

ITMS WebClient
Quick Reference Guide



WebClient Quick Reference Guide

WebClient eliminates the need to physically deposit checks at the bank. WebClient lets you scan checks and remittances, enter data, balance batches, deposit transactions remotely, and access deposit history reports.

Before you begin

Make sure you have all of the required items.

- » A supported scanner, scanner cables, and scanner documentation.
- » A computer that meets the minimum system requirements:
 - A monitor with at least a 1024 x 768 screen resolution.
 - Windows 11, Windows 10, MacOS 13 or later– 64 bit architecture.
Note: Some scanners cannot work on some operating systems. See the "Scanner details" chapter of the Getting Started Guide.
 - Microsoft Edge, Chrome, Firefox, or Safari– latest versions.
 - Adobe Acrobat Reader version 8 or later.
- » Administrative access on the computer.
- » A test check to scan (to ensure the scanner is properly connected and configured).

Supported scanners

- » RDM EC7500i
- » RDM EC9000i, EC9100i, EC9600i, EC9700i
- » Canon CR-L1, 120, 150, 190i, 190i-II
- » Digital Check SmartSource Adaptive
- » Digital Check CheXpress CX30
- » Digital Check CheXpress CX35 - USB (RNDIS mode) only
- » Digital Check TS240
- » Digital Check TS250 - USB (RNDIS mode) only (currently only RNDIS mode)
- » Epson CaptureOne Single-Feed
- » Epson CaptureOne 30, 60, 90
- » Epson TM-S1000U, SF (TM-S1000U), TM-S1000II
- » Panini I-Deal
- » Panini ml:Deal, Vision E, EvereXt - USB (RNDIS mode) only
- » Panini Vision X 1F, 50, 75, 100
- » TWAIN flatbed scanners
- » TWAIN auto feed scanners

Set up your computer

You are now three steps away from scanning checks in WebClient.

1. Modify Internet browser to work with ITMS.
2. Install scanner drivers and components.
3. Test your scanner in WebClient.

Step 1: Set up Internet browser

Chrome:

- » Follow [Google's instructions for how to allow pop-ups for specific websites](#), and enable pop-ups for your ITMS access URL.

Firefox:

- » Follow [Mozilla's instructions for how to allow pop-ups for specific websites](#). Add your ITMS access URL to your Allowed Sites list.

Microsoft Edge:

To allow ITMS popups in Edge:

1. Open Edge.
2. Click the **Menu** button.
3. Click **Settings**.
4. Click **Cookie and site permissions**.
5. Click **Pop-ups and redirects**.
6. Under Allow, click the **Add** button.
7. Enter in the ITMS URL to allow pop-ups.
8. Close the settings tab and proceed to the site.

Safari:

- » Follow [Apple's instructions for customizing pop-ups for specific websites](#) and ensure that pop-ups are enabled for your ITMS access URL.

Step 2: Install the Scanner Control Manager (SCM)

1. Open your browser.
2. Log into the Deposit application.
3. Click **Settings** (the gear icon in the top right corner of the page).
4. Select your scanner from the **Scanner Model** list.
 - If you use a TWAIN scanner, select TWAIN Scanner from the list and then select your scanner model from the TWAIN Model list.
5. Click **Save**.
You are prompted to begin the installation of the SCM.
6. Click **Install** and follow the on-screen prompts to continue and finish the SCM installation.

NOTE: Existing users installing SCM v5.0 should use an offline installation link. See the ITMS Getting Started Guide for more information.

On Windows

- When you are prompted to allow ITMS to install or download SCM components, do so.
- If you are prompted to allow the SCM to make changes to your computer, do so.

On Mac

- After the installation file downloads, open the .dmg file.
 - Command-click RDMDownloadAgent.pkg and click **Open**. Note: If you double click the file, you might not be able to open it.
 - When the Install RDM Installation Package wizard appears, click **Continue**.
 - When prompted to begin the installation of the RDMDA, click **Install**.
 - When prompted, enter your administrator password.
 - When the install finishes, click **Close**.
7. When the install finishes, **restart** your browser (if you have not already done so).
 8. Log into the Client and open the **Settings** dialog again. When you are prompted to download an update, click **Install**.
 9. The update begins to install on your computer.
 10. If you are prompted to disconnect your scanner, do so.
 11. After a few moments, a message appears indicating it is safe to connect your scanner. Connect and turn on your scanner.
Warning: If you do not connect and turn on your scanner at this point in the installation process, your scanner will not be installed.
 12. Click **OK**.
 13. The SCM update completes. It is recommended to wait a few moments for your operating system to finish installing your scanner.
 14. Click **OK**.
 15. Some scanners require a computer **restart**. If you are prompted to restart your computer, do so. Even if you are not required to restart your computer, it is recommended that you restart it.

