BANC OF CALIFORNIA

USER GUIDE:

REMOTE DEPOSIT ADMIN

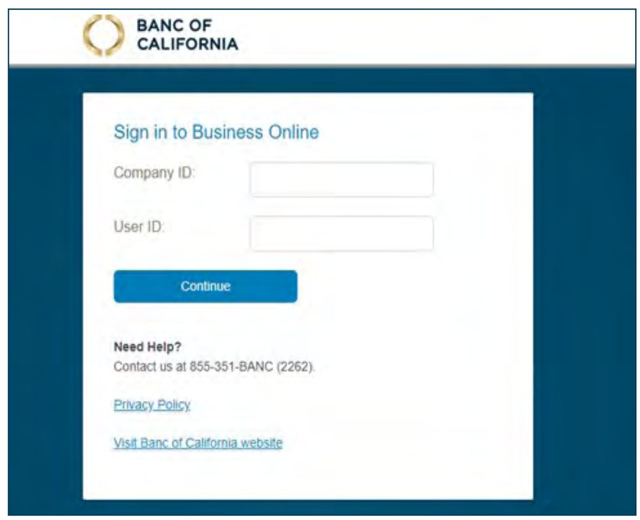
User Guide:
Remote Deposit Admin

Step 1: Adding a user

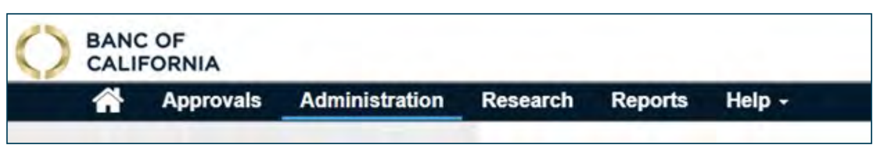
NOTE: Only the Company Administrator has access to this function. You are required to add the user in BOC Remote Deposit before enabling the convenience link in Online Banking for Business for the new user.

Enabling a user in BOC remote deposit.

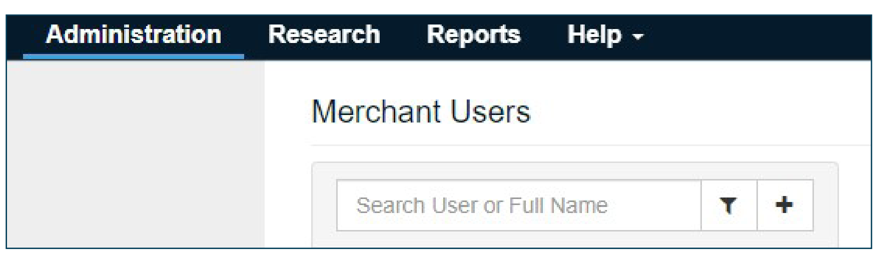
1. Log in to online banking at bancofcal.com. In the upper right-hand corner, click the **Online Banking** button. A drop-down menu will appear. Click on **Business Online Login**.
2. Enter your Online Banking for Business user credentials.
3. In Online Banking for Business, hover over the Account Services menu drop-down, and then click **Remote Deposit Check Capture**.
4. This will bring you to the Remote Deposit portal where you can begin administering users.



5. Click **Administration** from the menu bar.



6. Click Add User **(+)** icon found in top-right corner of Merchant Users pane.



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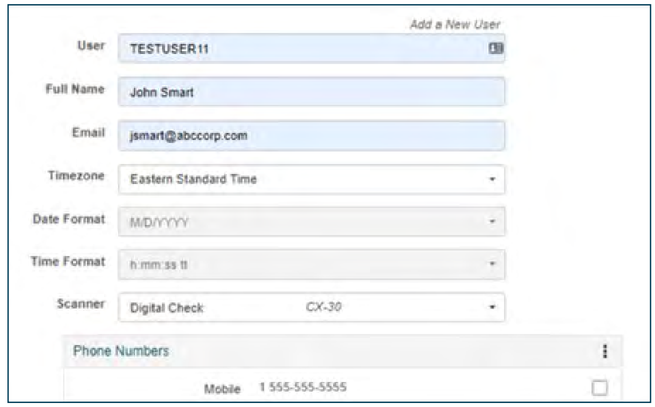
(cont'd) Enabling a user in BOC remote deposit.

7 Enter the user's information in the following required fields:

- User – User name that will be linked to Online Banking for Business user profile.
- Full Name – User's first and last name.
- Email – The email address for the user to get deposit notifications.
- Time zone – The preferred time zone for user that will reflect on reports.
- Phone Numbers (optional) – Phone number(s) can be added by clicking the vertical ellipsis and selecting Add.
  After entering name and phone number, click the plus **(+)** button to save phone number.
- Scanner – Desktop scanner model to be used for scanning.

