R360+ Basic End User Archive Guide Corp

Use this guide to learn more about **R360+ Basic End User Archive Guide-Corp.**

For questions about this guide, please reach out to your Fifth Third relationship team or contact our Commercial Support Center at 866-475-0729, Monday through Friday, 7 a.m. to 10 p.m., ET.

September 2026

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Navigation Tip: The table of contents and internal hyperlinks allow quick access to relevant information located elsewhere. After using a link, press **Alt+Left Arrow** to return to the original location in the document

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Logging into R360+

1. Enter the URL or web address, provided by your application host, into your web browser to connect to the R360+™ application. For this document the link is: https://payments.deluxe.com/receivables?brandingID=FifthThird.
2. A login page will be displayed.

NOTE: The full user setup Okta activation process is covered in the Member Setup Guide in the Admin training course.

3. Enter your username in the **Username** field.
4. Check **Remember me** to save the username for the next login attempt.

5. Click **Next.**
6. Enter the password for your account.
7. Click **Sign in.**

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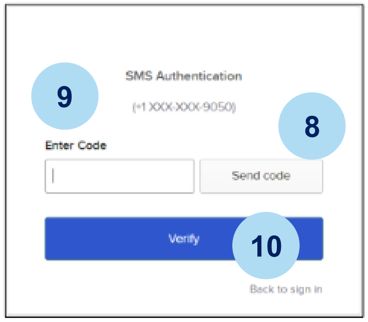
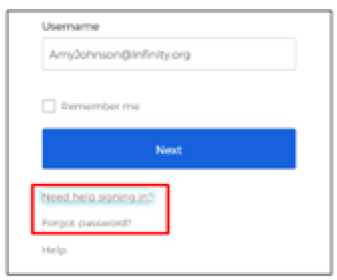
8. If Multi Factor Authentication is enabled, click **Send Code** to send the authentication code to the configured authentication location.
9. Enter the code provided in the **Enter Code** field.
10. Click **Verify**.

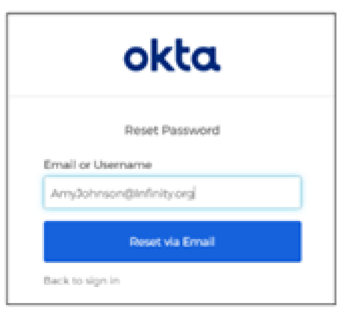


Reset Password

If the user has entered the wrong password 5 times, the account will be locked for 15 minutes. After 15 minutes, the user may attempt to log in again. A forgotten password may be remedied using the **Need help signing in** link on the login page, followed by **Forgot password**?



Enter your username (email) and click **Reset via Email**.



An email will be sent with instructions to reset the password.

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Inactivity Logout

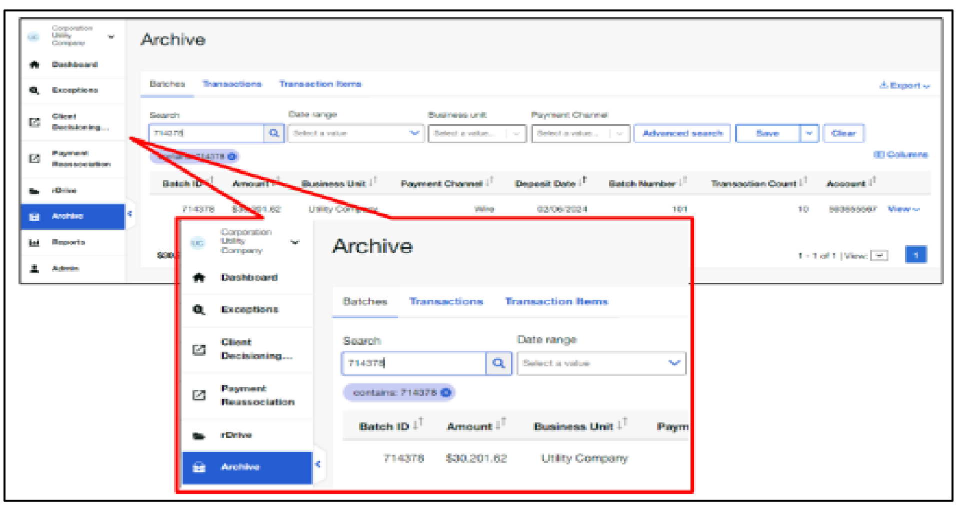
If the user is inactive (not using the browser at all) for 10 minutes, a message will be displayed on the screen to continue the session or logout. If they are completely inactive an additional 5 minutes, they will be logged out of the system, and the **Login** option will display to the user.

Archive

The Archive is utilized to search for batch, transaction, and item information.

