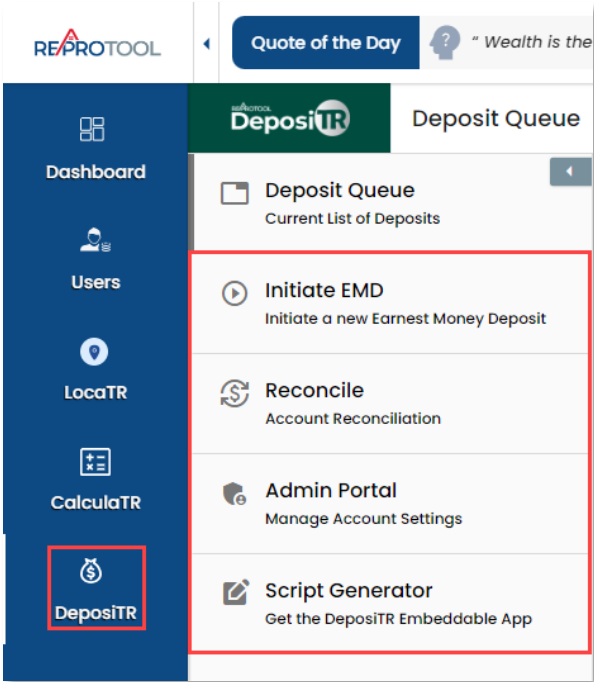
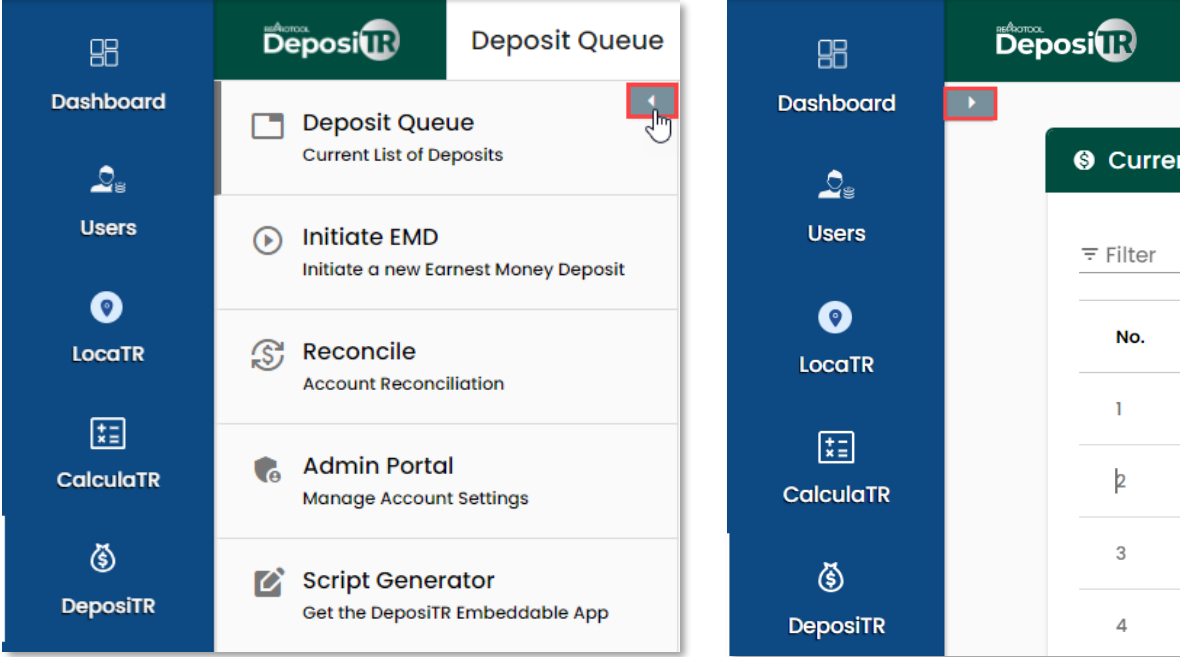


Depositr Admin Guide

Depositr admin tools can be accessed via REProTool from the Depositr navigation by an Agency Admin.



The Depositr navigation can be opened or collapsed using the arrow at the top of the menu.