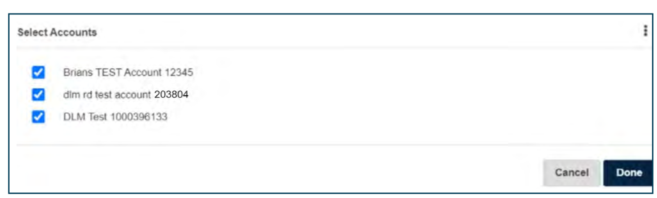


8 Next to Roles, click the **horizontal ellipsis,** and check one or more of the following roles, and click **Done**:

- Admin – Merchant admin user who can add, delete and restrict user access in addition to approving deposits.
- Desktop Operator – Merchant user who can only scan deposits.
- Manager - Merchant user who can scan, approve and submit deposits.
- Supervisor - Merchant user who can scan, approve and submit deposits in addition to managing user access. **RECOMMENDED ROLE**

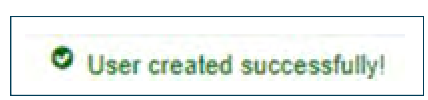
9 Next to Locations, click the **horizontal ellipsis**, and check one or more of the locations and click **Done**. You can also click the **vertical ellipsis**, and click **Select All** to enable all locations.

10 Next to Accounts, click the **horizontal ellipsis**, and check one or more of the locations, then click **Done**. You can also click the **vertical ellipsis,** and click **Select All** to enable all accounts.



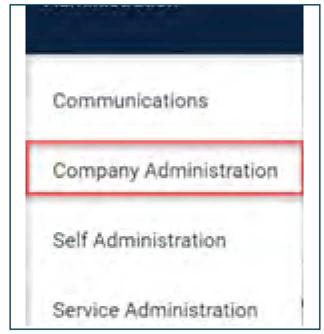
11 Click **Save** when ready to finalize user profile.

12 A success message will appear once the user is created.

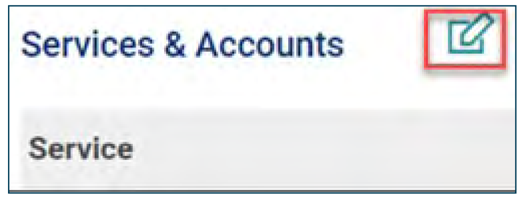


Step 2: Enabling a user in online banking for business

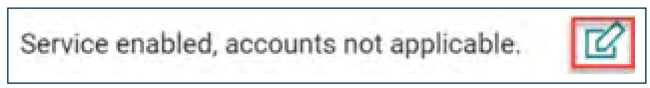
1. In Online Banking for Business, hover over Administration in the menu bar, and then click **Company Administration**.



2. Select the user by clicking the **User ID**. Under the Services & Accounts section, click the **Edit Services & Accounts** icon as seen on the right.



3. Next to BOC Remote Deposit, click the Add **(+)** icon.
4. Once the service has been added, click the **Edit Services** icon as seen on the right.



5. Enter in the User name that was assigned to the user in BOC Remote Deposit in order to link to their Online Banking for Business user profile.

6. Click **Save Changes** at the bottom of the screen to confirm the changes.
7. After saving, the user can now access BOC Remote Deposit using the link within Online Banking for Business.

Updating a user

1. Click **Administration** from the menu bar, then select the user you want to modify from the left Merchant Users pane.
2. Make all necessary changes, including any updates to roles, locations and accounts.
3. Click **Save** at the bottom of the page.

Re-enabling a user

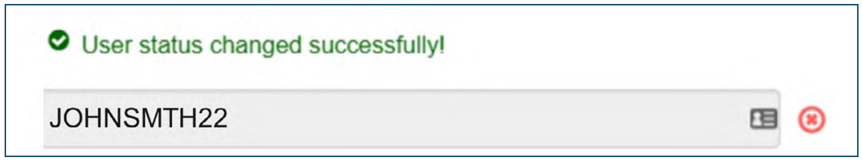
The administrator is responsible for re-enabling an employee's profile. If the administrator is locked out, please contact support.

1. Click **Administration** from the menu bar, then select the user you want to enable from the left Merchant Users pane.
2. Click the **vertical ellipsis** in the top-right corner of the page, and then select Enable User. The user profile will be changed back to Enabled.

Disabling a user

1 Click **Administration** from the menu bar, then select the user you want to enable from the left Merchant Users pane.

2 Click the **vertical ellipsis** in the top-right corner of the page, and then select Disable User. The user profile will be changed to Disabled, signified by a red X.



Deleting a user

1 Click **Administration** from the menu bar, then select the user you want to delete from the left Merchant Users pane.

2 Click the **vertical ellipsis** in the top-right corner of the page, and then select Delete User.