- **Batches Tab** – Search the archive for batches. The batches contain transactions and items. The **Batch** page summarizes the data at the batch level. On this table, if the results columns are batch level fields, then the results table will show the batch level information; if a transaction or item level field is added the column will be blank.
- **Transactions Tab** – Search the archive for transactions. Transactions will contain the items processed within that transaction. The **Transaction** page summarizes the data at the transaction level. On this tab the results table displays information on only the first payment in a transaction. If there are no payments in a transaction, then the first non-payment transaction information would be displayed.
- **Transaction Items Tab** – Search the archive for items (stubs, payments, etc.). The transaction items page lists **ALL** items in the results table.

Users can view images and review details of items. Organizations can only view the numbers of viewing days of data configured for the organization. The archive is accessed by selecting Archive from the menu on the left which will display the Search page. The archive is automatically filtered to the current day.



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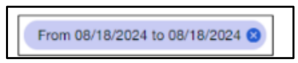
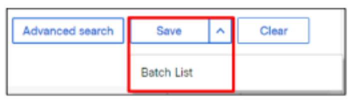
The archive displays items for the selected organization. Default results columns are displayed, but these can be customized which will be shown later in this document. Columns can be sorted ascending or descending. The Transactions page can be viewed by selecting the Transactions tab.

Search Options

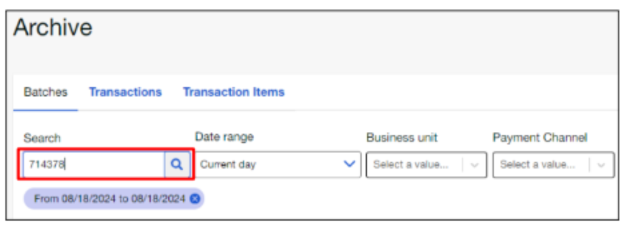
The automatic date filter can be removed by selecting the X to remove the filter below the filter boxes. When the filter is removed, the results will include all dates. Searching across all dates may require a long period of time.



The user can also search with previously saved searches using the Save option in the Batches, Transactions or Transaction Items tabs.



Use the freeform Search field highlighted below to search any part of the data in the displayed search results fields. Text and numbers are allowed in the search. The search can be filtered by a Date, Business Unit, Payment Channel or Payment Type. Date fields can be searched using the following formats: mm/dd/yyyy, mm-dd-yyyy, yyyy/mm/dd, mm-dd-yy, yyyy-mm-dd, and mm dd yyyy.



The search filters on the **Archive** screen are defined below. These options are the same across all search tabs.

Archive Screen-Search Filters	
Field	**Details**
Search	The **Search** option allows a freeform text search of any of the values in the columns of data displayed in the search results.
Date Range	Enter the **Deposit Date** in the **Date range** of the search range. The default selection is Current day. The date range is calculated using the user's current date.

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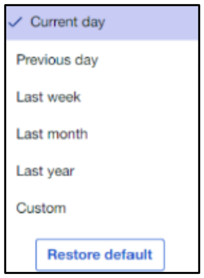
Archive Screen-Search Filters	
Field	**Details**
	 • **Current day** – current day is both start and end date. • **Previous day** – current day minus 1 for both start and end date. • **Last week** – current day minus 7 days for the start date, while current day is the end date. • **Last month** – current day minus 30 days for the start date, while the current day is the end date. • **Last year** – current day minus 365 days for the start date, while current day is the end date. • **Custom** – allows the user to select a start and end date range. • **Restore Default** – restores the Date range filter to **Current day**.
Business Unit	The client to whom the payment was made.
Payment Channels	The configured payment channel where the payment came from (Lockbox, Bill Pay, etc.).
Payment Types	The type of payment type for this item.
Advanced Search	Create a search using standard and customized fields. This search will be able to search custom fields made on all lower levels of the organization.
Save	Create or apply a saved search.
Clear	Select this option to clear all the filters including the date field.

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Search Steps

1. From the left menu, select **Archive**.
2. Select the appropriate search tab: **Batches, Transactions,** or **Transaction Items**.
3. Enter data in the **Search** field and adjust filters for the item being searched for. The **Search** field will search across all column data located in the search results fields below.

NOTE: This basic search searches only the fields in the results columns displayed. An **Advanced Search** can search fields within the database. This search will only search for results in the selected tab, for example, if in the **Batch** tab it will not search for matching transactions as it will search for batch information and not transaction or item information. If the user needed to search for an account number, since it is located on an item, the **Transaction** or **Item** page should be used to search.

As filters are selected, the pills on the screen will be updated and the search results will be automatically displayed. Only one **Date Range** can be selected at a time, but the user can select multiple **Business Units** and **Payment Channels**.