Deposit Queue

The **Deposit Queue** shows a list of all **Earnest Money Deposits** made for your agency with their relevant details. Any deposits currently going through **Quality Control** will display in yellow on this view.

Current Earnest Money Deposits							
No.	Name	Email	Realtor	Amount	Type	State	Submitted
1	Test Nachoman	testnacho@4tier.com	Don Dalton	\$1,000.00	ACH	Trust Account Deposit Pending	06/19/2023 03:05 PM
2	Nachoman Test	nachomantest@4tier.com	Don Dalton	\$785.00	ACH	Trust Account Deposit Pending	06/19/2023 03:03 PM
3	Test Test	test635215@4tier.com	Sue	\$67.00	ACH	EMD Submitted	06/14/2023 04:36 PM
4	test test	test67889@4tier.com	susan	\$520.00	ACH	EMD Submitted	06/14/2023 04:31 PM
5	Kate Avvey	katherineav@4tier.com	James Stones	\$85.00	RDC	EMD Submitted	06/14/2023 02:34 PM
6	Rehzeria Void	rhezvoid@4tier.com	Susan Smith	\$750.00	ACH	QC Approved	06/14/2023 10:33 AM
7	Shannon Test	stwilson23@4tier.com	Susan	\$12.00	RDC	QC Rejected	06/14/2023 10:29 AM
8	test test	twilson3245@4tier.com	sam	\$200.00	ACH	QC Rejected	06/13/2023 01:23 PM
9	test test	twilson44@4tier.com	test	\$20.00	ACH	EMD Submitted	06/13/2023 11:48 AM
10	test test	tcwilson63@4tier.com	Susan	\$85.00	RDC	EMD Submitted	06/13/2023 10:46 AM

Items per page: 10 1 - 10 of 31

Clicking on any deposit line here will bring up more details about the deposit.

Current Earnest Money Deposits							
No.	Name	Email	Realtor	Amount	Type	State	Submitted
1	Test Nachoman	testnacho@4tier.com	Don Dalton	\$1,000.00	ACH	Trust Account Deposit Pending	06/19/2023 03:05 PM
2	Nachoman Test	nachomantest@4tier.com	Don Dalton	\$785.00	ACH	Trust Account Deposit Pending	06/19/2023 03:03 PM
3	Test Test	test635215@4tier.com	Sue	\$67.00	ACH	EMD Submitted	06/14/2023 04:36 PM
4	test test	test67889@4tier.com	susan	\$520.00	ACH	EMD Submitted	06/14/2023 04:31 PM
5	Kate Avvey	katherineav@4tier.com	James Stones	\$85.00	RDC	EMD Submitted	06/14/2023 02:34 PM
6	Rehzeria Void	rhezvoid@4tier.com	Susan Smith	\$750.00	ACH	QC Approved	06/14/2023 10:33 AM
7	Shannon Test	stwilson23@4tier.com	Susan	\$12.00	RDC	QC Rejected	06/14/2023 10:29 AM
8	test test	twilson3245@4tier.com	sam	\$200.00	ACH	QC Rejected	06/13/2023 01:23 PM
9	test test	twilson44@4tier.com	test	\$20.00	ACH	EMD Submitted	06/13/2023 11:48 AM
10	test test	tcwilson63@4tier.com	Susan	\$85.00	RDC	EMD Submitted	06/13/2023 10:46 AM

Details

Ref No: Z7G5-WJZS-2OLW-GC5B

Detail	Notes
Name:	Test Nachoman
Email:	testnacho@4tier.com
Contract Property:	559895 Jeans Ave
Realtor:	Don Dalton
Deposit Type:	ACH
Amount:	\$1,000.00
Status:	Trust Account Deposit Pending
Submitted:	06/19/2023 03:05 PM
Last Modified:	06/19/2023 03:06 PM

Ok

Items per page: 10 1 - 10 of 31

Quality Control

If you have the **Quality Control** role as an **Agency Admin**, you can access the **Quality Control** page.

