VersaCheck® X1

Platinum, Professional & Enterprise

Quick Start Guide

STEP 1 — How to INSTALL

1. Disable any virus protection software and firewalls on your computer; restart your computer if prompted.

2. We recommend that you update your operating system files before installing VersaCheck®. Click **Start**, click **Control Panel**, and then click **Security**. Click **Check for updates**. Download all files recommended by Microsoft® and restart your computer.

3. **Windows 7 & Vista Users:** Insert the CD into your DVD/CD-Rom drive. Click 'Open folder to view files', right-click 'autorun', select 'Run as administrator'.

Windows XP/2000 Users: If installation does not begin automatically, double click on the file autorun.exe on the DVD/CD-ROM.

4. After installation, click the "VersaCheck®" icon on your desktop to launch your program.

5. After installing VersaCheck®, please repeat installation procedure to install your copy of Infinity Business Cards & ProLabels from the VersaCheck® Productivity Solutions CD.

FOR NETWORK CONNECTIVITY

Install VersaCheck AND Active Check SERVER on your server.
Install VersaCheck AND Active Check CLIENT on each client.

Active Check Server Setup
Please make sure you are entering your standard network logon (including the domain name) in the following format:
Username: Domain name\User name (e.g. WORKGROUP\Admin)

Peer-to-peer network environment
Please make sure you are entering your windows logon including the machine name in the following format:
Username: Machine name\User name (e.g. MyComputer\Owner)
Password: Your password.

To print **Secure Bank Compliant Checks** you will need:

-A Validated Bank Account(s)
-Validated Security Check Paper & magnetic (MICR) black ink

VersaCheck® includes what you need to fulfill banking regulations while keeping your bank account safe.

Please follow the instructions in **STEP 2** & **STEP 3** to begin.

STEP 2 — Account & Check SETUP

1. Open VersaCheck® using the desktop icon.

Have an existing pre-printed blank check from your bank with your bank information and MICR line, which can be found at the bottom of the check.

MICR line

2. **Set up a financial account and checkbook.** You must first set up an account in VersaCheck® before you can write and print checks.

Financial Account Setup:

For first time users, follow the 3-step new account wizard. Complete all entries and click on "**Finish**." The Checkbook Information wizard will automatically open.
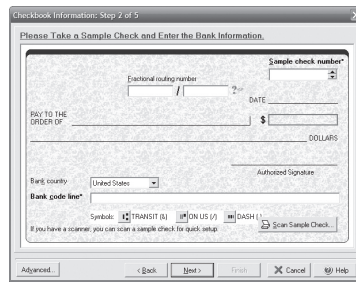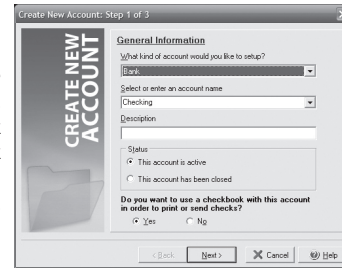
Checkbook Setup:

Follow the 6-step Checkbook Information wizard. This will allow you to name the account, enter MICR line and enter bank information. Click on the **Help** button for detailed instructions.

Note: Each account only needs to be set up once.

3. **Financial Account Validation:**

Before you print your first check your bank account access authority will be validated. This process is interactive and results in a $0.01 micro-transaction on your bank account which you can track online.
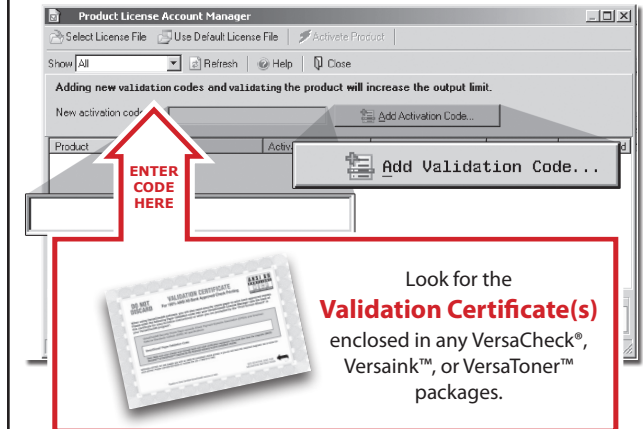
Once you have reported back the associated transaction number you have demonstrated account authority and validation is completed.
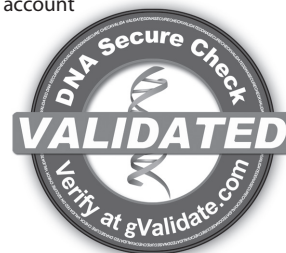
AT NO STAGE WILL USERS BE REQUIRED TO ENTER SENSITIVE PERSONAL INFORMATION

STEP 3 — Bank COMPLIANCE

1. From the **VersaCheck®** menu on the top, left corner of the screen, click **Tools\Manage Product Licenses** and then click **Product License Manager**. That will open the **VersaCheck® License Account Manager** window.

2. Enter a Validation Code, click **Add Validation Code** and follow the wizard. Repeat this step to add additional Validation Codes. Click **Close** when finished.

ENTER CODE HERE

Add Validation Code...

Look for the **Validation Certificate(s)** enclosed in any VersaCheck®, Versaink™, or VersaToner™ packages.