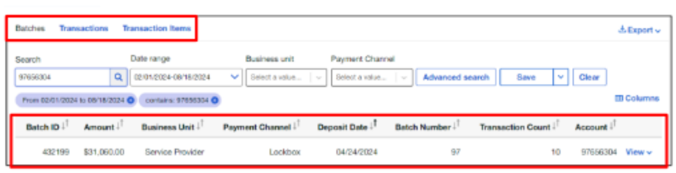
NOTE: **Clear** can be used to clear all search fields and filters.

4. Click the magnifying glass or press **Enter** to perform the search.

The search results will be displayed under the search filters. If this is a common search, the search can be saved. Save Search is discussed later in this document.

View Search Results

The archive search can be performed on **Batches**, **Transactions,** or **Transaction Items** tabs. The Search Results displayed can be customized in each tab. The customization process is discussed later in this document.



The search results of all tabs will be sorted by: **Deposit Date**, **Source Batch ID**, **Transaction Sequence,** and **Item Sequence**.

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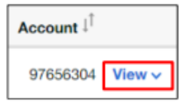
To view images click **View** on the row of the batch/transaction/item.



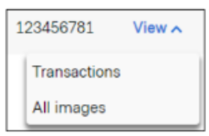
The **View** options vary depending on if the user is viewing the **Batches**, **Transactions** or **Transaction Items** tabs. Each view option is described below.

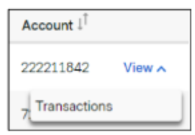
Batches Tab View Options

In the **Batches** tab, if the user selects **View** and there are images associated with the batch, the user will see two options: **Transactions** (displays **Transaction Summary** page) and **All images** (displays a preview of all images). If there are not any images, only **Transactions** will be displayed.

Batch totals include the total payment amounts in the batch, or the applied amount of the payments; it **does not** include stub record data in the totals.

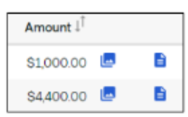
If the user clicks **All images**, they will see a preview of all images for the batch.



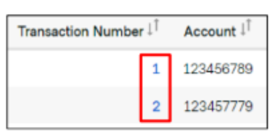


Transaction Tab View Options

In the **Transactions** tab, the transaction is listed with the total amount of the payment as the applied amount. The user can select the **View Images** icon to view images, or the **View Truncation Details** icon to be navigated to the Transaction Details page.



Click on the **Transaction Number** to be navigated to the transaction in the **Transaction Items** tab.



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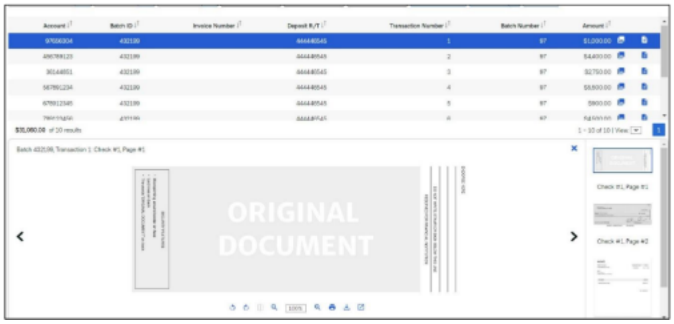
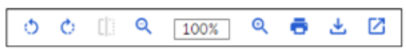
View Transaction Images

Transaction images can be viewed by selecting the icon next to the transaction in the **Transactions** tab. This will display an image viewer at the bottom of the screen.



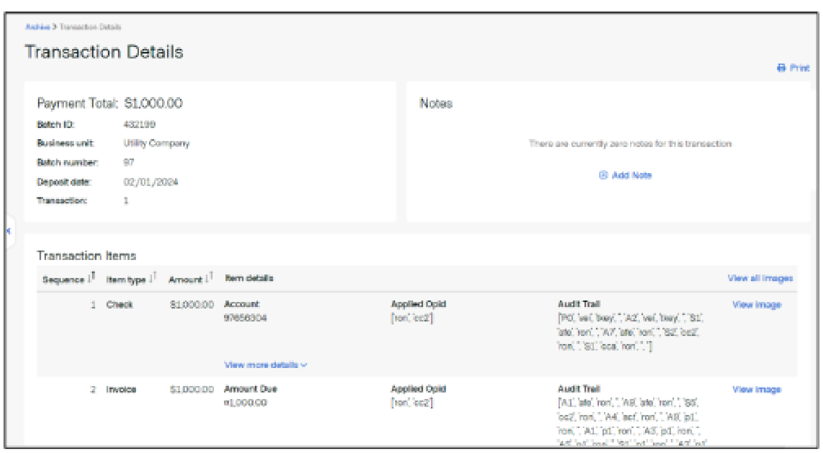
The images can be navigated by clicking the left or right arrow on either side of the image, or by clicking the image/item in the right most pane.

