

This checklist is designed to help business users:

- **Confirm existing configurations**
- **Reestablish scheduled operations**
- **Ensure proper access to services previously used in Business Plus**

Please review the sections relevant to the services you're enrolled in to verify that everything is set up correctly. If you notice any missing services or encounter issues, contact the **Cash Management Department**:

- **Email:** [cashmanagement@bankcherokee.com](mailto:cashmanagement@bankcherokee.com)
- **Phone:** 651-291-6240

We're here to help ensure a smooth transition and continued access to your essential banking tools.

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## Validate Existing Information

### Bill Pay

- ☐ Go to **Transfer & Pay > Bill Pay**
- ☐ Review scheduled payments, activity, and history.

### ACH Originator

- ☐ Go to **Tools > Business Admin > Payees**
  - ☐ You can edit payee details as needed here.
- ☐ Go to **Transfer & Pay > Business ACH**
  - ☐ You can Access and manage ACH templates here.

### Wire Transfers

- ☐ Go to **Tools > Business Admin > Payees**
  - You can edit wire payee details as needed here.
- ☐ Go to **Transfer & Pay > Business Wires**
  - You can process wire transfers here.

## Remote Deposit

- ☐ Go to **Tools > Remote Deposit**
- ☐ Uninstall current scanner driver ([see section entitled "Remote Deposit Users: Uninstall Printer Drivers"](#))
- ☐ Install new printer driver when creating first deposit. Under **Quick Links** click on **Remote Deposit Complete** and click on **Create New Deposit**. Once you do that, the system will prompt you to install your scanner. Make sure the scanner is unplugged from the computer before starting the install wizard.

## Check Positive Pay / ACH Fraud Alerts

- ☐ Go to **Tools > Check Positive Pay / ACH Alert**

## eDocuments

- ☐ Go to **Accounts > eDocuments**
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## Reestablish Key Functions

### Scheduled Internal Transfers

- ☐ Go to **Transfer & Pay > Transfers > Make a Transfer**
  - Set frequency under the 'Frequency' section.

### Scheduled Internal Loan Payments

- ☐ Go to **Transfer & Pay > Loan Payments Scheduled**
  - Review and manage scheduled loan payments.

## Alerts

- ☐ Go to **Tools > Alerts**
  - Customize alert preferences.
- ☐ Pro Tip to set up Text Alerts: Click **profile icon > Settings > Contact > Mobile > Enable text alerts**.

## Quicken & QuickBooks

- ☐ Download the guides from our website at <https://bankcherokee.com/digital-banking-upgrade-for-your-business/>
    - Please note, it can take up to 5 days for Intuit to update Web Connect to point to our new platform.
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## Remote Deposit Users: Uninstall Printer Drivers

### Windows Instructions

#### Step 1: Open the Control Panel

1. Click the **Start** button (bottom-left corner of your screen).
2. Type **Control Panel** and click on it when it appears.

#### Step 2: Go to Devices and Printers

1. In the Control Panel, click **Devices and Printers** (you might need to click **View by: Small icons** to see it).

#### Step 3: Remove the Printer

1. Find the printer you want to uninstall.
2. **Right-click** on the printer icon.
3. Click **Remove device**.
4. If asked to confirm, click **Yes**.

#### Step 4: Open Print Server Properties

1. At the top of the Devices and Printers window, click **any printer icon** once.
2. Then click **Print server properties** (you'll see this in the top menu bar).

#### Step 5: Delete the Driver

1. In the new window, click the **Drivers** tab.
2. Find the printer driver you want to remove in the list.
3. Click on it, then click **Remove**.
4. Choose **Remove driver and driver package**, then click **OK**.

**Step 6: Restart Your Computer**

- This helps make sure everything is fully removed.

**Mac Instructions**

- **Step 1: Open System Settings (or System Preferences)**
  1. Click the **Apple menu** in the top-left corner of your screen.
  2. Choose **System Settings** (on macOS Ventura or later) or **System Preferences** (on older versions).
- **Step 2: Go to Printers & Scanners**
  1. In the settings window, find and click **Printers & Scanners**.
  2. You'll see a list of printers on the left side.
- **Step 3: Remove the Printer**
  1. Click on the printer you want to uninstall.
  2. Click the **minus (-) button** below the list.
  3. Confirm by clicking **Delete Printer**.
- **Step 4: Delete the Printer Driver Files (Optional but Recommended)**
  1. Open **Finder**.
  2. Click **Go** in the top menu, then choose **Go to Folder**.
  3. Type this in the box:
  4. `/Library/Printers/`
  5. Press **Return**.
  6. Look for a folder with the name of your printer brand (like HP, Canon, Epson).
  7. Drag that folder to the **Trash**.
- **Step 5: Empty the Trash**
  - Right-click the **Trash** icon and choose **Empty Trash** to fully remove the files.
- **Step 6: Restart Your Mac**
  - This helps make sure everything is cleaned up properly.