

The Research page enable you to search for previously made deposits, using search criteria you define or saved queries. The ability to save or edit company level queries are dependent on the roles assisted to your user profile.

1 NAVIGATE TO RESEARCH

Navigate to the **Research** option in the navigation menu.

2 INPUT SEARCH CRITERIA

You can select a previously saved query from your **Saved Queries** list or, you can search deposits within a specific date range.

Research Options

Institution Name
(123456) - TEST Bank

Merchant
Test Merchant

Saved Queries
All Deposit Detail

Start Date
07/01/2019

End Date
09/18/2019

Click to expand fields

Clear Add Field Search

Export Options

Merchant Capture Deposit Ticket

Account Number: 1234567890
Date: 08/22/2019 08:31:05 AM
Amount: \$ 138.99

Deposit M001677340 with 4 debit(s) for \$138.99 was submitted on 8/22/2019 8:31:10 am

Items **88**

Subm...	Merc...	Locat...	User ...	Track...	Sequ...	Amou...	Serial...	Acco...	Routi...	Amou...
8/22/2...	Test...	Test...	Test...	M001...	16773...	Credit		12345...	5021-...	\$138.99
8/22/2...	Test...	Test...	Test...	M001...	16773...	Debit	1003	18000...	25148...	\$16.50
8/22/2...	Test...	Test...	Test...	M001...	16773...	Debit	1001	11000...	25148...	\$40.83
8/22/2...	Test...	Test...	Test...	M001...	16773...	Debit		30660...	25607...	\$40.83
8/22/2...	Test...	Test...	Test...	M001...	16773...	Debit	1002	10001...	05100...	\$40.83
8/22/2...	Test...	Test...	Test...	M001...	16773...	Credit		02960...	5021-...	\$288.75

Credits **29** \$14,479.85 Debits **59** \$14,479.85

3 LIMIT SEARCH RESULTS

To limit your search results further, click the **Down Arrow** to expand fields.

Note: Searching for custom field values uses additional system resources, and may impact retrieval time. We recommend using this option only when necessary.

Click the **Add Field** button and select from the drop-down list.

To remove a query line, click the **X** button.

Amount

- Amount Type
- Deposit Account
- Routing
- Sequence
- Serial
- Source
- Tracking Number

excluding custom fields.

es Desk

EST

Name Value X

Clear Add Field Search

4 SEARCH

To configure export options, click the **Down Arrow** (to the right of **Export Options**) and provide appropriate values. If you make a mistake and need to start over, click **Clear** to reset the search query to the default.

Finally, click **Search** and your items will be listed in the right pane.