Buttons are displayed at the bottom of the image. From left to right, this will allow the user to: rotate right, rotate left, flip, zoom in, zoom out, print image, download image, and open image in a new tab.



Transaction Details

The **Transaction Details** screen is displayed when the user selects the view icon from the transaction search results screen.



Item Details vary greatly depending on the fields configured for this client. Standard fields are defined in the **Results** section of this document.

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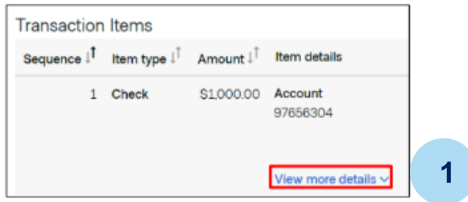
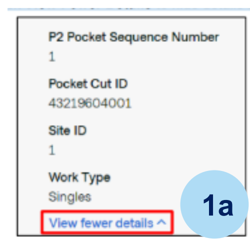
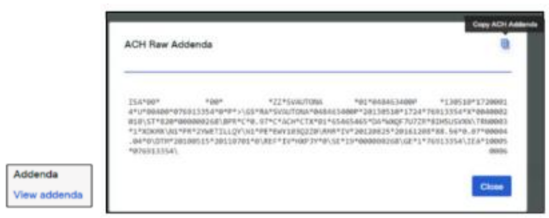
1. Click the **View More details** to review additional fields for this item.



   a. Click **View Fewer Details** to hide details again.



NOTE: If addenda data exists for an item, the **View Addenda** link will display the raw addenda data in a popup.



Transaction Details-View Images

1. On the **Transaction Details** page, **View all images** can be selected to view the images of the transaction.

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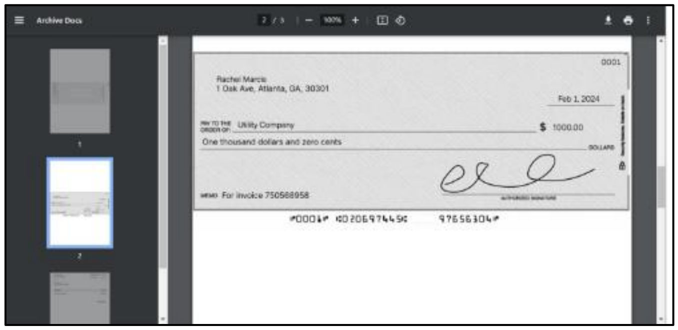
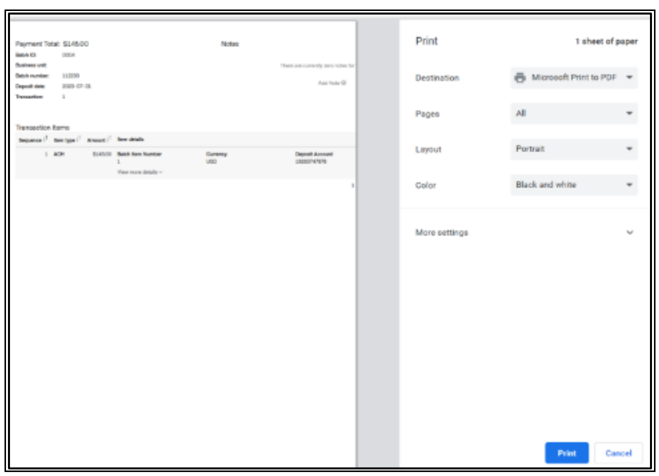
View all images will display all images in the transaction in a **PDF Viewer** (front and rear images).



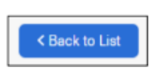
Transaction Details – Print

Print can be selected from the upper right to print the transaction details.

The **Print** screen will be displayed. This will print everything that was currently displayed on the [Transaction Details](#) page. Select printer options and click **Print** to print the image to paper or PDF.



On the **Transaction Details** page, select **Back to List** from the bottom left to the search results.



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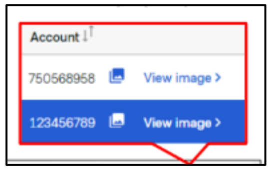
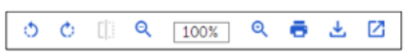
Transaction Items Tab View Options

In the **Transaction Items** tab, the user has the option to view the item with the **Image Viewer** right on the screen, or the user can select **View image** to open the images for this item in the **PDF viewer**.



The images can be navigated by clicking the left or right arrow on either side of the image, or by clicking the image/item in the right most pane.

