The screenshot shows the RynohSync interface. The left sidebar has 'Bank Accounts', 'Manage Accounts', 'Company', and 'Company Profile'. The main area is titled 'Manage Account Details' for 'Escrow 1 (\*\*1111) -'. There are tabs for 'Account Information', 'Verifi' (active), and 'SyncOut'. Under 'Verifi', there are toggle switches for 'Verifi' and 'SyncOut'. The 'Transaction Validation Criteria' section has a dropdown menu for 'Payee' which is open, showing 'Payee' (checked), 'Amount', and 'Purpose'. There are also 'Add' and 'Remove' buttons. At the bottom, there is a 'Verification Alerts Review' section with checkboxes for 'Unadvised Alerts' and 'Warning Alerts'.

Criteria can be set up by:

Payee  
Purpose  
Amount

This is a close-up of the dropdown menu from the screenshot above. It shows the 'Payee' dropdown menu with three options: 'Payee' (selected with a green checkmark), 'Amount', and 'Purpose'.

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.

### RamQuest

The screenshot displays the 'Complete Closing Enterprise' software interface. The main window shows a 'Check Writing' screen with a 'Status' tab. A 'Transfers' dialog box is open, allowing users to enter wire and routing information. The dialog box includes the following sections:

- Bank:**
  - ☒ Wire Transfer(s)
  - ☐ Transfer to Other File
- Wire Information:**
  - Wire Amount:
  - Wire Number:
  - Date of Wire:
  - Reference:
- Receiving Bank Information:**
  - Bank Name:
  - ABA:
  - Bank Address:
  - City, State, Zip:
  - Account Number:
  - Customer Name:
  - Wire Instructions:
- Offline Bank Information:**
  - Bank Name:
  - Bank Address:
  - City, State, Zip:
  - ABA:
  - Account Number:
  - Further Credit to:
  - Notes:

At the bottom of the dialog box, there are 'OK' and 'Cancel' buttons. A note at the bottom states: '\*You must select a transfer option before clicking OK.'