Submitted

Filter

No.	Name	Email	Realtor	Amount	Type	Submitted	Actions
1	test test	tcwilson63@4tier.com	Susan	\$85.00	RDC	06/13/2023 10:46 AM	✎ ↓
2	test test	twilson44@4tier.com	test	\$20.00	ACH	06/13/2023 11:48 AM	🔒 ↓
3	Kate Avvey	katherineav@4tier.com	James Stones	\$85.00	RDC	06/14/2023 02:34 PM	✎ ↓
4	test test	test67889@4tier.com	susan	\$520.00	ACH	06/14/2023 04:31 PM	✎ ↓
5	Test Test	test635215@4tier.com	Sue	\$67.00	ACH	06/14/2023 04:36 PM	✎ ↓

On Hold

No on hold earnest money deposits found...

Approved

Filter

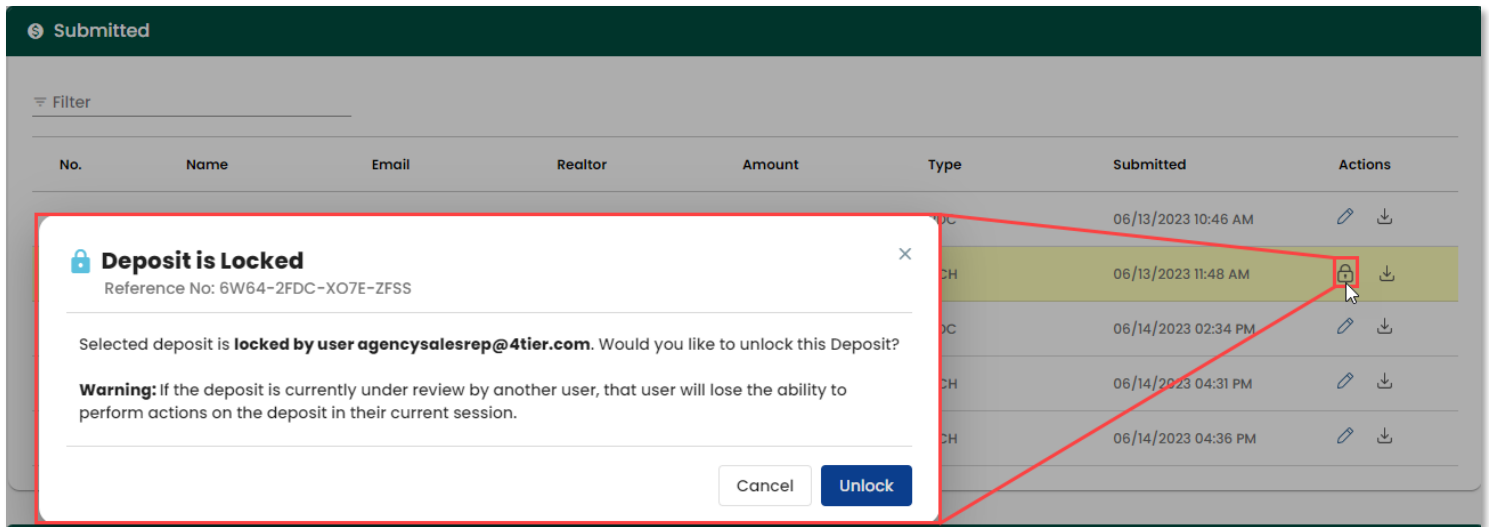
No.	Name	Email	Realtor	Amount	Type	Last Update	Actions
1	Rehzeria Void	rhezvoid@4tier.com	Susan Smith	\$750.00	ACH	06/14/2023 01:09 PM	↓
2	test test	twilson233@4tier.com	Susan	\$500.00	ACH	06/13/2023 01:45 PM	↓

Rejected

Filter

No.	Name	Email	Realtor	Amount	Type	Last Update	Actions
1	Shannon Test	stwilson23@4tier.com	Susan	\$12.00	RDC	06/14/2023 10:31 AM	↓
2	test test	twilson3245@4tier.com	sam	\$200.00	ACH	06/13/2023 01:24 PM	↓

Agency Admins can unlock deposits that may be locked by another **Quality Control** user by clicking the lock icon. A popup will display with information about who currently has the deposit locked and a confirmation that you would like to unlock the deposit.



