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BUSINESS

Mobile Banking User Guide

Questions? Please contact us at 888.928.3936.



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MOBILE BANKING - OVERVIEW & NAVIGATION

Mobile Banking is a comprehensive banking solution that encompasses two modes of Mobile Banking: Mobile Web and downloadable application.

- Mobile Web - allows a user to access their bank accounts via a compatible browser on a mobile device
- Mobile App - allows the user to access their bank accounts via an application that is downloaded to the mobile device (smart phone or tablet).

NOTE: Users must be enrolled in Online Banking for Business with an existing username and password to enroll in mobile banking.

MOBILE BANKING FEATURES

	MOBILE APP	MOBILE WEB
View Account Balance	✓	✓
View recent account activity	✓	✓
Internal account transfers	✓	✓
Pay Bills to existing payees	✓	✓
Deposit Checks	✓	

NOTE: Because both Mobile Web and Mobile App modes require users to provide login credentials in order to see their account information both modes are subject to a time-out period. After five minutes of inactivity the user is automatically logged out of mobile banking for security purposes. This will happen regardless of whether the mobile browser or mobile banking application is the current app in focus.

NAVIGATION

1. The Tab Bar provides users with access to all the features and functions of the mobile banking application.



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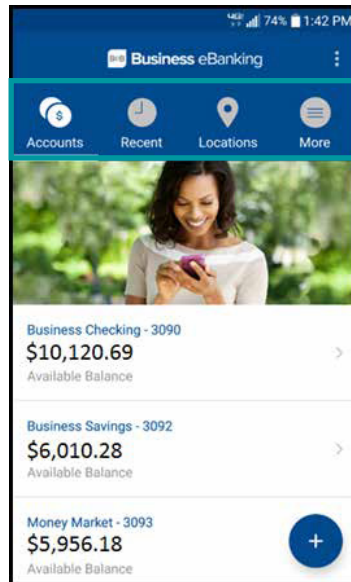
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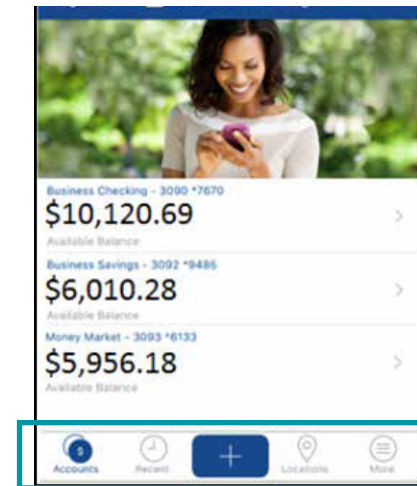
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Android



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Within the Tab Bar users will see the following options:

- **ACCOUNTS:** Balances, Recent Transactions, and Account Summary.
- **RECENT:** Recent transaction history in money movement features such as Bill Pay and Check Deposit.
- **NOTE:** The Recent Bill Payments and Check Deposits screens will show up to 30 days of history. Users can scroll through the payments if there are more items than will fit on a screen.
- **TASK MENU (PLUS SIGN):** Allows access to features of Mobile Banking such as Bill Pay, Transfers, and Check Deposit.
- **LOCATIONS:** Find Bank Branches or ATMs.
- **MORE:** Gives access to help content and an About screen.

NOTE: On an Android device, 4 of the 5 Tab Bar elements appear at the top of the screen. However, the Task menu is located at the bottom of the screen.

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2. Log off using the **Sign Off** button.

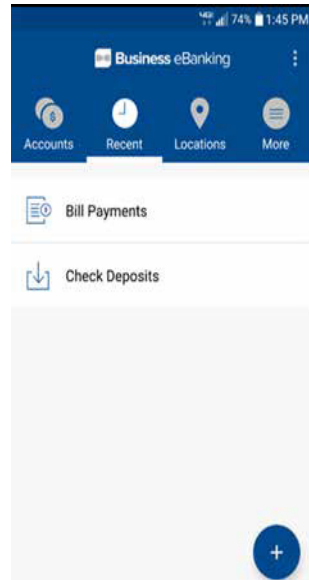
Android



iPhone



3. Select **Recent** to view recent money movement history
4. Select **Bill Payments** or **Check Deposits** as desired to view relevant recent transactions.



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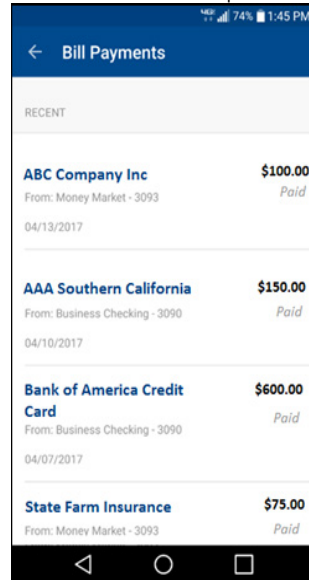
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5. View the respective history for the selected feature.



6. Click the Task menu (Plus symbol) to access the Transfer, Pay Bill and Deposit features

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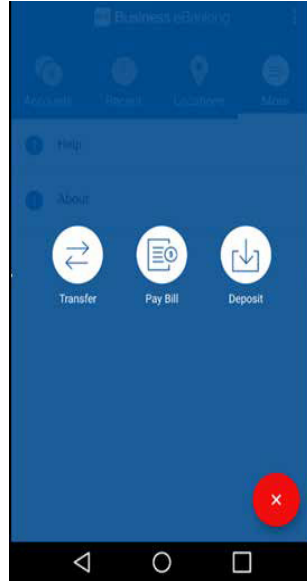
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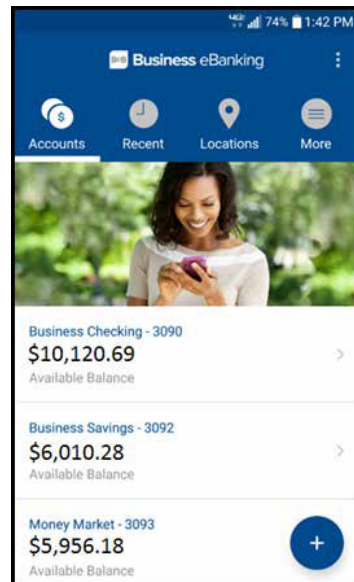
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7. Click the desired feature, or hit the red X to return to the previous screen.

