

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

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.

Admin

Verifi

SyncOut

Help

Wile Coyote

Bank Accounts

Manage Accounts

Company

Company Profile

Manage Accounts

Filters

Activate

Search Criteria

Search

Reset

Agencies*

A*** Title N*****

Account Type

Nothing selected

Banks

Rynoh Demo Bank

Sync Status

☒ All ☐ Active ☐ Inactive

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.

Admin

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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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Page 1 of 1

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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.

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 top navigation bar includes the RynohSync logo, 'Admin', 'Verifi', and 'SyncOut' tabs, along with a 'Help' link and the user 'Acme Title National'. The left sidebar lists 'Bank Accounts', 'Manage Accounts', 'Company', and 'Company Profile'. The main content area is titled 'Manage Account Details' for 'Escrow 1 (**1111) -'. It features three tabs: 'Account Information', 'Verifi' (which is active), and 'SyncOut'. The 'Verifi' tab shows a toggle switch that is turned on. Below the tabs, the 'Verifi Transactions' section is visible. It includes a 'Transaction Validation Criteria' section with a dropdown menu set to 'Payee', a 'Value' field, and a '+ Add' button. A blue arrow points from the 'Payee' dropdown in the main screenshot to a zoomed-in view of the dropdown menu. The zoomed-in view shows three options: 'Payee' (selected with a green checkmark), 'Amount', and 'Purpose'. Below the criteria list, 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 zoomed-in view of the dropdown menu from the 'Transaction Validation Criteria' section. It shows 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.

Resware

File #:

Property:

Requested: By:

Amount:

Transactee: ACME Test Company

Address:

Status: Pending

Method: Wire

Check #: N/A

Issued:

Cleared:

Deposited:

Bank Acct:

Note:

Memo:

Supporting Document: No Supporting Document Attached

Entry Items

Accounting Code	Amount	HUDLineDescription	
Doc Prep/Settlement	(\$10.00)	ACME Test Company	\$10.00

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Buyers/Sellers

Type	Name
Buyer	
Seller	

Confirmation Number:

Authorization Document: No Authorization Document Attached

Outgoing Wire Log

Status	Internal User	Status Date	Reverted	Note
Initiated			☐	

Wire Information

☐ Use Intermediary Bank

Bank

ABA/Routing Number:

Bank Name:

Bank City, State:

Beneficiary

Account Number:

☐ International

Disburse

Requested:

Method: Wire

Supporting Document: View

Wire Information

☐ Use Intermediary Bank

Bank

ABA/Routing Number:

Bank Name:

Bank City, State:

Beneficiary

Account Number:

Name:

Address Line 1:

Address Line 2:

City, State, ZIP:

☐ International

Note:

Remaining OBI Characters:

Help

Save

Reset

Close