

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.

RynohSync

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.

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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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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

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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.

RynohSync Admin Verifi SyncOut ? Help Acme Title National

Bank Accounts
Manage Accounts
Company
Company Profile

Manage Account Details Escrow 1 (**1111) - Save

Account Information Verifi SyncOut

Verifi Transactions

Transaction Validation Criteria ⓘ

Payee is exactly Value + Add

Remove

Verification Alerts Review ⓘ

☐ Unadvised Alerts

☐ Warning Alerts

Criteria can be set up by:

Payee
Purpose
Amount

Payee is exactly

☒ Payee

☐ Amount

☐ 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.

SoftPro

Outgoing Wire

General Bank Details History

Bank information

Bank name:

ABA routing number:

Credit account name:

Credit account number:

Bank sequence number:

Federal reference number:

Special instructions:

Further credit: