

# Digital Banking

**ROBERTSON**  
BANKING COMPANY  
EST. 1870

## USER GUIDE

Learn how to use Digital Banking with this handy guide.

For questions contact us at **1-866-289-1033**



**FDIC** *FDIC-Insured - Backed by the full faith and credit of the U.S. Government*

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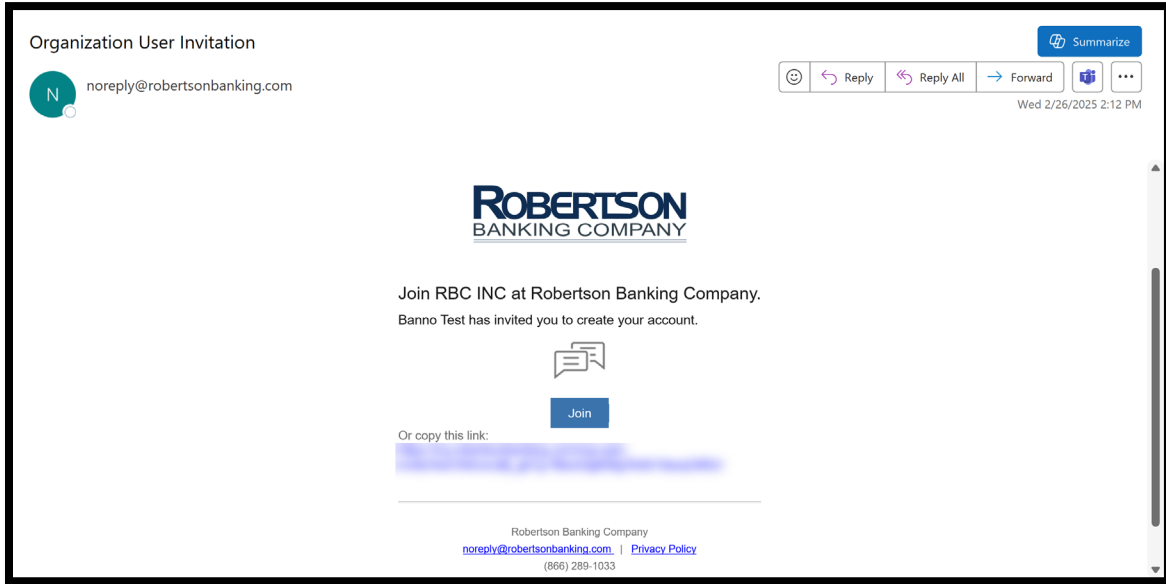
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## First Time Login

### Step 1

Open your enrollment email and click **Join**.



### Step 2

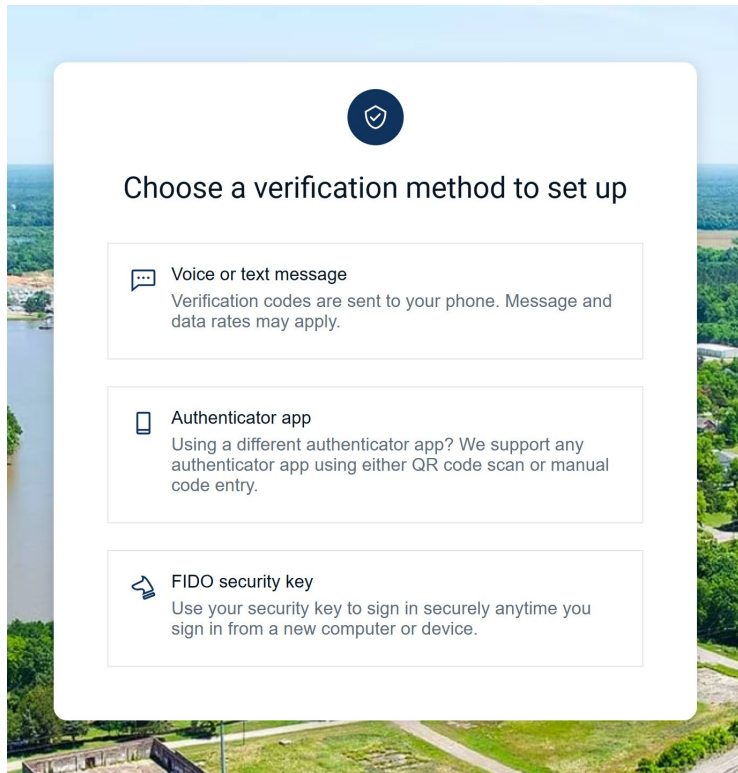
Create your **username** and **password**. Click **Create** and sign In.

A form titled "Create your account to join RBC INC" with a lock icon. It contains three input fields: "Username", "Password", and "Confirm Password". Below the "Password" field is the text "Username rules". Below the "Confirm Password" field is the text "Show rules". A "Create" button is at the bottom of the form. The background is a scenic view of a river and greenery.

## Step 3

Review the information regarding registering for two-factor authentication and click **Get started**. Choose how to receive your two factor authentication codes:

- **Voice or text message:** Enter your phone number and choose to receive your code via text or phone call. Enter the code you receive.
- **Authenticator app:** Open your authenticator app and either scan the QR code or enter the code that appears manually. Enter the code that generates on your app.
- **FIDO security key:** Scan the QR code, insert, or tap your physical key to your device



## Step 4

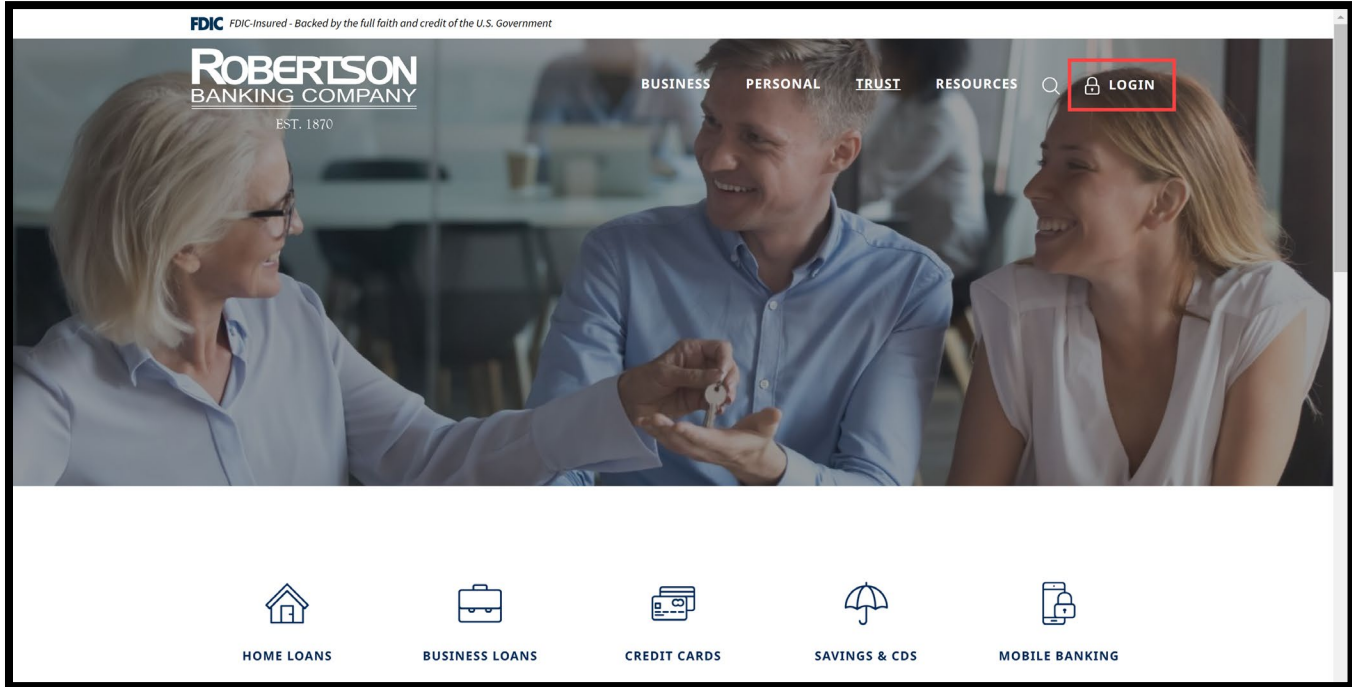
Click **Done** and accept the **Terms and Conditions**.

## Account Recovery

Use these steps to reset your password and/or retrieve your username.

### Step 1

Navigate to our website and click **Login**. Select **Forgot Password**

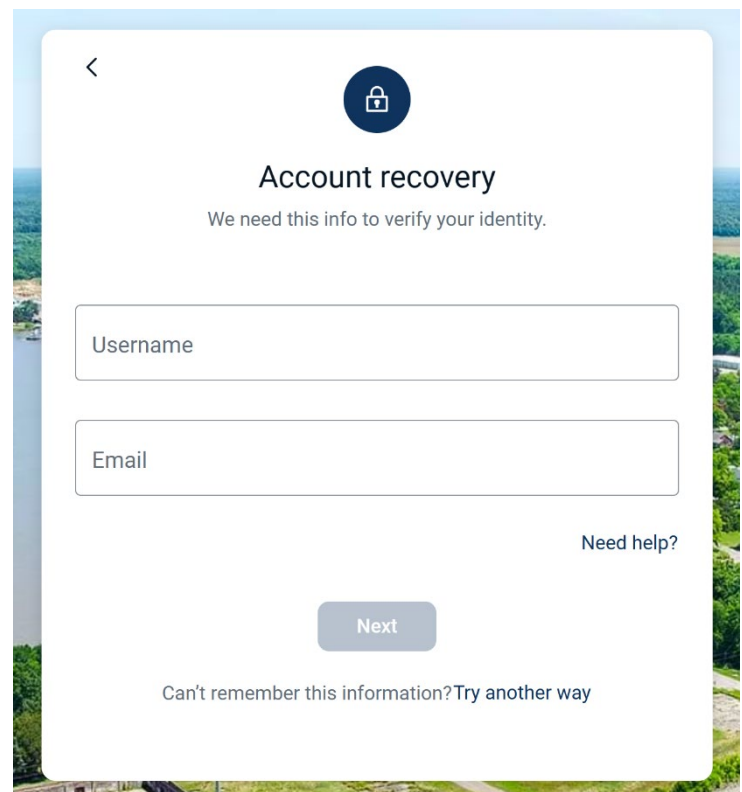


### Step 2

Enter your username and email address.

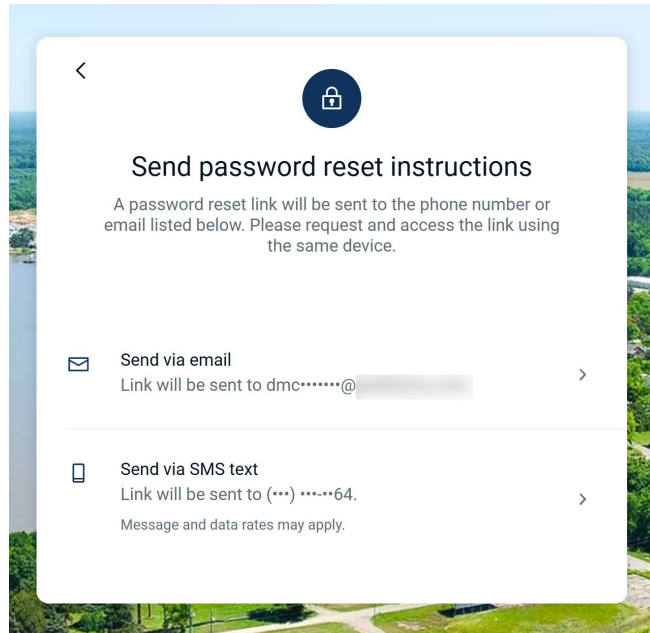
**IMPORTANT:** Email must match what is on file.

Don't know your username or email address? Click **Try another way** to use your social security and account numbers instead.

A screenshot of the Account Recovery mobile app screen. The screen displays the title "Account recovery" and the instruction "We need this info to verify your identity." Below this, there are two input fields for "Username" and "Email". A "Next" button is visible at the bottom, along with a link for "Need help?" and a link for "Can't remember this information? Try another way". The background of the app shows a scenic view of a lake and trees.

## Step 3

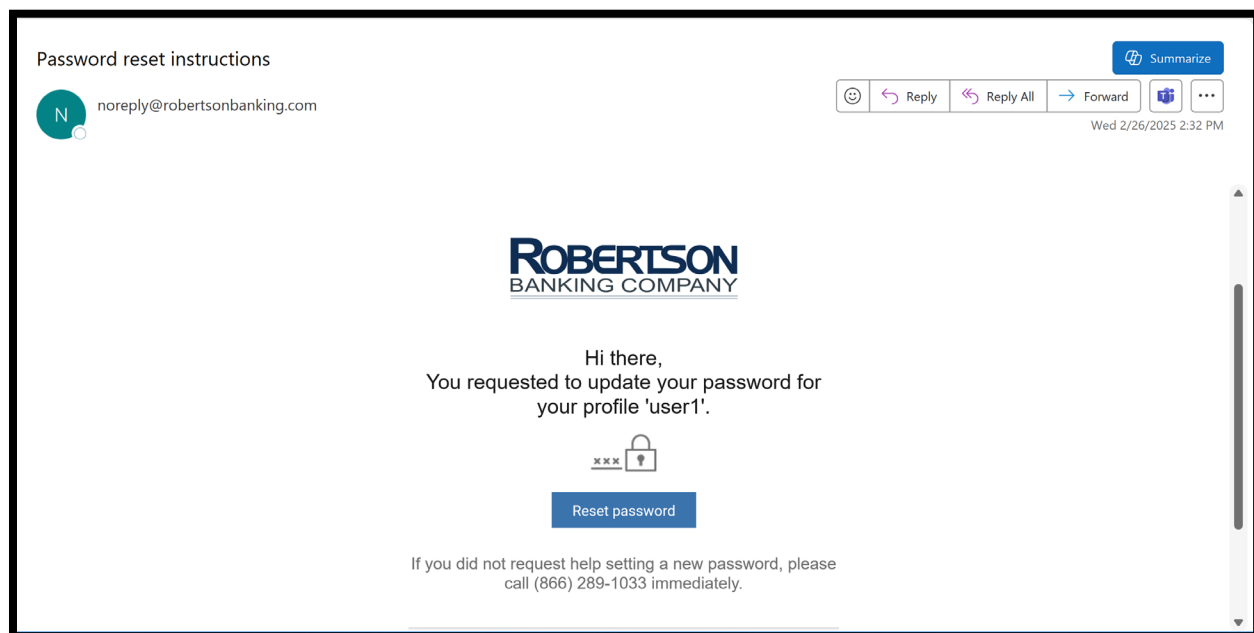
Choose to receive your instructions via email or text.



## Step 4

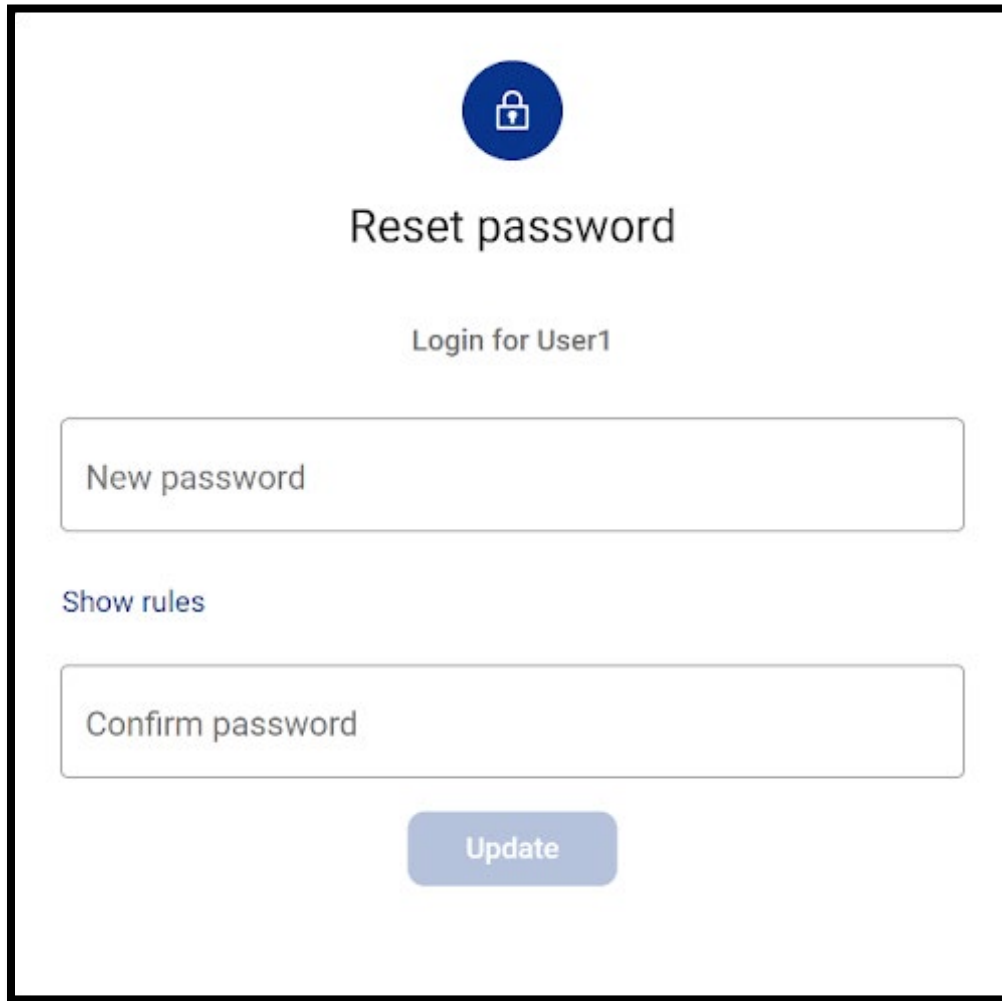
**Email:** Open your email. Your username will appear in the email body. Click **Reset Password** if applicable.


**Text:** Open your text and click the link.



## Step 5

Enter the code you receive and create a new password.





### Reset password

Login for User1

[Show rules](#)

[Update](#)



## Dashboard

This is your landing page where you can access your accounts, review recent activity, and move money.

## Layout

1. **Accounts** - Displays accounts including balance, status, and last four digits of account number.
2. **Quick Action Buttons** - Click a button to jump to that feature of online banking
3. **Transactions** - Displays recent activity on all accounts
4. **Messages** - Displays conversations between you and support representatives as well as alerts and bank messages.
5. **Remote deposits**- Enroll for and view recent mobile deposits
6. **Card Management** - Displays debit cards that are linked to your accounts. Select a card to toggle it on or off, report it lost or stolen, or reorder.
7. **Transfers** - Displays scheduled transfers and a quick link to Make a Transfer.
8. **Accept Online Payments**- Send an invoice, accept a payment, or sell online

The screenshot displays the Robertson Banking Company digital banking dashboard. The interface is clean and modern, with a dark blue header and a light gray sidebar. The main content area is organized into several sections, each with a numbered indicator (1-8) corresponding to the layout list. The 'Accounts' section shows a balance of \$0.00 for the Checking account (x1626) and \$211.69 for the Savings account (x1553). The 'Transactions' section lists recent activity, including pending transactions for VERTEX-TRAN# 5 (\$2,231.06), PULSE EFT ASSOC PULSE (+\$203.44), FDC STAR SYSTEM DICEVCINTG ACH PROCESSING (+\$8.25), FDC STAR SYSTEM MNTLY (+\$9.90), and JACK HENRY CPS CPSVSAMISC ACH PROCESSING (\$19.80). The 'Messages' section shows a welcome message dated May 23, 2022. The 'Remote deposits' section encourages users to enroll for mobile deposits. The 'Transfers' section shows a scheduled transfer of \$1.00 from Savings to Checking on March 31. The 'Card management' section indicates that no cards are available. The 'Accept Online Payments' section offers options to send an invoice, accept a payment, or sell online. The dashboard also includes a navigation menu on the left, a footer with copyright information, and a help icon.

## Organize Dashboard

Use this feature to **add**, **remove**, or **reorder** the cards on the dashboard.

### Step 1

Click **Organize Dashboard**.

The screenshot displays the Robertson Banking Company digital banking dashboard. On the left is a navigation menu with the following items: Dashboard (selected), Messages (with a red notification badge), Accounts, Transfers, Remote deposits, Payments (with a dropdown arrow), Cash Management, and Support. The main dashboard area contains several cards: a pending transaction list with two entries (FDC STAR SYSTEM MNTLY FEES ACH PROCESSING for +\$9.90 and JACK HENRY CPS CPSVSAMISC ACH PROCESSING for \$19.80), a Transfers card with a 'Make a transfer' button and a scheduled transfer of \$1.00 to Checking, and an 'Accept Online Payments' card with options to send an invoice, accept a payment, or sell online. A 'Card management' card shows 'No available cards'. At the bottom of the dashboard, a dark button labeled 'Organize dashboard' is highlighted with a red rectangular box. The footer includes the user's profile 'B My profile', copyright information '© 2025 Robertson Banking Company', and links for 'Privacy policy', 'Member FDIC', and 'Equal Housing Lender'.

## Step 2

1. Click and hold the **6 dot icon** to drag and drop the cards to the order you prefer.
2. Click the **X** to remove a card from the dashboard.
3. Click **+ Add a card** to browse available cards that may be added to the Dashboard. Select any you'd like to appear and click **<** when finished.
4. Click **Done** once the layout suits your needs.

The screenshot shows the 'Organize dashboard' interface. At the top, it says 'Organize dashboard' with a subtitle 'Drag & drop to reorder' and a '4 Done' button. Below this is a section titled 'Accounts'. The dashboard contains several cards: 'Transactions' (with a red '1' callout), 'Messages', 'Transfers' (with a red '2' callout), 'Remote deposits', 'Accept Online Payments', and 'Card management'. Each card has a three-dot menu icon on the left and an 'X' icon on the right. At the bottom left, there is a '+ Add a card' button with a red '3' callout.

## Organize Accounts

Use this feature to change the order of your accounts on the dashboard or update how the account information is displayed.

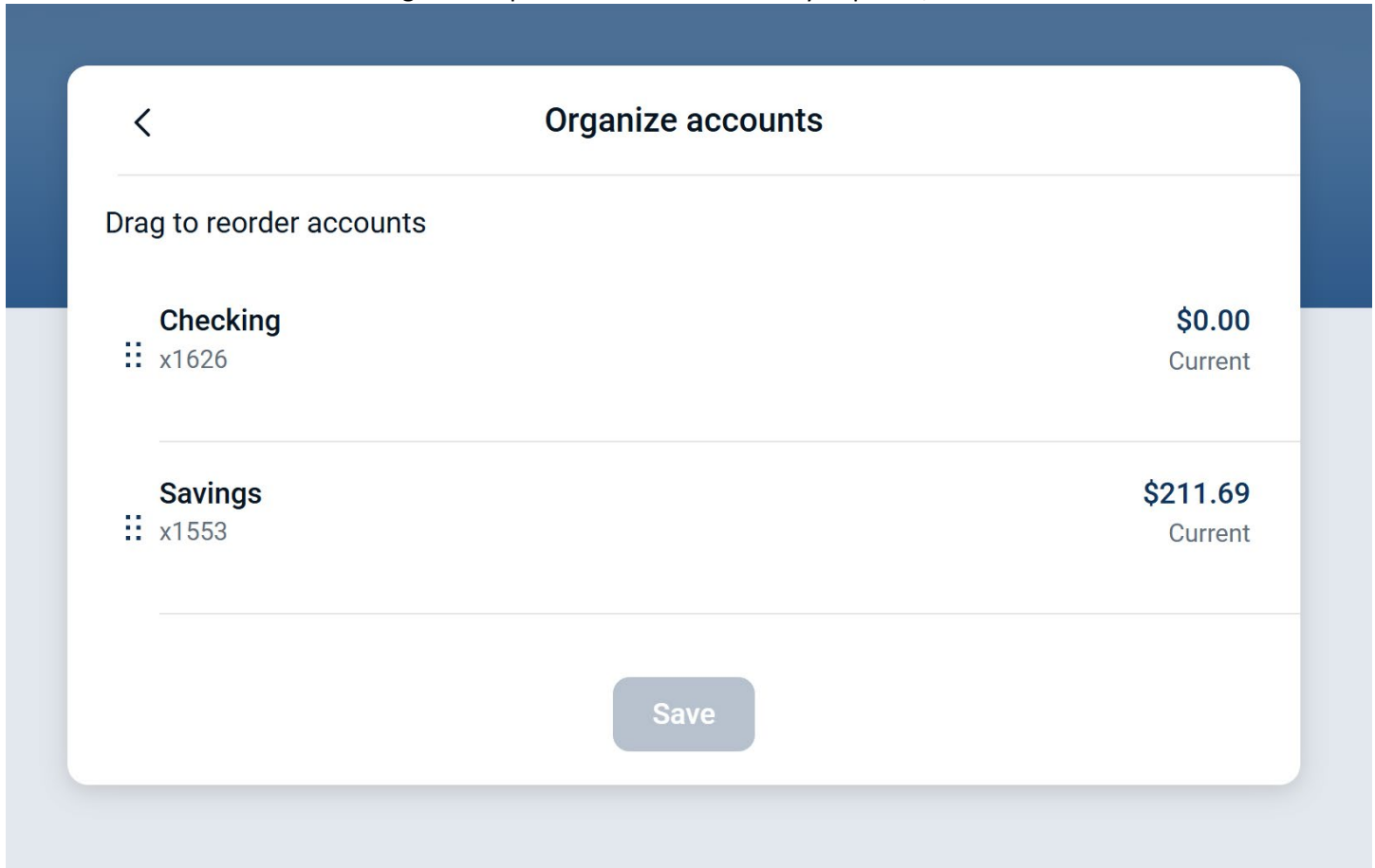
### Step 1

Click the **ellipsis icon** next to the **Accounts** section, then select **Organize accounts**.

The screenshot displays the Robertson Banking Company digital banking dashboard. On the left is a navigation sidebar with options: Dashboard, Messages (with a red notification badge), Accounts, Transfers, Remote deposits, Payments, Cash Management, and Support. The main content area features a 'Hi there!' greeting for 'RBC INC'. Below this is the 'Accounts' section, which includes two account cards: 'Checking x1626' with a balance of '\$0.00 Current' and 'Savings x1553'. A three-dot menu icon is located to the right of the Accounts section. A dropdown menu is open, showing the 'Organize accounts' option highlighted with a red rectangular box. Other options in the dropdown include 'View', 'Compact', 'Expanded', 'Totals', and 'Organize dashboard'. Below the Accounts section are three buttons: 'Transfer', 'Message', and 'Documents'. The dashboard also includes a 'Transactions' list with five entries, a 'Messages' section with a 'Welcome!' message dated May 23, 2022, and a 'Remote deposits' section with an 'Enroll today' button. A 'My profile' button is visible at the bottom left of the main content area.

## Step 2

Click and hold the **6 dot icon** to drag and drop an account to the order you prefer, then click **Save**.



## Account View

Use this feature to change what account information is displayed on the dashboard.

Click the ellipsis icon next to the **Accounts** section choose from one the **View** options:

- **Compact:** Displays accounts in a single row. Only three accounts will appear at a time.
- **Expanded:** Displays accounts in two rows. Up to six accounts will appear at a time.
- **Totals:** Groups accounts together based on type such as Cash, Borrowed, Credit Balance, and Investments. Displays the total balance for all accounts in each group.

The screenshot displays the Robertson Banking Company dashboard. On the left is a navigation sidebar with options: Dashboard, Messages (with a red notification badge), Accounts, Transfers, Remote deposits, Payments, Cash Management, and Support. The main content area features a 'Hi there!' greeting for 'RBC INC'. Below this is the 'Accounts' section, which shows two account cards: 'Checking x1626' with a balance of '\$0.00 Current' and 'Savings x1553'. A dropdown menu is open next to the Accounts section, showing options: 'Organize accounts', 'View', 'Compact', 'Expanded', 'Totals', and 'Organize dashboard'. The 'View' option is highlighted with a red box. Below the Accounts section are three buttons: 'Transfer', 'Message', and 'Documents'. The dashboard also includes a 'Transactions' list with five entries, a 'Messages' section with a 'Welcome!' message dated May 23, 2022, and a 'Remote deposits' section with an 'Enroll today' button. A 'My profile' link is visible at the bottom left of the main content area.

Transaction	Amount
VERTEX-TRAN# 5 Pending Feb 26, Savings	\$2,231.06
PULSE EFT ASSOC PULSE Pending Feb 26, Savings	+\$203.44
FDC STAR SYSTEM DICEVCINTG ACH PROCESSING Pending Feb 26, Savings	+\$8.25
FDC STAR SYSTEM MNTLY Pending Feb 26, Savings	+\$9.90
JACK HENRY CPS CPSVSAMISC ACH PROCESSING Pending Feb 26, Savings	\$19.80

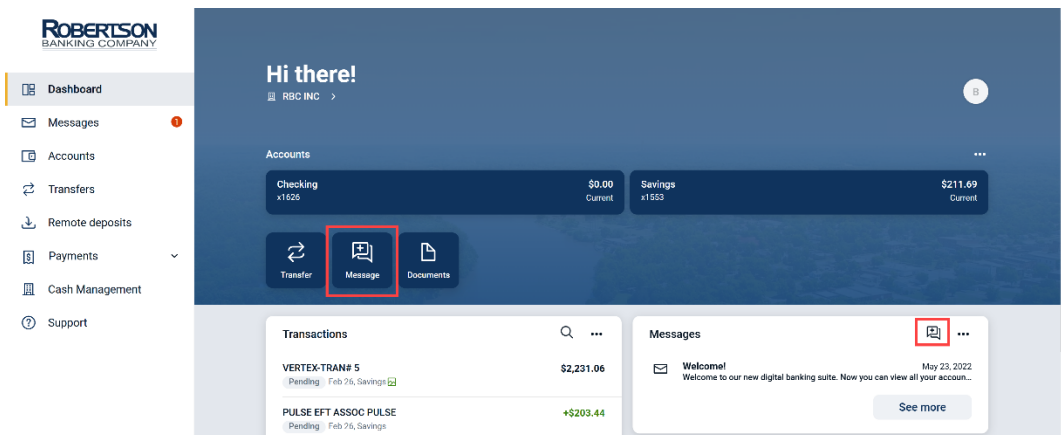
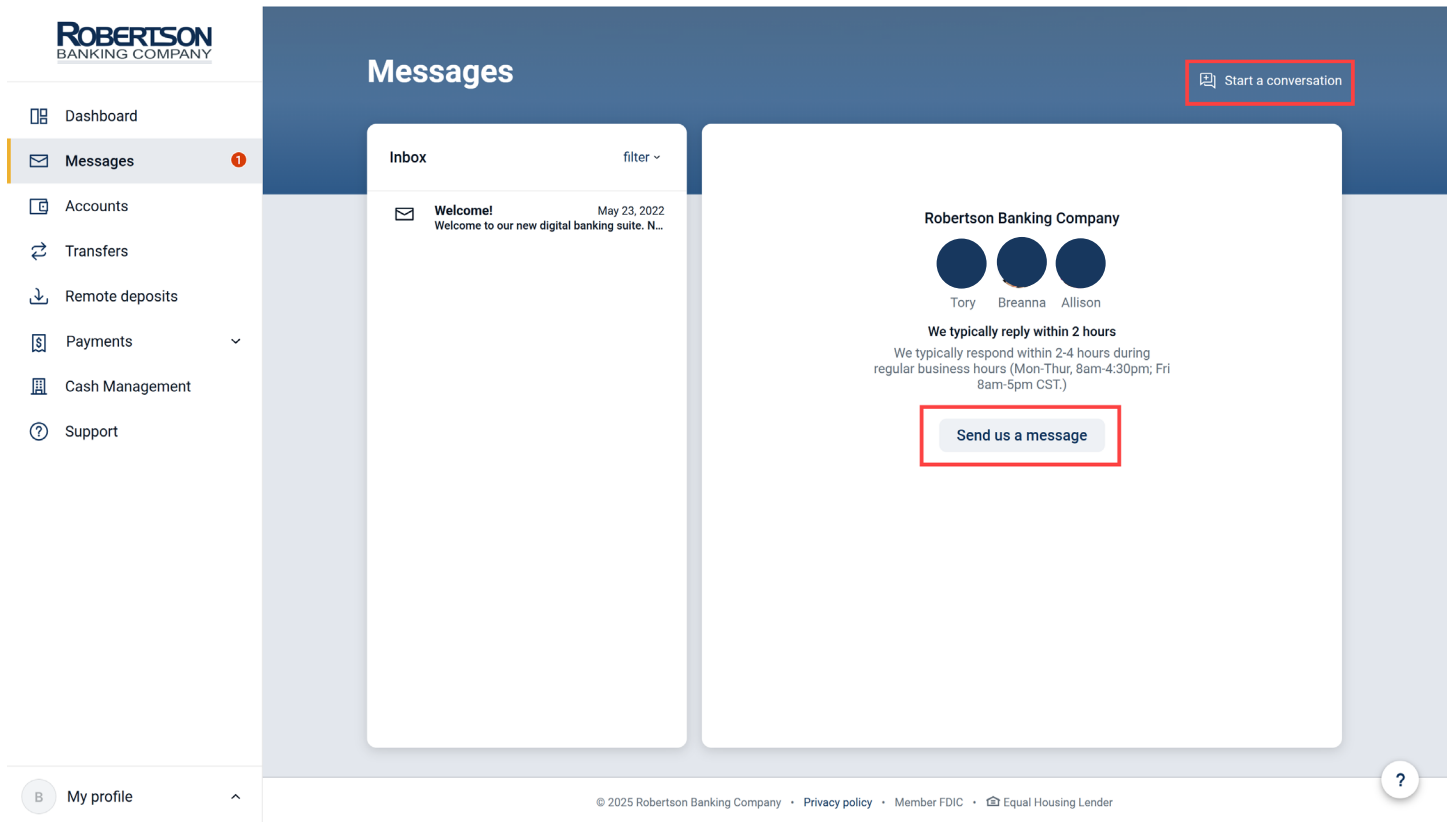
## Messages

Use this module to start a conversation with the institution, review alerts, and access informational messages from the institution.

### Start a Conversation

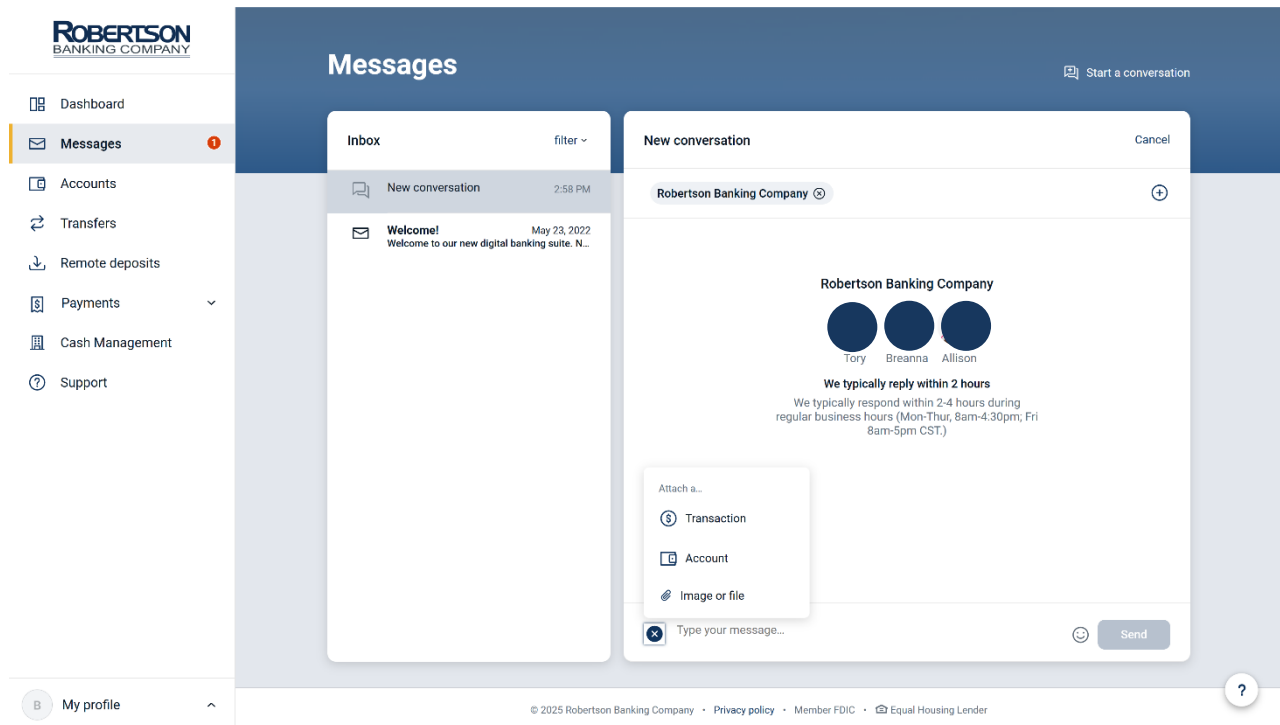
#### Step 1

Select **Messages** from the navigation pane or navigate to the **Messages** card on the **Dashboard**. Click **Start a conversation**, **Send us a message**, or select the **New conversation** icon.



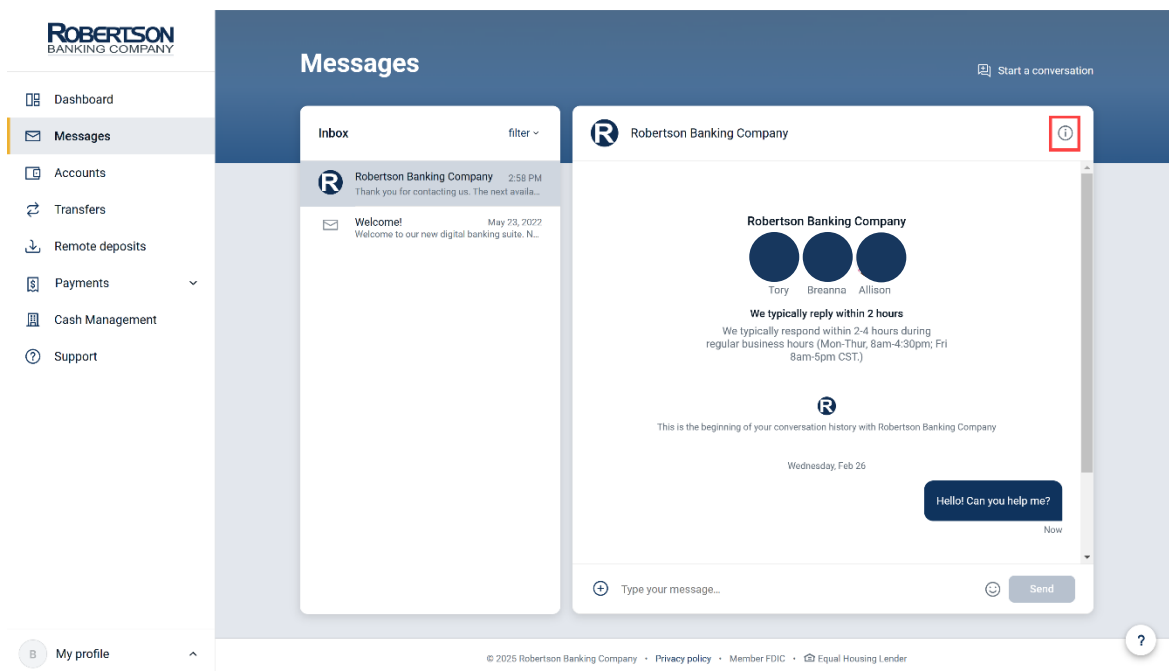
## Step 2

Type your message in the field. Click the **+** to add transaction, account, or payment details to your message. You can also attach images or other files. Click **Send** when done.



## Close/Delete a Message

Select the icon and click **Close conversation**. Closing a conversation deletes it.





## Accounts

Select **Accounts** to see a listing of all the accounts tied to your online banking ID.

## Account Information

Select an account from the **Accounts** page or from the **Dashboard**.

1. Download into CSV, TXT, OFX, QBO or QFX format, print, or search transaction activity.
2. Review recent account activity.
3. Quickly access other features for this account.
4. Review account details such as account and routing numbers, account owners, and important dates.

The screenshot displays the Robertson Banking Company digital banking interface. On the left is a navigation menu with options: Dashboard, Messages, Accounts, Transfers, Remote deposits, Payments, Cash Management, and Support. The main content area shows the 'Savings' account (x1553) with a current balance of \$211.69. Below the balance is a 'Transactions' table with 1 scheduled activity. The table lists several transactions, including a large transfer of \$2,231.06 and several smaller deposits. To the right of the transactions is a 'Details' panel with sections for Account numbers, Account information, and Activity. The Account numbers section shows the account and routing numbers. The Account information section lists the owner as Robertson Banking Co and other names on the account. The Activity section shows the last statement balance and dates.

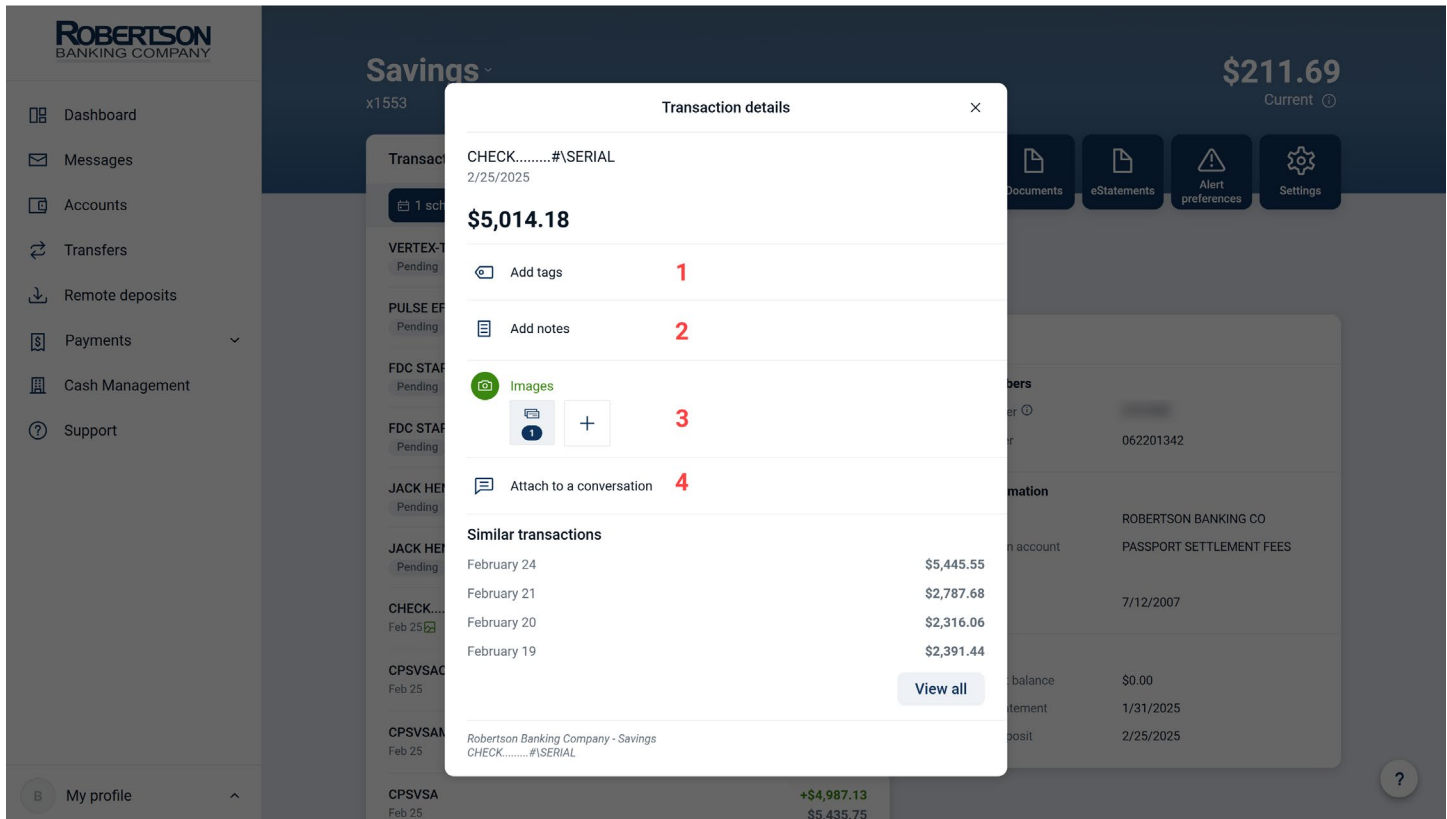
Transaction Description	Amount
VERTEX-TRAN# 5	\$2,231.06
PULSE EFT ASSOC PULSE	+\$203.44
FDC STAR SYSTEM DICEVCINTG ACH PROCESSING	+\$8.25
FDC STAR SYSTEM MNTLY	+\$9.90
JACK HENRY CPS CPSVSAMISC ACH PROCESSING	\$19.80
JACK HENRY CPS CPSVSA	+\$1,968.08
CHECK.....#SERIAL	\$5,014.18
CPSVSACHBK	\$100.00
CPSVSAMISC	\$48.69
CPSVSA	+\$4,987.13

Category	Value
Account number	[Redacted]
Routing number	062201342
Owner	ROBERTSON BANKING CO
Other names on account	PASSPORT SETTLEMENT FEES
Date opened	7/12/2007
Last statement balance	\$0.00
Date of last statement	1/31/2025
Date of last deposit	2/25/2025

## Transaction Details

Select a transaction to view additional information.

1. Add a **tag** to categorize the transaction.
2. Add **notes** to accompany the transaction description.
3. Review check **images** or add an image such as an invoice or receipt.
4. Attach the transaction details to a conversation with the institution.



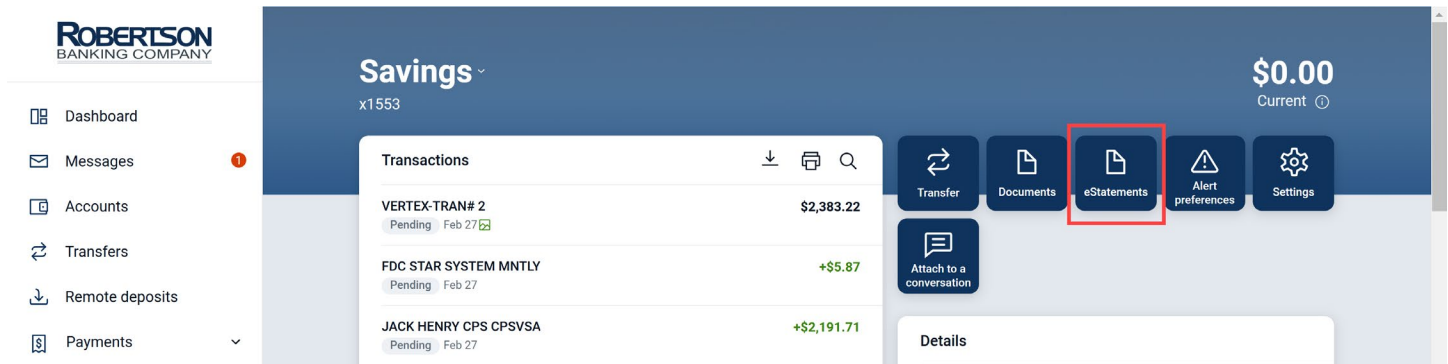
## eStatements

Enroll for eStatements to stop paper documents from being mailed. You will receive an email when your electronic document is available to view. eStatements are available online for 18 months.

## eStatement Enrollment

### Step 1

Click **eStatements** from the Accounts page or the Dashboard.



### Step 2

1. Click Details and choose the account(s) to enroll.
2. Confirm your email address
3. Accept the disclosure by clicking **I Agree**

You may choose to receive your statements for your account(s) delivered via email and made available online through this site. To enroll your account(s) please follow the steps outlined below:

1. Account(s) and Document Enrollment  
All available documents for all active accounts. [Details](#)
2. Please review the following email address. If not correct, please update it in the space shown.
3. Please read the disclosure below. You must scroll to the bottom of the disclosure before agreeing to the terms listed.

**Robertson Banking Company**  
**Electronic Banking Account Statement Disclosure and Agreement**

This Electronic Banking Account Statement Disclosure and Agreement "Agreement" is made between you and Robertson Banking Company and provides your request and consent to receive statements, notices, and documents for your Robertson Banking Company account(s) by electronic delivery. These electronic statements, notices, and documents are called "eDocs." This Agreement is in addition to the terms and conditions described in the

[Click here to see a sample document.](#)

## Step 3

Select a document to download and view. You can use the filter to change account, document type, and date range.

**ROBERTSON**  
BANKING COMPANY

Documents

eStatements/Notices Sign Up/Changes Email Settings Disclosures

Account(s) Document Type Date Range

All All Most Recent Filter Download

	Account(s)	Date	Document Type	Description	Action
<input type="checkbox"/>	Main Checking	02/19/2025	Statement	Statement February 2025	<a href="#">Download</a>

My profile

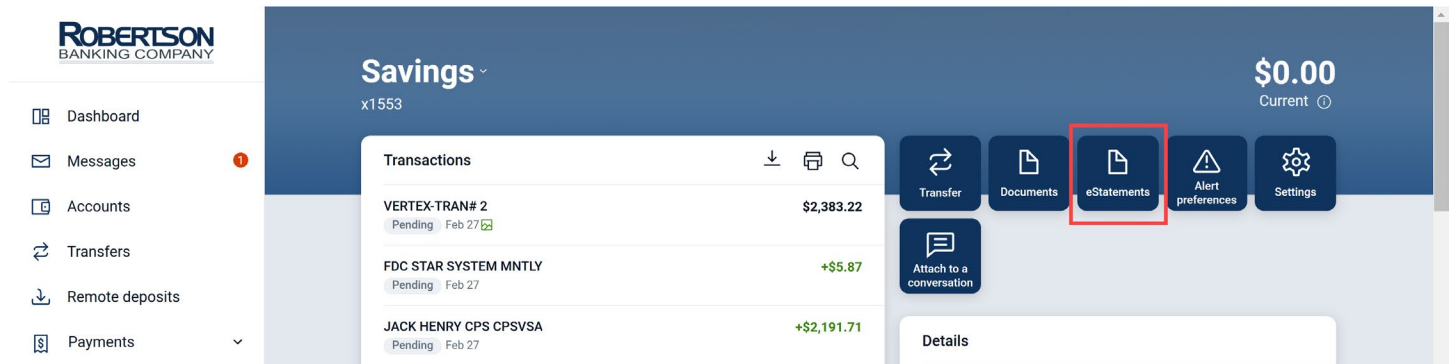
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## eStatement Enrollment Changes

Need to make changes to your eStatement enrollment?

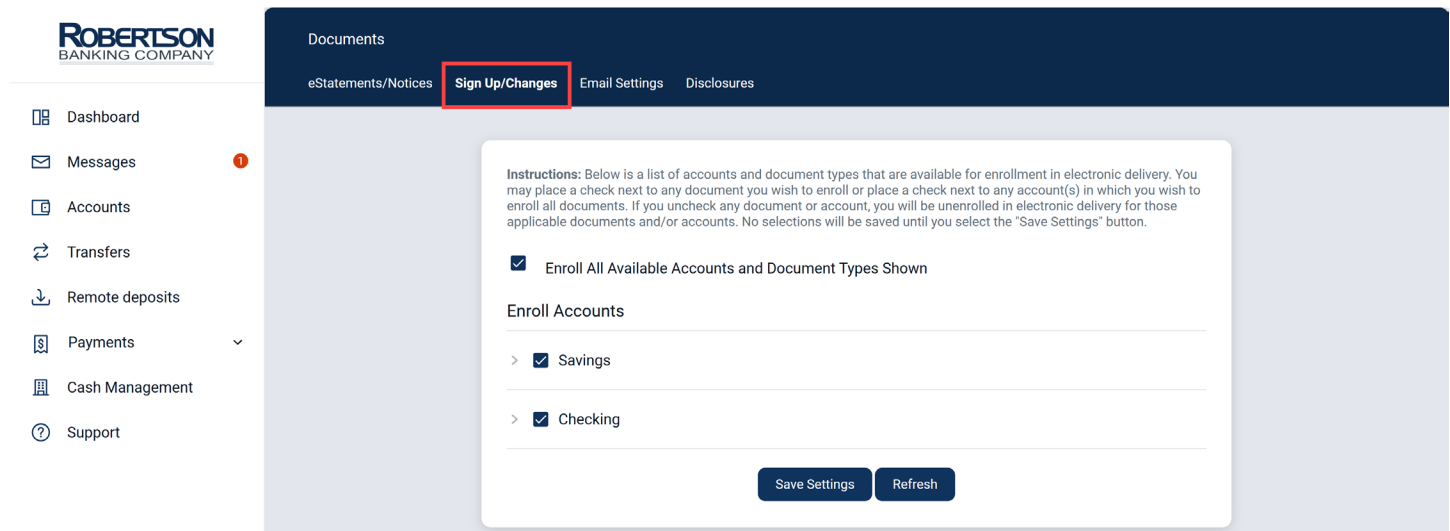
### Step 1

Click **eStatements**.



### Step 2

Select **Sign Up/Changes**. Choose which accounts to enroll. Click the > to expand each account to choose which documents to receive electronically. Click **Save Settings** when done.



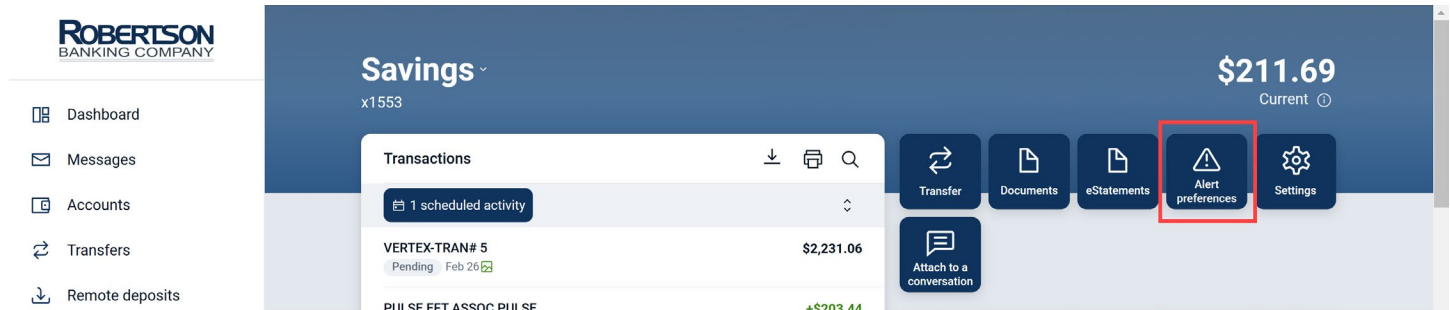
## Alerts

Set up alerts to be notified about your balance or certain transactions.

### Set up Balance and Transaction Alerts

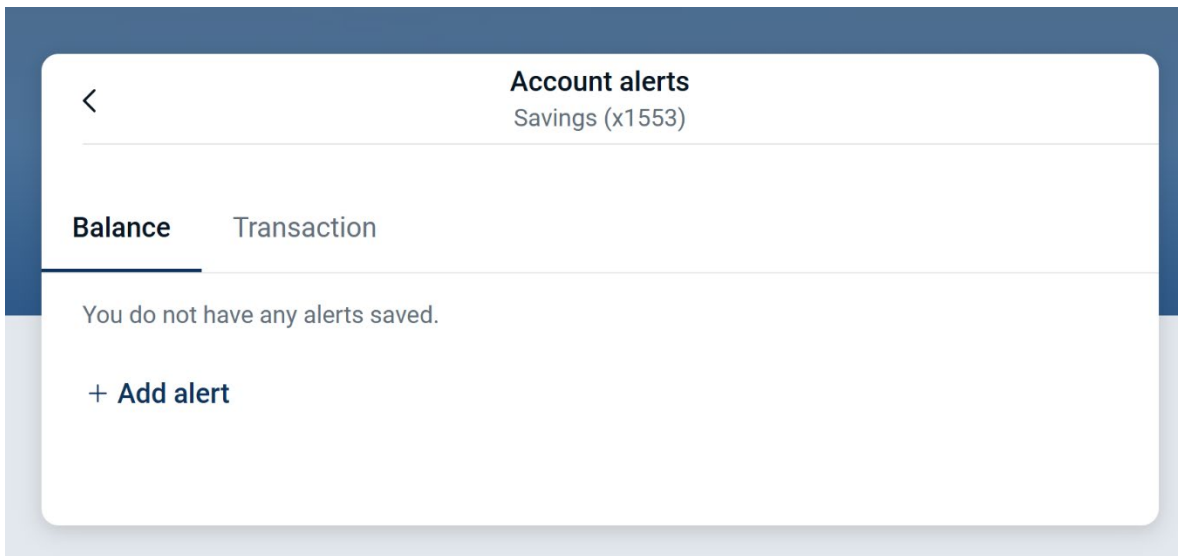
#### Step 1

Click **Alert Preferences** and select **Balances, transactions, and deposits**.



#### Step 2

Choose **Balance** or **Transaction** and click **+ Add alert**.



## Step 3

Complete the details and select how you'd like to receive the alert. Click **Add alert**.

**Account alerts**  
Savings (x1553)

**Balance** Transaction

You do not have any alerts saved.

Notify me when my balance is :

under \$ 10000

Notify by:

Text  Email  In-App Message

Cancel Add alert

## Set Up Check Alerts

### Step 1

Click **Alert preferences** and choose **Checks**

### Step 2

Select an alert and choose how to be notified

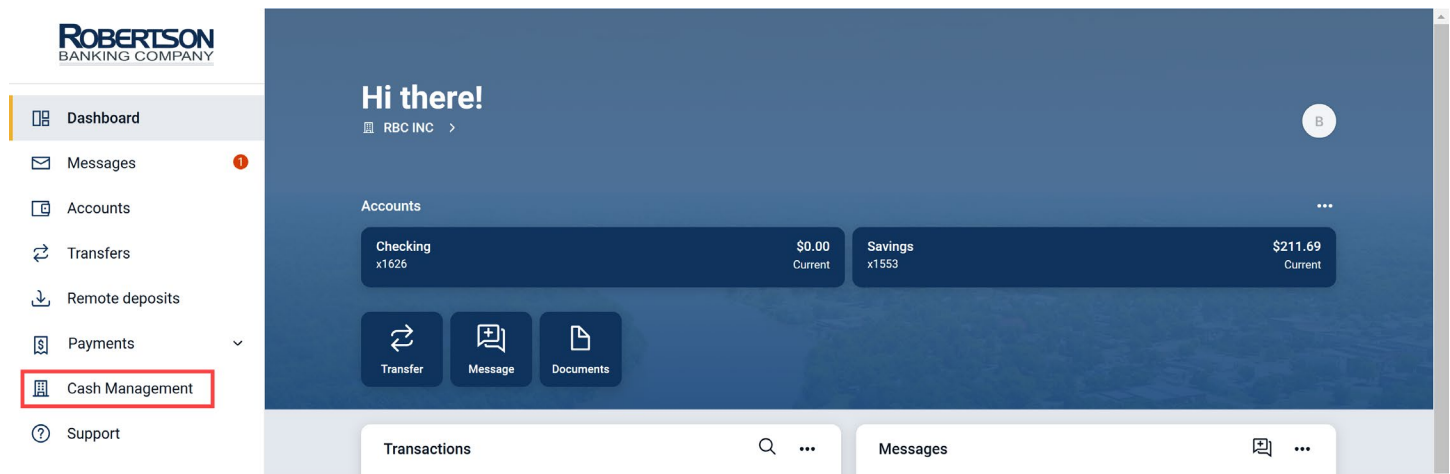
**Account alerts**  
Savings (x1553)

Check accepted	Active >
Check deposited	Active >
Check rejected	Active >

## Set Up Business Activity Alerts

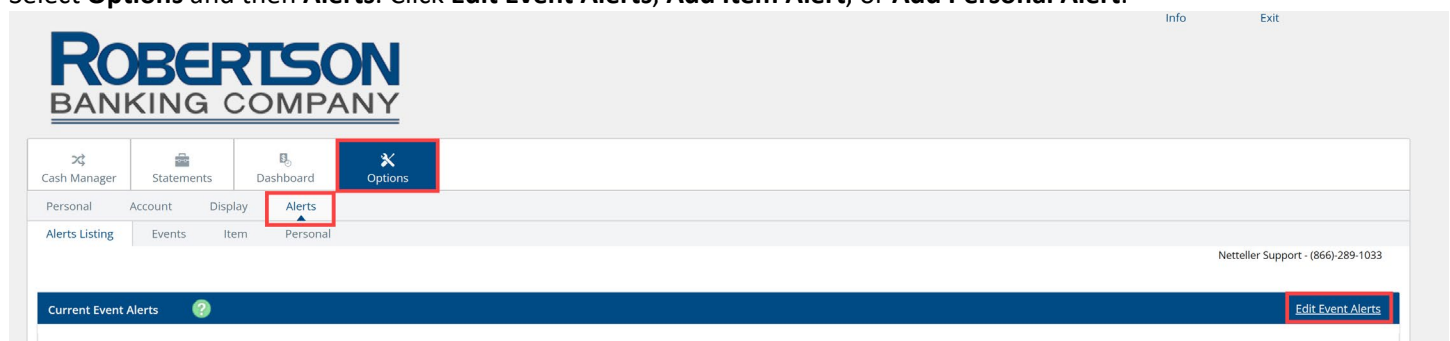
### Step 1

Select **Cash Management** from the navigation pane.



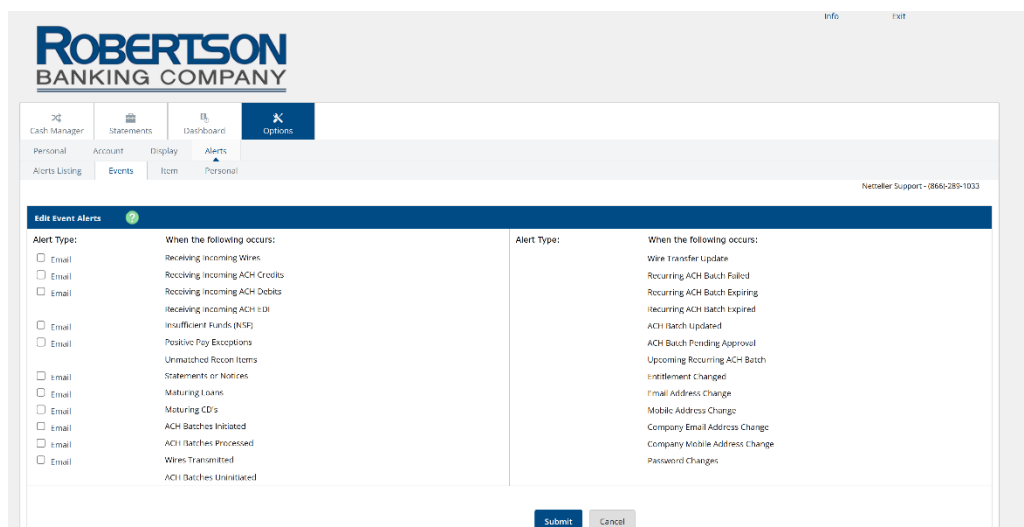
### Step 2

Select **Options** and then **Alerts**. Click **Edit Event Alerts**, **Add Item Alert**, or **Add Personal Alert**.



### Step 3

Check the **box** next to the desired alert. Click **Submit** and then **Accept** once you confirm your email address.

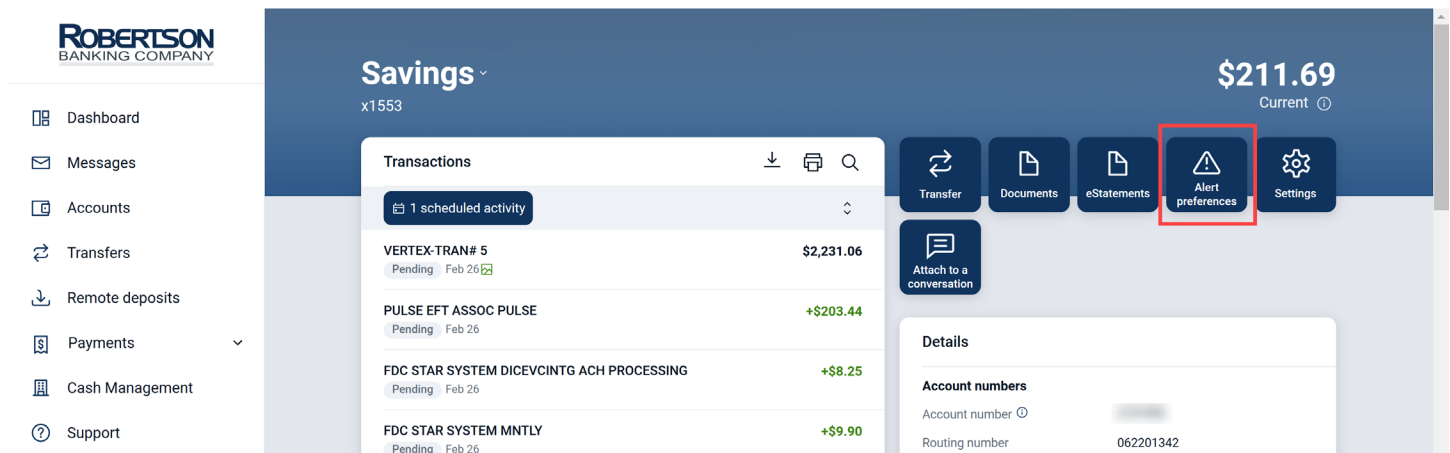




## Edit or Delete a Balance and Transaction Alert

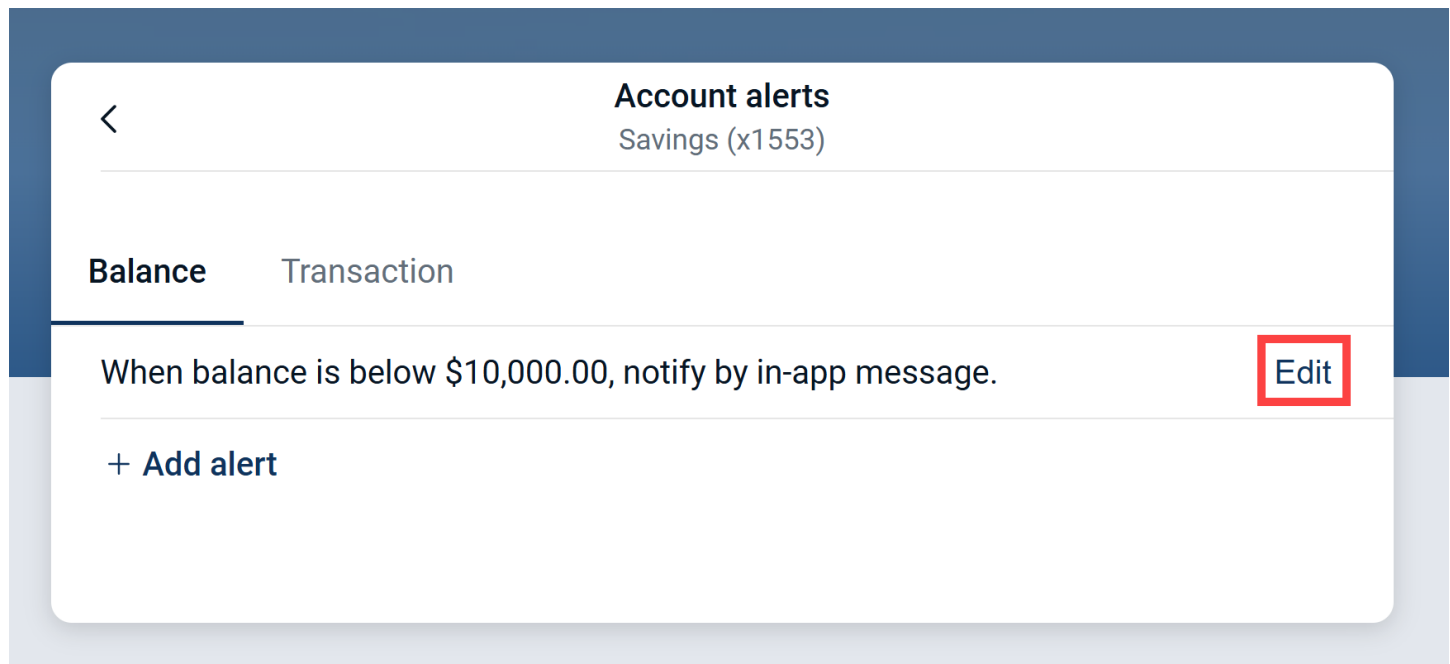
### Step 1

From within the account, click **Alert Preferences** and select **Balances, transactions, and deposits**.



### Step 2

Toggle between **Balance** and **Transaction** to find the alert to modify or delete. Select **Edit**.



### Step 3

Modify the details or click the **trash can** icon to delete.

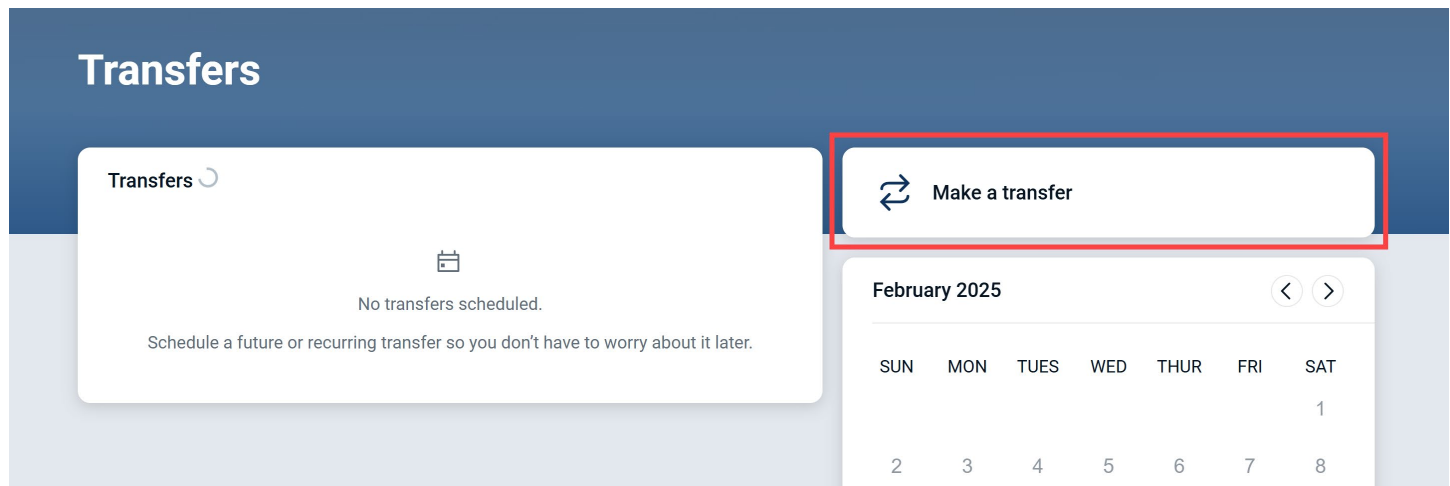
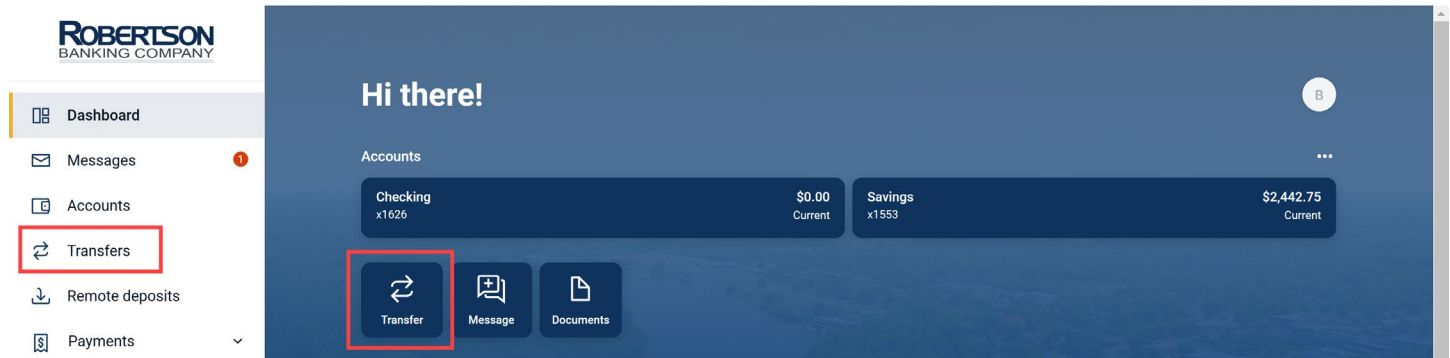
## Transfers

Move money between internal accounts.

### Submit a Transfer

#### Step 1

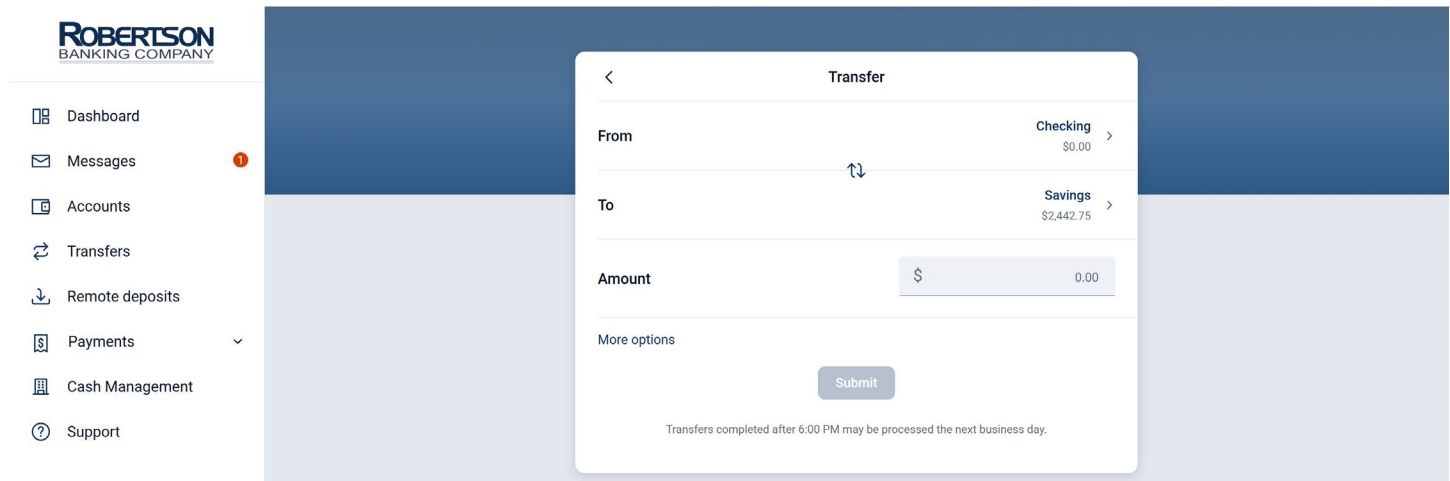
Click **Transfer** or **Make a Transfer** from the **Dashboard** or the **Transfers** page.



## Step 2

Select your **From** and **To** accounts and enter the amount to transfer.

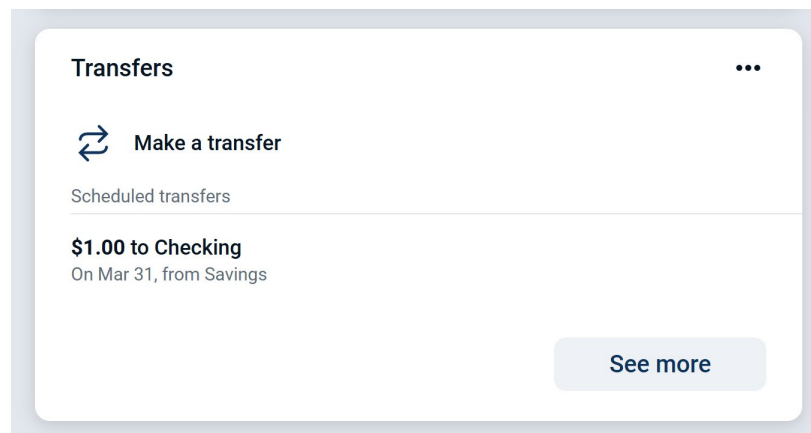
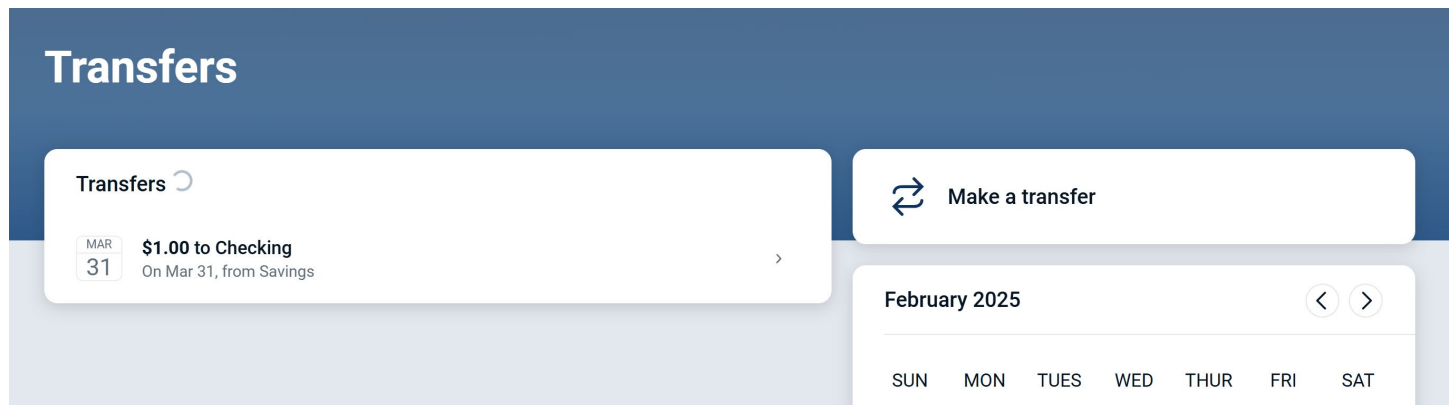
Click **More options** to set up a recurring frequency, select a future date, or add a memo if applicable. Click **Submit**.



## Edit or Delete a Transfer

### Step 1

Navigate to the **Transfers** card on the **Dashboard** or the **Transfers** page to find the transfer to edit or delete.



## Step 2

Select the transfer and modify details or select the **trash can** icon to delete.

The screenshot displays the Robertson Banking Company digital banking interface. On the left is a navigation menu with the following items: Dashboard, Messages (with a red notification badge), Accounts, Transfers, Remote deposits, Payments (with a dropdown arrow), Cash Management, and Support. At the bottom left is a 'My profile' button with a dropdown arrow. The main content area is a light blue background with a dark blue header. A white modal window titled 'Transfer' is centered on the screen. The modal has a back arrow on the top left and a trash can icon on the top right. The form fields are: 'From' (Savings, \$2,442.75), 'To' (Checking, \$0.00), 'Amount' (input field with '\$' and '1.00'), 'Frequency' (Once with a dropdown arrow), and 'Date' (March 31 with a dropdown arrow). A 'Save' button is at the bottom of the modal. Below the button, a note states: 'Transfers completed after 6:00 PM may be processed the next business day.' At the bottom of the page, there is a footer with the text: '© 2025 Robertson Banking Company · Privacy policy · Member FDIC · Equal Housing Lender'. A help icon (question mark) is located in the bottom right corner of the main content area.

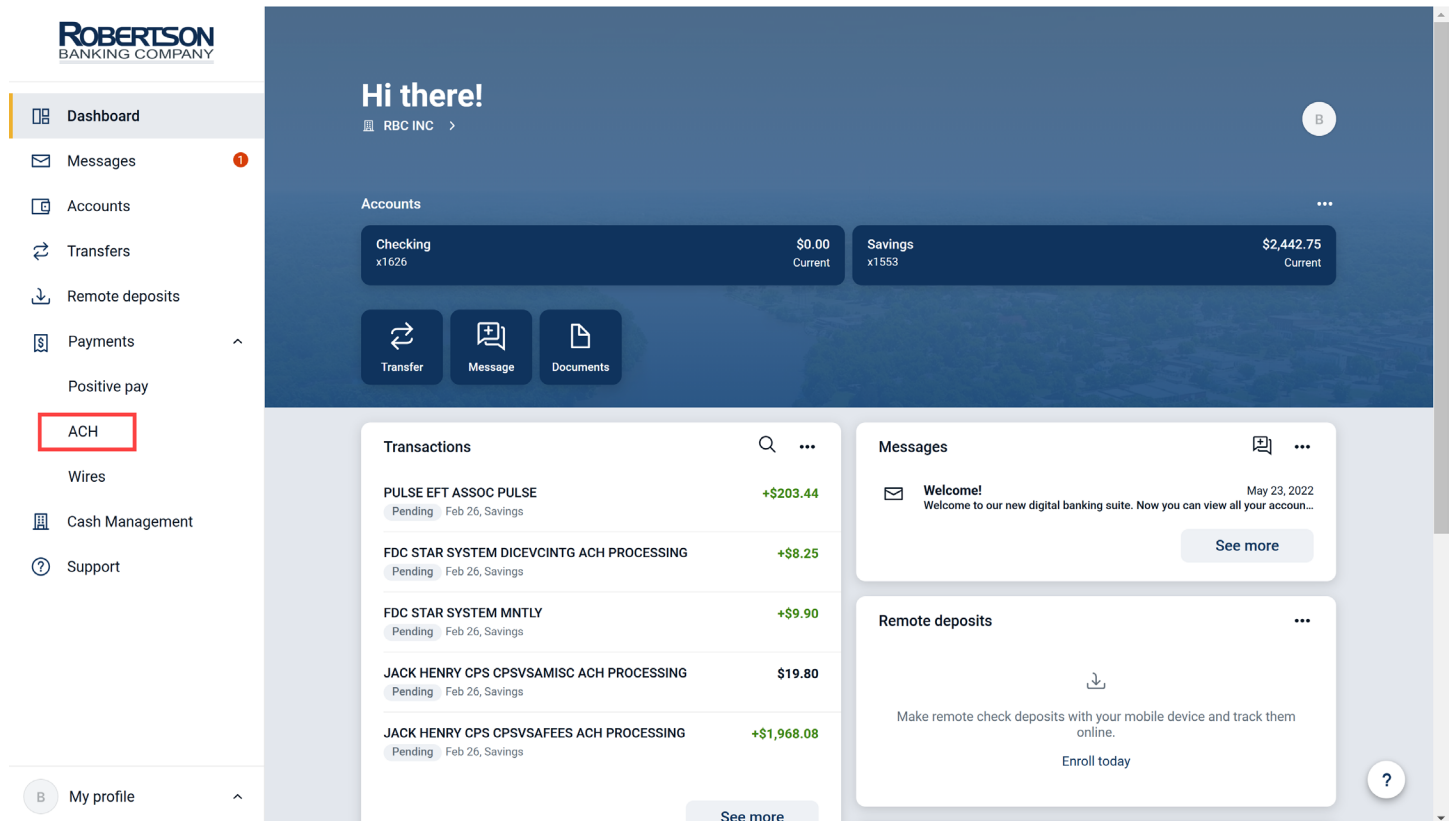
## ACH

### Create a Batch Manually

#### Step 1

Select **ACH** from the navigation pane.

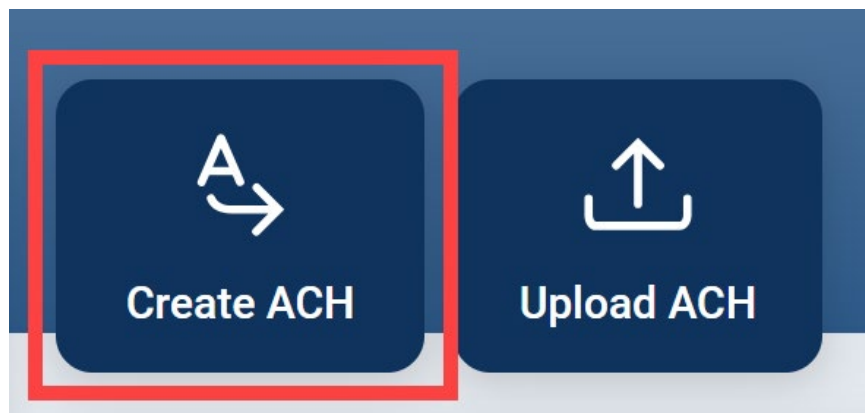
**Please note:** If you have multiple payment features activated, select the **Payments** menu first.



The screenshot shows the Robertson Banking Company digital banking interface. On the left, a navigation menu includes 'Dashboard', 'Messages', 'Accounts', 'Transfers', 'Remote deposits', 'Payments', 'ACH' (highlighted with a red box), 'Wires', 'Cash Management', and 'Support'. The main area displays a 'Hi there!' greeting for 'RBC INC'. Below this, account balances are shown: 'Checking x1626' at \$0.00 and 'Savings x1553' at \$2,442.75. A 'Transactions' section lists several pending ACH payments: 'PULSE EFT ASSOC PULSE' (+\$203.44), 'FDC STAR SYSTEM DICEVCINTG ACH PROCESSING' (+\$8.25), 'FDC STAR SYSTEM MNTLY' (+\$9.90), 'JACK HENRY CPS CPSVSAMISC ACH PROCESSING' (\$19.80), and 'JACK HENRY CPS CPSVSAFEES ACH PROCESSING' (+\$1,968.08). Other sections include 'Messages' with a welcome message and 'Remote deposits' with an 'Enroll today' button.

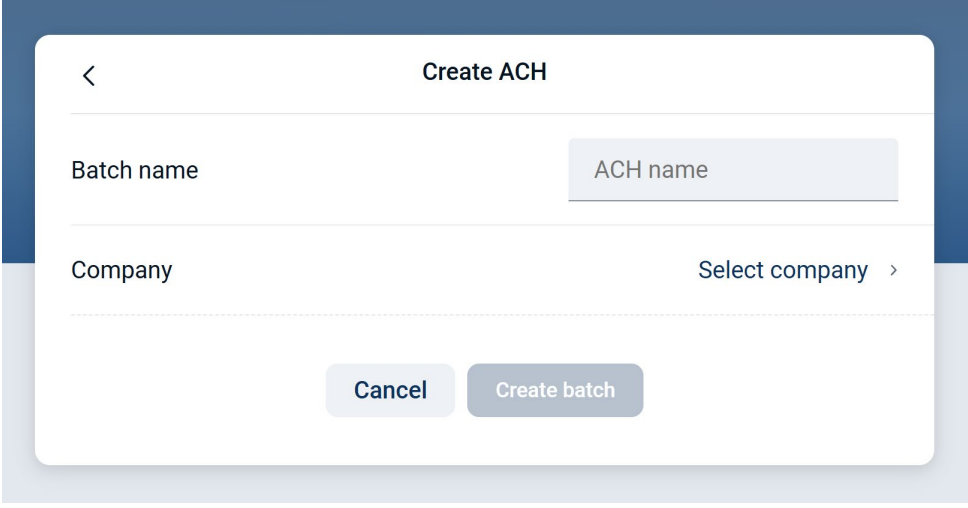
#### Step 2

Click **Create ACH**.



## Step 3

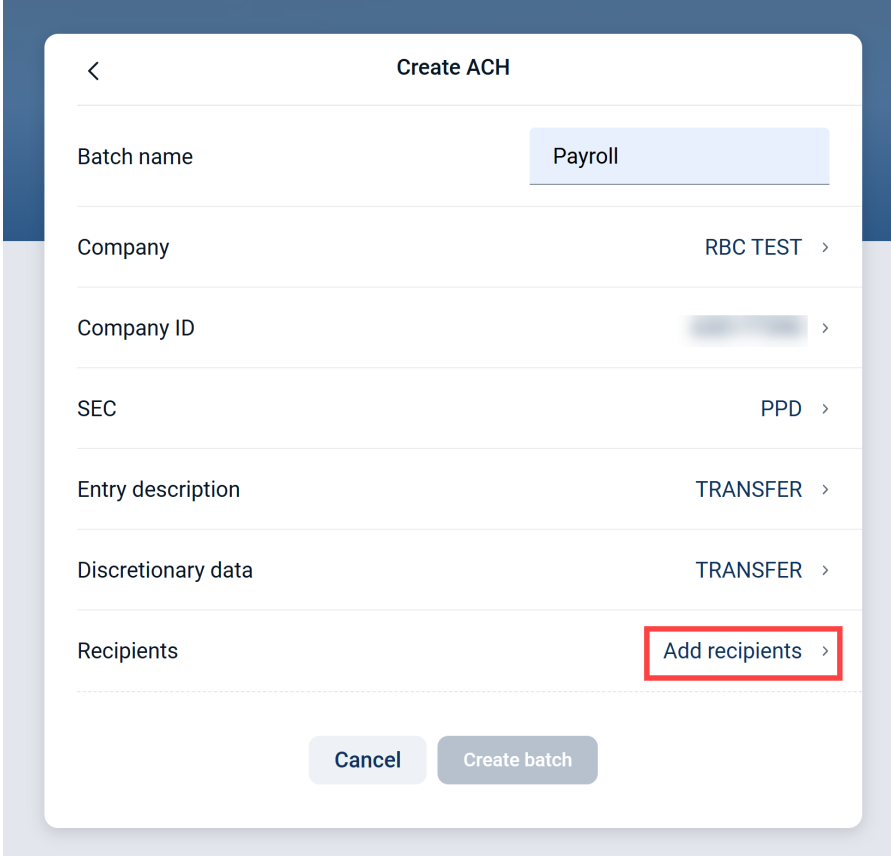
Enter the **Batch name** and select the **ACH company** to originate the payment from.



The screenshot shows a mobile application interface for creating an ACH batch. At the top, there is a back arrow and the title "Create ACH". Below this, there are two main input fields: "Batch name" with a text entry box containing "ACH name", and "Company" with a dropdown menu showing "Select company >". At the bottom of the form, there are two buttons: "Cancel" and "Create batch".

## Step 4

Confirm that the correct **SEC code**, **Entry description**, and **Discretionary data** display. Modify if necessary. Click **Add recipients**.



The screenshot shows the "Create ACH" form with several fields populated. The "Batch name" field contains "Payroll". The "Company" field is set to "RBC TEST". The "Company ID" field is blurred. The "SEC" field is set to "PPD". The "Entry description" field is set to "TRANSFER". The "Discretionary data" field is set to "TRANSFER". The "Recipients" field has a button labeled "Add recipients >" which is highlighted with a red rectangular box. At the bottom, there are "Cancel" and "Create batch" buttons.

## Step 5

Enter the **Recipient name**, the **amount** to pay them, transaction type (**Credit** or **Debit**), and account information.


Click **Optional fields** to enter a recipient ID number or addenda information.

Check **Prenote** to create a zero dollar batch for this transaction. This prenote batch may then be initiated to confirm account details prior to sending the live batch. (optional)

Check **Hold** to prevent this transaction from processing with the other transactions in the batch. (optional)

Click **+ Add another recipient** to enter another recipient. Click **Save recipient** when done adding recipients to the batch

**Recipients**


**Employee One** 

Recipient name

Amount

Credit/Debit

Account number

Routing number  

Account type

Optional fields

Prenote  Hold

[+ Add another recipient](#)

**Save recipient**

## Step 6

Click **Create batch**, review the confirmation, then click **Done**.

The batch will appear under the **Active** tab in a **Ready** status. Please see the **Initiate a Batch** section for steps on how to send the payment.

BATCH	RECURRING	AMOUNT
Payroll	RBC TEST	\$1.00

February 2025

SUN	MON	TUE	WED	THUR	FRI	SAT
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	

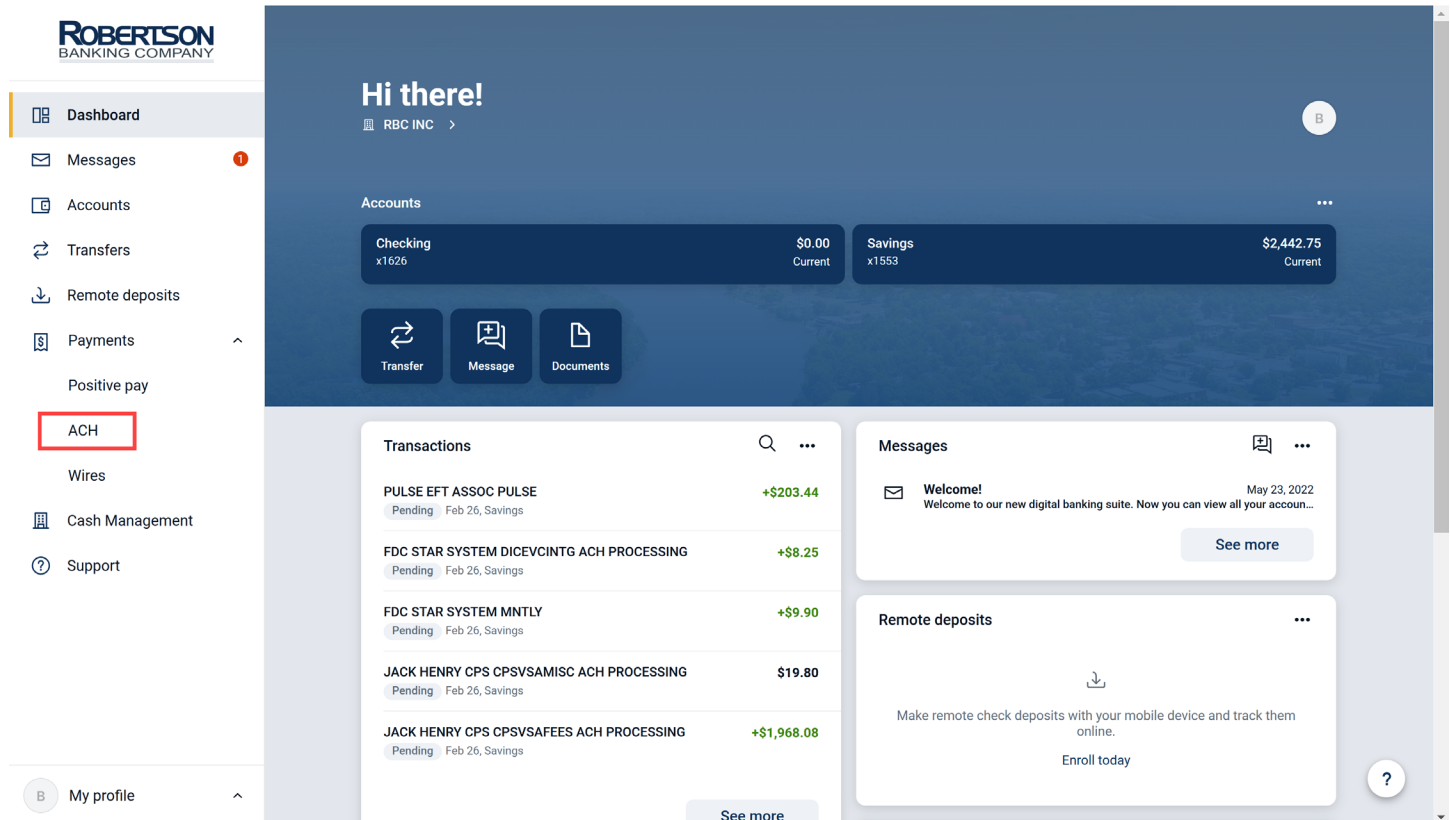


## Upload a NACHA File

### Step 1

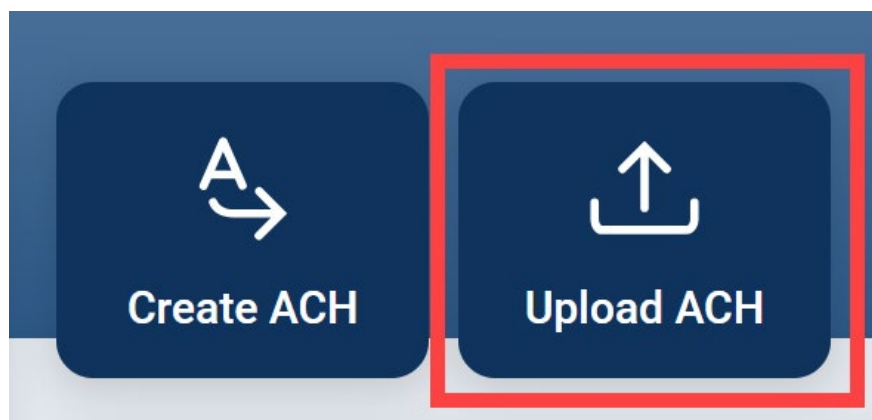
Select **ACH** from the navigation pane.

**Please note:** If you have multiple payment features activated, select the **Payments** menu first.



### Step 2

Click **Upload ACH**.

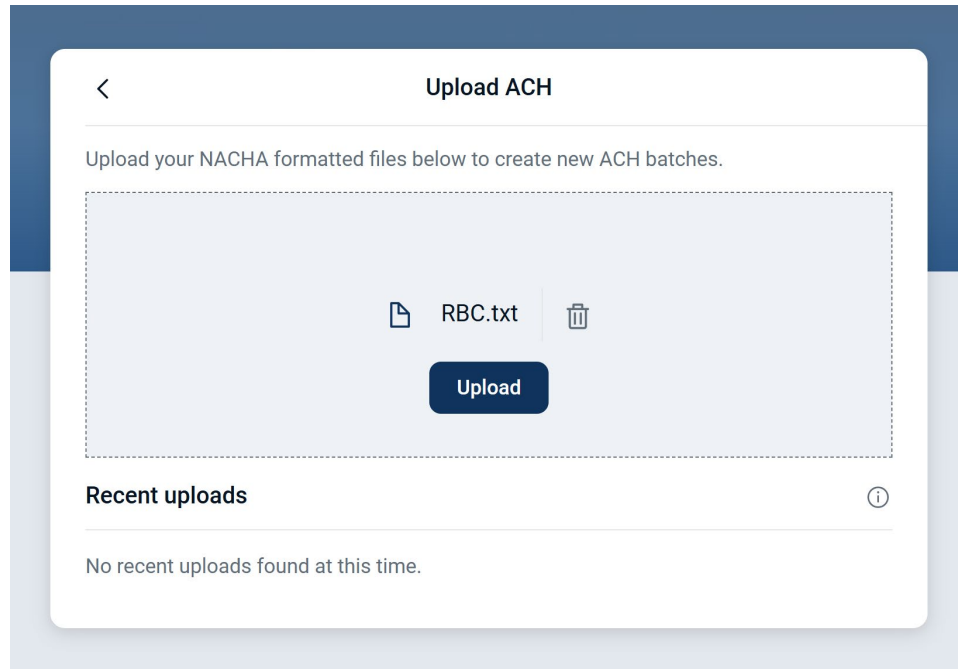


## Step 3

Browse for your file and click **Upload**. Review your file for proper formatting if you receive an error.

The batch will appear under the **Active** tab in a **Ready** status.

**Note:** A generic name will be given to an uploaded batch. Select the batch and click **Edit** if you wish to change the name.



Please see the **Initiate a Batch** section in this document for steps on how to send the payment.

## ACH

Active History ☑ ⚙

BATCH	RECURRING	AMOUNT
0000002		\$0.04
<span>Ready</span> RBC TEST		PPD

Create ACH Upload ACH

February 2025 < >

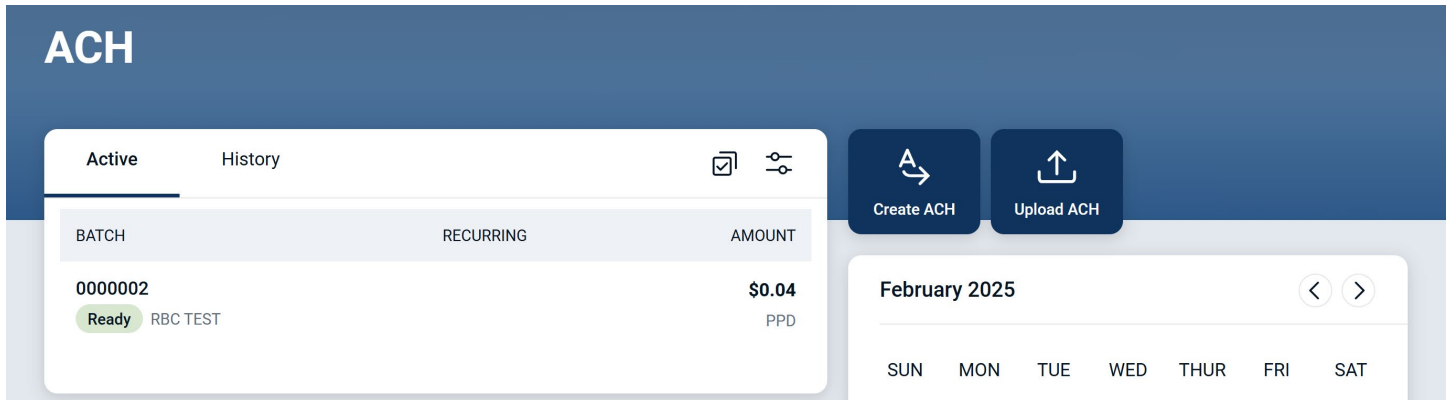
SUN	MON	TUE	WED	THUR	FRI	SAT
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	

## Edit or Delete a Batch

**Please note:** Batches in an initiated or processed status cannot be edited or deleted. Please uninitiate the batch first or contact the bank for assistance.

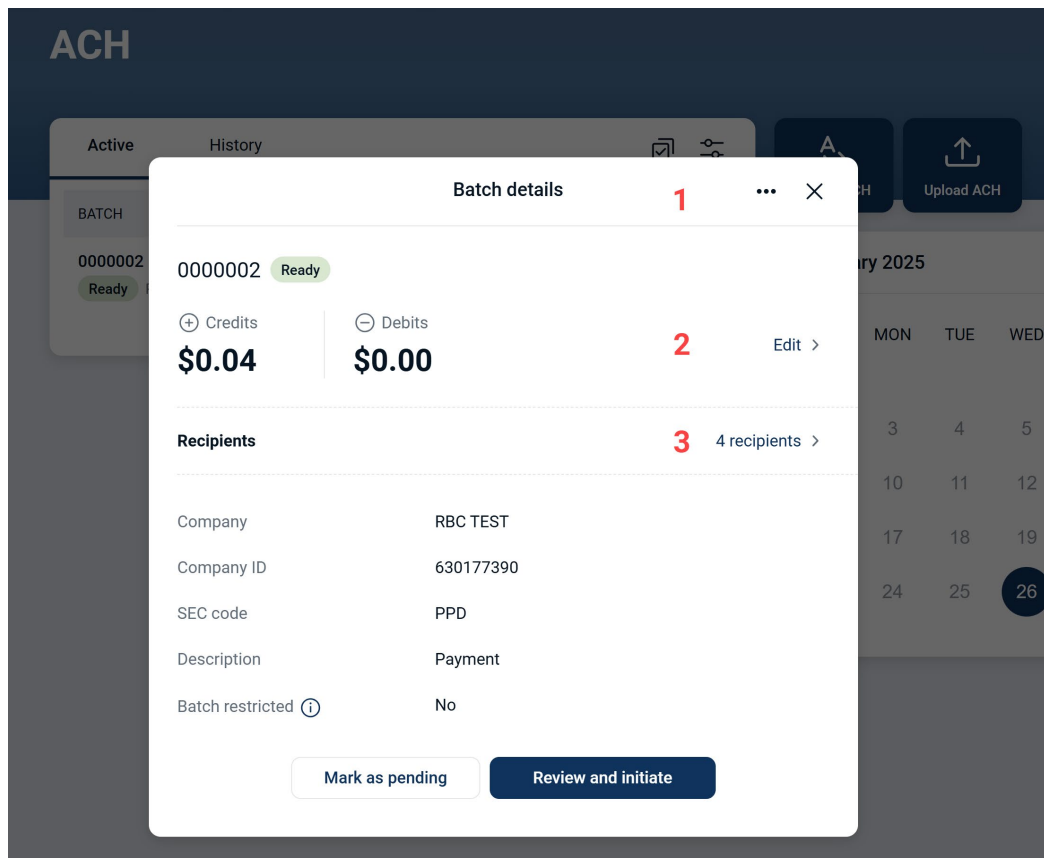
### Step 1

Select the batch.



### Step 2

1. Select the ellipsis icon to delete the batch.
2. Click **Edit** to modify the batch header information.
3. Click **Recipients** to add, delete, or modify the recipient(s) account information or payment amount(s).

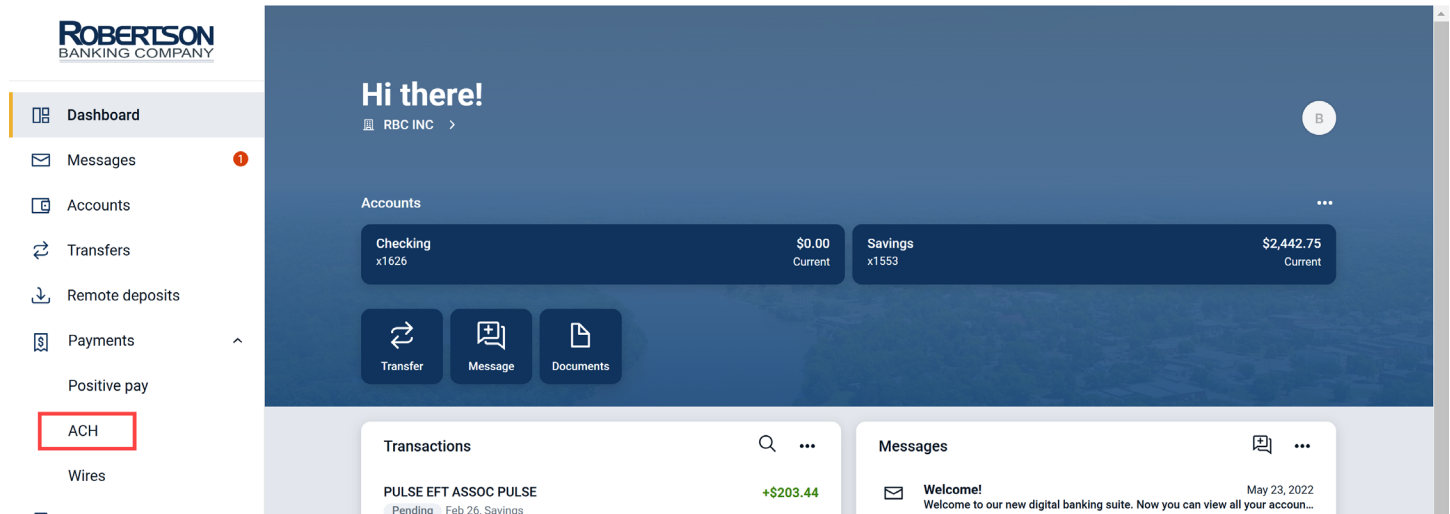


## Initiate a Batch

### Step 1

Select **ACH** from the navigation pane.

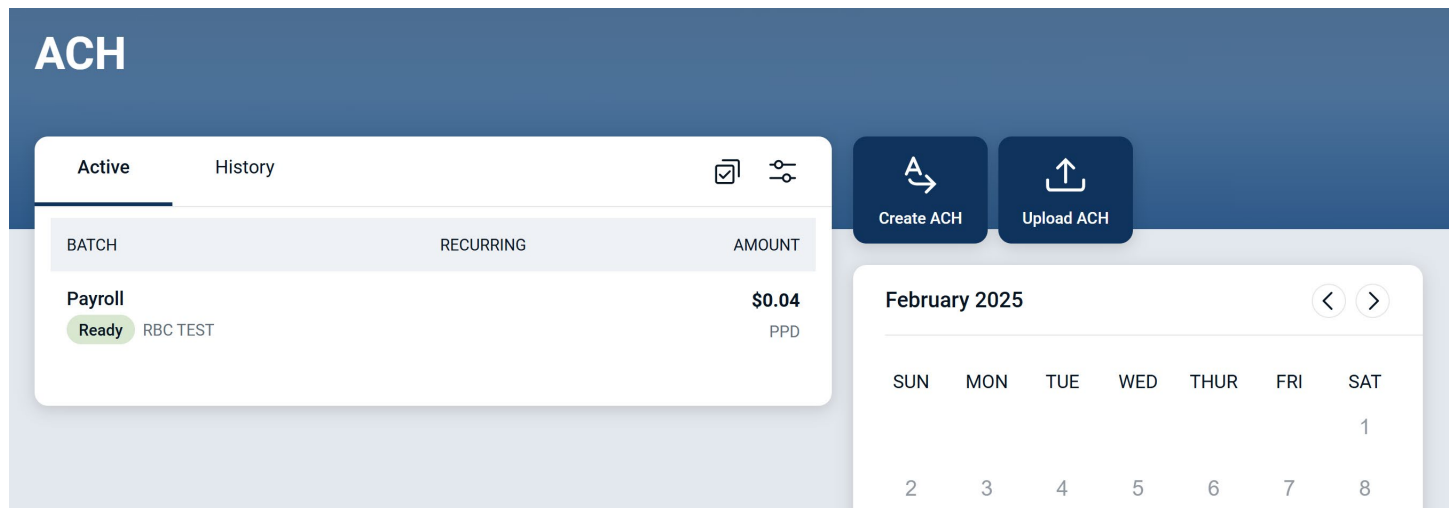
**Please note:** If you have multiple payment features activated, select the **Payments** menu first.



### Step 2

Select the batch in a **Ready** status and click **Review and initiate**.

**Please note:** If dual control is activated, you cannot initiate a batch that you created or edited. A second user will need to complete this step.



## Step 3

Select the **Offset account** if applicable, recurring **Frequency** if applicable, and the **Effective date**.

Check the Reset amounts to \$0.00 after processing if you'd like to clear out the dollar amounts in the template after processing. (optional)

Click **Initiate**.

You may be asked to authenticate.

The screenshot shows a form titled "Initiate ACH" with the following fields and options:

- Payroll**
  - + Credits**: \$0.04
  - Debits**: \$0.00
  - Show details ▾
- Offset account**: Savings x1553 >
- Effective date**: Mar 12 >
- Reset amounts to \$0.00 after processing**:

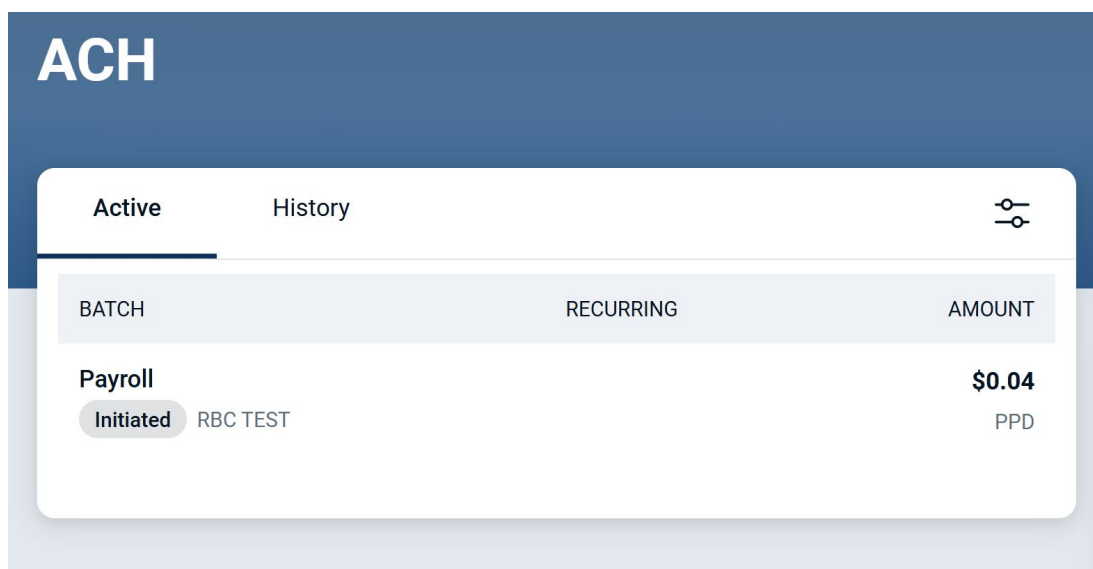
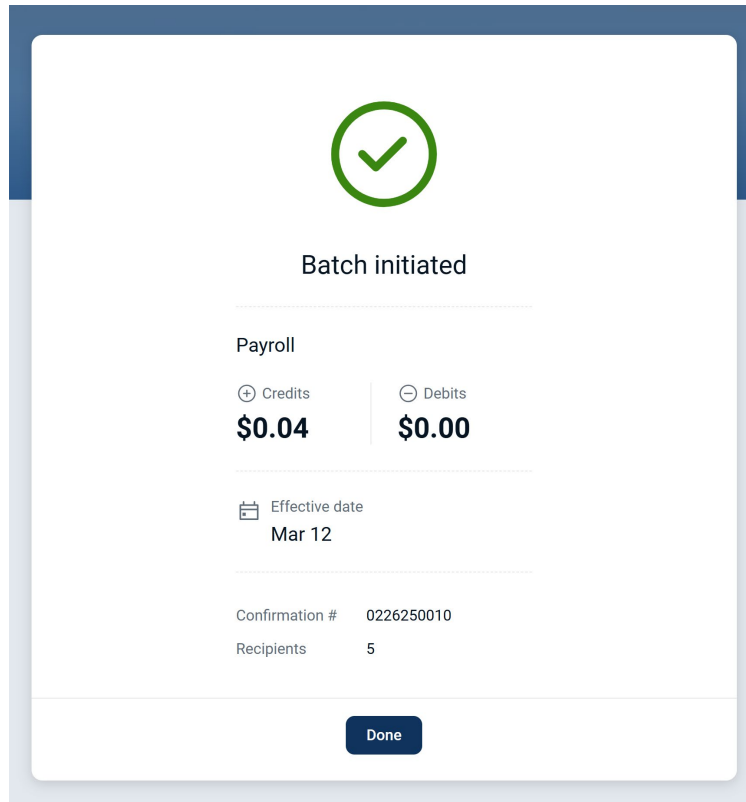
At the bottom of the form are two buttons: "Cancel" and "Initiate".

Review your confirmation and click **Done**.

The batch will appear in an **Initiated** status under the **Active** tab.

**Please note:** Batches in an Initiated status may be uninitiated up until our cut off. Please see the **Uninitiate a Batch** section in this document for more information.

The batch will return to a **Ready** status after processing and may be reused, edited, or deleted.

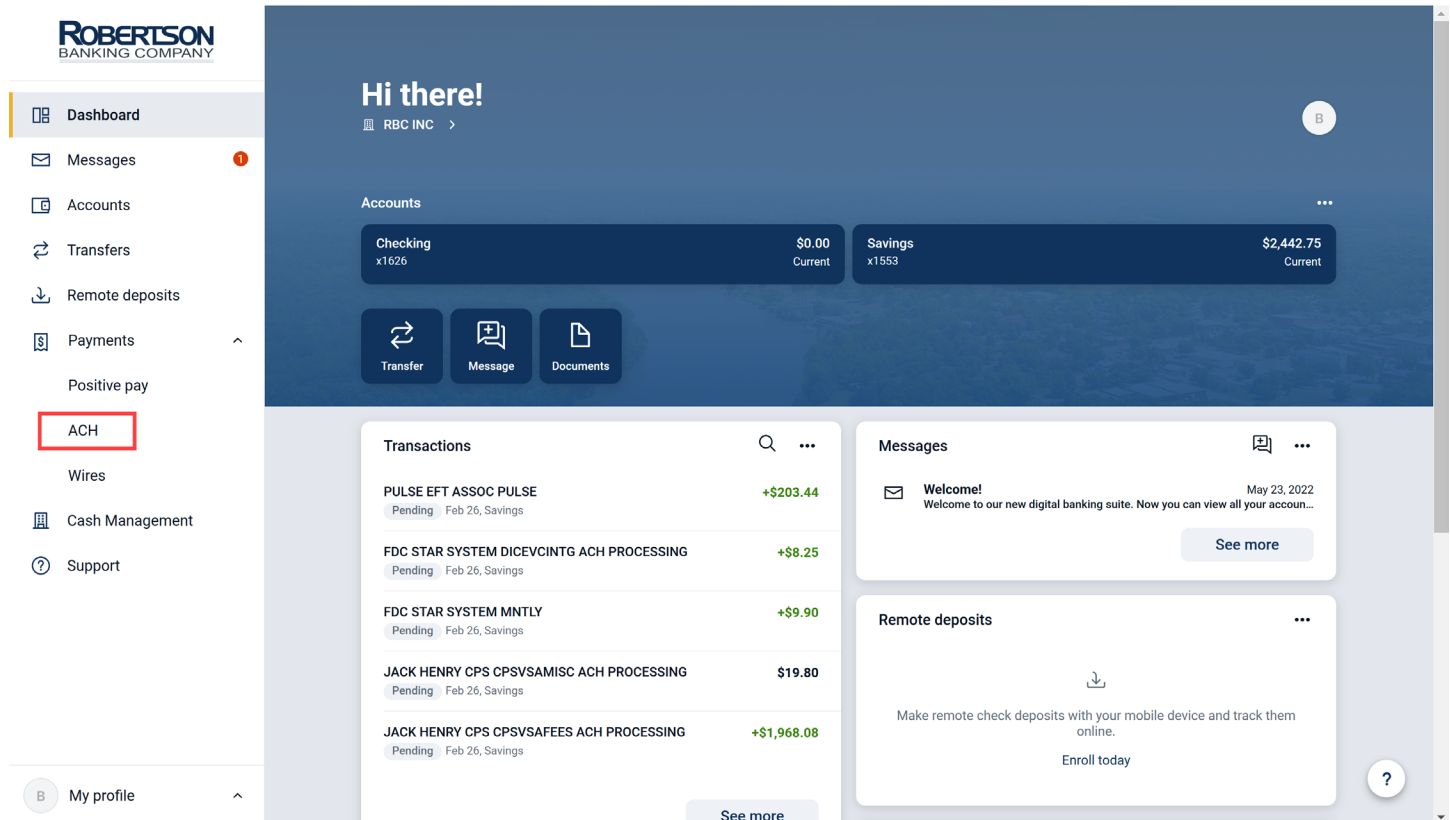


## Initiate Multiple Batches

### Step 1

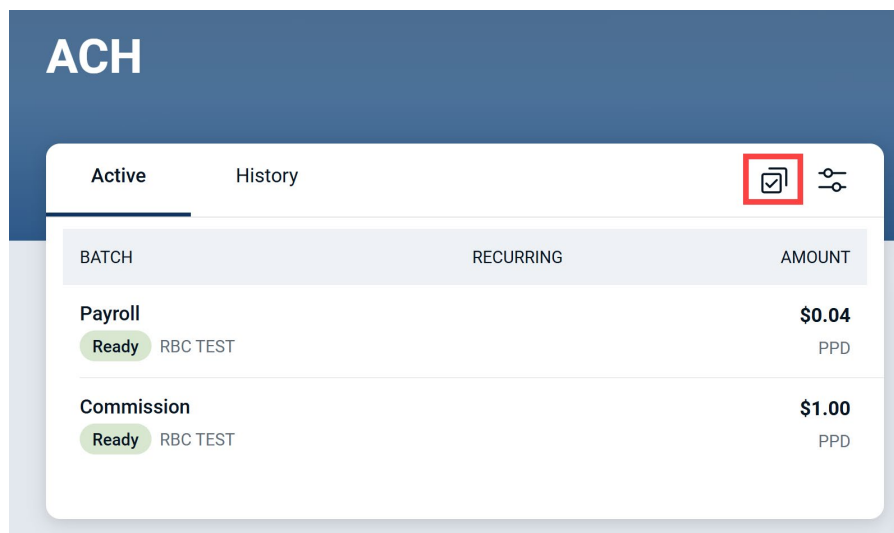
Select **ACH** from the navigation pane.

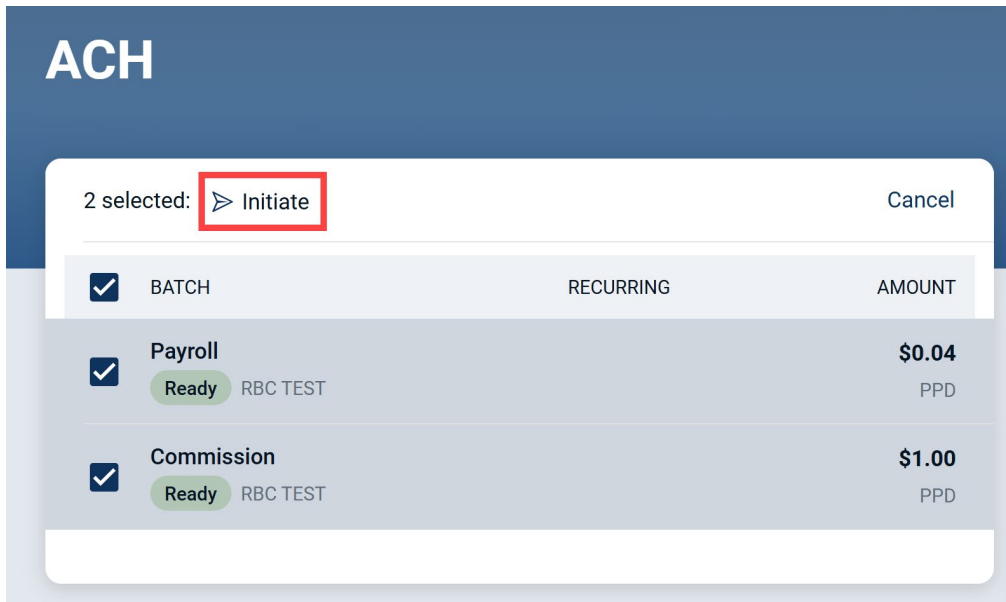
**Please note:** If you have multiple payment features activated, select the **Payments** menu first.



### Step 2

Click the **Bulk Action** icon and select the batches you want to initiate. Click **Initiate**.



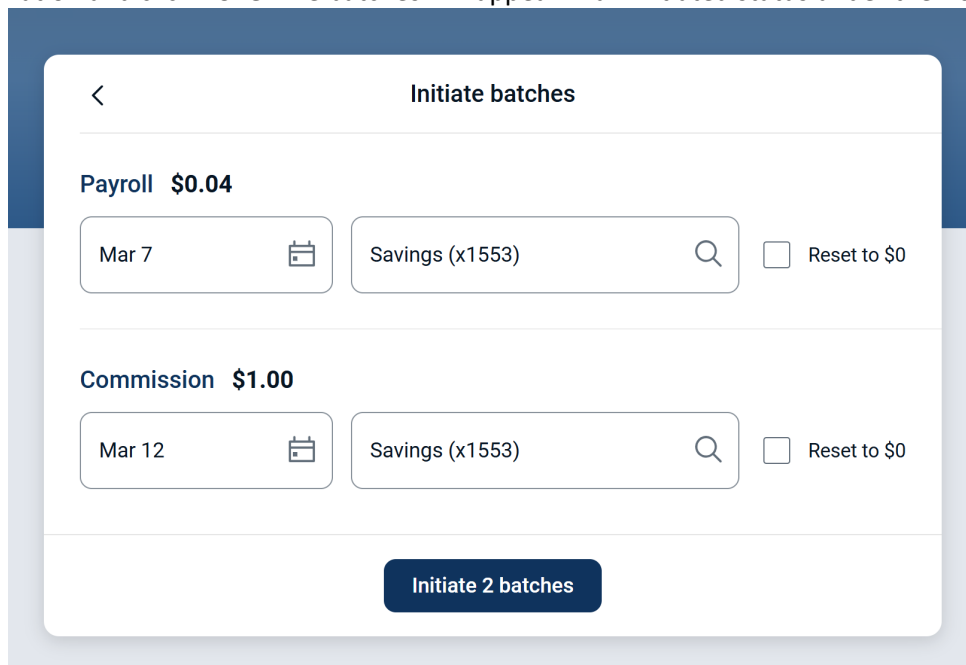


### Step 3

Enter the **Effective date**, select the **Offset account** if applicable, and check the **Reset to \$0** box if desired for each batch. Click **Initiate**.

You may be asked to enter your password to authenticate.

Review your confirmation and click **Done**. The batches will appear in an Initiated status under the **Active** tab.



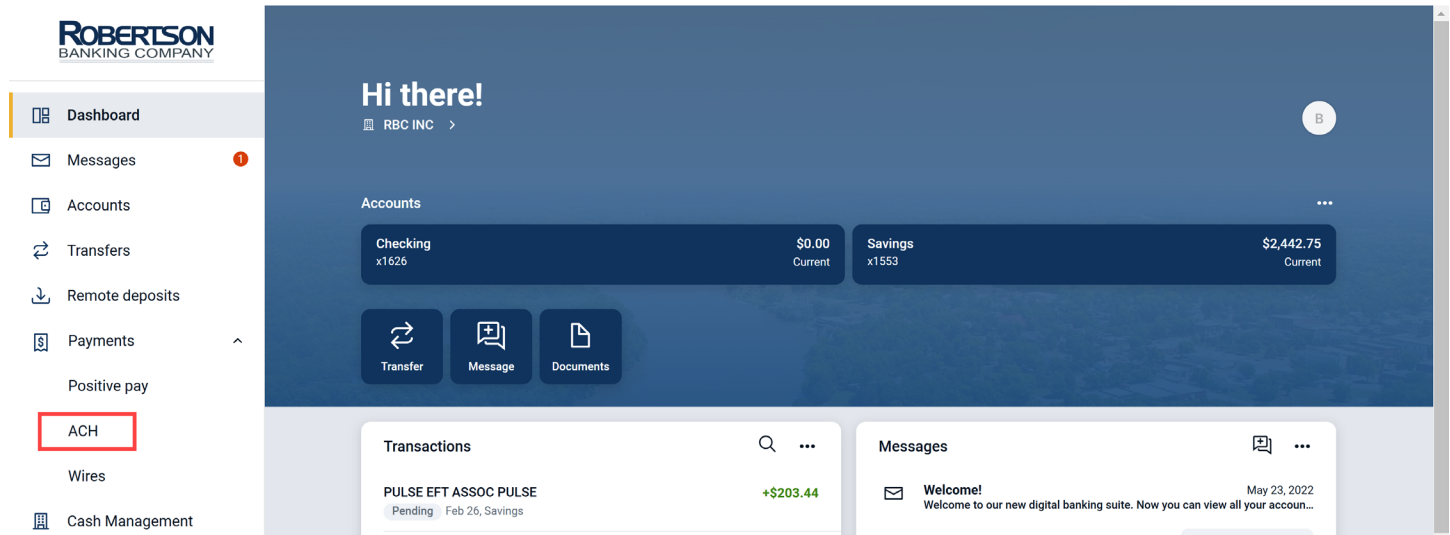


## Uninitiate a Batch

### Step 1

Select **ACH** from the navigation pane.

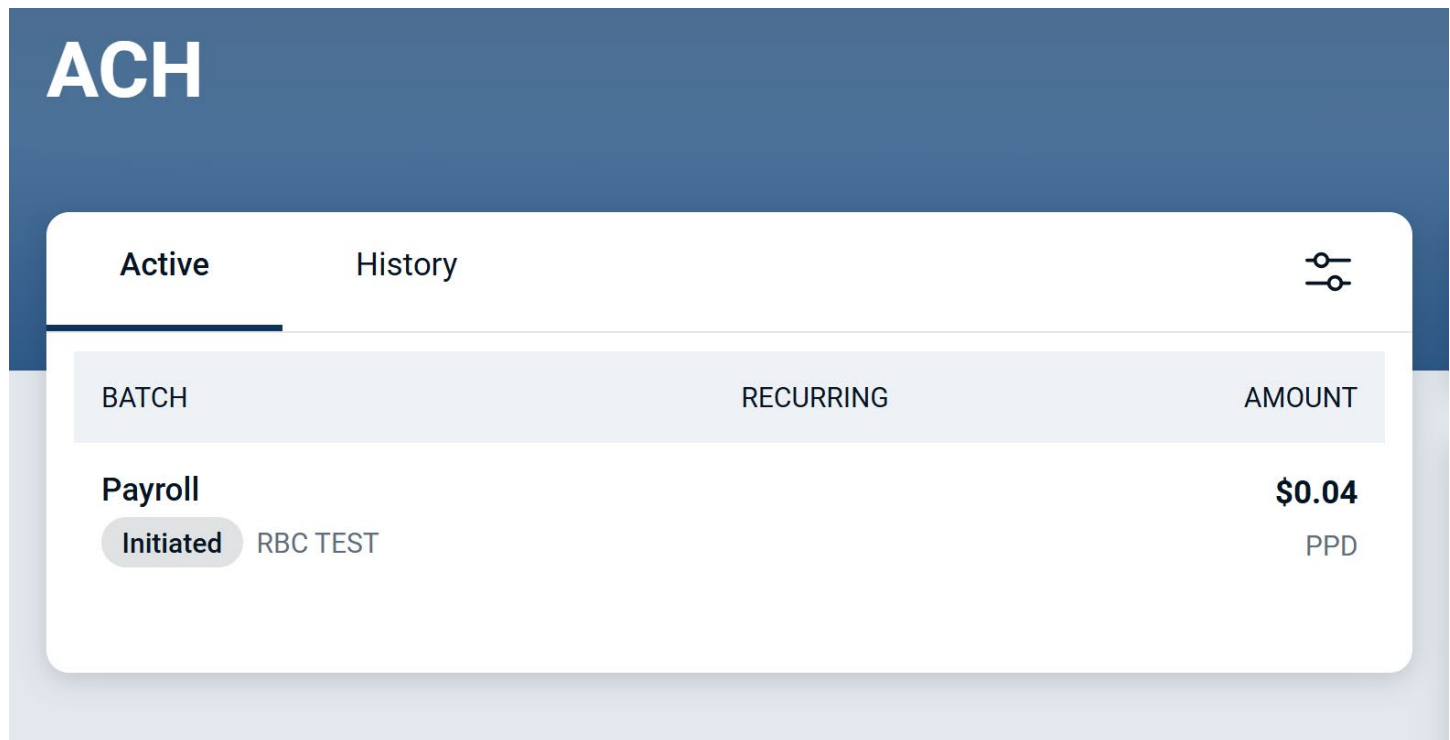
**Please note:** If you have multiple payment features activated, select the **Payments** menu first.

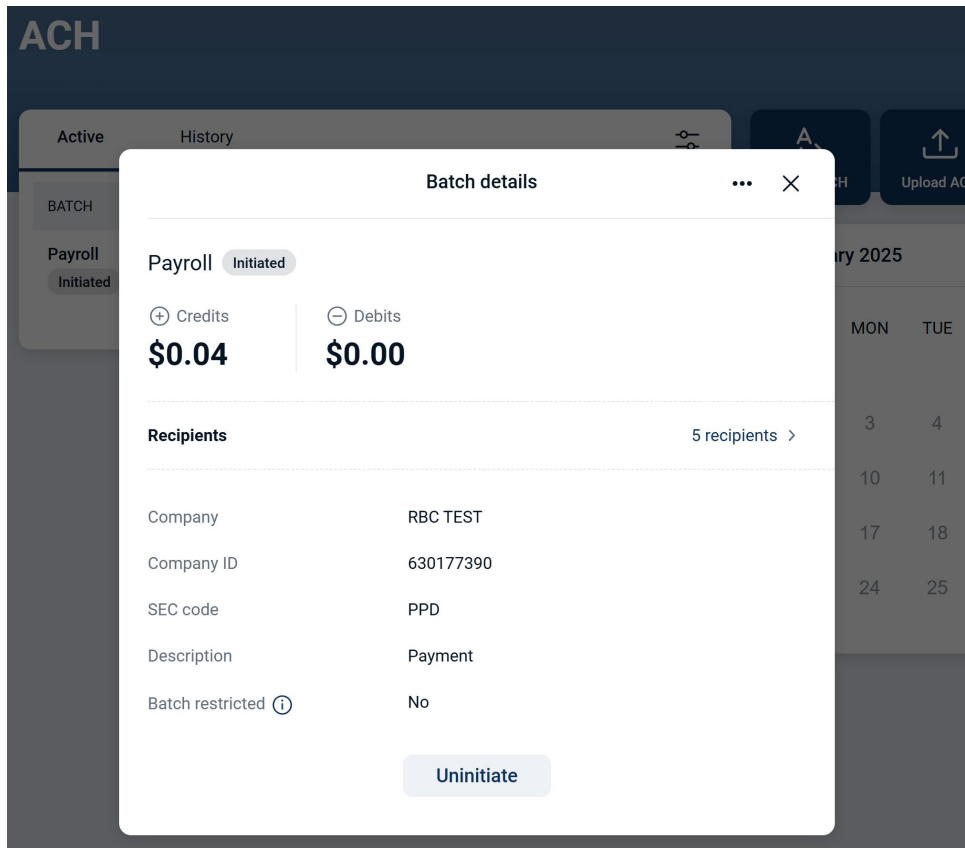


### Step 2

Select the batch in an Initiated status, click **Uninitiate**, and confirm.

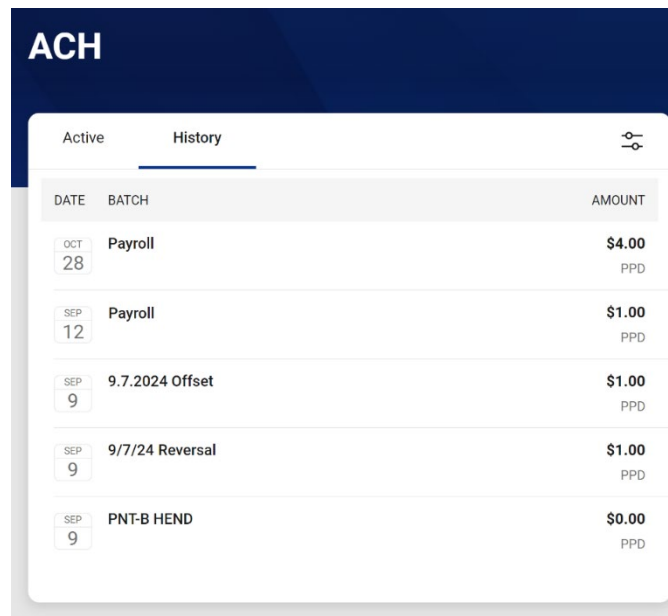
The payment will return to a **Ready** status and will not process.





## History

Select this tab to review batches that have been processed.



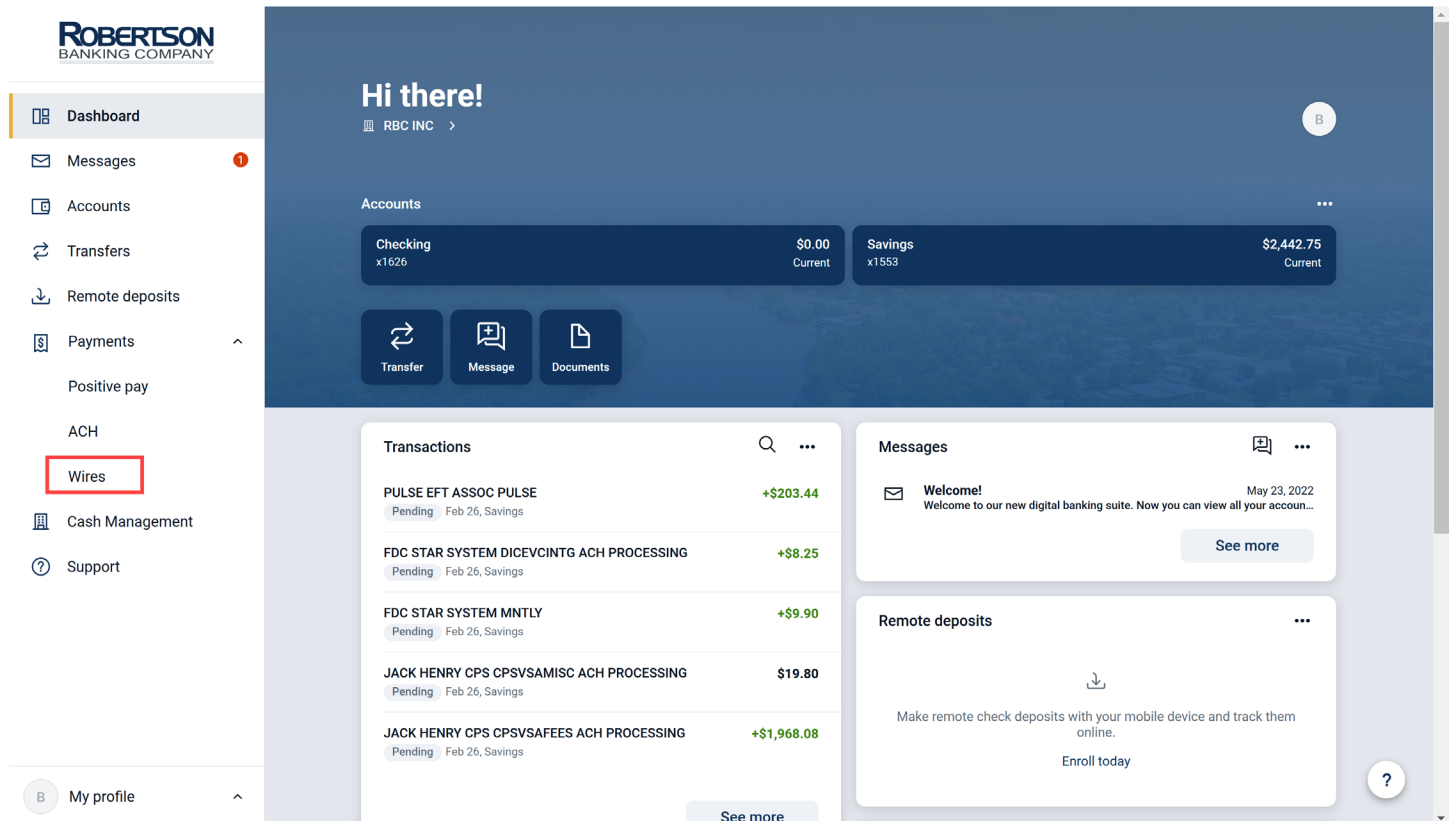
## Wires

### Create a Wire

#### Step 1

Select **Wires** from the navigation pane.

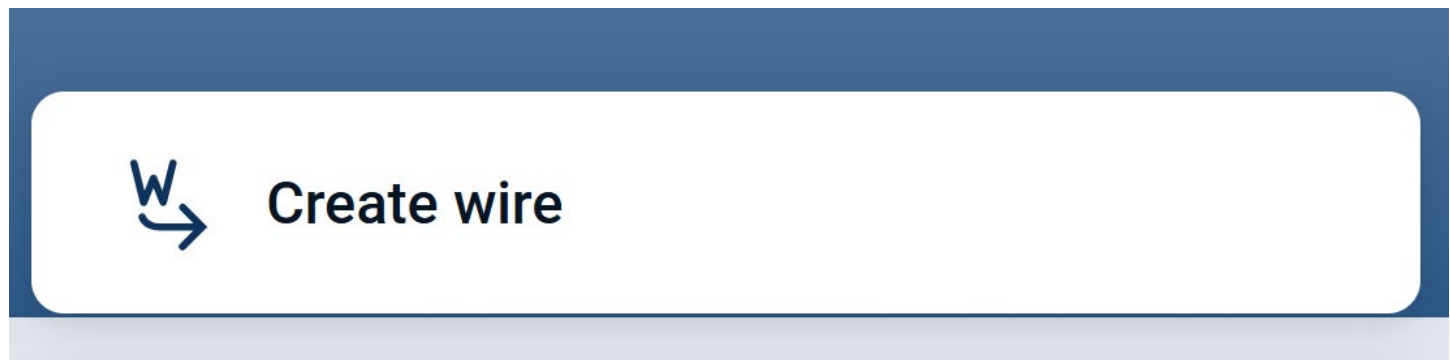
**Please note:** if you have multiple payment features activated, select the **Payments** menu first.



The screenshot shows the Robertson Banking Company digital banking dashboard. The left navigation pane includes: Dashboard, Messages (1), Accounts, Transfers, Remote deposits, Payments (expanded), Positive pay, ACH, **Wires** (highlighted with a red box), Cash Management, and Support. The main content area displays: "Hi there! RBC INC", account balances for Checking (\$0.00) and Savings (\$2,442.75), transaction history with items like "PULSE EFT ASSOC PULSE" (+\$203.44) and "JACK HENRY CPS CPSVSAFEES ACH PROCESSING" (+\$1,968.08), a "Welcome!" message, and a "Remote deposits" section with an "Enroll today" button.

#### Step 2

Select **Create wire**.



A large blue button with a white 'W' icon and an arrow pointing right, followed by the text "Create wire".

## Step 3

Enter a **Wire name**, choose the account to debit the funds **From**, and click **Add recipient**.

The screenshot shows a mobile application interface for creating a wire transfer. At the top, there is a back arrow and the title "Create wire". Below the title are several input fields: "Wire name" with a text box containing "Wire name" and a character count "0/30"; "From" with a dropdown menu labeled "Select account"; "To" with a dropdown menu labeled "Add recipient"; "Amount" with a text box containing "\$ 0.00"; and "Notes" with a dropdown menu labeled "Add notes". At the bottom center, there is a "Create wire" button.

## Step 4

Enter the beneficiary's name, account number, and address in the Recipient account section

The screenshot shows a mobile application interface for entering recipient information. At the top, there is a back arrow and the title "Recipient". Below the title is a section titled "Recipient account" which contains several input fields: "Recipient name", "Account number", "Address line 1", "Address line 2", "City", "State", and "Zip".

## Step 5

Click **Find institution** to lookup the beneficiary's financial **Institution name** then click **Save**.

The screenshot shows a form titled "Receiving financial institution" with a search icon and "Find institution" button. It contains input fields for "Routing/ABA number", "Institution name", "City", and "State". A note with an information icon states: "We temporarily don't support wires that require an intermediary financial institution. To create this type of wire, please use Cash Management." A "Save" button is at the bottom.

## Step 6

Enter the amount of the wire and add any notes that should accompany the wire if applicable.

If you anticipate sending this wire again in the future, click **Save** as template to retain the information under the Templates tab.

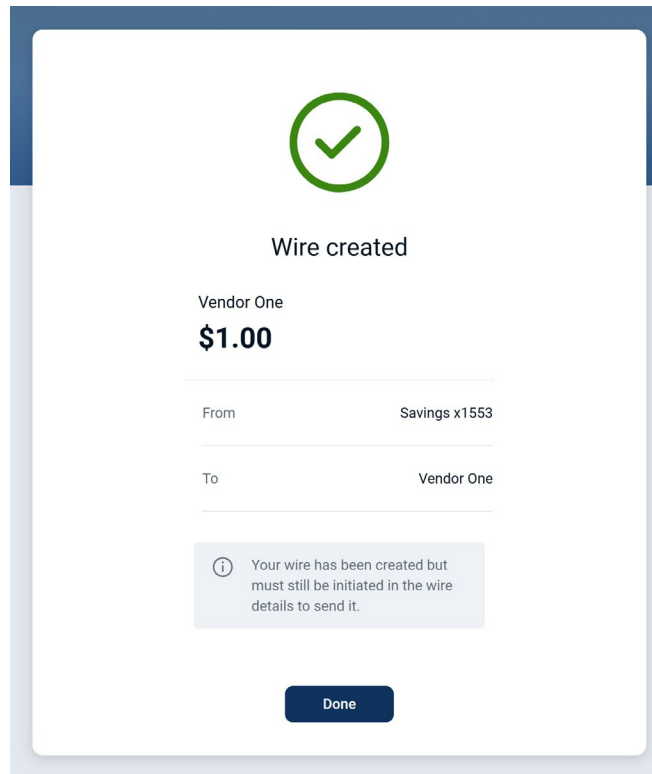
**Please note:** if you wish to send a recurring wire, it must be saved as a template first.

Click **Create wire**.

The screenshot shows the "Create wire" form with fields for "Wire name" (Vendor One), "From" (Savings x1553, \$211.69), "To" (Vendor One 123456789, FIRST CITZ RALEIGH), "Amount" (\$ 1.00), and "Notes" (Add notes). There is a checkbox for "Save as template" and a "Create wire" button at the bottom.

## Step 7

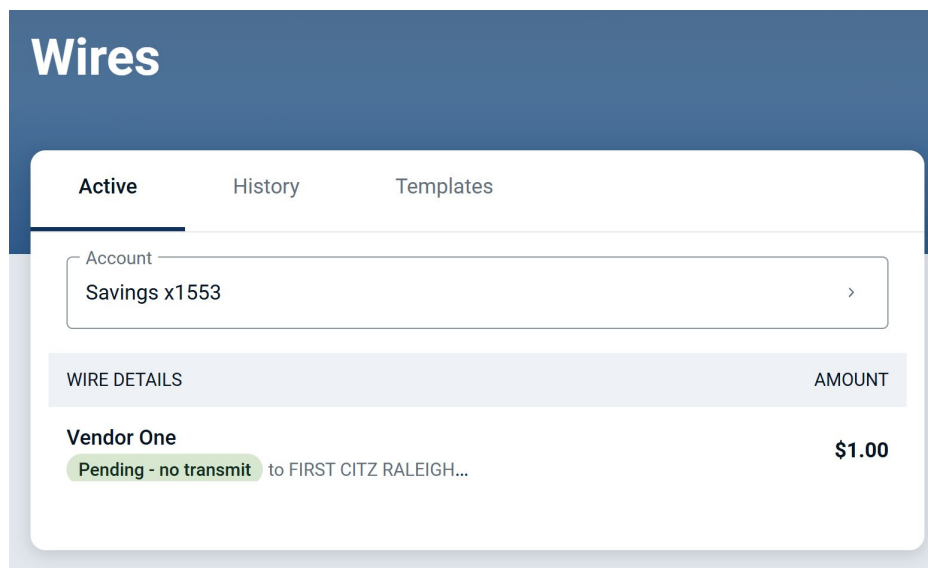
Review your confirmation message and click **Done**.



## Step 8

Your wire will appear under the **Active** tab in a **Ready** status.

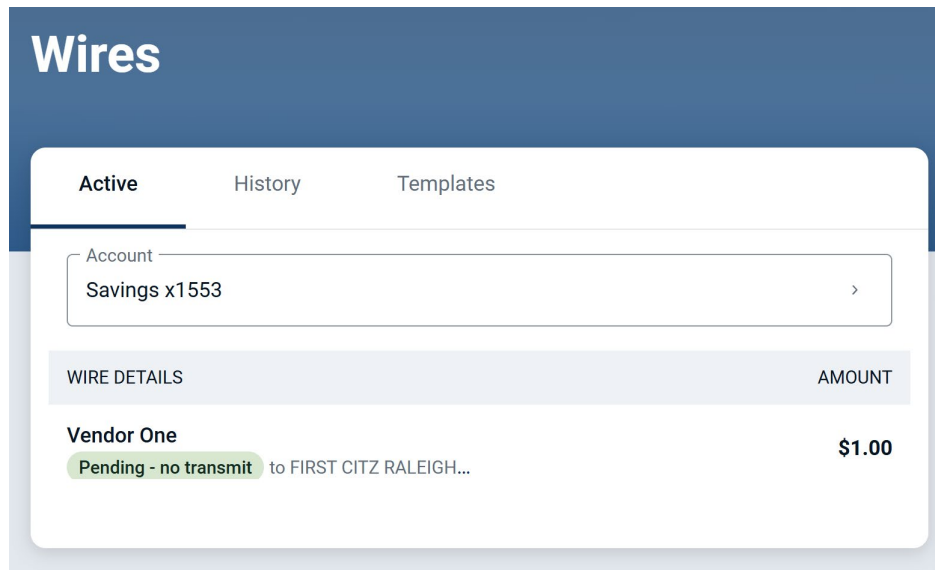
If you saved the wire as a template, it will appear under the Templates tab.



## Edit or Delete a Wire

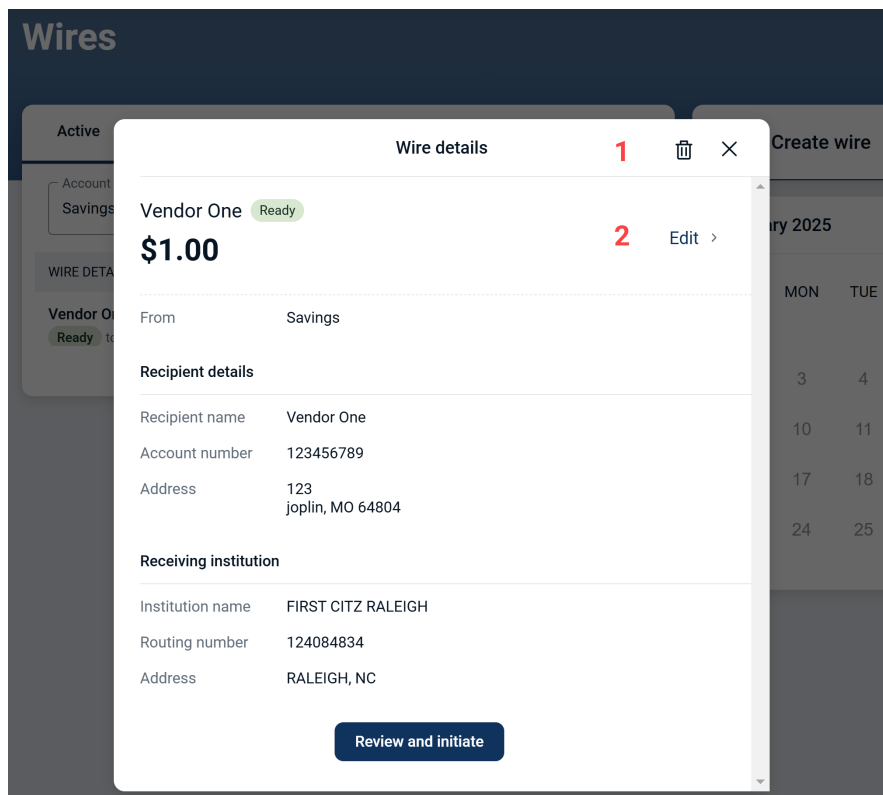
### Step 1

Select the wire under the **Active** or **Templates** tab.



### Step 2

1. Click the ellipsis icon to delete the wire
2. Click Edit to change the wire name, beneficiary information, amount, or notes.

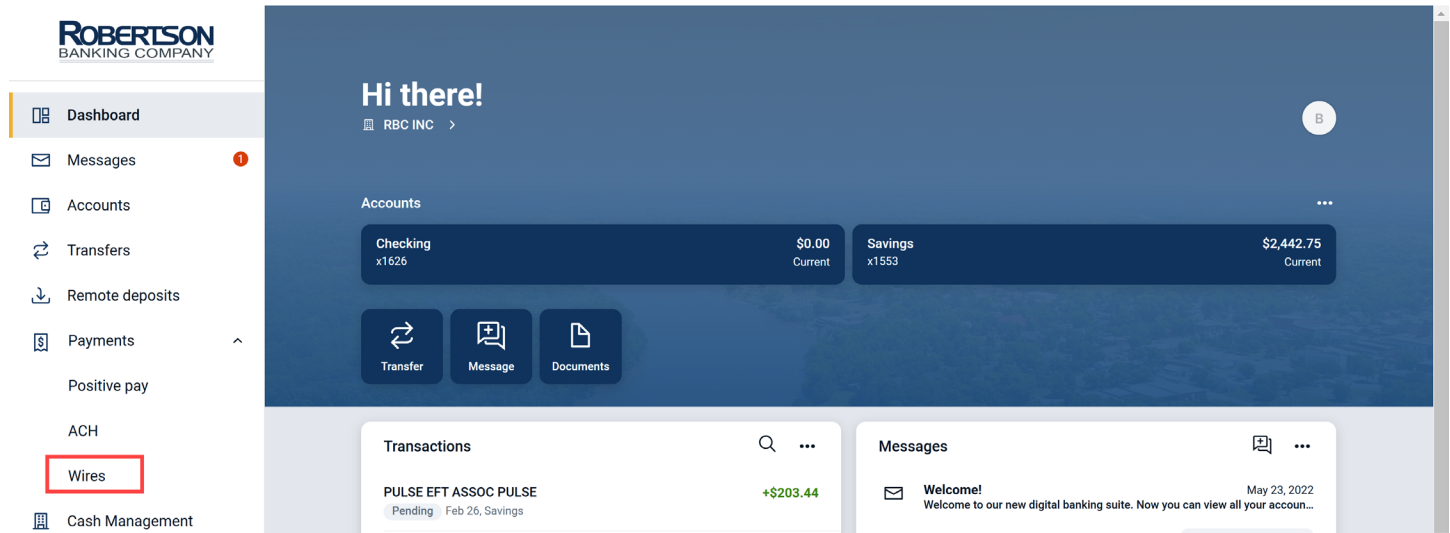


## Initiate a Wire

### Step 1

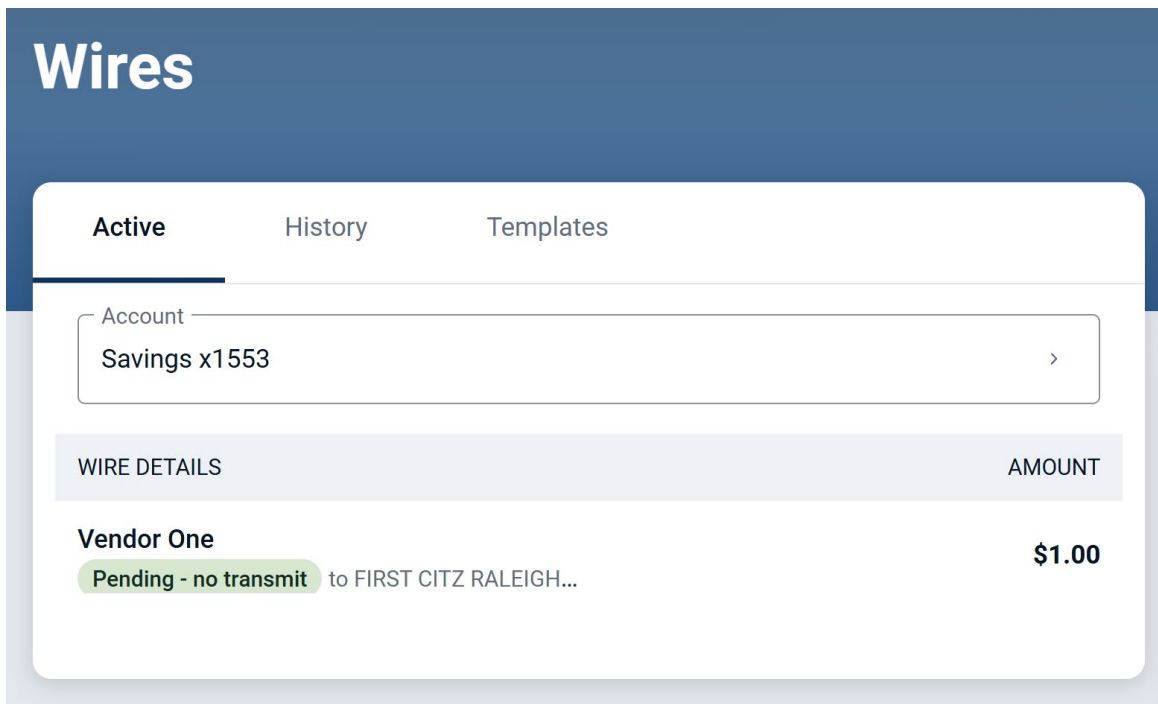
Select **Wires** from the navigation pane.

**Please note:** If you have multiple payment features activated, select the **Payments** menu first.



### Step 2

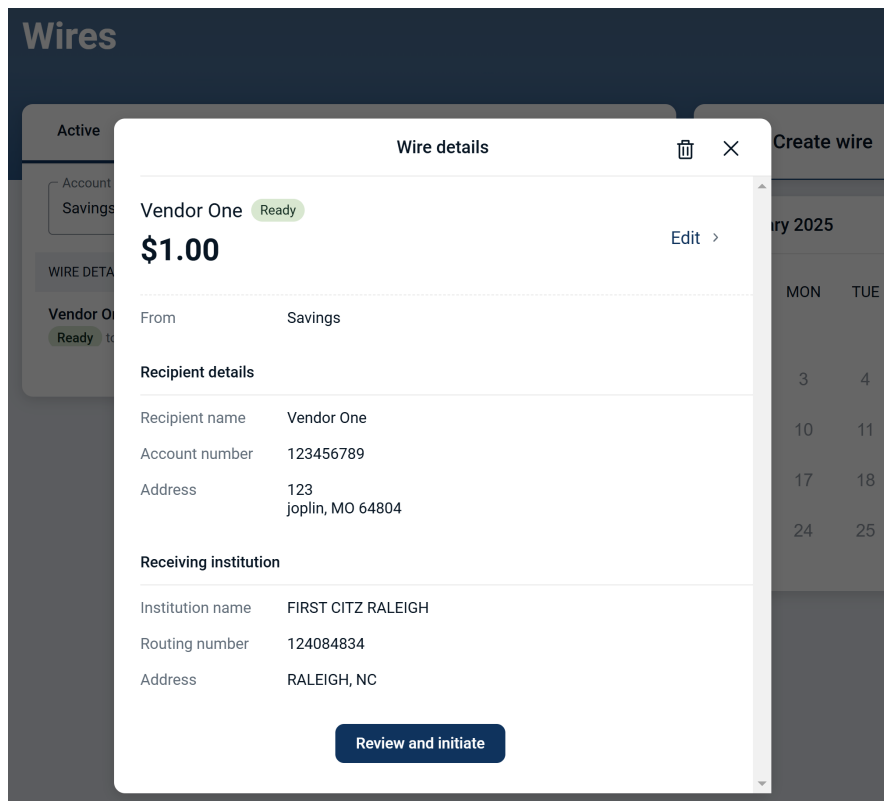
Select the wire from under the **Active** or **Template** tab.





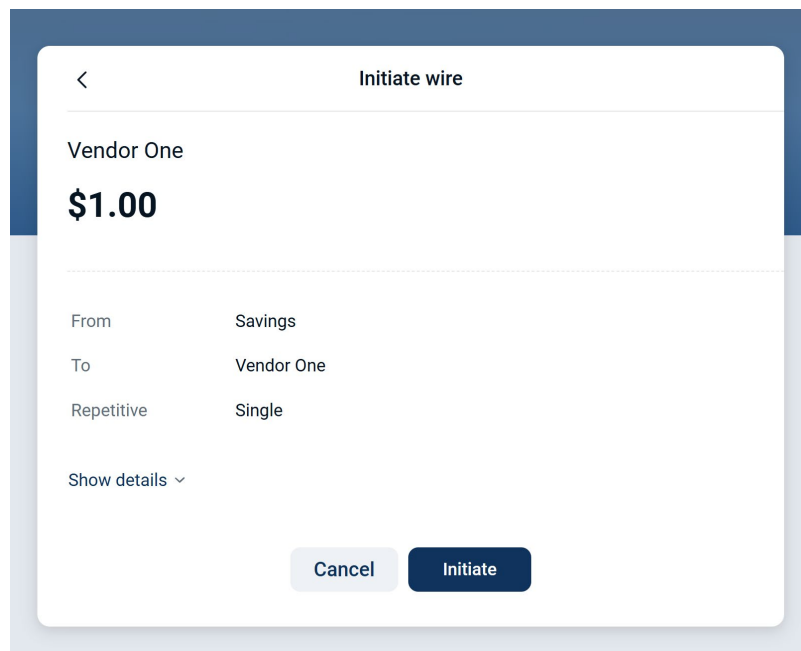
## Step 3

Click **Review and initiate**.



## Step 4

Review the wire details. If initiating a template, choose a recurring frequency if applicable. Click **Initiate**. You may be prompted to authenticate by entering your password.



## Step 5

Review your confirmation and click **Done**.

## Step 6

Your wire will appear under the **Active** tab in an Initiated status.

**Wires**

Active History Templates

Account Savings x1553

WIRE DETAILS AMOUNT

Vendor One  
Initiated to FIRST CITIZ RALEIGH (x6789) \$1.00

February 2025

SUN	MON	TUE	WED	THUR	FRI	SAT
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	

## History

Select this tab to review wires that have been processed.

**Wires**

Active History Templates

Account Savings x1553

FEB 13 to FST NAT BANKERS BK (x2333) \$1.00

February 2025

SUN	MON	TUE	WED	THUR	FRI	SAT
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	

## Positive Pay

### Enter Issued Items Manually

#### Step 1

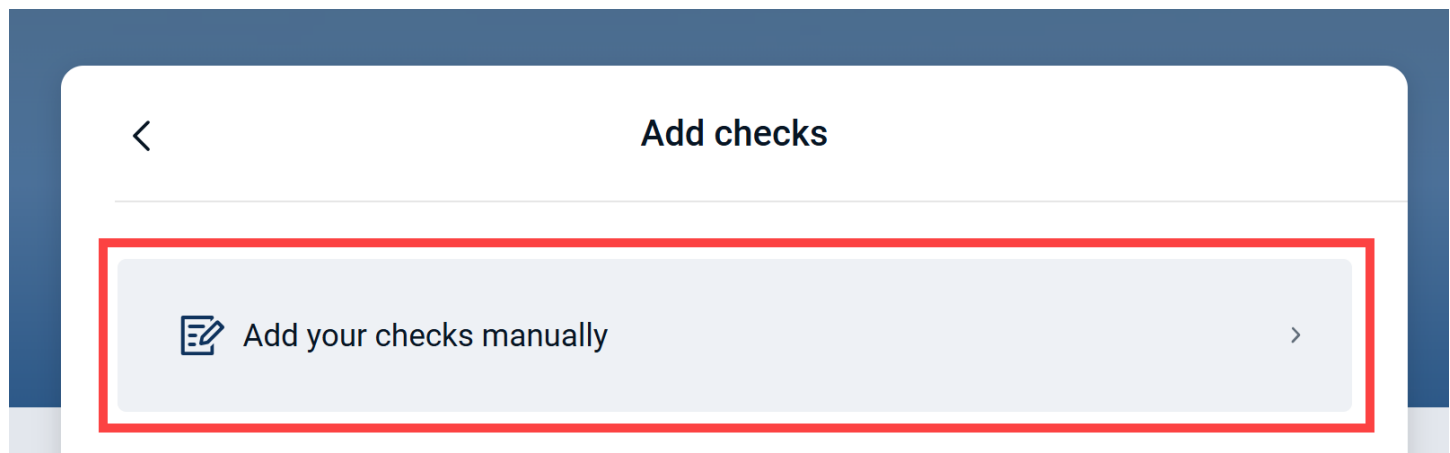
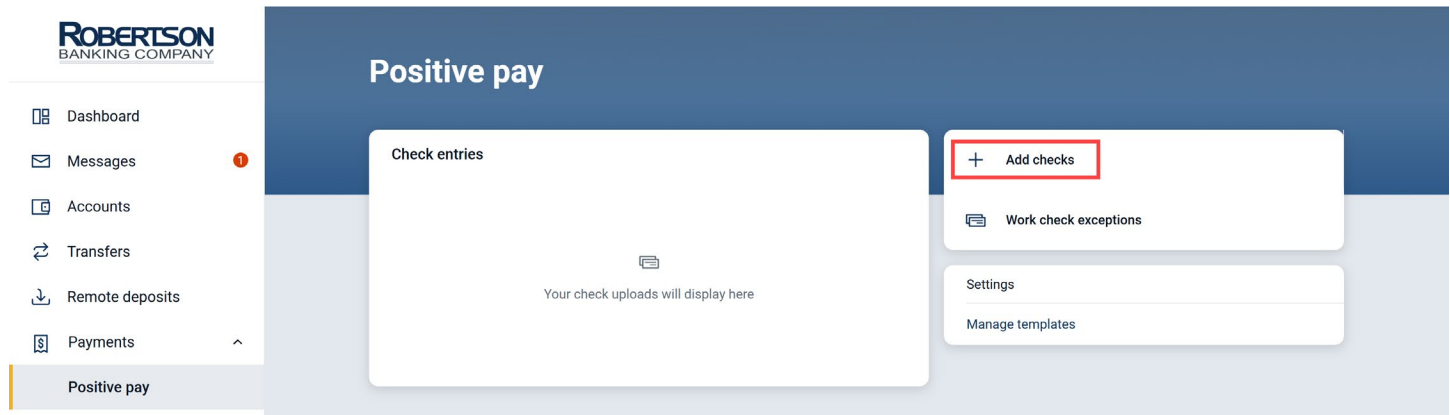
Select **Positive Pay** from the navigation pane.

**Please note:** If you have multiple payment features activated, select the **Payments** menu first.

The screenshot displays the Robertson Banking Company digital banking interface. On the left, a navigation menu includes options like Dashboard, Messages, Accounts, Transfers, Remote deposits, Payments, and Positive pay (highlighted with a red box). The main dashboard area features a 'Hi there!' greeting, account balances for Checking (\$0.00) and Savings (\$2,442.75), and a 'Transactions' list with entries such as 'PULSE EFT ASSOC PULSE' (+\$203.44) and 'JACK HENRY CPS CPSVSAFEES ACH PROCESSING' (+\$1,968.08). Other sections include 'Messages' with a welcome message and 'Remote deposits' with an 'Enroll today' button.

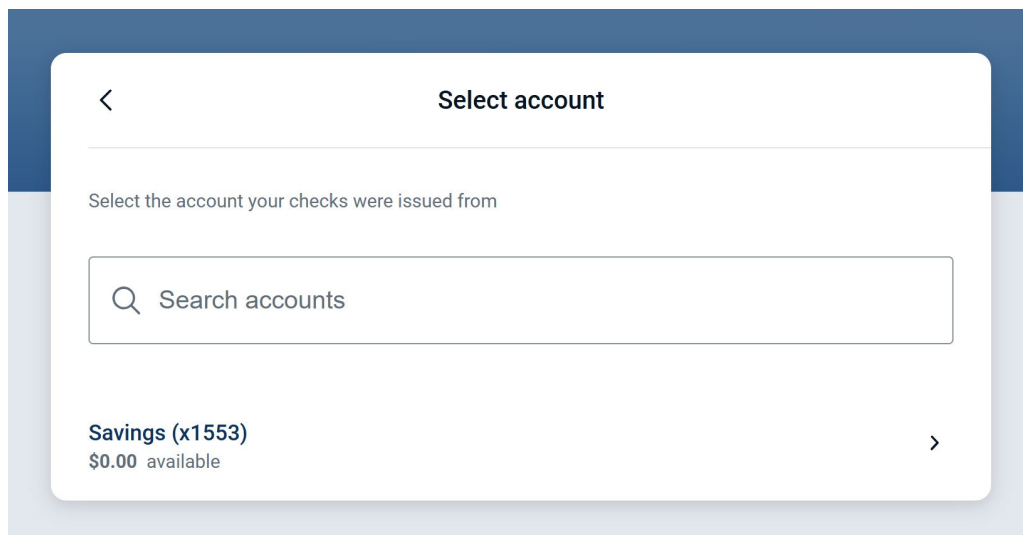
## Step 2

Click **+ Add checks** and select **Add your checks manually**.



## Step 3

Select the account the checks were written against.



## Step 4

Enter the **Check number**, **Check amount**, **Payee**, **Type**, and **Check date**.  
For check **Type**, select **void** to invalidate a previously entered issued item.  
Click **Save and enter another** if you have more checks or click **Review** if done.

< Enter checks  
Savings x1553

Check number 1234 4/10

Check amount \$ 1.00

Payee Vendor One 10/35

Type Debit ▾

Check date February 27, 2025 >

Save and enter another Review 1 check

## Step 5

Review the details you entered and click **Approve** to continue. Click **Approve** to confirm. Review the confirmation and click **Done**.

< Review checks

Account Savings x1553 >

Upload summary

Total items 1

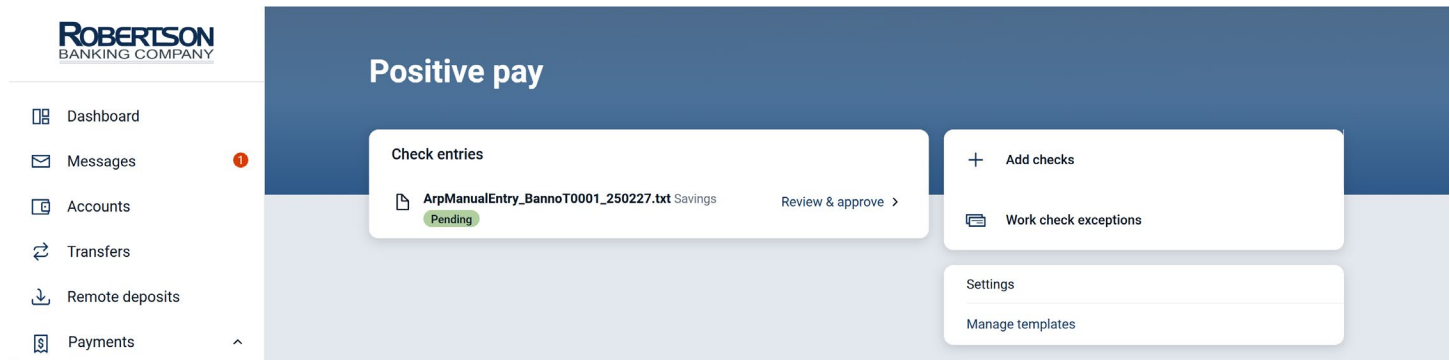
Total amount \$1.00

DATE	PAYEE/AMOUNT	CHECK #
FEB 27	\$1.00 Vendor One	1234 >

Enter another Approve

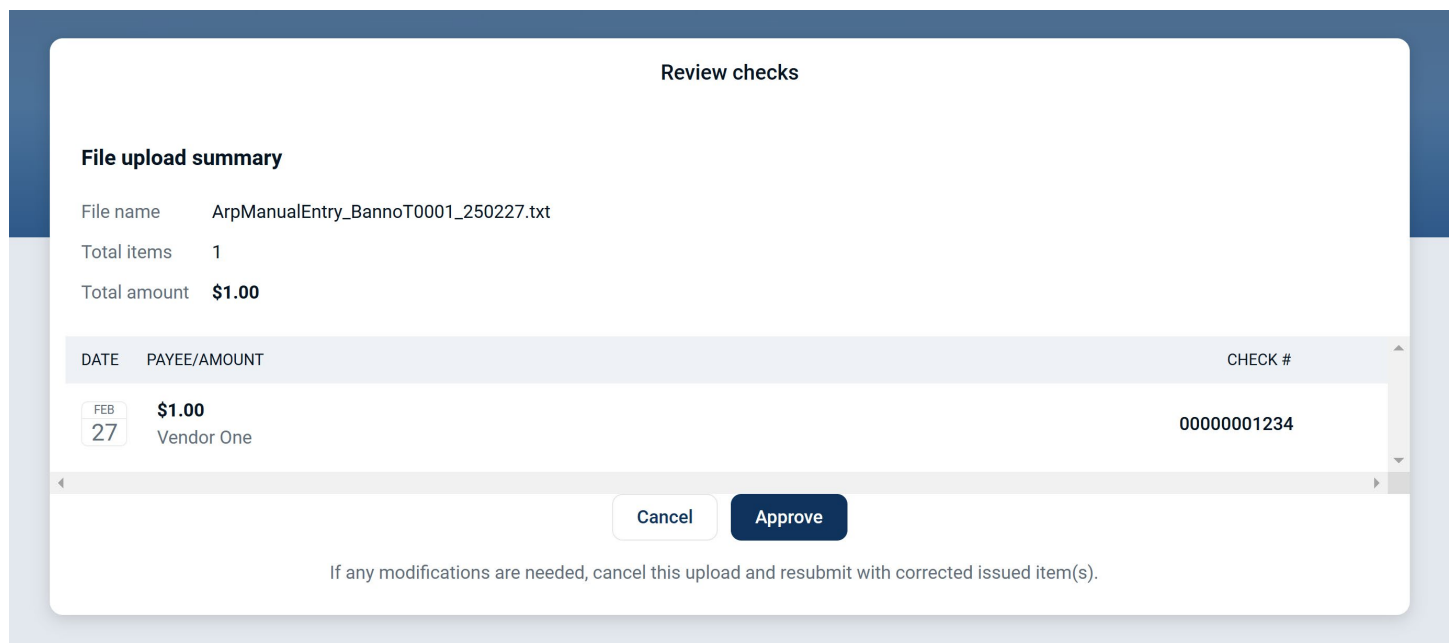
## Step 6

Your check file will appear on the **Positive Pay** dashboard in a **Pending** Status. Click **Review & approve**.



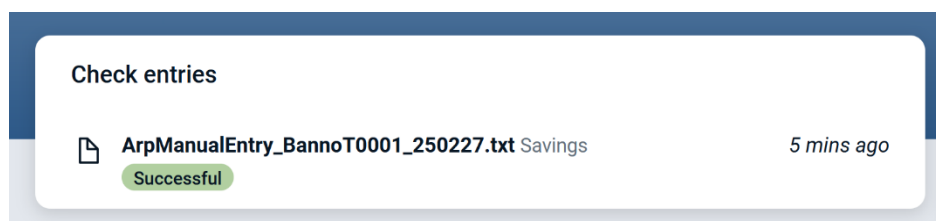
## Step 7

Review the details and click **Approve**.  
Review the confirmation and click **Done**.



## Step 8

The issued items file status will now show as **Successful**.