Buttons are displayed at the bottom of the image. From left to right, this will all the user to: rotate right, rotate left, flip, zoom in, zoom out, print image, download image, and open image in a new tab.



If the user selects **View** image, the image of the item will display in a **PDF Viewer** (front and rear images).

Advanced Search Steps

Advanced Search is available on **Batches**, **Transactions** and **Transaction Items** archive tabs. **Advanced Search** allows users more flexibility in searching various field types with adjustable filters. The same fields are available on advanced search and columns on each of the tabs. This is to allow the user access to all fields when setting up their archive search pages. Each page's search is

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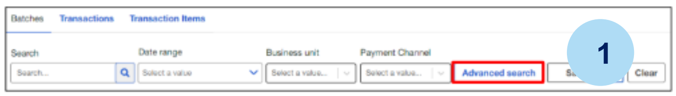
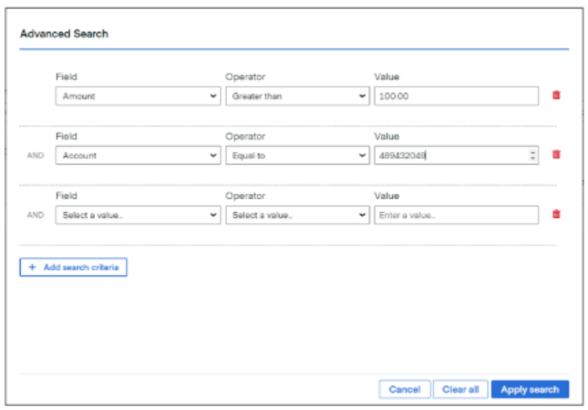
designed to support the relevant level of search batch, transaction, or item. Using **Advanced Search**, organizations can search custom fields created at lower levels of the organization.

Normally the search fields the user is using in **Advanced Search** would also be defined to display in the **Columns/results** area, otherwise when searching that field, it may not seem immediately clear why that result was displayed without drilling down further in the batch, transaction, or item. Also, if searching for an account number on the **Batch** page, only the first payment in the batch displays in the results grid and it will not search all items in the batch, therefore it is not best practice to search for an account number on the **Batch** tab, but more likely on the transaction or item page.

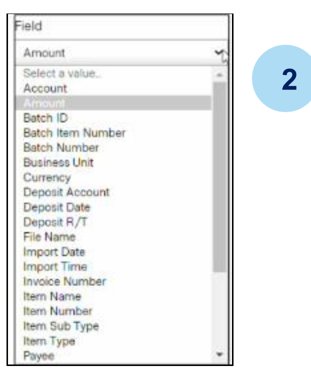
1. Select **Advanced search** on the **Archive** screen.



The **Advanced Search** screen displays.



2. Select the **Field dropdown** and select which field to search on. Typical field definitions can be found in Results Fields. The fields displayed here were configured for this item and can vary.



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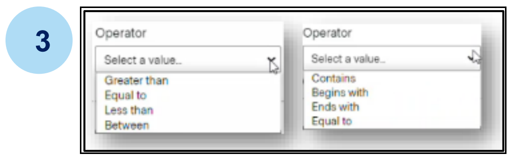
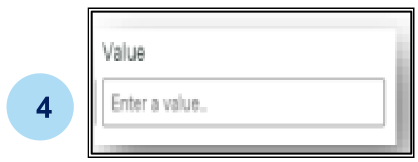
NOTE: If a field name does not display on the list and the field is newly configured, new field names do not retroactively display files imported prior to the configuration change.

3. Select the **Operator dropdown** and select the operator function to use in the search. If the field is numeric or a date field, the options are **Greater than**, **Equal to**, **Less than** and **Between**. If this field is alphanumeric, the options are **Contains**, **Begins with**, **Ends with** and **Equal to**.



4. In the **Value** field, enter a value to use in the search operation.



Validation is performed on the **Value** fields. If incorrect data is entered, an error will occur.

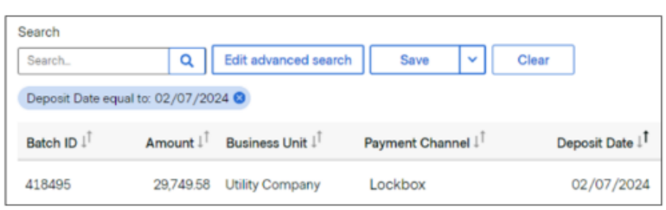
5. If more search criteria should be added to this search, fill in the next line of **Field**, **Operator** and **Value**.

More search criteria than the default 3 lines can be added by selecting **Add search criteria**. Currently only AND is an available search criteria operator, though OR will be available in a future release.

Lines of search data that are not filled in will be ignored during the search.