Connect an EC9700i/9600i Series Network Scanner (if applicable)

1. Log in to the Deposit application.
2. If not automatically taken to the Settings dialog, click **Settings**.
3. In the Scanner Model list, select **RDM EC9700i, EC9600i Network**.
4. In the Network Scanner Serial Number field, enter the scanner's **serial number**, located on the sticker on the bottom of the scanner.
5. Click **Download Certificate** and choose where to save the certificate installer on the computer.
6. Run the installer by double clicking the application file from the file explorer or by opening the file from the browser.
7. Once the certificate installer has finished, click **Connect** in the Settings dialog in ITMS.
8. Click **Save**.
9. Another dialog should appear, stating the scanner connected successfully to ITMS.
10. Click **Done** or **Cancel** to exit the dialog.

Connect a Panini Network Scanner (if applicable)

1. Log in to the Deposit application.
2. Connect the power cable and turn on the scanner.
3. If not automatically taken to the Settings dialog, click **Settings**.
4. In the Scanner Model list, select the applicable Panini network model:
 - Panini EverneXt Network
 - Panini ml:Deal Network
 - Panini Vision-E Network
 An IP address automatically displays in the 'Network Scanner IP Address' field.
5. Click **Download Certificate** and choose where to save the certificate installer on the computer.
6. Run the installer by double clicking the application file from the file explorer or by opening the file from the browser.
7. Once the certificate installer has finished, connect the USB cable and allow the scanner to complete the boot cycle.
8. Click **Connect** in the Settings dialog in ITMS.
9. Click **Save**.
10. Another dialog should appear, stating the scanner connected successfully to ITMS.
11. Click **Done** or **Cancel** to exit the dialog.

Connect a Digital Check Network Scanner (if applicable)

1. Log in to the Deposit application.
2. Connect the power cable and turn on the scanner.
3. If not automatically taken to the Settings dialog, click **Settings**.
4. In the Scanner Model list, select **Digital Check CX35, TS250 Network**.
5. An IP address automatically displays in the 'Network Scanner IP Address' field.
6. Click **Download Certificate** and choose where to save the certificate installer on the computer.
7. Run the installer by double clicking the application file from the file explorer or by opening the file from the browser.
8. Once the certificate installer has finished, connect the USB cable and allow the scanner to complete the boot cycle.
9. Click **Connect** in the Settings dialog in ITMS.
10. Click **Save**.
11. Another dialog should appear, stating the scanner connected successfully to ITMS.
12. Click **Done** or **Cancel** to exit the dialog.

Step 3: Test your scanner

1. Scan a test check according to the type of scanner that you are using.
 - If you are testing any scanner other than a TWAIN scanner, insert one test check into the scanner and click **Test**.
 - If you are testing a flatbed TWAIN scanner, click **Test** and then place a test check in the scanner.
 - If you are testing an auto-feed TWAIN scanner, click **Test** and then insert one test check into the scanner.

The first scan can take up to a minute to complete. A small preview of the check image appears in the image viewer to indicate a successful test.

2. Complete the testing process.
 - If you are testing a non-TWAIN or an auto-feed TWAIN scanner and the test check does not scan, insert it into the scanner and scan it again.
 - If you are testing a flatbed TWAIN scanner, turn the check over so that the back side is facing down, and then click **Test**.
3. Click **Cancel** to return to the Deposit page.
4. If the test was unsuccessful, see Troubleshooting below.

Troubleshooting

For a more extensive list of troubleshooting tips, see the Getting Started Guide.

Scan your checks

1. Click **Scan**.
2. Select a **Location** from the list.
3. Select an **Account** from the list.
4. Click **Scan**.
5. If prompted, accept the terms in the Authentic License Agreement and click **Next**.
6. If prompted, enter the batch control total and/or the batch control number and click **OK**.
7. If prompted, select a **transaction profile**.
8. Load or feed your items into the scanner hopper.
9. When prompted to close the batch, click **OK**. WebClient moves you to the next applicable module automatically.

Key your deposit

1. Enter check and/or remittance amounts as needed and click **Submit Data** for each check.
2. If the batch needs balancing, select the **Proceed to Balance Batches** option when prompted, and click **OK**. WebClient moves you to the next applicable module automatically.

Balance your deposit

You must balance your deposit before you can submit it.

1. Adjust specific check amount values or adjust the batch control total to match list total value.
2. Click **Save**.
3. Select the **Proceed to Approve Batches** option and click **OK**. WebClient moves you to the next appropriate module automatically.

Approve your deposit

1. Select the deposit you want to submit.
2. Click **Submit For Deposit**.
3. When your deposit is submitted successfully, click **OK**.
4. Select the **Deposit History** tab.
5. Navigate to the batch you submitted and select the checkbox to the left of the row.
6. Click **Print Batch List**.
7. Click **Print**.
8. When Windows prompts you to print, click **Print**.

See WebClient Online Help for details on available WebClient reports

Need help?

If you have any problems, please contact customer support.