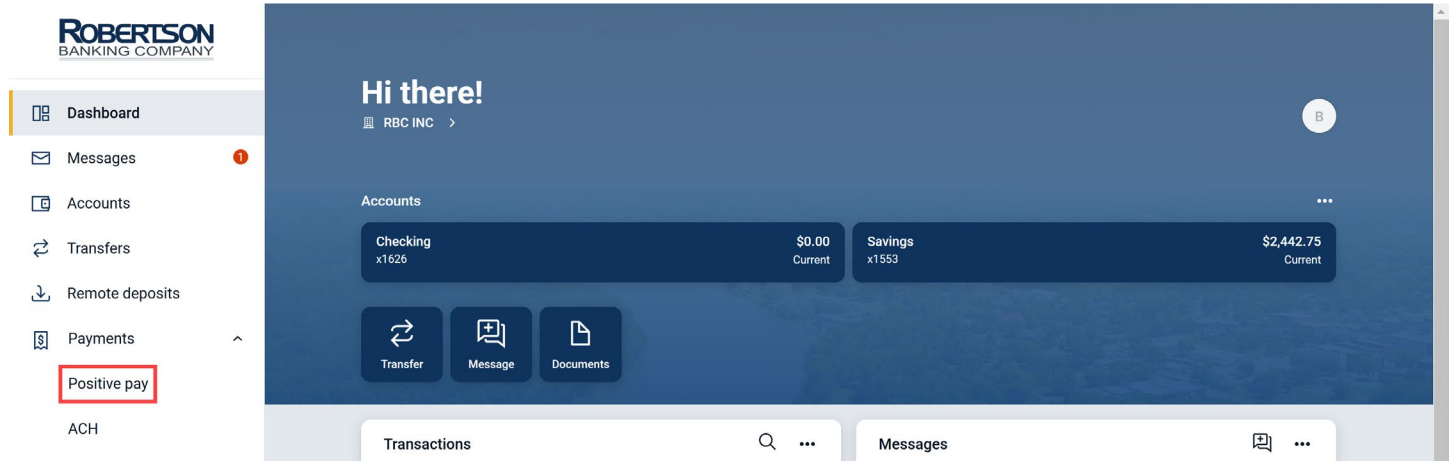


## Create an Issued Items Upload Format

### Step 1

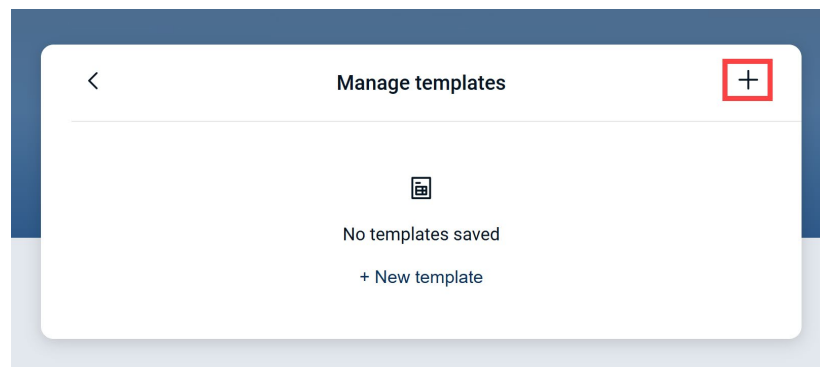
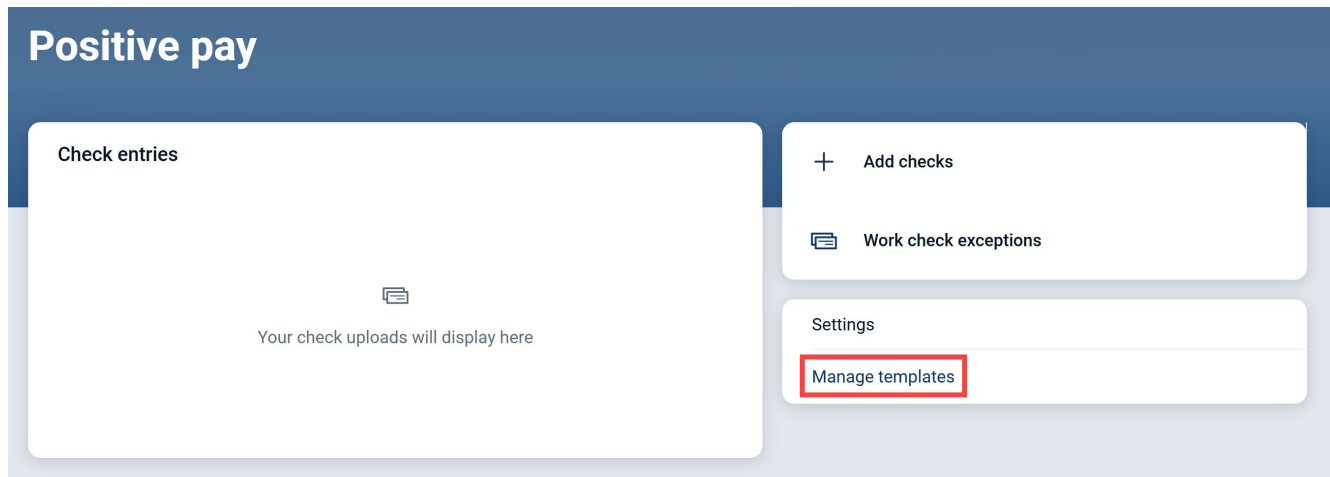
Select **Positive Pay** from the navigation pane.

**Please note:** If you have multiple payment features activated, select the **Payments** menu first.



### Step 2

Click **Manage templates** and click the + sign.



## Step 3

Select the format of your file.

### Delimited:

1. Enter a name for this upload format.
2. Choose your amount format, field delimiter and text qualifier.
3. Enter the column number from your file into the corresponding field. Leave any columns you're not using blank.

**Please note:** Some fields may require additional configuration. Click the arrow to adjust those fields.

Click **Review** and then **Save**. Click **Done**.

<
Create delimited template

---

Template name

Template name

0/50

---

Amount format ⓘ
No format validation >

---

Field delimiter ⓘ
Comma (,) >

---

Text qualifier ⓘ
None >

---

**Column order**  
Enter which column each label appears in your file. Leave any columns you're not using blank.

LABEL	COLUMN NUMBER	CONFIGURATION(S)
<b>Item Number</b> <small>Required</small>	<input style="width: 50px;" type="text" value="Col #"/>	
<b>Item Amount</b> <small>Required</small>	<input style="width: 50px;" type="text" value="Col #"/>	
<b>Account number</b>	<input style="width: 50px;" type="text" value="Col #"/>	
<b>Account type</b>	<input style="width: 50px;" type="text" value="Col #"/>	Set indicators > <small>Required</small>

Debit/credit

Col #

Set indicators >  
Required

---

Void indicator

Col #

Set indicator >  
Required

---

Void date

Col #

Set date format >  
Required

---

Payee address 1

Col #

---

Payee address 2

Col #

---

Payee address 3

Col #

---

Payee address 4

Col #

---

Stop indicator

Col #

Set indicator >  
Required

---

Cancel

Review



**Fixed Position:**

1. Enter a name for this upload format.
2. Choose your amount format.
3. Enter where each label starts and ends in your file. For example, if the item number is the first six characters in your file, the beginning number would be 1 and the end would be 6.

Click **Review** and then **Save**. Click **Done**.

**Create fixed position template**

Template name  0/50

Amount format  No format validation >

**Label position**  
Enter where the label position begins and ends in your file. Leave columns you're not using blank.

LABEL	BEGIN	END	CONFIGURATION(S)
Item Number Required	<input type="text" value="Begin"/>	<input type="text" value="End"/>	
Item Amount Required	<input type="text" value="Begin"/>	<input type="text" value="End"/>	
Account number	<input type="text" value="Begin"/>	<input type="text" value="End"/>	
Account type	<input type="text" value="Begin"/>	<input type="text" value="End"/>	Set indicators Required >
Issue date	<input type="text" value="Begin"/>	<input type="text" value="End"/>	Set date format Required >
Payee Max 35 characters	<input type="text" value="Begin"/>	<input type="text" value="End"/>	

Debit/credit   Set indicators  
Required >

Void indicator   Set indicator  
Required >

Void date   Set date format  
Required >

Payee address 1

Payee address 2

Payee address 3

Payee address 4

Stop indicator   Set indicator  
Required >

Your upload template will be listed under the **Manage Templates** page and can be edited or deleted at any time.

Click the **+** to add more template if necessary.

**Manage templates**

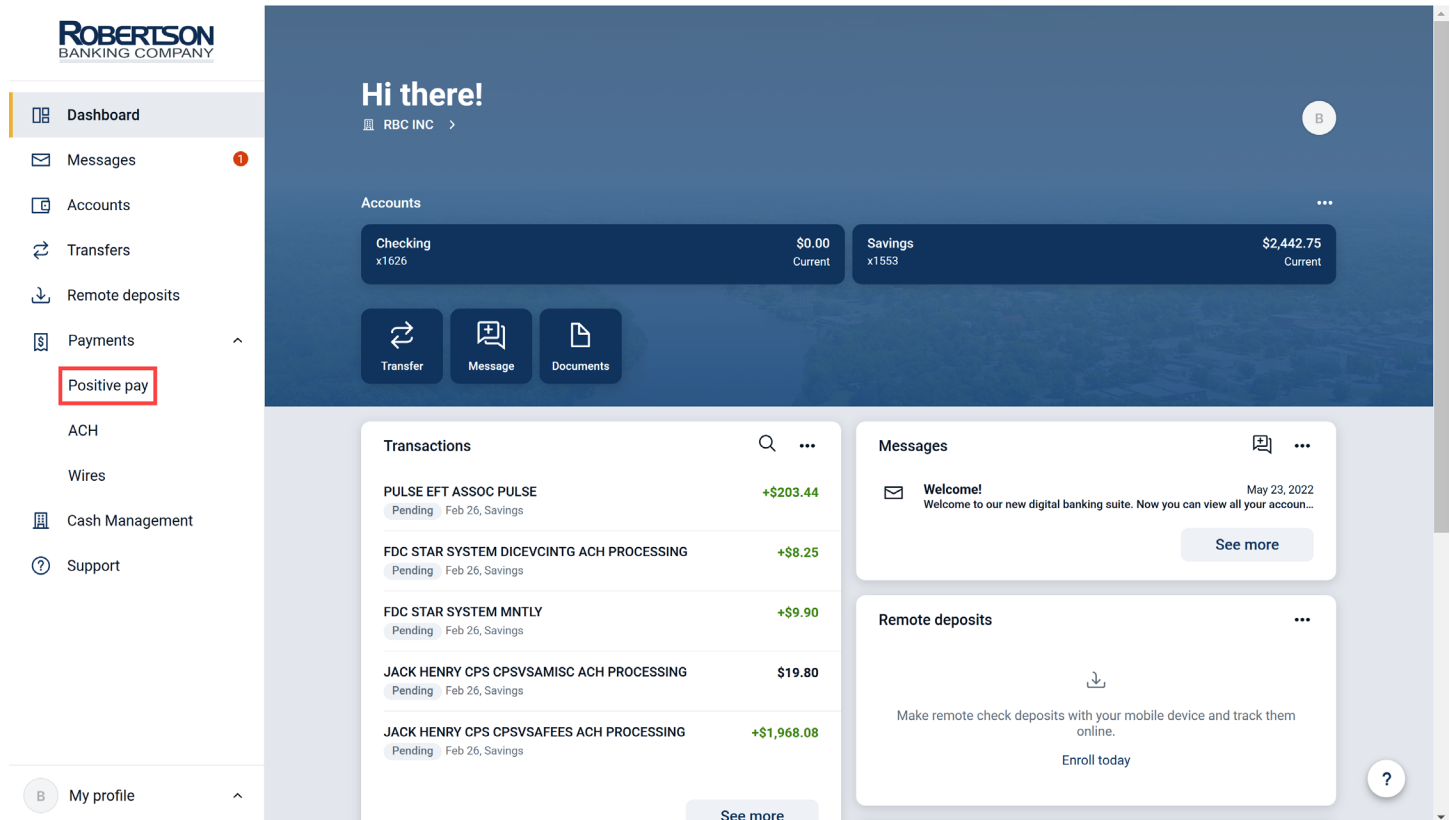
Property Management  
Delimited >

## Upload an Issued Items File

### Step 1

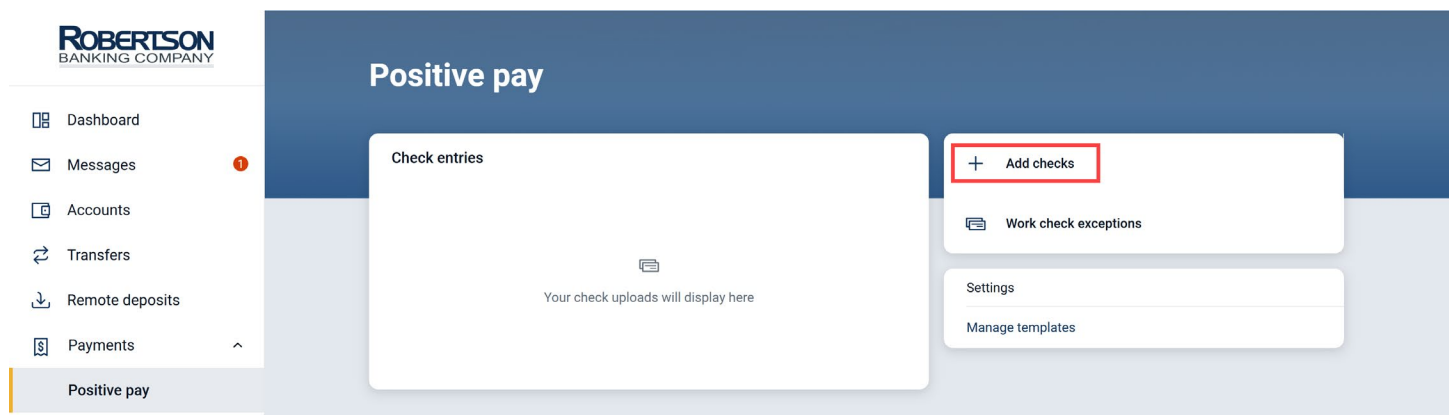
Select **Positive Pay** from the navigation pane.

**Please note:** If you have multiple payment features activated, select the **Payments** menu first.



### Step 2

Click **+ Add checks**.



## Step 3

Choose your upload format template.

1. Select the account the checks were written against.
2. Browse for your issued items file.
3. Click **Submit**.

The screenshot shows a mobile application interface titled "Add checks". At the top, there is a back arrow and the title "Add checks". Below the title, there is a button with a check icon and the text "Add your checks manually". The main content area is divided into three numbered steps:

- 1 Select template**: Shows "Default template" and "Delimited" with a right arrow.
- 2 Choose associated account**: Shows "Savings" and "x1553" with a right arrow.
- 3 Upload file**: Shows "arp3.csv" with a trash icon and a link to "Default template formatting guide". Below this is a dashed box containing a file icon and the text "arp3.csv" with a trash icon.

At the bottom, there is a blue "Submit" button and a note: "After submission, please allow time for processing."

## Step 4

Your uploaded file will appear on the Positive Pay dashboard in a **Pending** status. Click **Review & approve**.

The screenshot shows a dashboard titled "Check entries". It contains two entries:

- arp3.csv Savings**: Status is "Pending" (in a green pill). Action: "Review & approve" (with a right arrow).
- ArpManualEntry\_BannoT0001\_250227.txt Savings**: Status is "Successful" (in a green pill). Time: "10 mins ago".




## Step 5

Review the details and click **Approve**.  
Review the confirmation and click **Done**.

### Review checks

**File upload summary**

File name    arp3.csv  
Total items    3  
Total amount    **\$1.42**





DATE	PAYEE/AMOUNT	CHECK #
 OCT 27 2024	<b>\$0.25</b> Vendor 1	00000000457
 OCT 28 2024	<b>\$0.30</b> Vendor 2	00000000458
 OCT 29 2024	<b>\$0.87</b> Vendor 3	00000000459

If any modifications are needed, cancel this upload and resubmit with corrected issued item(s).

## Step 6

The issued items file status will now show **Successful**.

### Check entries

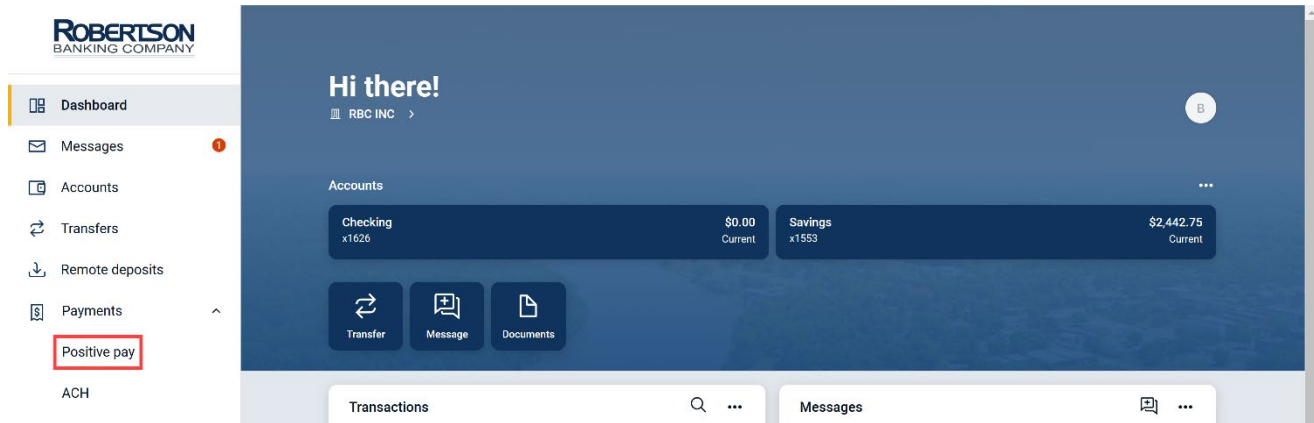
 <b>arp3.csv</b> Savings	<i>Just uploaded</i>
	
 <b>ArpManualEntry_BannoT0001_250227.txt</b> Savings	<i>10 mins ago</i>
	

## Work Exception Items

### Step 1

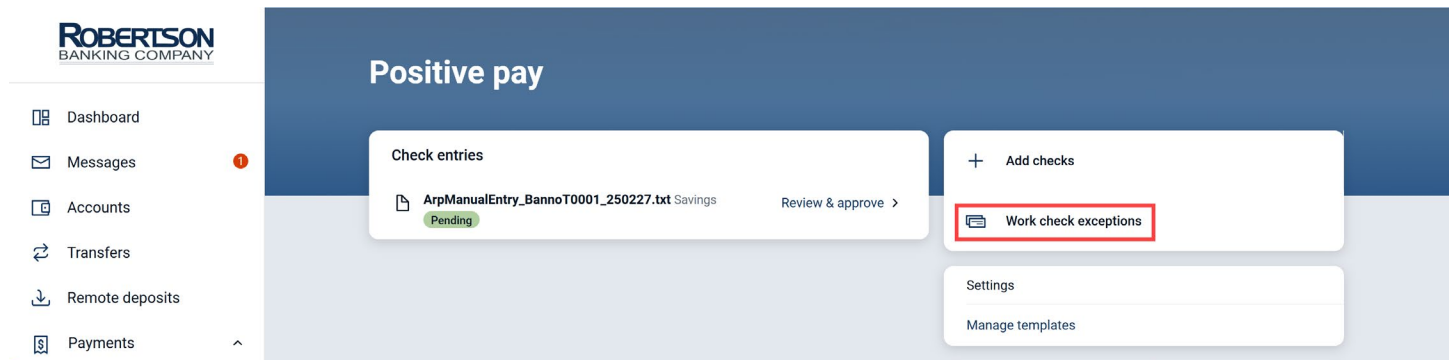
Select **Positive Pay** from the navigation pane.

**Please note:** If you have multiple payment features activated, select the **Payments** menu first.



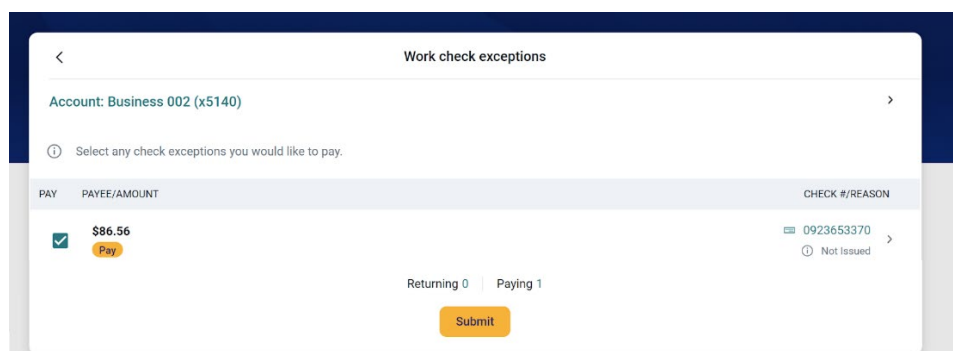
### Step 2

Click **Work check exceptions**.



### Step 3

Review your exception(s). Click the check number to see additional details. Check the box to Pay the item or leave the box unchecked to return. Click Submit when done.



## Administration

### Create a New User

#### Step 1

Click your profile and select **Business management**.

The screenshot shows the Robertson Banking Company dashboard. On the left is a navigation sidebar with the following items: Dashboard, Messages (with a red notification badge), Accounts, Transfers, Remote deposits, Payments, Cash Management, Support, Personal settings, **Business management** (highlighted with a red box), Account settings, Sign out, and My profile. The main content area displays a greeting 'Hi there!' with a user icon 'B'. Below this are account summaries for 'Checking x1626' (\$0.00 Current) and 'Savings x1553' (\$211.69 Current). There are buttons for 'Transfer', 'Message', and 'Documents'. The 'Transactions' section lists several pending transactions: VERTEX-TRAN# 5 (\$2,231.06), PULSE EFT ASSOC PULSE (+\$203.44), FDC STAR SYSTEM DICEVCINTG ACH PROCESSING (+\$8.25), FDC STAR SYSTEM MNTLY (+\$9.90), and JACK HENRY CPS CPSVSAMISC ACH PROCESSING (\$19.80). The 'Messages' section shows a 'Welcome!' message dated May 23, 2022. The 'Remote deposits' section encourages enrolling today. The 'Accept Online Payments' section is also visible.

#### Step 2

Click **+ Create user**.

The screenshot shows the 'Settings' page. The left sidebar lists 'PERSONAL' settings (Profile, Security, User alerts, User agreement) and 'BUSINESS MANAGEMENT' settings (Profile, **User management**, Activity). The 'User management' section is active, showing a search bar with 'user' and a '+ Create user' button (highlighted with a red box). Below the search bar is a table with columns for NAME, ROLE, and STATUS. The table contains one entry: 'User One' with a role of 'User' and a status of 'Pending'.

NAME	ROLE	STATUS
User One	User	Pending

## Step 3

Enter the user's **First name**, **Last name**, **Email address**, and choose their **User role**.

- **User:** can have customized permissions and account access but cannot manage other users.
- **Viewer:** View only access on specified accounts.
- **Admin:** can have customized permissions and account access as well as user management.

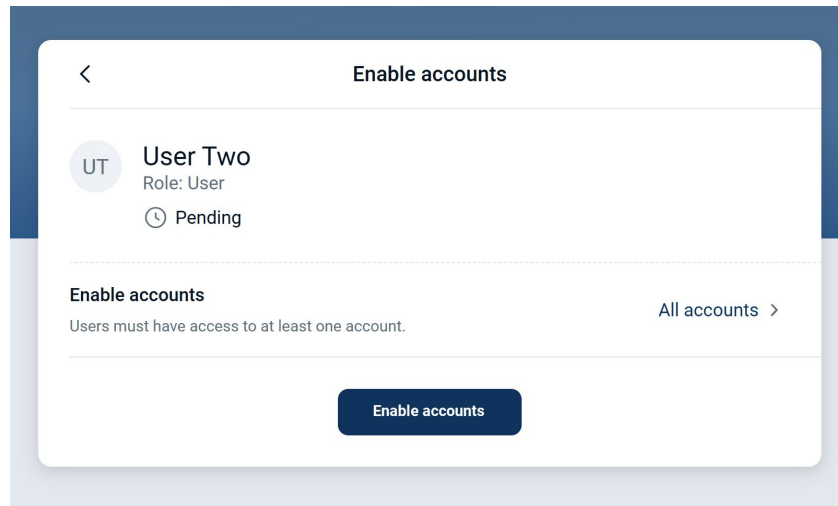
Click **Create user**.

**Please note:** You may be asked to authenticate with your password

The screenshot shows a mobile application interface for creating a user. At the top, there is a title bar with a back arrow on the left and the text "Create user" in the center. Below the title bar, there are four input fields stacked vertically. The first field is labeled "First name" and has a character count of "0/20" on the right. The second field is labeled "Last name" and also has "0/20". The third field is labeled "Email" and has "0/80". The fourth field is labeled "User role" and is a dropdown menu. The dropdown menu is open, showing three options: "User" (which is highlighted with a blue background), "Viewer", and "Admin". Below the input fields, there is a button labeled "Create user".

## Step 4

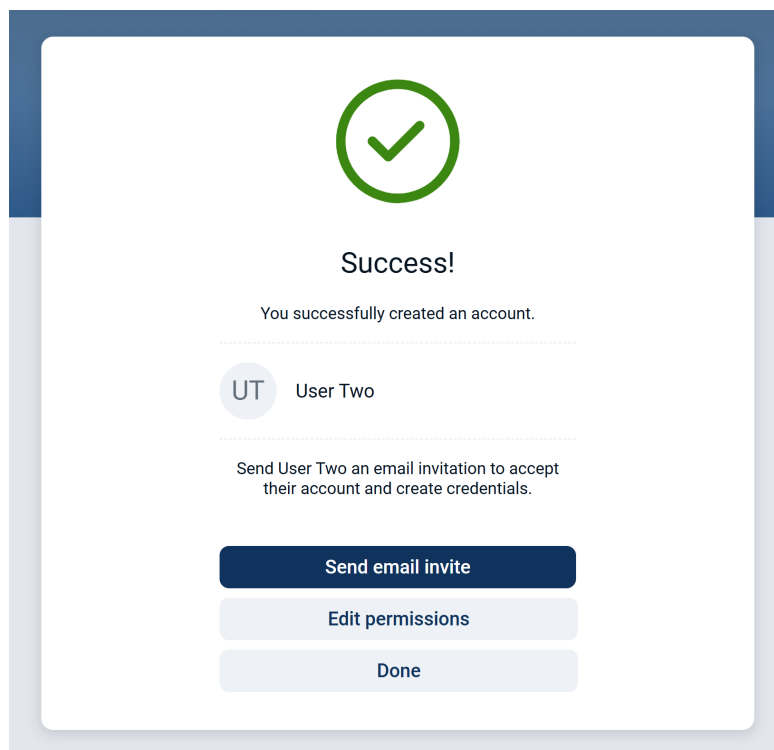
Click the **Enable accounts** arrow and choose the account(s) the user should have access to. Click **Enable accounts** to continue.



## Step 5

Review your confirmation and choose from the following options:

1. Click **Send email invite** to send the user a link to set up their login credentials without modifying permissions further.  
**Please note:** Permissions and account access can be modified in the user's profile at a later time if necessary.
2. Select **Edit permissions** to modify entitlements and account access prior to sending the email invite.
3. Click **Done** to send the invite and edit permissions at a later time.





## Step 6

If **Edit permissions** was selected:

1. Click **set permissions** to modify global entitlements for the user.
2. Toggle on an account to give the user access.
3. Select an account to adjust the global permissions at the account level is necessary.
4. Select **Invite** to send the user an email to set up their login credentials.
5. Click the arrow to return to the Business Management page.

Please see the **Editing or Deleting a User** section in this document for more information on permissions

The screenshot displays the 'User One' management page in the Robertson Banking Company system. The interface includes a left-hand navigation menu with options like Dashboard, Messages, Accounts, Transfers, Remote deposits, Payments, Cash Management, and Support. The main content area is titled 'User One' and features a user profile card with a 'U' icon, email 'user1@testco.com', and status 'Pending'. Below the profile are 'Additional services' such as 'Accept Online Payments', 'Cash Management', 'eStatements', and 'Manage payments', each with a toggle switch. To the right is a 'Permissions' section with a 'Set permissions' button (marked with a red '1') and a table of accounts with their access levels (marked with red '2' and '3'). The table lists 'Checking' (XXX1626), 'Demand 0002' (XXX4236), and 'Dividend Account' (XXX4376), each with a green toggle switch and a right-pointing arrow. A 'See more' button is located at the bottom of the permissions section. A dark notification banner at the top of the main content area states 'User One's account is pending. Invite them to complete set-up of their account.' with an 'Invite' button (marked with a red '4'). A red '5' is visible in the top left of the main content area, and a red '1' is next to the 'Set permissions' button.





## Step 7

The new user will appear as **Pending** on the Business Management page. Their status will change to **Active** once they set up their credentials.




**Please note:** You can modify permissions, account access, or manage the invite at any time by clicking the user's name.