6. After all search criteria has been entered, click **Apply Search**.

Pills of the search criteria will display above the search results.



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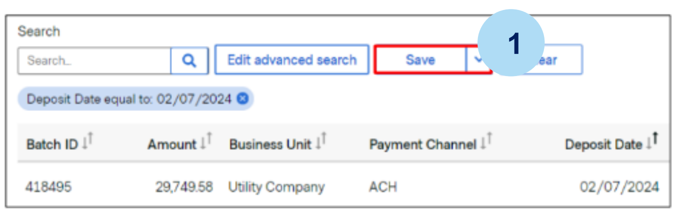
Edit advanced search can be used to return to the **Advanced Search** screen and modify the search, or **Clear** can be selected to return to the default **Search** screen and automatically clear all search options.

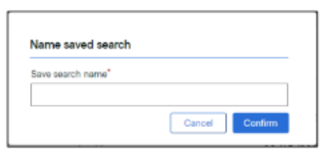
Save Search

After a search is performed, it can be saved using the **Save** option. The **Save** feature saves search criteria, the table column list and order active at the time the user saves the search. Searches are saved only for the user's active archive page (Batches, Transactions or Transaction Items). **Save Search** names must be unique per page. Saved searches are saved on the tab as well as under **My Payment Reports** on the report page (if the user has access to the report page).

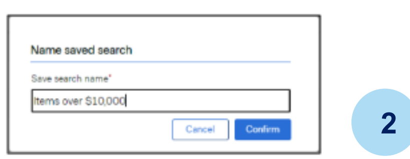
1. Click **Save**.



The following screen displays.



2. Provide a name for the search and click **Confirm**.



Note: Currently, this is only saved under the user account and cannot be shared among users.

Once saved, the **Save** button will change to **Saved** and will have a blue background. This search is currently applied to the **Archive** screen.

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The user can click **Clear** to remove the saved search, which will reset the search options and results columns to the default for this user.

Select a Saved Search

Once a search has been saved, the saved searches can be selected by a user.

1. To select a previously saved search, click the chevron next to **Saved**.

If there is a search that is currently active and applied on the screen, it will display with a checkmark and will be highlighted.

2. Select **Saved search** to apply.

The search options will automatically apply, and search results will be displayed.

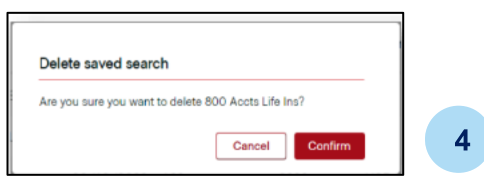
Delete a Saved Search

If the search saved becomes obsolete, it can be deleted.

1. Click the **Saved chevron**.
2. Select the search to delete.
3. Click the **Saved option** again.

A deletion message will display.

4. Click **Confirm** to delete the search.



Export Search Results

After the search results are displayed on the screen, the user can select to export a CSV, PDF or XLSX file containing the results.

1. On the search page, click **Export** on the right, and select the file type to download.

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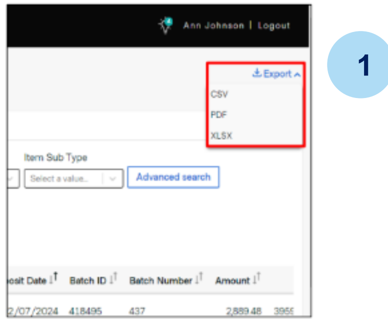
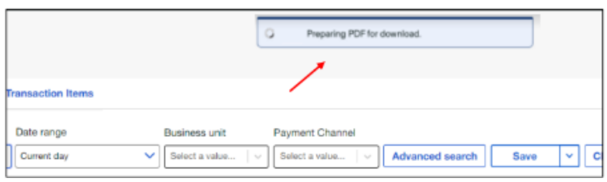
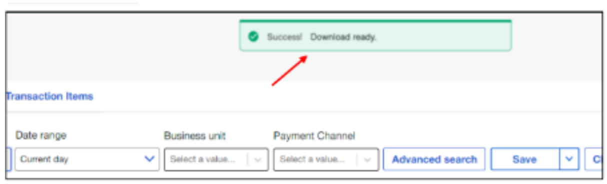


NOTE: All search results (including custom and standard fields) will be part of the download, even when there are multiple pages of data in the search results.

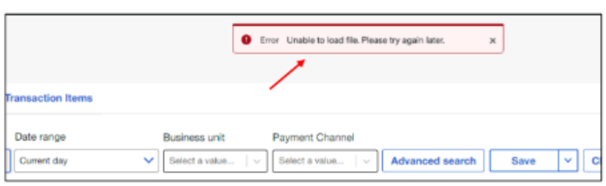
The user will receive a notification during their in-progress download, giving them a visual indication that the file download is in progress.



