

# **REMOTE DEPOSIT NOW ADMINISTRATION USER GUIDE**

## **ADDING A USER**

2.

**NOTE:** Only the Company Administrator has access to this function. You are required to add the user in Business eBanking before creating a new user in Remote Deposit.

#### STEP 1: ENABLING A USER IN BUSINESS EBANKING

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 eBanking**.



### Sign in to Business eBanking

Company ID:	
User ID:	
Continue	

3. Once logged in, select Administration and then click on the Manage Users link under Company Administration.





4. Select the user by clicking the User ID. Under the Services & Accounts section, select Edit Services & Accounts.

User Profile		Print this page
To edit the user's profile, click the	appropriate edit link. To delete this user, click "Delete user." To modify the user's system access, click "Edit User Information."	
To view a different user profile, ret	um to <u>User Administration</u> .	
User Information		Edit User Information • Delete user
Name: User ID: User status:	Terret Terre	
Contact Information		Edit Contact Information
Primary e-mail address: Secondary e-mail address: Telephone number:	A contract of the second se	
Roles		Edit Roles
Roles		
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Services & Accounts		Edit Services & Accounts
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5. Next to Remote Deposit, select **Add** and select **Save Changes**. Then click **Save Changes** at the bottom of the screen to confirm the changes.

### **STEP 2: ENABLING A USER IN REMOTE DEPOSIT**

- 1. In Business eBanking, select Account Services and then click on the link under Remote Deposit.
- 2. This will bring you to the Remote Deposit portal to log in.
- 3. Select Admin from the left main menu.

PACIFIC WESTERN BANK
Dashboard
• Transactions
🗱 Admin 🔸
> Users
> Roles
Reports

4. Click Add User.

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	Auth Caller			Locked
	Disabled			
	Disabled			



- 5. Enter the user's information in the following required fields:
  - a. Full Name User's first and last name
  - b. User Name The user's login name, not case sensitive
  - c. RDN ID Copy and paste from the User Name above
  - d. Email Address The email address for the user to get deposit and password reset notifications

Users / Edit User	
Update User Settings	
<ul> <li>Enabled</li> </ul>	Authorized Caller
Full Name *	
User Name *	
User Location	
RDN ID	
Email Address	
Auto Disable	
Dual Auth Amount	
0	
Dual Auth Status	
Approved	~

6. Under Privileges for this User, select **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
Credits & 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 & Customer Reports
RTG User / Server Only	**REQUIRED**
Remote Deposit Now	**REQUIRED**
icodi E 4 04	DWP Remote Depent New Admin Lleer Cuide  Member



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

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
		*

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.
Receive Alert Emails	Allows the user to receive 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	Allows 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.

## **UPDATING A USER**

- 1. Select Admin, then select Users from the left main menu.
- 2. Select the **edit icon** for the user profile to be updated.

Users		
View	Edit	User Name
	1	
-	1	
	1	
	1	

- 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.

Auth Caller	Locked
Disabled	🗗 Unlock

**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.

# **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			
Enabled			
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.**