## Settings


PERSONAL

-  Profile
-  Security
-  User alerts
-  User agreement

BUSINESS MANAGEMENT





-  Profile
-  User management
-  Activity

ACCOUNTS

-  Robertson Banking Company

### User management

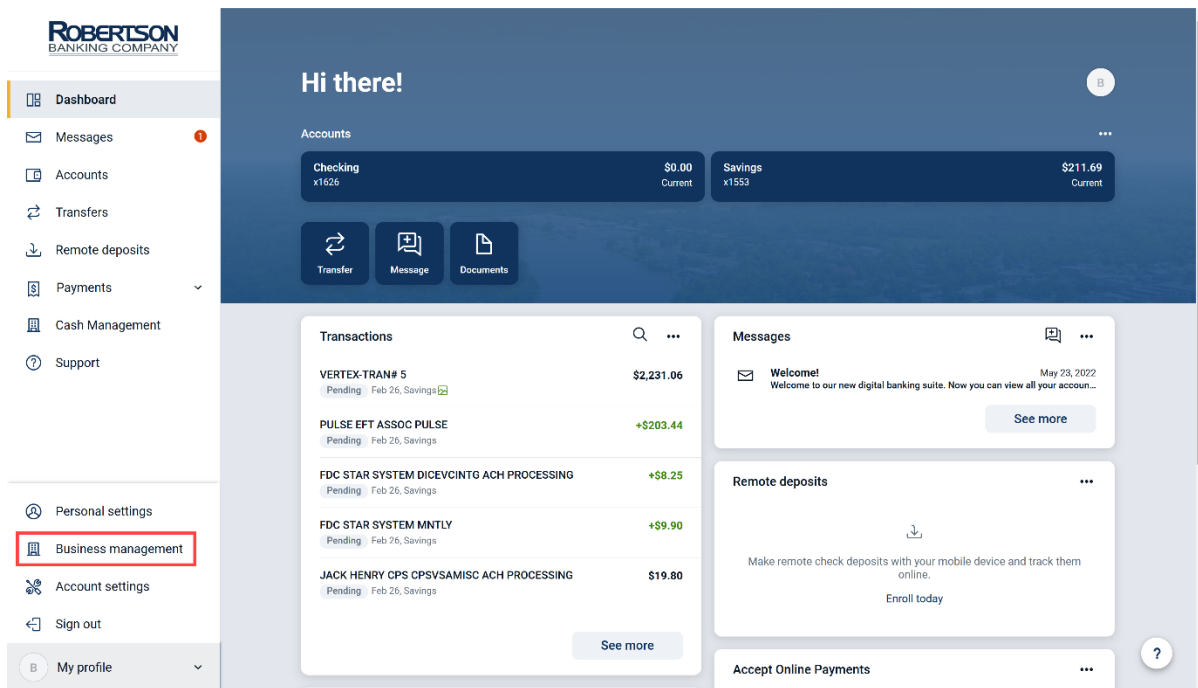
+ Create user

	NAME	ROLE	STATUS
	User One	User	 Pending
	User Two	User	 Pending

## Editing or Deleting a User

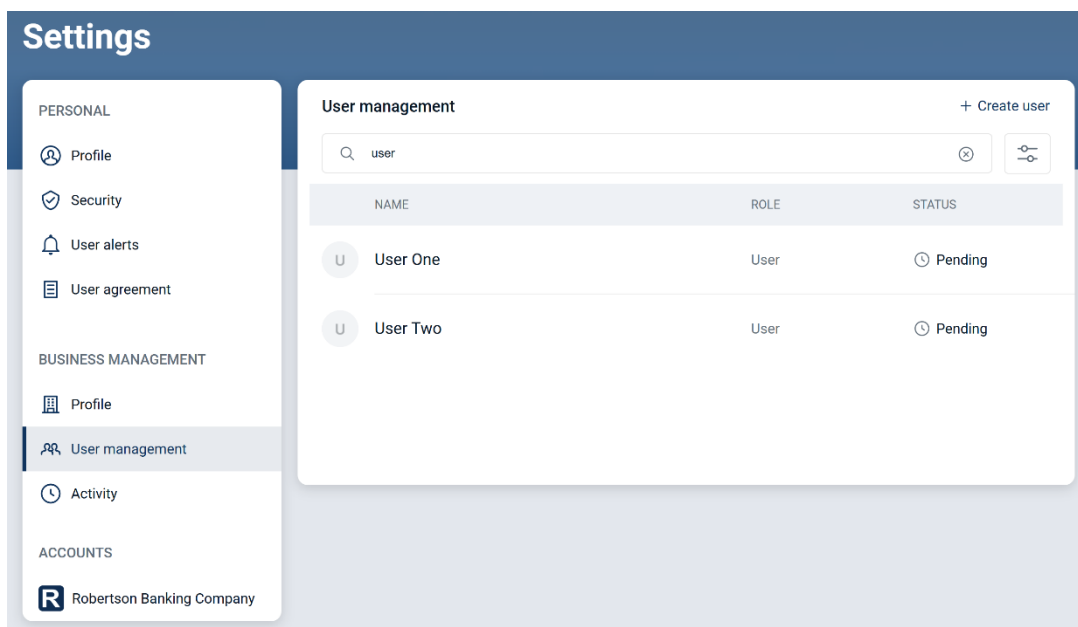
### Step 1

Click your profile and select **Business management**.



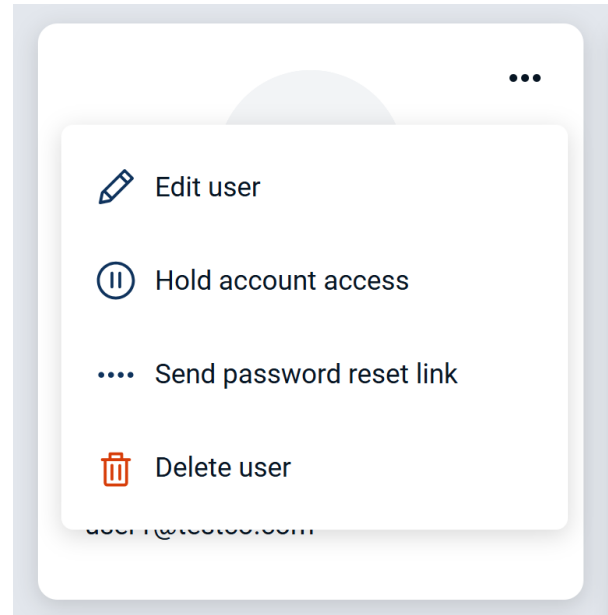
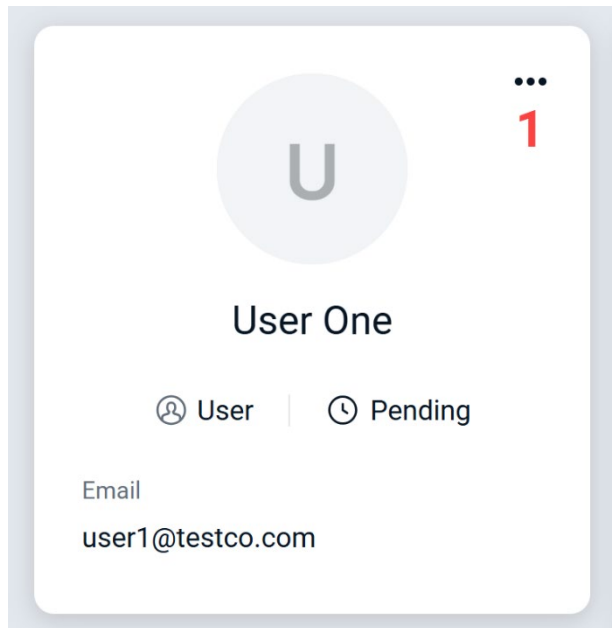
### Step 2

Select the user you'd like to edit.

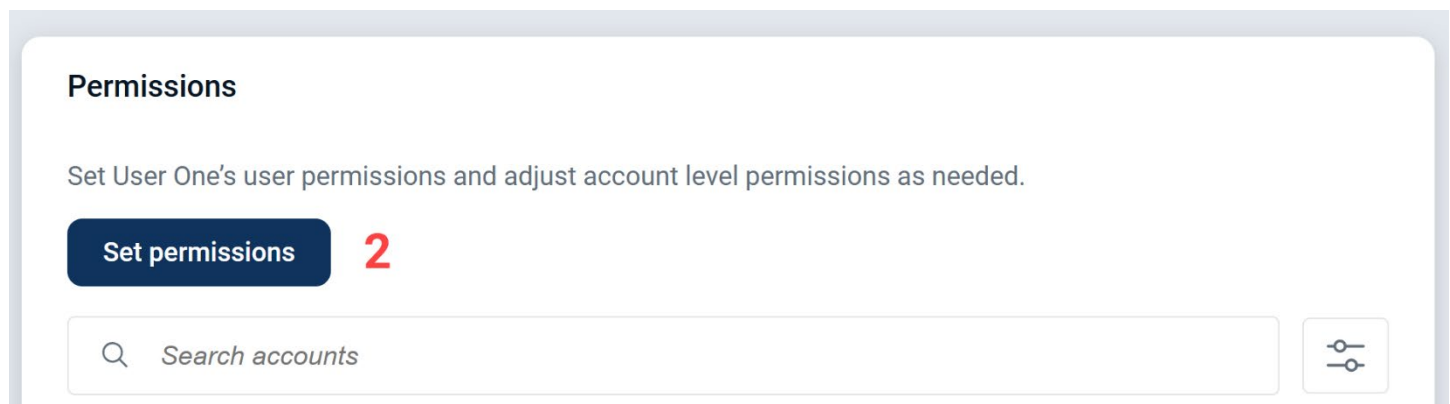


## Step 3

1. Select the **ellipsis** icon.
  - a. Click **Edit user** to change the users name, role, or email address.
  - b. Select **Hold account access** to temporarily prevent them from logging in.
  - c. Click **Send password reset** link to email them a link.
  - d. Select **Delete user** to remove their access permanently.

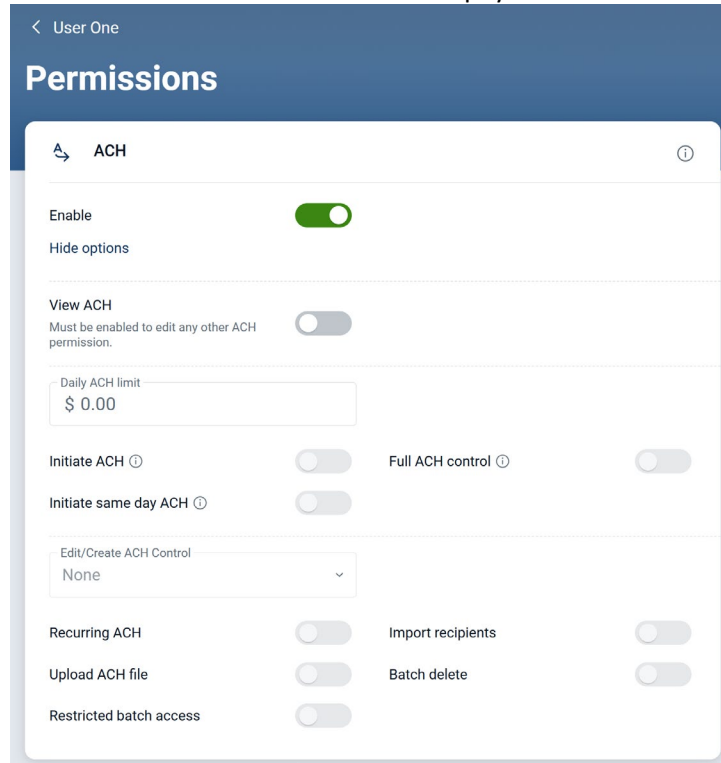


2. Click **Set permissions** to modify global entitlements.  
**Please note:** Options may vary depending on your company's setup.



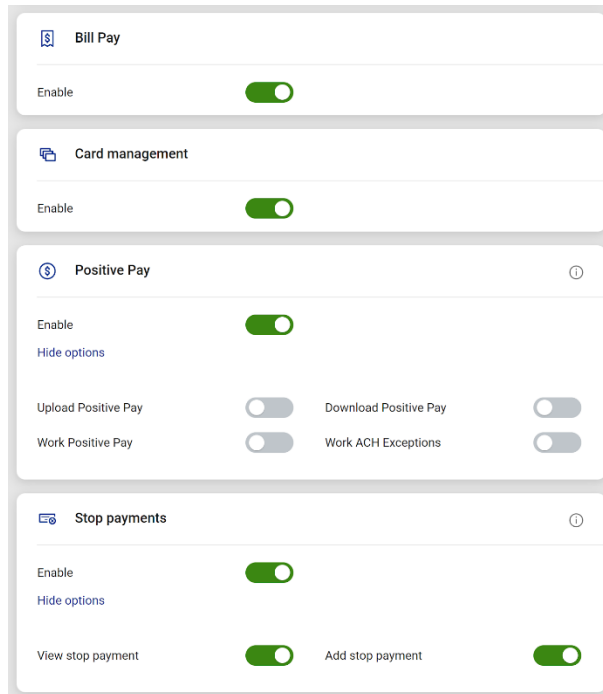
- a. ACH
  - i. **Enable:** Activates this feature for the user.
  - ii. **View ACH:** Must be enabled to edit any other ACH permission.
  - iii. **Daily ACH limit:** Maximum amount the user can initiate per day.
  - iv. **Initiate ACH:** Allows user to transmit ACH payments to the bank.
  - v. **Initiate same day ACH:** Allows user to transmit same day ACH payments to the bank.

- vi. **Full ACH Control:** Allows a user to initiate an ACH payment that they have created. If this is not activated, the user cannot initiate a payment they created. A second user must initiate it.
- vii. **Edit/Delete ACH Control:**
  - 1. **Full edit/create:** Allows the user to edit everything within a payment.
  - 2. **Partial Edit:** User can only change the dollar amount of a transaction, debit or credit indicator, add a prenote, or hold the transaction.
  - 3. **None:** User cannot Edit an ACH payment.
- viii. **Recurring ACH:** Allows the user to set a recurring frequency for a payment.
- ix. **Upload ACH file:** Allows the user to upload a NACHA formatted file.
- x. **Restricted batch access:** User can view payments that have been flagged as restricted.
- xi. **Import recipients:** User can import a file containing recipient data to create a payment.
- xii. **Batch delete:** User can delete an ACH payment.



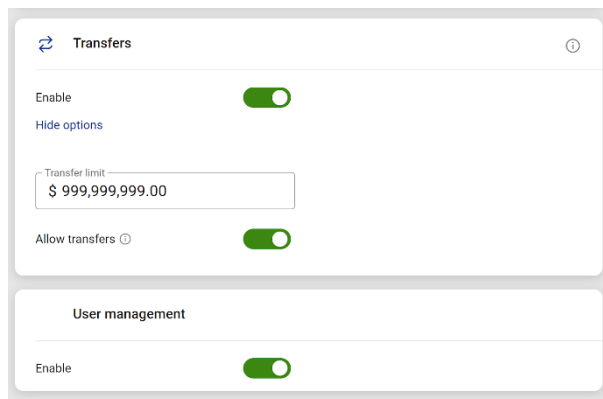
- b. **Bill Pay**
  - i. **Enable:** Activates this feature for the user.
- c. **Card Management**
  - i. **Enable:** Activates this feature for the user.
- d. **Positive Pay**
  - i. **Enable:** Activates this feature for the user.
  - ii. **Upload Positive Pay:** Allows user to upload an issued items check file to the bank.
  - iii. **Work Positive Pay:** Allows user to pay or return issued item check exceptions.
  - iv. **Download Positive Pay:** Not applicable.
  - v. **Work ACH Exceptions:** User can pay or return ACH exceptions items.
- e. **Stop Payments**
  - i. **Enable:** Activates this feature for the user.
  - ii. **View Stop Payment:** User can only see existing stop payments.

- iii. **Add stop payment:** User can create a stop payment.



## f. Transfers

- i. **Enable:** Activates this feature for a user.
- ii. **Transfer limit:** Maximum amount a user can transfer per day.



- g. **User Management:** Allows user to create, modify, and delete other users.

## h. Wires

- i. **Enable:** Activates this feature for a user
- ii. **Create wire templates:** Allows user to set up a wire that can be reused
- iii. **Edit wire templates:** Allows user to modify reusable wires
- iv. **Create one-time wires:** Allows user to set up a single use wire
- v. **Edit one-time wires:** Allows user to modify single use wires
- vi. **Per wire limit:** Amount the user can transmit per wire
- vii. **Transmit wires:** Allows user to send wires to the bank for processing

- viii. **Full wire control:** Allows user to transmit wires they have created. If this is deactivated, a second user will have to transmit the wire.

Click the **back arrow** once done.

- 3. Toggle on the switch to activate an account for a user.

ACCOUNT	ACCESS
1083686 XXX3686	<b>3</b> <input checked="" type="checkbox"/> <b>4</b> >
1007890 XXX7890	<input type="checkbox"/> >
1009672 XXX9672	<input type="checkbox"/> >

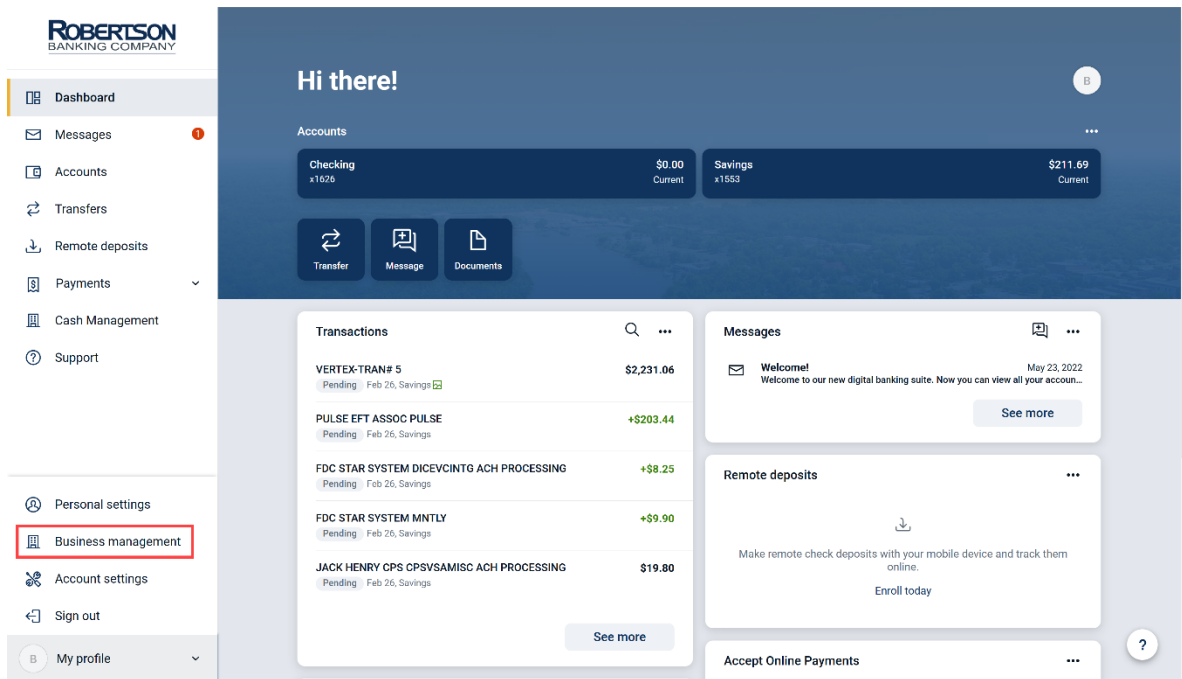
[See more](#)

- 4. Select an account to modify the global permissions on a per account basis.
- 5. Click the **back arrow** to return to the Business Management page.

## Unlock a Locked User

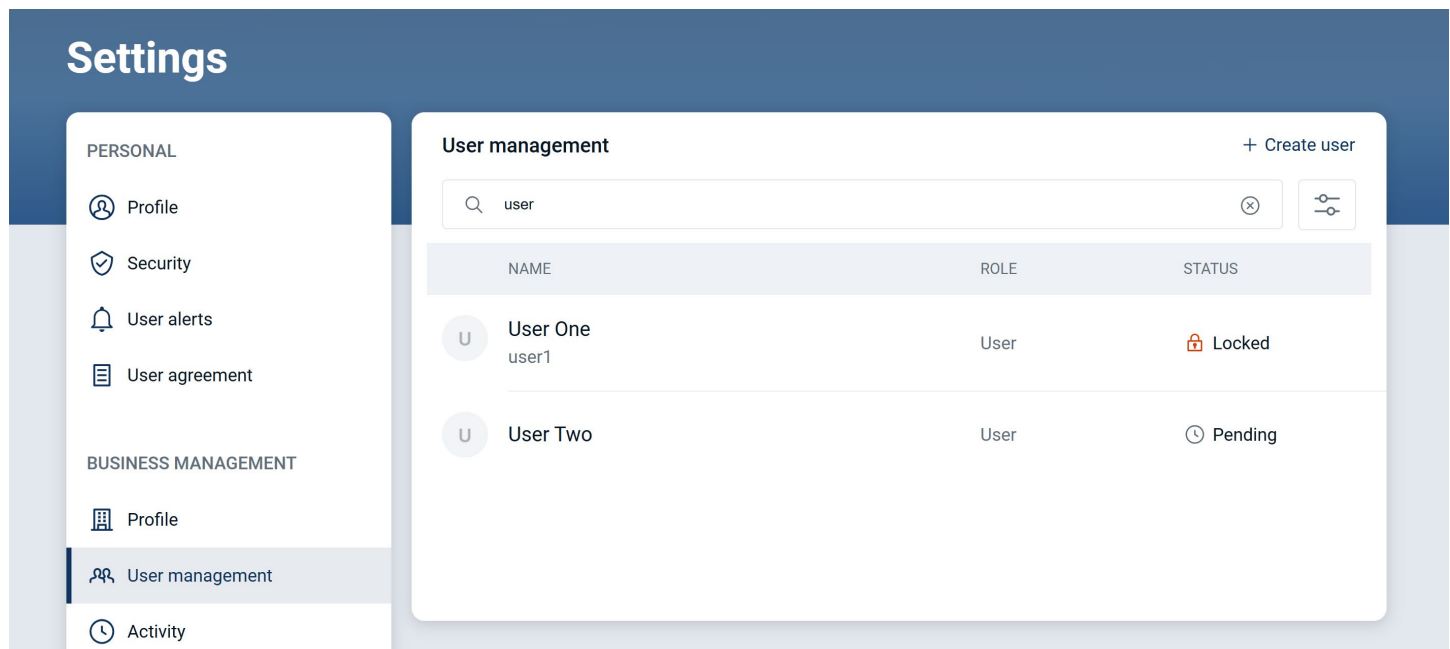
### Step 1

Click your profile and select **Business management**.



### Step 2

Select the locked user.

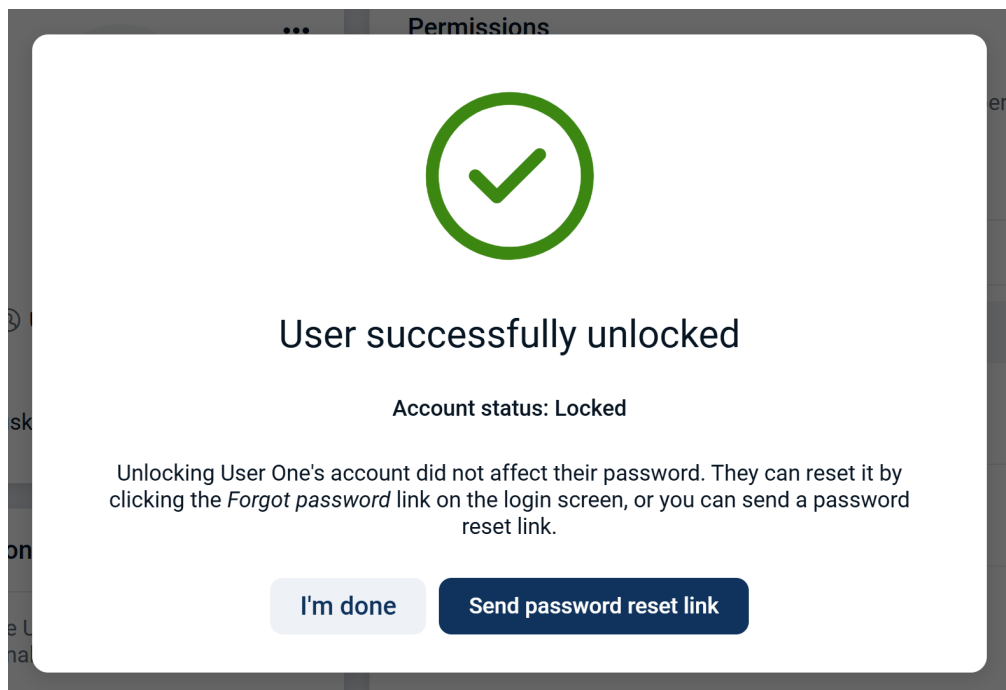
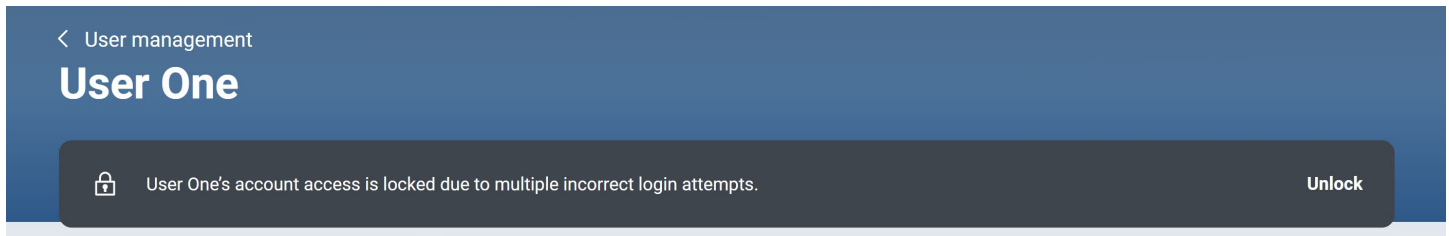




## Step 3

Click **Unlock** and review the confirmation.

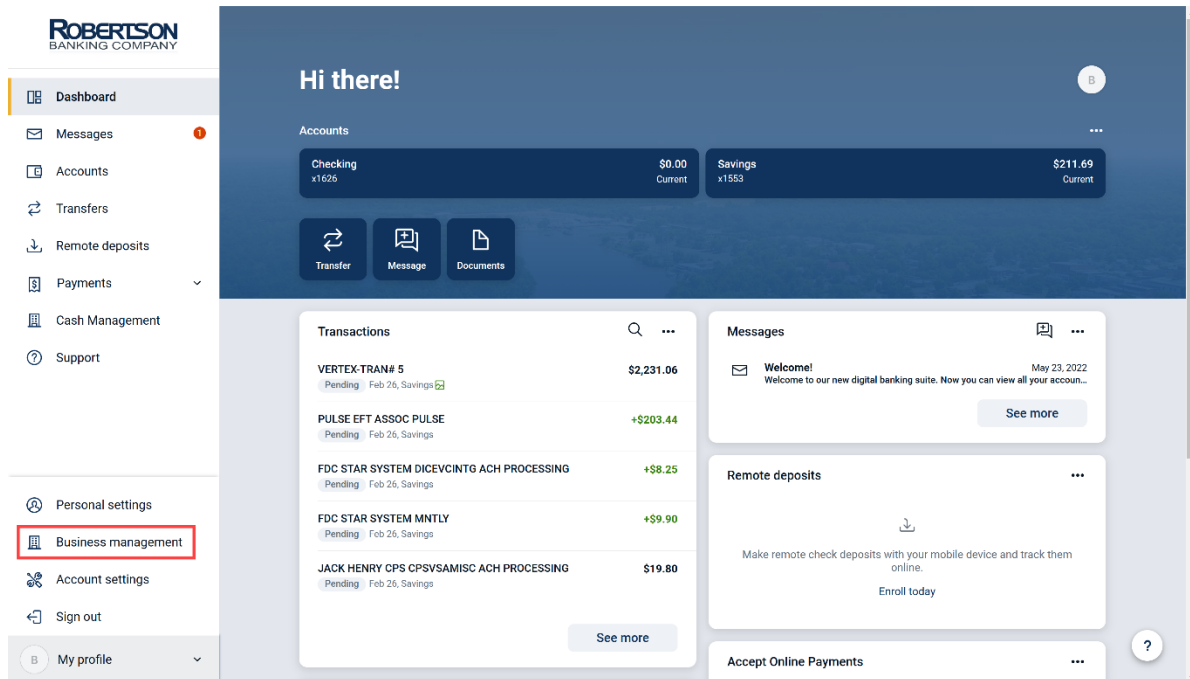
**Please note:** You can email the user a link to reset their password if they continue to have trouble. Otherwise, click **I'm Done**.



## Reset a User's Password

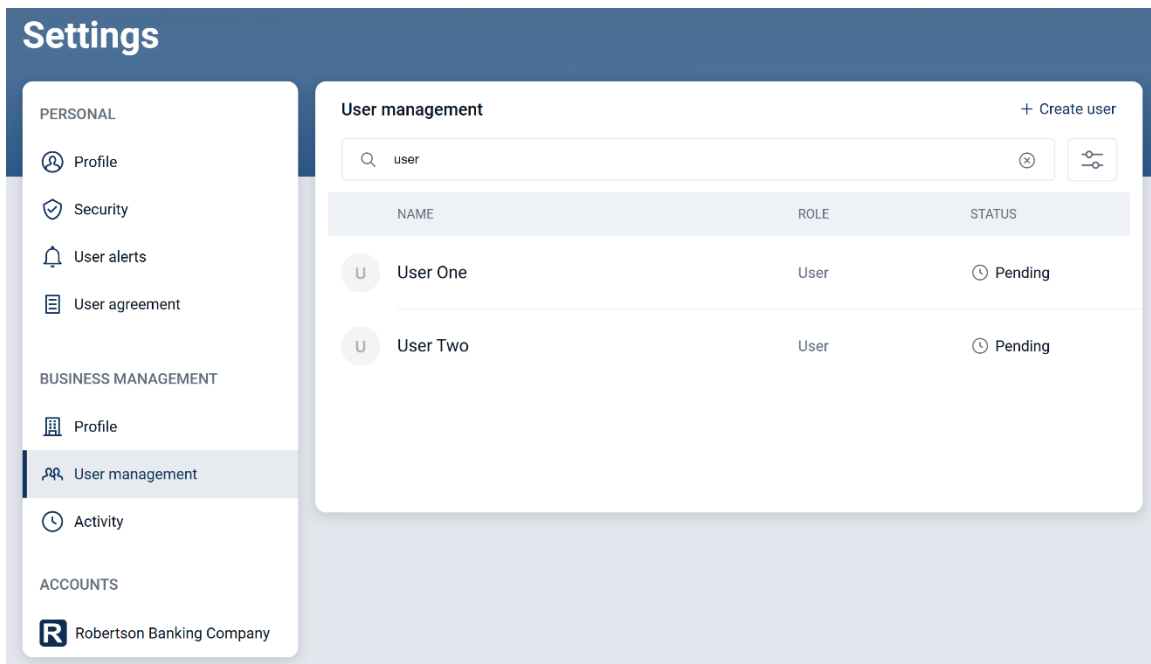
### Step 1

Click your profile and select **Business management**.



### Step 2

Select the user to reset.



## Step 3

Click the **ellipsis** icon and choose **Send password reset link** to email the user.

