Adding Remote Deposit Access to a Sub User Guide





First, the administrator should grant Remote Deposit Access for the sub user's permissions.

Go to Cash Management — Business Admin.



Click on "Users" and then select the name of the user you wish to edit.

Business Admin	1				C
Authorizations Payees Users					
All Users			Q Search By Name	(First Or Last)	+
USER	ACCOUNTS	PAYMENT TYPES		STATUS	
🔔 Alison Gafney	1	ACH Collection Wires, Internal	s, ACH Payments, Transfers, Bill Pay	ACTIVE	
1 Amanda Caringi	3	ACH Collection Wires, Internal	s, ACH Payments, Transfers, Bill Pay	ACTIVE	
1 Amanda Roberts	1	ACH Collection Wires, Internal	s, ACH Payments, Transfers, Bill Pay	ACTIVE	
L Christina Rogers	3	ACH Collection Wires, Bill Pay	s, ACH Payments,	ACTIVE	

Under the user's permissions, choose "General Permissions."

< в	ack to U	ser Listing				E
A	liso	n Gafney				
Sum	mary	General Permissions	Payment Permissions	Account Access		

Scroll down to the bottom of the page to "Receivables" and click "Manage Permissions."

Receivables		Manage Permissions
Remote Deposit Capture Ability to capture deposits.		

In the pop-out window, toggle on "Remote Deposit Capture" then click "Save."

Beechables	
Receivables	Unselect All
Remote Deposit Capture Ability to capture deposits.	

Next, go back to "Cash Management" and click on "Remote Deposit".

Mascoma Pank			۵ 🖉
Dashboard Accounts Transfer & Pay	Cash Management	Card Management Financial Wellness Tools	
K Back to User Listing	Cash Managemen Extended Business Banki	ng Services	Ce
	Business Admin	Remote Deposit	
Allson Gatney	Business ACH	ACH Alert & Positive Pay	
Summary General Permissions Payn	Business Wires	Business Reports	

This will load you to the SmartPay scanning website. From the menu on the left, click on "Admin" then click "Users".

100	🐓 Mascoma Bank		
æ	Dashboard	<	Deshboard
0	Transactions		Overview
o;	Admin	*	Configure the dashboard display by clicking the settings icon.
>	Users		Welcome
>	Roles		Monday, March 25, 2024
	Reports		You are currently logged in to the Any Customer online system.

On the following page, click "Add User" then "Business User" from the right-hand side of the screen.

Q Searc	h Any Customer	💄 Kayla G	irdwood 🗸	Mon, Mar 25
Page Recor	1 of 1, rds 1 to 7 of 7	Page v	Z ±-	Add User 🗸
Enabled	Au	th Caller	Busin	ess User
Disabled	Dis	abled	RTGU	Jser
Enabled	Dis	abled		
Enabled	Ene	abled		

Fill out the following information:

- Full Name
- Username: Must match your sub user's Mascoma Bank username
- User Location: Optional
- Cash Mgmt ID: Must match your sub user's Mascoma Bank username
- Email: User's email address

Leave the remaining fields blank

Add User Settings	
Enabled	Authorized Caller
Full Name *	
Alison Gaffney	
User Name *	
User Location	
Cash Mgmt ID *	
Email Address	
Auto Disable	
Dual Auth Amount	
0	
Dual Auth Status	
Approved	~

Under 'Privileges for this User," check off "customer service" and "reports" then click add.

Privileges	for this User	
Enabled	Privilege	
	Customer Services	
	Reports	

This will reload the page with more access settings. Click the dropdown arrow for "Roles within the Customer Services Privilege." Check off options.

Note: User must have "RDC Admin" and "RDC User" checked off to be able to open and submit deposits.

Roles wit	Roles within the Customer Services Privilege				
Enabled	Role Name	Description			
	Credits & Debits PDF Report	Allows the user to view the Credits & Debits PDF report with check images for a batch.			
	Accounting	All Reporting Functionality			
	RDC Admin	Remote Deposit Complete Administrator			
	RDC User	Remote Deposit Complete User			
	Reconciliation Report	Allow User to view Reconciliation Report			
	Customer Data Privacy	User can view the page, generate report, and forget customer			

Next, click the dropdown arrow for "Locations for this User" and check off any accounts you wish the user to be able to deposit into.

Locations	s for this User	^
Enabled	Location Name	Location Enabled
•	CM Account xx5309	*
	testing name	

Click "Update."