Once the download is complete, the user will receive a **Success notification** that the download is ready. A new tab with the report in the selected format will open.



If a user leaves the archive page while downloading the search results, they will receive an **Error warning notification**. The user will be asked to confirm they want to leave the page because doing so will require them to reinitiate the download upon returning to the archive page.



Search Result Fields (Columns) Customization

The search results (columns) that are displayed at the bottom of the screen can be customized. Different fields can be displayed as well as the order of the fields. The **Column list** and **order** are

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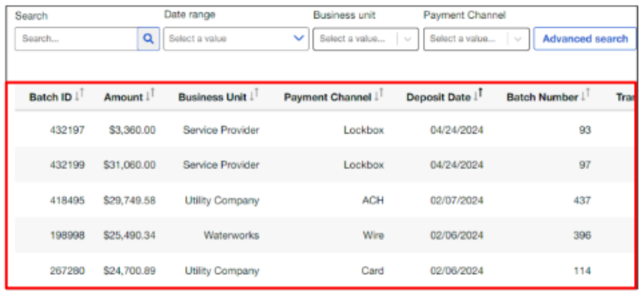
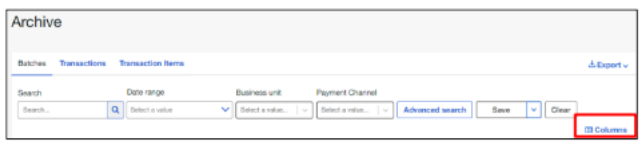
set by the user for each page/tab for their unique user login and are saved this way until they are updated again.

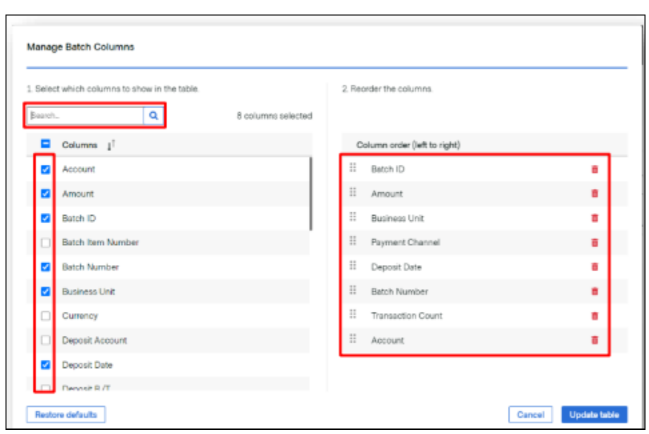
The user can choose from a list of fields for the corporation that they are searching for. If searching from an **FI level** (across all corporations), users will only be able to search across standard search fields.



The **Columns** option can be used to change the available result fields on the screen.



- Secure File Transfer Protocol (SFTP)
- The fields displayed below will vary depending on field configuration on the corporate level.
  - Column and filter labels are dynamic and reflect the field display name provided by the customer during org set up.
- Add or remove columns by checking or unchecking the box next to the field names on the left pane.
- When a field is checked on the left pane, it will display on the right pane of the screen.
- The **Search** field can be used to search for a known field name.



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- Field/columns will display in the order they are listed on the right.
- The fields can be reordered by moving the fields using the up or down arrows or by dragging and dropping.
- The field can be deleted by using the trash icon or by unchecking the field on the left side of the screen.
- **Restore Defaults** resets the column list and order by page.

Result Fields

Example Result Fields are displayed below. The fields will vary as fields can be mapped or created by a user and mapped to differing fields.

Sample Result Fields	
Field	**Details**
Account	The bank checking account or savings account associated with this payment (debit). It is the bank account from which the funds were withdrawn. On a check this is the account number in the MICR. On a stub, this is typically the customer account number.
Amount	Amount associated with this payment; this is the deposit amount of a single item.
Batch ID	The unique identifier is assigned to the batch by the source system.
Batch Item Number	Used to order items within a batch. If this field is not supplied, it will be populated with a rolling number starting at 1 for each batch
Batch Number	The secondary identifier assigned to the batch by the source system (does not need to be unique).
Business Unit	The client to whom the payment was made.
Currency	The type of currency used for the deposit of this payment (i.e., USD = US Dollar).
Deposit Account	This is the deposit Account number for the corporate customer. The bank account number where the money is deposited. This DDA is the DDA that is used for association in a multiclient file option. (Required for Payments only)