The screenshot shows a table of submitted deposits. A modal popup titled "Deposit is Locked" is displayed over the table. The modal contains the following text:

Deposit is Locked
Reference No: 6W64-2FDC-XO7E-ZFSS

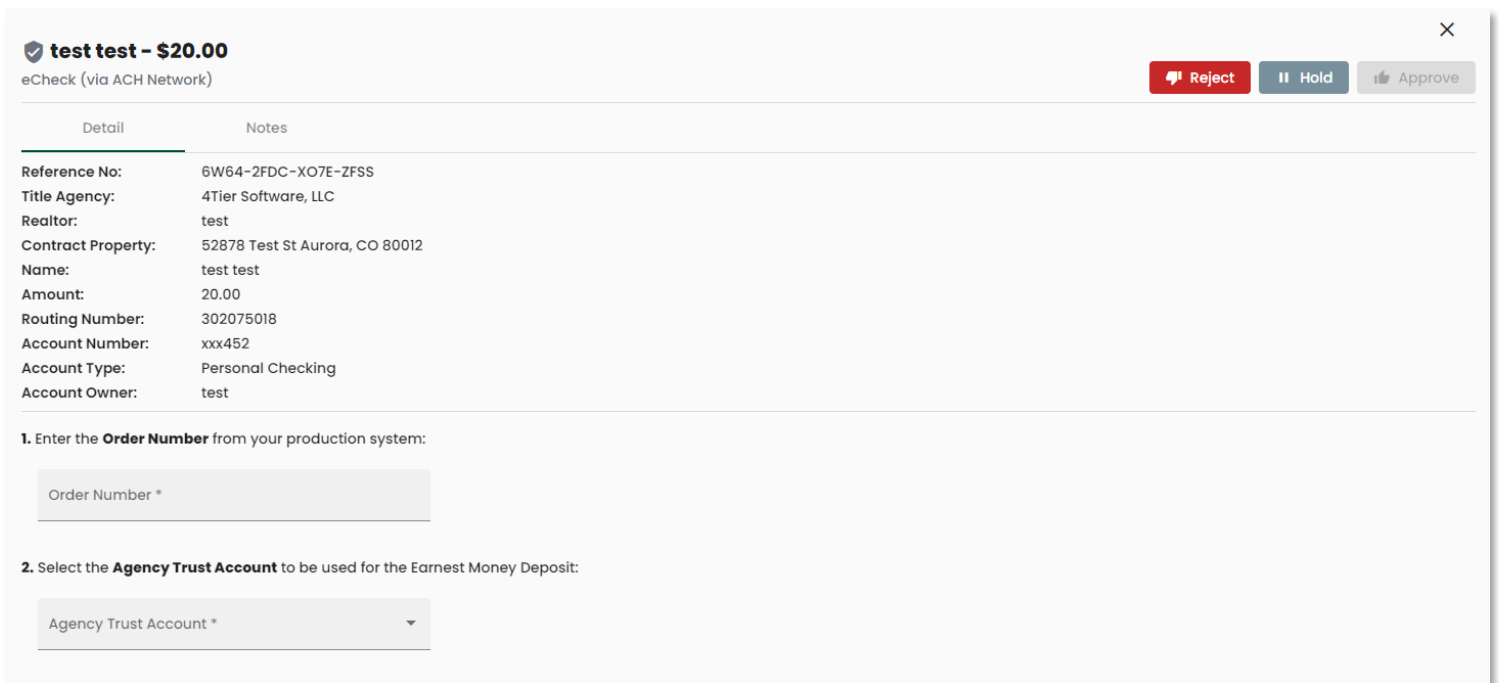
Selected deposit is **locked by user agencysalesrep@4tier.com**. Would you like to unlock this Deposit?

Warning: If the deposit is currently under review by another user, that user will lose the ability to perform actions on the deposit in their current session.

Buttons: Cancel, Unlock

No.	Name	Email	Realtor	Amount	Type	Submitted	Actions
						06/13/2023 10:46 AM	
						06/13/2023 11:48 AM	
						06/14/2023 02:34 PM	
						06/14/2023 04:31 PM	
						06/14/2023 04:36 PM	

Selecting the pencil icon on an unlocked deposit will take you to the **Quality Control** screens. For detailed instructions on the **Quality Control** screens, please see the corresponding guide.