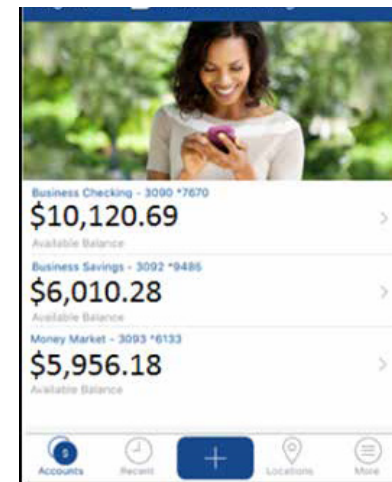


8. The Account dashboard page displays all available accounts in Mobile Banking. Scroll down the page to view the accounts.

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BIOMETRIC LOGIN

Mobile Banking app users can log in using Face ID or Touch ID (iPhone), or Fingerprint ID (Android).

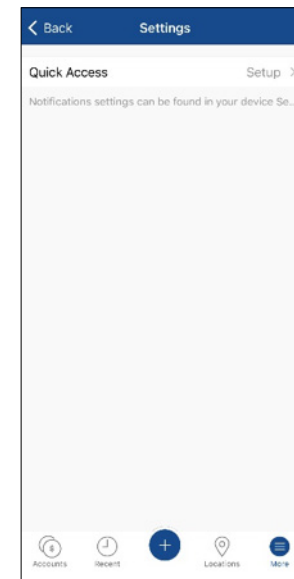
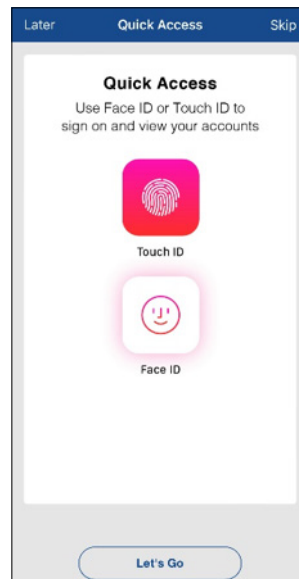
To begin using Biometric Login, you must have the latest version of the Mobile Banking app installed on your mobile device.

SET UP BIOMETRIC LOGIN

Once the Mobile Banking app is downloaded on your mobile device, you must activate the appropriate biometric identification type on your mobile device via the device's Settings.

IPHONE

1. Log in to the Mobile Banking app on your device using your existing login credentials.
2. Upon your first login, the app will prompt you to set up Touch ID or Face ID.
3. Click **LET'S GO** to continue to setup.
4. Click **SETUP**.



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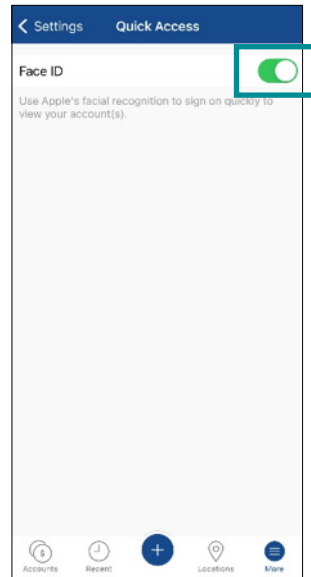
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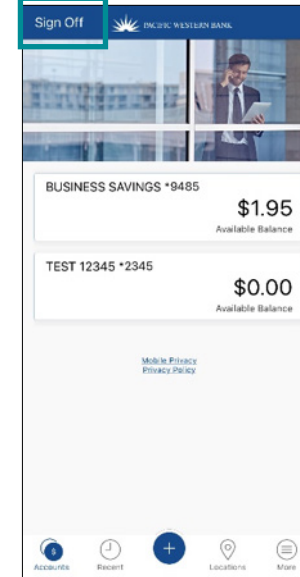
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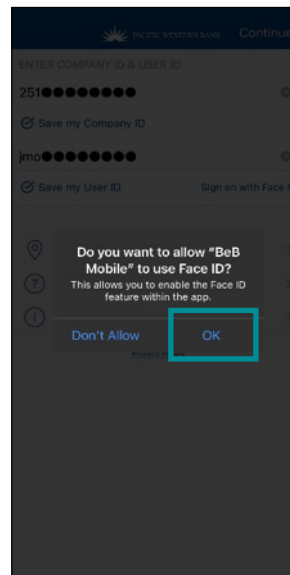
5. Ensure Face ID or Touch ID is active (green).



6. **SIGN OFF** from the app and close it fully.



7. The next time you attempt to log in to the Mobile Banking app, you'll be prompted to allow the identification method you specified previously. Click **OK**.



8. Touch ID / Face ID is now activated.



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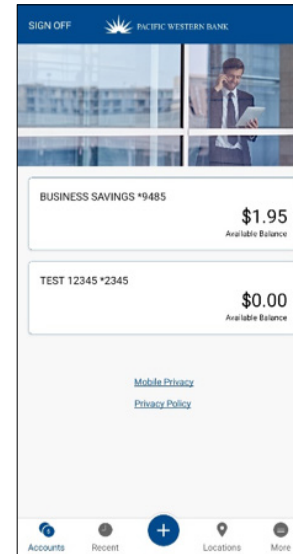
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ANDROID

1. Log in to the Mobile Banking app on your device using your existing login credentials
2. Click **MORE**.



3. Click **SETTINGS**.
4. Click **SETUP**.



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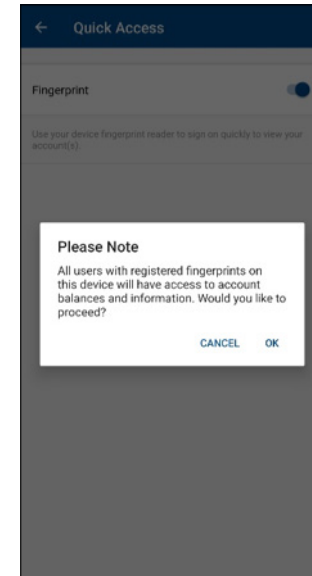
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5. Toggle **Fingerprint** to **On** position.