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Sample Result Fields	
Field	**Details**
Deposit Account	This is the deposit Account number for the corporate customer. The bank account number where the money is deposited. This DDA is the DDA that is used for association in a multiclient file option. (Required for Payments only)
Deposit Date	The deposit date of the deposit.
Deposit R/T	This is the ABA (or R/T) deposit of the corporate customer's bank. The bank where the money is deposited into. (Required for Payments only)
File Name	The File Name of the file where this item was imported.
Import Date	Import date created upon import.
Import Time	Import time created upon import.
Invoice Number	This only applies to document/stub and is a custom field.
Item Name	This is a display field that allows the organization to define the value to see for the item
Item Sub-Type	Represents a more defined type for the item. Examples of values for Payment Type: WIRE, ACH, Check, Lockbox, Card, Swift, CashEx of values for Item Type: For "Stub": Invoice, Check n List, Stub For "Document": Correspondence, Envelope, Letter, and Other. For Lockbox, this equates to a document name
Item Type	Represents the type of item. Allowed values are Payment, Stub, or Document. In Lockbox, a Document is a Correspondence or non-balancing type of document.
Payee	The entity that the check was written to.
Payment Channel	Free form text of what the payment source is. This is based on what payment channels a site uses and needs to search on, group by, etc., for example "ABC Lockbox System - Washington - Lockbox Feed".
Payment Type	The type of payment type for this item.

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Sample Result Fields	
Field	**Details**
Payor	The person's name or company name who made the payment. This can come from a source keying job, scanline, cross-referenced in a table function, or provided in an ACH file, Wire file, etc.
Process Date	The batch processing date. Represents the operational date the batch was processed in the source system. yyyy-mm-dd (operational date batch processed in source system)
R/T	The R/T associated with this payment (debit). It is the bank from which the funds were withdrawn. On a check this is the RT in the MICR line.
Status	Allowed values “Deposited” or “Rejected.”
Trace Number	This field can vary based on the field mapping performed by the user.
Tran Code	Many times, this is defined as the check number on the check. This can vary as a user can map this to a different type of field
Transaction Code	Used to order transactions within a batch. If this field is not supplied, it will be populated with a rolling number starting at 1 for each batch

Click **Update table** to save the search results fields.

The search results columns will be saved for this user in future searches. This table customization only applies to the active archive page (**Batches, Transactions** or **Transaction Items**).

Notes for Archive Items

After an archive item is located and researched, a user may want to add a note regarding the item. Up to 100 notes can be added to an item. Notes will be presented chronologically with the newest note on top**. Notes can never be deleted.**

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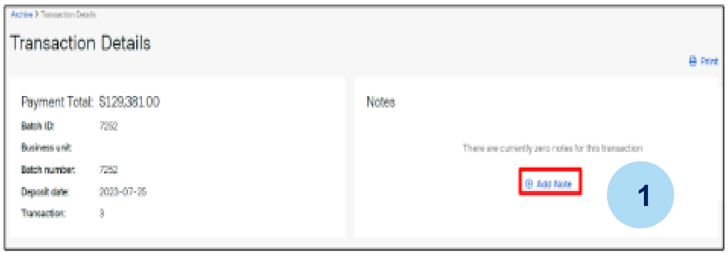
Add a Note

Notes can be added to a transaction on the **Transaction Details** page. Up to 100 notes can be entered. Remember, notes cannot be deleted.

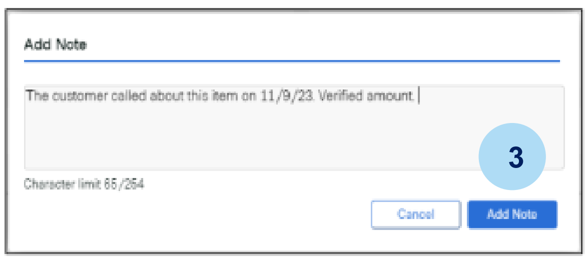
1. On the **Transaction Details** page, click **Add Note**.



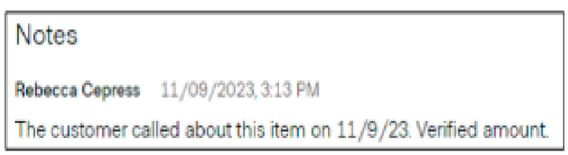
2. Enter a note for the item. Once saved, the note can never be deleted.

   NOTE: Up to 254 characters (letters, numbers, or special characters) can be entered.

3. Click **Add Note**.

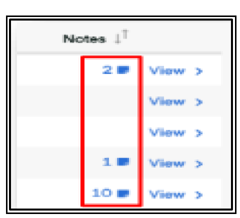


NOTE: The user's first and last name and the timestamp will be displayed with the note text.



View a Note

Notes can be viewed by clicking the number next to the sticky note in the **Notes column** of the **Transactions Summary** page. Notes can also be viewed on the **Transaction Details** page.



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