3. Your **VersaCheck®** blank check paper, **Versaink™** or **VersaToner™** is now validated with VersaCheck®. Click **Close**.
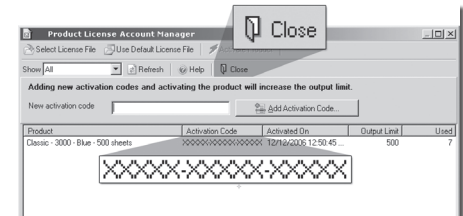
User's MANUAL

The complete VersaCheck® User's Manual is in electronic format and can be found by clicking **Help** on the main menu bar.
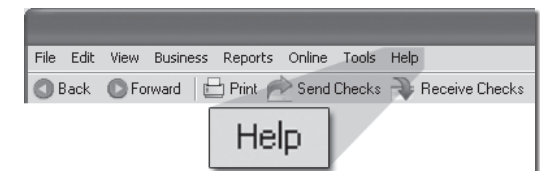
You can also obtain instructions for a specific feature by pressing the F1 key.

How to PRINT from QuickBooks® & other accounting software.

Note: The example below demonstrates printing a check through QuickBooks®, Quicken® and Peachtree software packages will follow the same process.

1. Create a check in your financial software. Click **Print** when check is completed.

2. In the **Printer Name** window, select **VersaCheck Printer** and ensure that the applicable check style is selected. Click **Print**. This will open a **VersaCheck®** window.
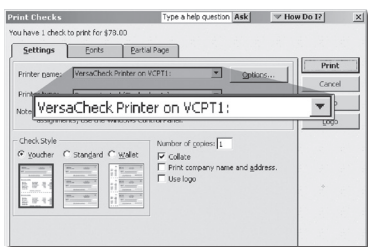
3. After logging in with your gValidate.com user name & password, confirm Account Name and Check Number and click **Next**.

4. Confirm print options, click **Printer Setup** and select the physical printer that will be used to print the check (different than **Step 2**). Click **Print**.
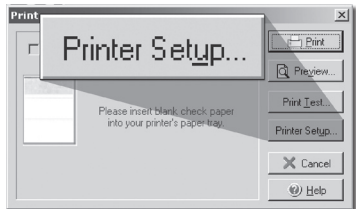

How to APPROVE Checks

**Use ProVision to get checks approved via EMAIL.**

Click the **Write Checks** icon.
Fill out your check and click **To be e-mailed**.
In **Check Approval Options** click **Approval Required**.
Enter the **name** and **e-mail** address of the approver.
Enter the **e-mail** address of the person who will print the check.
Click the **Record** button.
Click the **Send Checks** button to send your check for approval.

(Note: The check recipient will need 'Versa' brand check paper & ink/toner to print the check)
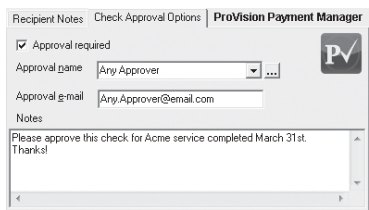
How to PRINT from VersaCheck®

Click on the **Write Checks** button. Select your checking account from the drop-down menu in the upper left-hand corner. Simply fill out the fields of the check, then click **Record**. Click **+New Check** for each additional check. Your check will be placed in the register. To print checks, click on **Print** from the **File** menu.
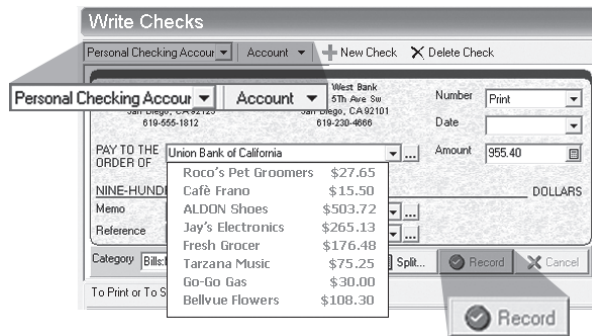
How to create CHECK DRAFTS

Accept checks instantly by phone, fax or email using the 'Draft' feature. Click on the **Address Book** button and click on **New**. This will launch the Payee/Payor Setup window. Complete all entries on the General and Financial tabs and click **OK**. To create and print the check draft, click on **Business** from the main tool bar and select **Collect Checks/Drafts**. Select the payor from the drop-down Payor list, enter the check amount and click on **Record**. To print drafts, simply print from the **File, Print Checks** menu and use the **Check Drafts** tab.
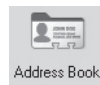
To set up the 'Draft' feature you will need:

-An Approved Merchant Partner (AMP) plan from gValidate.com
-Payor accounts validated by gValidate.com

(Feature available in Gold, Platinum, Enterprise and Pro versions)

How to EMAIL CHECKS

Send, Receive, and Process checks via EMAIL.

Click on the **Receive E-mail Checks** icon

To **RECEIVE** email checks - click the **Request Checks** button to request a check from a payor. Once the payor has sent the check, click the **Get Checks** button to display & print their check.

To **SEND** email checks - click on the **Write Checks** button. Fill out the check and choose the **To be e-mailed** button, then click **Record**. Click on the **Send Checks** button to send your check.

How to ORDER SUPPLIES

1 (303) 532-4738 | versacheck.com

CHECK PAPER:
VersaCheck® Security Check Refills meet Check Payment Systems Association (CPSA) and American National Standards Institute (ANSI) X9 check processing specifications.

MAGNETIC INK & TONER:
Magnetic Ink Character Recognition (MICR) Versaink™ and VersaToner™ meet ANSI X9 Check Processing specifications.

CHECK PRINTERS:
Loaded with bank compliant Versaink™/VersaToner™

How to REGISTER

Register online instantly & conveniently:

1. Open VersaCheck®
2. Click **Help\VersaCheck (Version) Registration**
3. Follow on-screen instructions

How to CONTACT

VersaCheck.com

SALES: 303-532-4738   sales@versacheck.com

SUPPORT: 303-532-4738   versacheck.com/web/support

621 17th Street, Denver CO 80293
P: 303-532-4738   F: 303-532-4406   www.versacheck.com