6. Click **OK**.



7. Fully shut down the Mobile Banking app. Fingerprint ID will be active the next time you attempt to log in to Mobile Banking.

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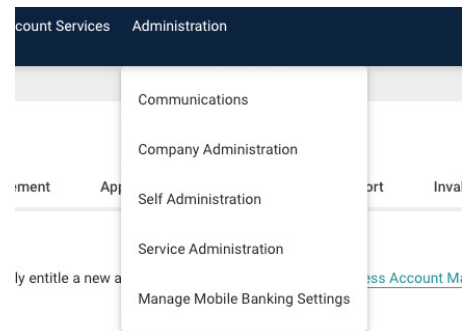
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SUB USER ENTITLEMENTS FOR MOBILE BANKING

Company Admins are responsible for entitling sub users for Mobile Banking.

1. Navigate to the **Administration** menu in Online Banking for Business and select **Company Administration**.



2. Select the desired sub user.

NOTE: If this is a new user, click on **Create New User** and follow the prompts to set up the new user profile.

Company Administration

Manage Users Account Information Express Account Management Approval Settings User Setup Report Invalid Login Report ACH File SEC Codes

User Administration

Review the options listed below for available user administration tasks. To quickly entitle a new account for company users, go to [Express Account Management](#).

New User

You will have an opportunity to copy an existing user during the process.

[Create New User](#)

Manage Existing Users

To manage a user's profile, roles, service & accounts, system access, or change limits, click on the appropriate user ID.

User ID	First Name	Last Name	Status
AJULIEN	Alyssa	Julien	Inactive
ALEOS	AMINA	LEOS	Inactive
ASINGH	Ankita	Singh	Active
AVASNI17	Andrea	Vasquez	Inactive

[System Access](#)

[System Access](#)

[Got Questions? We can help](#) +



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3. Ensure that the user has at least one phone number listed as a “Mobile” phone.

NOTE: This is required in order for the user to validate their identity when logging in to Mobile for the first time.

User Profile

To edit the user's profile, click the appropriate edit link. To delete the user, click "Delete User". To modify

To view a different user profile, return to [User Administration](#).

User Information



Name:	LITTLE MERMAID
User ID:	TESTINGD1
User Status:	Active
Token Device Fulfillment Date:	N/A
Token Device Serial Number:	

4. Review the user's roles. The Approval role is the only role that impacts Mobile Banking. To enable the user to make internal transfers and bill payments in Mobile Banking, click **Allow this user to approve transactions**.

- Make an internal transfer.
- Make a bill payment (to an existing payee)

Roles



Roles

Administration

Edit Roles

Edit the user's roles and click "Save Changes". Editing the user roles could affect the user's access and functionality, including the cancellation of sched

[Return to User Profile](#)

User: TESTINGD1 (LITTLE MERMAID)

User Roles (Optional)

☐ Allow user to setup templates.
(This entitles the user to template setup and template approval capabilities for only those services and accounts to which the user has been entitled.)

☒ Allow this user to approve transactions
(This entitles the user to transmit capabilities for only those services and accounts to which the user has been entitled.)

☐ Grant this user administration privileges
(This will allow the user to add, modify, copy and delete users, modify their roles, services and account access, rename accounts, and modify the number of approvers required for requests.)



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5. Click **Save Changes**. If no changes were made, click **Return to User Profile**.

Edit Roles

Edit the user's roles and click "Save Changes". Editing the user roles could affect the user's access and functionality, including the cancellation of scheduled

[Return to User Profile](#)

User: TESTINGD1 (LITTLE MERMAID)

User Roles (Optional)

☐ Allow user to setup templates.

(This entitles the user to template setup and template approval capabilities for only those services and accounts to which the user has been entitled.)

☐ Allow this user to approve transactions

(This entitles the user to transmit capabilities for only those services and accounts to which the user has been entitled.)

☒ Grant this user administration privileges

(This will allow the user to add, modify, copy and delete users, modify their roles, services and account access, rename accounts, and modify the number of approvers required for requests.)

Save Changes

Do not save changes

6. In the User Profile screen, scroll to the Services & Accounts section and click the edit button.sub user to use only certain accounts for that specific service.

Services & Accounts



Service

Information Reporting

Statements and Documents



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- Click the Plus sign to add services.

Services & Accounts

To enable a service and assign accounts, click the appropriate link. To disable all services and accounts, click "Clear All".

A green dot (●) indicates that you have added or changed a service. The red (x) indicates that you have removed a service. To submit changes click "Save Changes" at the bottom of the screen.

2 of 44 services enabled

[Clear All](#)

Service	
ACH File Upload	+
ACH Positive Pay	+
ACH Reporting	+
Autobooks	+
AUTOMATED REPORTS	+

- Add the **Information Reporting** and **Mobile Banking** services with at least one account entitled. Without these services, the user will receive a "No Accounts Found" error when accessing Mobile Banking.
- Add Mobile RDC (Remote Deposit Capture) to enable users to make check deposits via the mobile app. Enable the user to deploy Mobile RDC for the available accounts as applicable.

Mobile Banking	+
Mobile RDC	+

- Click **Save Changes**.

Wire USD Intl One Time

Wire USD Intl Template Based

Save Changes

Do not save changes



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MOBILE - MOBILE DEPOSITS

Mobile Deposit provides two main functions for users.

- Deposit Checks: Allows users to deposit checks from their mobile device.
- Review Deposit History: Allows users to see a 30 day history of all deposit items that have already been processed.