The screenshot shows the "test test - \$20.00" Quality Control screen. The screen displays the following information:

test test - \$20.00
eCheck (via ACH Network)

Buttons: **Reject**, **Hold**, **Approve**

Detail	Notes
Reference No:	6W64-2FDC-XO7E-ZFSS
Title Agency:	4Tier Software, LLC
Realtor:	test
Contract Property:	52878 Test St Aurora, CO 80012
Name:	test test
Amount:	20.00
Routing Number:	302075018
Account Number:	xxx452
Account Type:	Personal Checking
Account Owner:	test

1. Enter the **Order Number** from your production system:



Order Number *

2. Select the **Agency Trust Account** to be used for the Earnest Money Deposit:

Agency Trust Account *

Initiate EMD

Initiate EMD is where **Earnest Money Deposit Invites** can be created and sent to consumers.





Welcome to the Earnest Money Deposit portal for
4Tier Software, LLC

Click the button below to create an **Invitation** for a Client to submit a residential Earnest Money Deposit.

[Create Earnest Money Deposit Invite >](#)

When creating an **EMD Invite**, all fields marked with a * will need to be entered. A valid **Email Address** and **Client Mobile Phone** number will need to be entered for the client to receive the **Depositr** link and **Security Code**.



Deposit Amount *
\$ 100.00

Buyer Information:

First Name * <u>John</u>	Last Name * <u>Smith</u>
Email Address * <u>jsmith@4tier.com</u>	Client Mobile Phone * <u>(123) 466-7890</u> <small>Must be capable of receiving SMS Texts</small>



Property Under Contract:


Property Address * <u>12345 Test Dr</u>	Property Suite, Apt, etc. <u># 53</u>
Property City * <u>Aurora</u>	Property State * <u>COLORADO</u>
Property Zip Code * <u>80016</u>	Realtor Name * <u>James Jones</u>

Consent to send an SMS text to your client: You consent to an SMS text message being sent to your client for Multi-Factor Authentication. *(Carrier message and data rates may apply)*

[Cancel](#) [Send EMD Invite >](#)

Once all information has been entered correctly, the **EMD Invite** can be sent. The consumer will receive an email with a link and instructions on how to proceed with their deposit as well as a security code via text.





Earnest Money Deposit Invite Sent Successfully!

An **SMS text message** has been sent to your client at the provided mobile phone number **123-466-7890** with a **Security Code** that will be required on the Depositr app to continue this earnest money deposit.

A **link** has also been sent to the client at the provided email address **jsmith@4tier.com** for Depositr application access.

Thank you for using Depositr!

[< Send Another Invite](#)

Reconcile

Reconcile is where the reconciliation report can be viewed.

Reconciliation for 4Tier Software, LLC

Start Date * End Date *

Entering valid dates will display any deposits that were made or updated within that time frame and any associated details. The **Download** option can be used to download an excel version of the report.

Reconciliation for 4Tier Software, LLC

Start Date * End Date *

Reconciliation report for period (06/01/2023 - 06/23/2023)

Account Summary

Starting Balance:	\$2.00
... Deposits:	+\$102.00
... Distributions:	-\$2.00
... FBO Chargebacks:	-\$0.00
Ending Balance:	\$102.00
... Outstanding Chargebacks:	-\$2.00
Real-Time Balance:	\$100.00

Report Period Details

Order No	Payor	Reference No	Current Status	Status Date	Emd Type	Register Code	Deposit Date	Deposit Amount	Agency Transfer I
Test3526166	James Paul	Y9SC-EY7T-HQSM-4OSQ	Chargeback	06/02/2023	RDC	J6D8WA	06/01/2023	\$2.00	06/02/20
Test985665	Susan New	MEY4-2AZI-6PC9-YWIP	Trust Account Deposit Pending	06/01/2023	ACH	JQB3JL	06/01/2023	\$100.00	

Admin Portal

The **Admin Portal** is where **Trust Account** info, **Earnest Money Deposit** options and **Quality Control** selections can be found.

