

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.

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.

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- 2 Enter your Online Banking for Business user credentials.
- 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.

Sign in to Busin Company ID:	ess Online	
User ID:	<u></u>	
Need Help? Contact us at 855-351	-BANC (2262).	
Privacy Policy Visit Banc of California	a website	

- 5 Click **Administration** from the menu bar.
- 6 Click Add User (+) icon found in top-right corner of Merchant Users pane.

Approva Approva	lls Administra	tion Resea	rch Reports	Help -
Administration	Research	Reports	Help -	
	Mercha	ant Users		
	Sear	ch User or Full	Name	τ +

(Cont'd on next page)



## (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.

		Add a New User	
User	TESTUSER11	08	
Full Name	John Smart		
Email	jsmart@abccorp.com		
Timezone	Eastern Standard Time	•	
Date Format	MDMMY	+	
Time Format	h.mm.ss ti	•	
Scanner	Digital Check CX-30	•	
Phone	Numbers		i
	Mobile 1 555-555-5555		

- 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.

<b>v</b>	Admin	Merchant admin user who adds/del/restricts users - approves deposits
9	Desktop Operator	Merchant user can capture deposits on a desktop
	Manager	Merchant user that can create/approve/submit deposits
V	Supervisor	Merchant user that can create/approve deposits in addition to managing users. ** RECOMMENDED

- 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.
- Select Locations.

Select.	Accounts		1
	Brians TEST Account 12345		
	dim rd test account 203804		
	DLM Test 1000396133		
			_
		Cancel	Done

- **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

- In Online Banking for Business, hover over Administration in the menu 1 bar, and then click **Company Administration**. Communications Company Administration Self Administration Service Administration 2 Select the user by clicking the **User ID**. Under the Services Services & Accounts & Accounts section, click the Edit Services & Accounts icon as seen on the right. Service Next to BOC Remote Deposit, click the Add (+) icon. 3 4 Once the service has been added, click the Edit Service enabled accounts not applicable 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.

	ocritice chubica, accounts not applicable.	
Link the	e user to this Remote Deposit Check Capture user I	ID:

TESTUSER11

- 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.

User status changed successfully!	
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## **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.