MAKING A DEPOSIT

1. To access initiate a mobile deposit, select the Task menu (plus sign) in the task bar of the application.

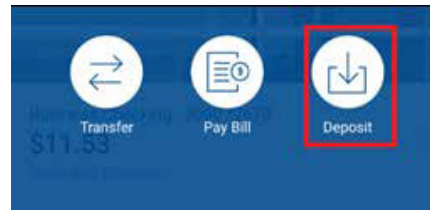
Android



iPhone



2. Select **Deposit**.



3. Select **Continue**.

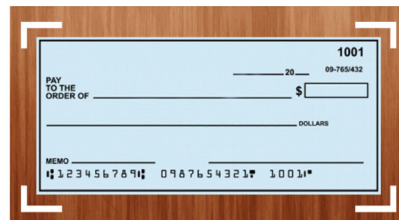
NOTE: If a user does not have entitlements to "Mobile RDC", the following error message displays: "You do not have any accounts authorized for check deposit."



Depositing Checks is Easy

Place your check on a flat surface with a dark background and good lighting.

Tap **Continue** to get started.



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4. Read the notice and click **Continue**.



All Mobile Check Deposits are subject to our verification and final review and may be rejected by us for any reason. Your deposit is not approved until you have received an approved email notification.

Funds Availability- Deposits made on a business day before 6:00 PM PT will be processed same day. All deposits will be subject to the Funds Availability Schedule.

Check Endorsement - Endorsing the back of the check is required.

Check Retention - Mark your check as deposited and retain for 30 days, then securely destroy.

5. If prompted, allow the app to access your device's camera.

6. Provide the requested check photos and information.

- **FRONT:** Allows users to capture an image of the front of their check.
- **BACK:** Allows users to capture an image of the back of their check.
- **AMOUNT:** Allows users to enter the amount of the check they are depositing.
- **DEPOSIT TO:** Allows users to choose the account to receive the deposit.
- **EMAIL RECEIPT TO:** Allows users to enter an email address where a deposit receipt will be sent.

The user will start by selecting Front to capture an image of their check.

Cancel	Deposit	Continue
Front	Back	
Deposit To	TEST 12345 *2345 Available Balance \$3.10	
Amount	>	
Email Receipt To	example@example.com	



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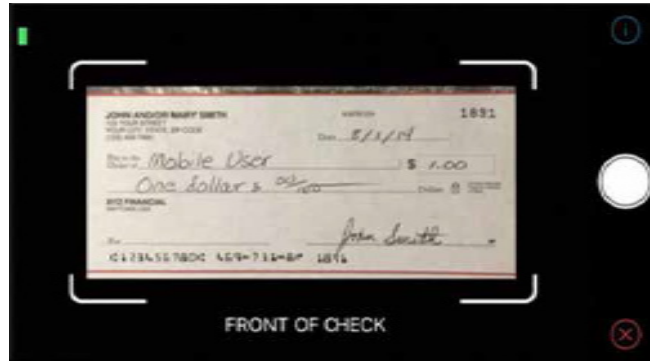
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7. Select Front to upload a picture of the front of the check.
8. Align the check within the white brackets against a dark background and click the shutter (white dot) to take the photo. To cancel the photo, click the red X.



9. Click the green check mark to accept the photo. To retake the photo, click the red arrow.



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10. To capture the back side of the check, click Back and repeat steps 8 & 9.

NOTE: For best results, the check should be placed on a dark background. All four corners of the check must also fit within the boundary indicated by the app.

← Deposit CONTINUE

Front Back

Amount >

Deposit To >

Email Receipt To example@example.com

11. Select **Amount** and use the keypad to enter the check amount exactly as it appears on the check.

12. Click **Done**.

← Amount DONE

\$425.00

1	2	3
4	5	6
7	8	9
⌂	0	Done

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13. Tap the **Deposit To** field to select the account into which the funds will be placed.
14. Select the account to receive the deposit from the list of eligible accounts.

15. Enter an email address in the **Email Receipt To** field.

NOTE: The last used email address will prefill if the user has completed a deposit before via either the phone or tablet application.



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16. Verify the information and tap **Continue**. To end the process and start over, press **Cancel** and then **Yes** in the prompt.

17. If the user pressed Continue in the previous step, the app will verify the submitted information. Resupply or correct any information as prompted during the verification stage. If the system accepts the user's check images and deposit information, a dialogue box appears asking the user to approve their deposit. Users can select cancel to make any changes to the deposit information. The user will select Approve to upload the check information and continue.
18. Verify the information and click **Approve**. Tap **Cancel** to make any needed corrections.
19. View deposit confirmation in green at the top of the Accounts screen.

NOTE: The bank is responsible for ensuring the check is eligible for deposit. Users receive an email confirmation upon acceptance, or email notification if the check is denied.

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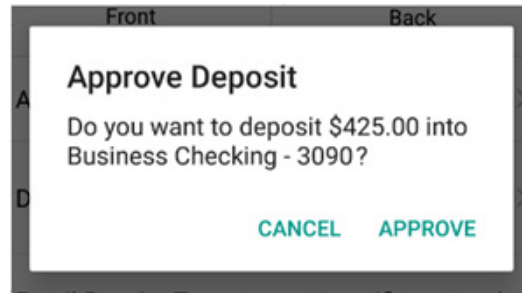
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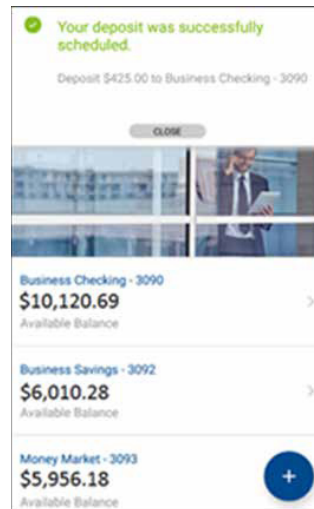
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Email notification when a deposit is submitted by the user and received by the bank:

This is to notify you that a deposit of \$XX.XX has been received through our mobile application. You will receive a separate notification when the deposit has been approved.

Please note that items received after 6:00 pm PST or on a non-business day will be processed on the next business day. If you need further assistance, please contact Pacific Western Bank at 800.350.3557.

Please do not respond to this message or send email to this address. This message is for information purposes only. Email should not be considered secure and should not be used for account related questions.

Thank you,

Email notification when the deposit has been approved:

This is to notify you that your deposit of \$XX.XX has been approved. Funds will be available within two business days, unless you are notified otherwise.

If you need further assistance, please contact Pacific Western Bank at 800.350.3557.

Please do not respond to this message or send email to this address. This message is for information purposes only. Email should not be considered secure and should not be used for account related questions.

Thank you,

Email notification if the deposit has been denied:

This is to notify you that your recent deposit of \$XX.XX made through our mobile application was declined due to the following reason: "(reason inserted)".



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If you need further assistance, please contact Pacific Western Bank at 800.350.3557.

Please do not respond to this message or send email to this address. This message is for information purposes only. Email should not be considered secure and should not be used for account related questions.

Thank you,

Email notification if a deposit is approved for an amount that is different from the amount entered by the user when submitted:

This is to notify you that your deposit of \$XX.XX has been approved. Funds will be available within two business days, unless you are notified otherwise.

A correction to this deposit for \$ YY.YY was made to adjust for a difference in your submitted deposit amount of \$ XX.XX and the amount of the actual check deposited.

If you need further assistance, please contact Pacific Western Bank at 800.350.3557.

Please do not respond to this message or send email to this address. This message is for information purposes only. Email should not be considered secure and should not be used for account related questions.



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Thank you,

MOBILE BANKING - MOBILE BILL PAY

Mobile Banking Bill Pay allows the following main functions for users:

- **PAY BILLS:** Allows users to schedule one-time payments to their existing payees.
- **SCHEDULED PAYMENTS:** Allows users to view payments that have not yet processed and cancel them if necessary.
- **RECENT PAYMENTS:** Allows users to see 30 days of payment history for bill pay items that have already been processed.

NOTE: All users will see the bill pay links in their mobile banking interface whether or not they are an existing bill pay user.

A user must already have access to online bill pay in order to use the Mobile Banking Bill Pay functionality. Because Mobile Banking Bill Pay is dependent on existing online bill pay access, payment transactions made in either interface will show in both platforms.

Some functions are not available in the mobile app and users who wish to perform the tasks below will need to use the online interface:

- Schedule recurring payments in Mobile Banking Bill Pay
- Edit scheduled payments in Mobile Banking Bill Pay (they can only be canceled).
- View or set-up eBills in Mobile Banking Bill Pay
- Approve a payment that was initiated by another user
- Adding new payees

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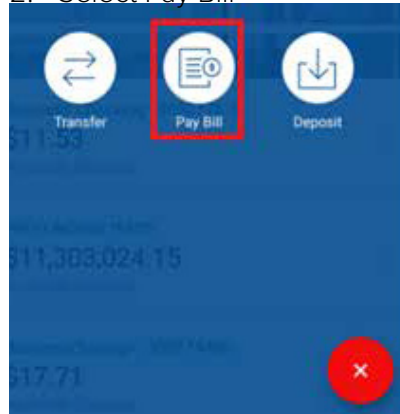
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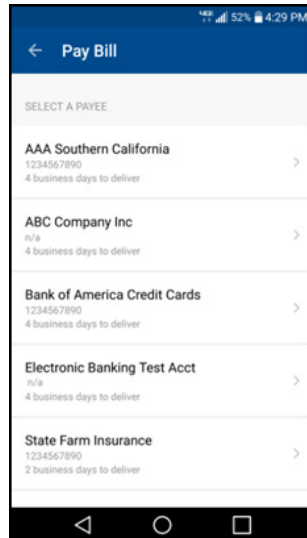
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1. Tap the Plus menu in the app's task bar.
2. Select Pay Bill



NOTE: If a user is not enrolled in Bill Pay, the following error message displays: “You do not have any accounts authorized



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to pay from.” The user will not be able to continue with the bill payment service.

3. Select an existing payee from the list.
4. Select any of the fields to begin. The example in this guide begins with **Pay From**.
 - **PAY FROM:** Allows the user to select the account which will be used to fund the payment.
 - **SEND ON:** Allows the user to select the date upon which the payment will be sent.
 - **AMOUNT:** Allows the user to input the amount of the payment.

- **MEMO:** Allows the user to enter an optional memo on their payment.

5. Select the account that will fund the bill payment.

NOTE: The only accounts that will appear on this screen are the accounts that have already been made available for



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payment in the user's online bill pay interface.

6. Tap **Send On** to select a custom payment date or use the pre-filled date, which is the next available payment based

A screenshot of the "Pay Bill" screen in a mobile app. The screen has a blue header with a back arrow and the text "Pay Bill", and a "CONTINUE" button. Below the header, it shows "State Farm Insurance" with a note "2 business days to deliver:". The "Pay From" section shows "Business Checking" and "Available Balance \$10,95". The "Send On" section shows "04/24/2017". There is an "Amount" field and a "Memo (optional)" field. At the bottom, a note states "Payment will be sent on the selected date.".

on the selected payee.

7. Select the desired custom date from the calendar. Non-processing days are grayed out to prevent their selection

NOTE: It will take 4 business days to deliver for a check payment. it will take 2 business days to deliver for an electronic payment

8. Tap **Done**.

A screenshot of a date selection calendar. The calendar shows April 2017 and May 2017. The date 24 is selected. A red box highlights the "DONE" button in the top right corner. At the bottom, a blue bar indicates "2 days to deliver. Send On: 04/24/2017".

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NOTE: Non-processing days are greyed out to prohibit selection in the calendar.

9. Tap the **Amount field**.
10. Use the number pad to enter a payment amount.
11. Tap **Done** after entering the correct amount

NOTE: It is important that the user enters the payment amount in dollars and cents. Otherwise their amount will be



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entered incorrectly. For example, entering “500” will pay \$5.00 instead of \$500.00.

12. Tap the **Memo (optional)** field to enter memo, if desired (entering a memo is not required to process the transaction)

A screenshot of the "Pay Bill" screen in a mobile app. The screen shows details for a bill from "State Farm Insurance" with a due date of "04/24/2017" and an amount of "\$65.00". The "Pay From" account is "Business Checking - ...". The "Memo (optional)" field is highlighted with a red rectangular box. Below the form, it says "Payment will be sent on the selected date.".

13. Verify the information is correct and tap **Continue**.

14. Verify the payment terms and tap Approve to submit the payment for processing

A screenshot of the "Approve Payment" dialog box. The dialog asks: "Do you want to pay State Farm Insurance from Business Checking - 3090 for the amount of \$65.00 on 04/24/2017?". At the bottom, there are two buttons: "CANCEL" and "APPROVE". The "APPROVE" button is highlighted with a red rectangular box.

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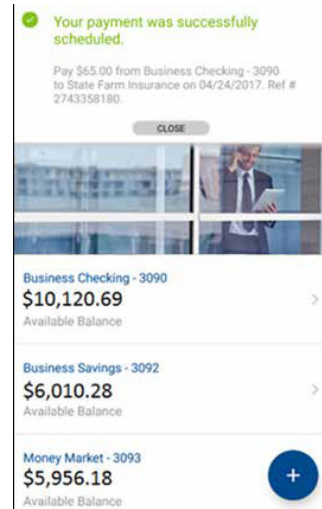
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- Click Cancel to delete the payment request

15. View the success notification (green font) and payment information at the top of the screen. Note the confirmation number for your records.



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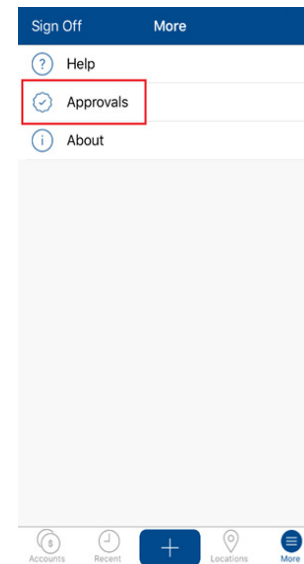
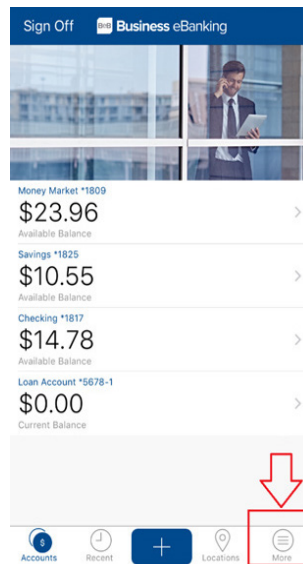
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Online Banking users with the appropriate entitlements may access the Approvals menu in the mobile app to approve the following items:

- Internal Transfers
- Payments
- Templates
- User Administration changes

1. To access Approvals, select the More menu in the taskbar



2. Tap **Approvals**.
3. Tap the item you'd like to approve from either the **Today** or **Scheduled** tab.

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NOTE: Users may approve only one item at a time.

Approvals		
Today		
WIRE DOMESTIC ONE TIME		
*1817-Checking	\$1.05	Test Me
*1817-Checking	\$0.01	Test and Joh...
*1817-Checking	\$0.02	Ricky Hender...
*1817-Checking	\$0.05	Kirby Puckett
*1817-Checking	\$0.01	Test
*1809-Money Market	\$0.50	TEST
*1817-Checking	\$0.25	TEST
*1817-Checking	\$11000.00	Mr. Test Jack...

Details	
Wire Domestic One Time	
Originating account	*1817-Checking
Recipient name	Test Me
Destination account	*6676
Effective date	03/23/2018
Amount	\$1.05
Entered by user ID	[REDACTED]
Entry date and time	03/23/2018 2:39 PM
Approval status	3 of 3 remaining

4. Review the information and click **Approve**.
5. Approval requires multi-factor authentication. Select the cell phone number to receive the security code, and click **Continue**.

Challenge	
An extra layer of security is needed.	
Select your mobile phone number to receive a security code by text message.	
XXX-XXX-9761	✓
XXX-XXX-3803	

Challenge	
We've texted you a security code. Please check your mobile phone and enter the code below.	
Security Answer or Code	



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6. View the confirmation screen and click Done when finished.

NOTE: The Approval Status at the bottom of the page will show if additional approvals are still needed for the item before it is complete.

Confirmation	Done
This item was successfully approved.	
Wire Domestic One Time	
Confirmation number	2268719291
Item status	Entered
Originating account	*1817-Checking
Recipient name	Test Me
Destination account	*6676
Effective date	03/23/2018
Amount	\$1.05
Entered by user ID	[REDACTED]
Entry date and time	03/23/2018 2:39 PM
Approval status	2 of 3 remaining

APPROVAL ROLE AND INTERNAL TRANSFERS

Users of Mobile Banking must have the **Approval** role in order to initiate internal transfers and/or send out a bill payment via the mobile channel.

In Online Banking, a user without the approval role can submit transactions for approval:

Verify Transfer	
New transaction	
From account:	*1234 - SAVINGS 1234 - Accessible \$20,719,920.05 (Balance as of: 04/02/2012 01:50:12 PM (ET) Not a guarantee of available funds.)
To account:	*0002 - SAVINGS 002 - Accessible \$10,943.21 (Balance as of: 04/02/2012 01:52:18 PM (ET) Not a guarantee of available funds.)
Amount:	\$100.00
Frequency:	Today Only
Submit for approval	



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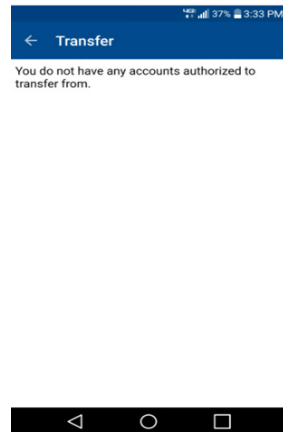
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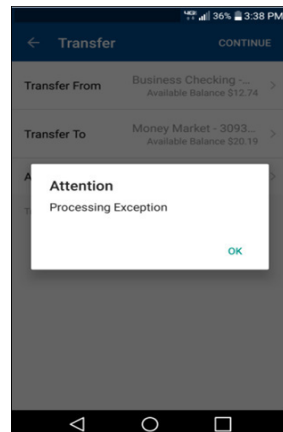
NOTE: In this example, the user enters a transfer. However, at the end of the process the user is shown a "Submit for approval" button.

In contrast, users in Mobile Banking app users are not able to enter an internal transfer without the approval role as "Submit for approval" is not an option.

In this example, the user receives the following message because they do not have the ability to approve internal transfers:



In this example, the user has the approval role, however, the company has enabled the requirement for internal transfers to be approved by a user other than the one who enters them. In this case, the user receives the following message:



In Mobile Banking, users without the approval role may only initiate a bill payment from an account they are entitled to. In order for the payment to be submitted and processed, a user with the approval role will need to approve the payment(s) within Online Banking for Business.

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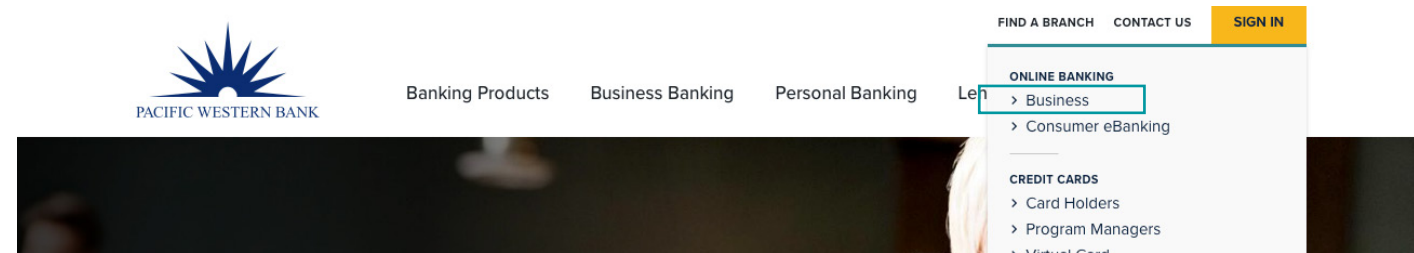
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ADDING A USER

Only the Company Administrator has access to this function. You are required to add the user in Online Business for Banking before creating a new user in Remote Deposit.

STEP 1: ENABLING A USER IN ONLINE BUSINESS BANKING

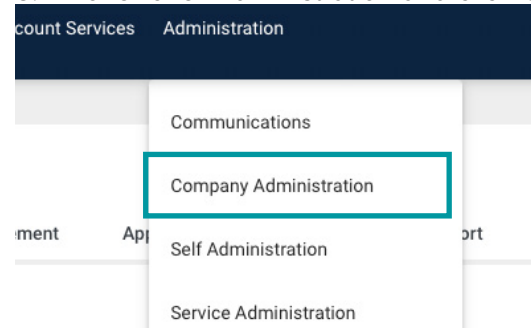
1. Log in to online banking at pacwest.com. In the upper right-hand corner, hover over SIGN IN. A drop-down menu will appear. Click on Business.



2. Enter your Online Banking for Business user credentials.

A screenshot of the "Sign in to Online Banking for Business" login form. It features two input fields: "Company ID:" and "User ID:". Below the fields is a blue "Continue" button. The form is titled "Sign in to Online Banking for Business" in blue text.

3. Hover over Administration and click **Company Administration**.



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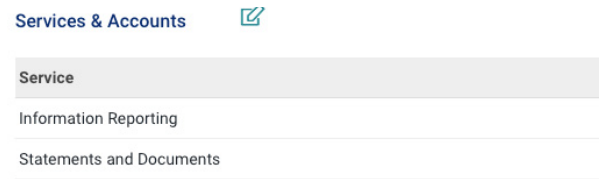
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- Click the appropriate user ID.
- Scroll to the Services & Accounts section, and click the **edit** icon.

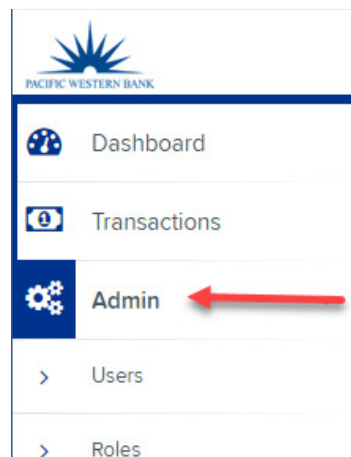


- Next to Remote Deposit, click the **ADD ICON**. Save Changes at the bottom of the screen to confirm the changes.

PPD Payment	+
Remote Deposit	+
Reverse Positive Pay	+
✓ Statements and Documents	Service enabled, accounts entitled. ✎ ⊗
Stop Payment	+

STEP 2: ENABLING A USER IN REMOTE DEPOSIT

- In Online Banking, hover over Account Services and then click on the link under Remote Deposit.
- This brings you to the Remote Deposit portal to log in.
- Select Admin from the left main menu.



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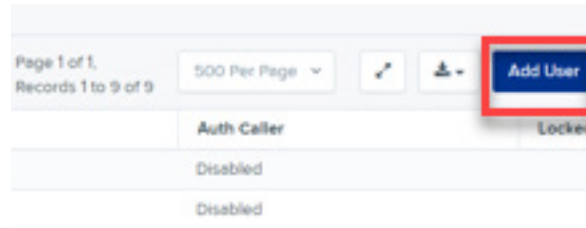
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4. Click **ADD USER**.



5. Enter the user's information in the following required fields:

- **FULL NAME** – User's first and last name
- **USER NAME** – The user's login name, not case sensitive
- **RDN ID** – Copy and paste from the User Name above
- **EMAIL ADDRESS** – The email address for the user to get deposit and password reset notifications

A screenshot of a web application interface showing a form titled "Update User Settings". The form has a header "Users / Edit User" and a sub-header "Update User Settings". Below the header, there are two checkboxes: "Enabled" (checked) and "Authorized Caller" (unchecked). The form contains several input fields: "Full Name", "User Name", "User Location", "RDN ID", "Email Address", "Auto Disable", "Dual Auth Amount", and "Dual Auth Status". The "Dual Auth Status" field is a dropdown menu with "Approved" selected.