Bank Name	Routing Number	Account Number
FORTIS PRIVATE BANK	107006428	xxxxxx3585
TESTING BANK	122105278	xxxxxx6789

Active	Option	Modified By	Modified On
<input type="checkbox"/>	Include service fees on Depositr EMD buttons (main screen)	agencyadmin@4tier.com	05/18/2023 11:02 AM
<input type="checkbox"/>	RDC service fee is bundled in closing costs	agencyadmin@4tier.com	05/26/2023 04:17 PM

Select	Name	Email	Phone
<input checked="" type="checkbox"/>	John Seller	agencyadmin@4tier.com	None
<input type="checkbox"/>	4Tier Check	4tieruser@4tier.com	SalesRep
<input type="checkbox"/>	Agency User	tier4agencyu@4tier.com	QualityControl
<input type="checkbox"/>	Test Aura	aura@4tier.com	None

Select	Name	Email	Phone
<input checked="" type="checkbox"/>	ETRCO	etrcoqc@4tier.com	844-784-8437
<input type="checkbox"/>	External Co	agencyex@4tier.com	755-986-6658
<input type="checkbox"/>	QA Test Co	twilsonqc@4tier.com	720-332-6658

The **Agency Trust Accounts** section displays any trust accounts associated to your agency. The **Account Number** is obfuscated, but can be viewed by selecting the eyeball icon.

Agency Trust Accounts		
Bank Name	Routing Number	Account Number
FORTIS PRIVATE BANK	107006428	xxxxxx3585 
TESTING BANK	122105278	123456789  Hide

The **Active Earnest Money Deposit Options** is where the **Transaction Types** can be set as well as the **EMD Service Fee Options**. At least one of the **Transaction Types** must be selected at all times. Changes made to this section will update what consumers will see when accessing your **Depositr** page.

Active Earnest Money Deposit Options			
Transaction Types:		<input checked="" type="checkbox"/> Remote Deposit Capture (RDC)	<input checked="" type="checkbox"/> eCheck (via ACH Network)
EMD Service Fee Options:			
Active	Option	Modified By	Modified On
<input checked="" type="checkbox"/>	Include service fees on Depositr EMD buttons (main screen)	agencyadmin@4tier.com	05/18/2023 11:02 AM
<input checked="" type="checkbox"/>	RDC service fee is bundled in closing costs	agencyadmin@4tier.com	05/26/2023 04:17 PM

The **Active QC Users** list will display all users that have and can be given the **Quality Control** role. Checking the box next to the user will grant the user the **Quality Control** role. Unchecking the box will remove the **Quality Control** role from the user.

Active QC Users			
Filter			
Select	Name	Email	Type
<input checked="" type="checkbox"/>	Agency Admin	agencyadmin@4tier.com	Admin
<input checked="" type="checkbox"/>	John Seller	agencysalesrep@4tier.com	None
<input type="checkbox"/>	4Tier Check	4tieruser@4tier.com	SalesRep
<input type="checkbox"/>	Agency User	tier4agencyu@4tier.com	QualityControl
<input type="checkbox"/>	Test Aura	aura@4tier.com	None

Under the **Active QC Agencies** section you will find a list of **Quality Control Agencies** that can perform **Quality Control** for your agency's deposits. Checking the box next to the agency will allow them to view and **QC** your agency's deposits. Unchecking the box will remove the agency's access to your deposits. **Quality Control Agencies** you have selected can see that they have been assigned to your agency, but cannot add or remove themselves as your **Quality Control Agency**.

Select	Name	Email	Phone
<input checked="" type="checkbox"/>	ETRCO	etrcoqc@4tier.com	844-784-8437
<input type="checkbox"/>	External Co	agencyex@4tier.com	755-986-6658
<input type="checkbox"/>	QA Test Co	twilsonqc@4tier.com	720-332-6658

Script Generator

The **Script Generator** tab is used to create Javascript script tags to embed Depositr into your own website where consumers can start their deposit without needing an agency to send them an invite.

To embed **Depositr** on your website for consumers to access, follow the instructions displayed.

Script Generator

To embed the **Depositr** application on your website for Earnest Money Deposit initiations, all you have to do is follow the **2 steps** below:

- Place this **script** tag inside the **head** tag of your website html.