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6. Select **Customer Services**.

Privileges for this User		
Enabled	Privilege	
<input checked="" type="checkbox"/>	Customer Services	

7. Once you have selected privileges to provide to this user, select Add. The system will create the user and allow you to select roles underneath each of the privileges assigned to them. Expand the Role within the Customer Services Privilege section and enable roles based on user functions needed.

NOTE: Some roles are required. Roles within the Customer Services Privilege:

ROLE NAME	DESCRIPTION
Credit & Debits PDF Report	Allows the user to view the Credits & Debits PDF report with check images for a batch.
Accounting	All Reporting Functionality - User can access Duplicate items & Cuustomer Reports
RTG User/Server Only	**REQUIRED**
Remote Deposit Now	**REQUIRED**

Roles within the Customer Services Privilege		
Enabled	Role Name	Description
<input checked="" type="checkbox"/>	Credits & Debits PDF Report	Allows the user to view the Credits & Debits PDF report with check images for a batch.
<input checked="" type="checkbox"/>	Accounting	All Reporting Functionality
<input checked="" type="checkbox"/>	RTG User / SERVER ONLY	Real Time Gateway, server to server activity only
<input checked="" type="checkbox"/>	Remote Deposit Now	Remote Deposit Now



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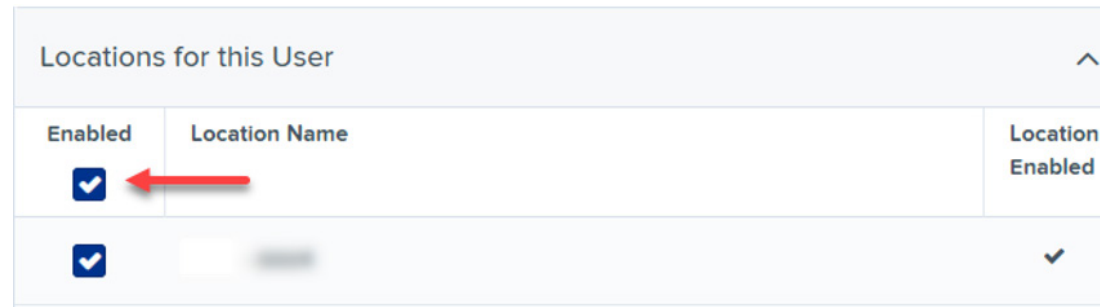
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8. Expand the Locations for this User section and enable account(s) based on user functions needed. To select all, click the box under **ENABLED**.



Locations for this User		
Enabled	Location Name	Location Enabled
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>

9. Check the box for **ENABLE RDN** under the **UPDATE USER SETTINGS** page. This allows the user to scan checks to submit for deposit using RDN. The screen will refresh and populate additional permissions to give a user.

ROLE NAME	DESCRIPTION
Admin	Allows the user to access the Tools tab, where the user can delete an existing batch.
Receive Activation Emails	Not applicable. Do not check this box.
Recieve Alert Emails	Allows the user to recieve deposit alert emails upon deposit.
Create Deposits	Allows the user to make deposits.
Scan Items	Allows the user to scan items.
Edit Items	Check this box to allow the user to be able to modify/fix their batches.
View Deposits	Allow the user to view deposits.
Search	Allows the user to be able to perform searches on the Search page.
Export Items	Allows the user to export items.
View Notifications	Allows the user to view any deposit messages.

10. After making all changes, select Update at the bottom of the page to finish and save changes.



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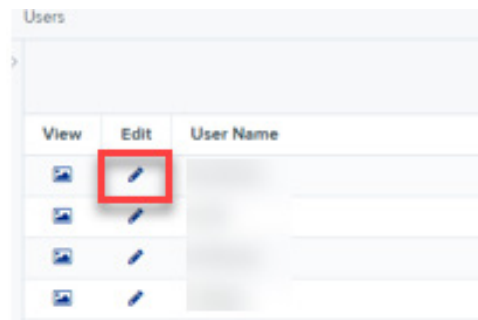
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1. Select **ADMIN**, then select Users from the left main menu.
2. Select the **EDIT ICON** for the user profile to be updated.

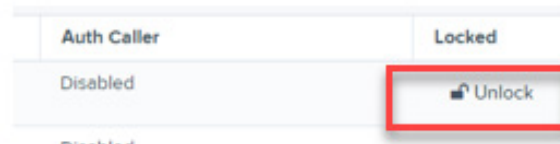


3. The Update User Settings page displays. Make all necessary changes.
4. Click **UPDATE** at the bottom of the page.

UNLOCKING A USER

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

1. Select **ADMIN**, then select Users from the left main menu.
2. Under the Locked column, select **Unlock** for that user. The Unlock will disappear, and the user profile will be unlocked.



NOTE: If the user needs a new password, you will need to reset the password. Follow the steps below.

RESETTING A PASSWORD FOR A USER

1. Select **ADMIN**, then select Users from the left main menu.
2. Select the **EDIT ICON** for the user profile to update.
3. Select **RESET PASSWORD** from the bottom of the page. The user's profile will have a case-sensitive temporary password generated. Provide this password to the user.
4. Select **UPDATE** to save all changes.

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UNLOCKING A USER

RESETTING A PASSWORD FOR
A USER

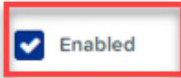
DISABLING A USER

DELETING A USER

DISABLING A USER

1. Select **ADMIN**, then select Users from the left main menu.
2. Select the edit icon for the user profile to disable.
3. Uncheck the **Enabled** box in the Update User Settings section.

Update User Settings



Full Name *

4. Select **UPDATE** to save all changes.

DELETING A USER

1. Select **ADMIN**, then select Users from the left main menu.
2. Select the **EDIT ICON** for the user profile to delete.
3. Select **DELETE USER**. A prompt will ask you to confirm deleting the user. Select **Yes**.