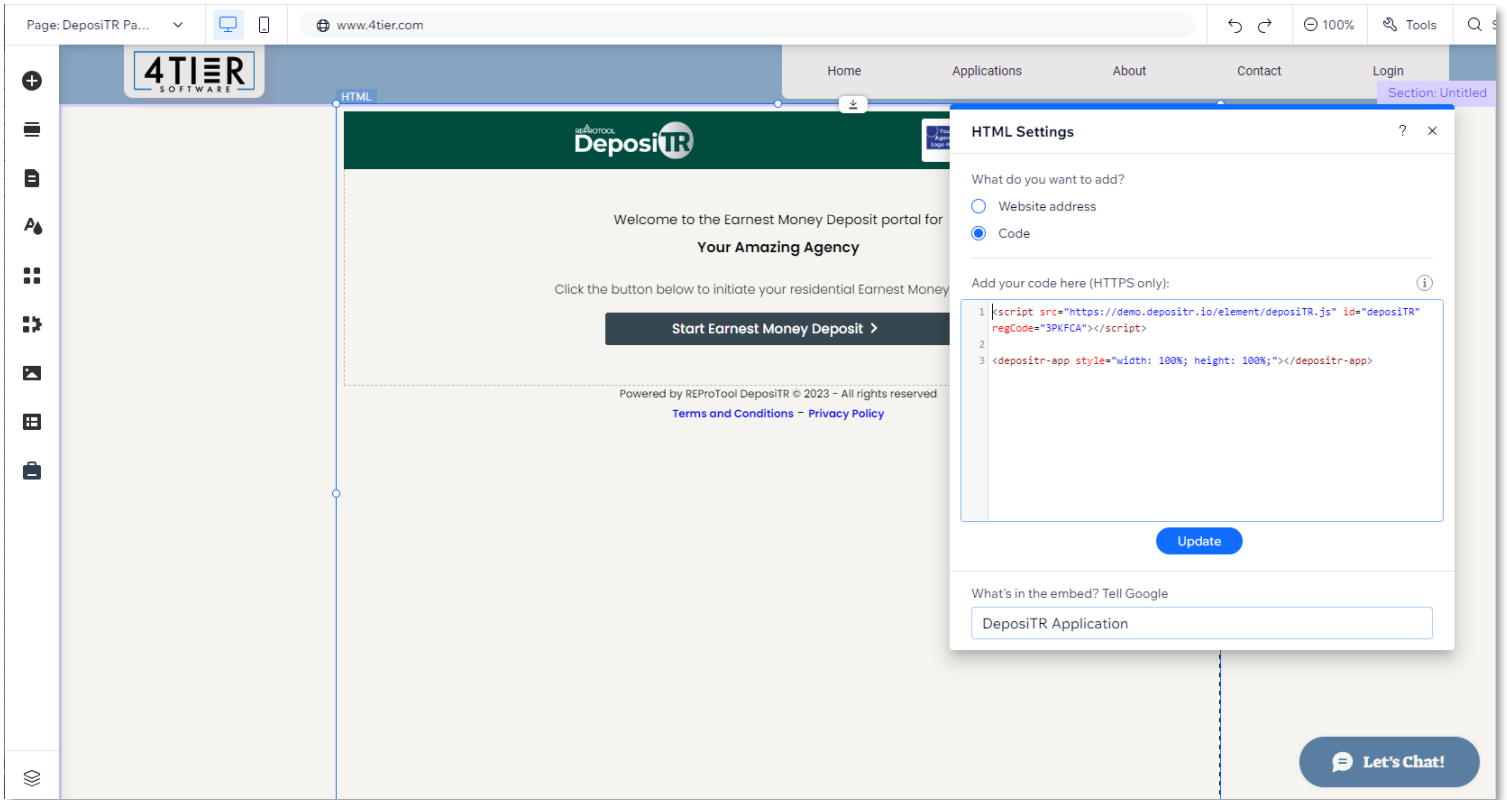
```
<script src="https://dev.depositr.io/element/depositr.js" id="depositr" regCode="D2GUD4"></script>
```
- Place this **depositr-app** tag where you want the Depositr application to be displayed.

```
<depositr-app style="width: 100%; height: 100%;"></depositr-app>
```

Example:

```
<html>
  <head>
    <script src="https://dev.depositr.io/element/depositr.js" id="depositr" regCode="D2GUD4"></script>
  </head>
  <body>
    <depositr-app style="width: 100%; height: 100%;"></depositr-app>
  </body>
</html>
```

If you use **Wix** or a similar website builder, you can simply copy the two lines of code into your HTML editor.



Make sure to expand the section height to ensure the application displays correctly.

