PACIFIC WESTERN BANK

PWB Remote Deposit Admin Guide

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Questions?

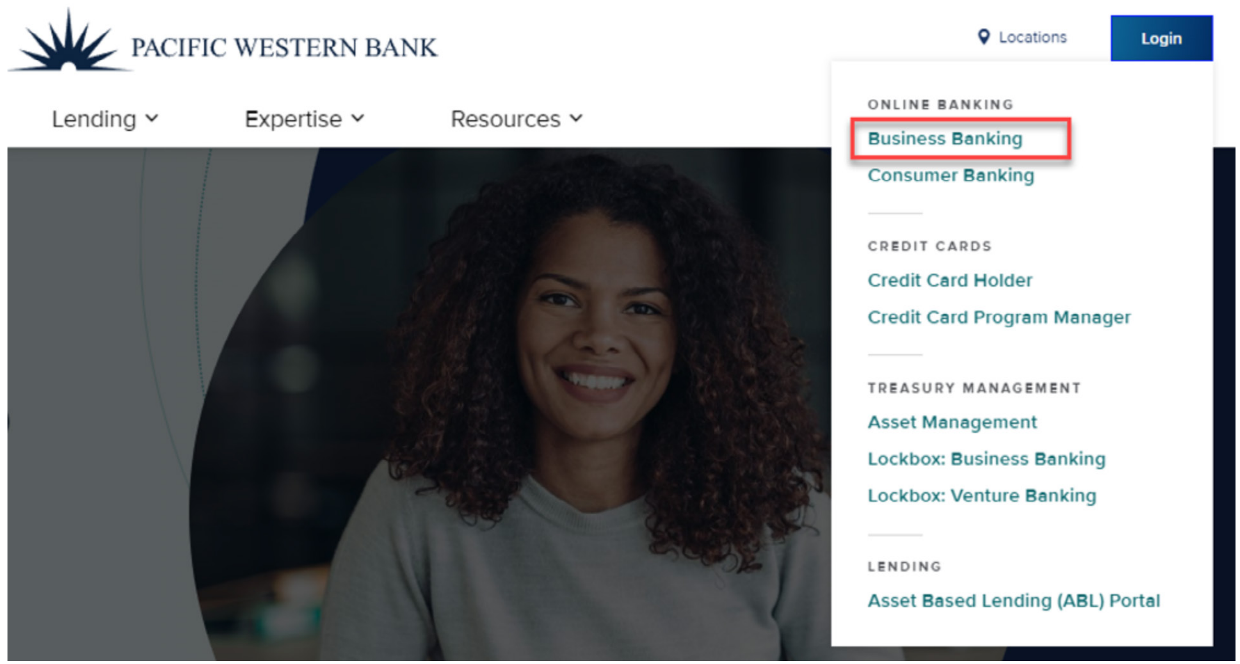
Please contact us at 855.527.6738.

Adding a user

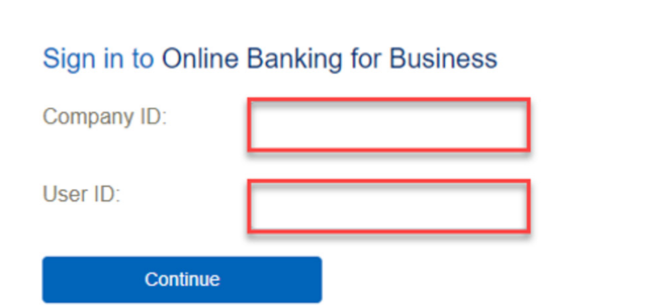
NOTE: Only the Company Administrator has access to this function. You are required to add the user in PWB Remote Deposit before enabling the convenience link in Online Banking for Business for the new user.

Step 1: Enabling a user in pwb remote deposit

1. Log in to online banking at pacwest.com. In the upper right-hand corner, click the Login button. A drop-down menu will appear. Click on Business Banking.



2. Enter your Online Banking for Business user credentials.



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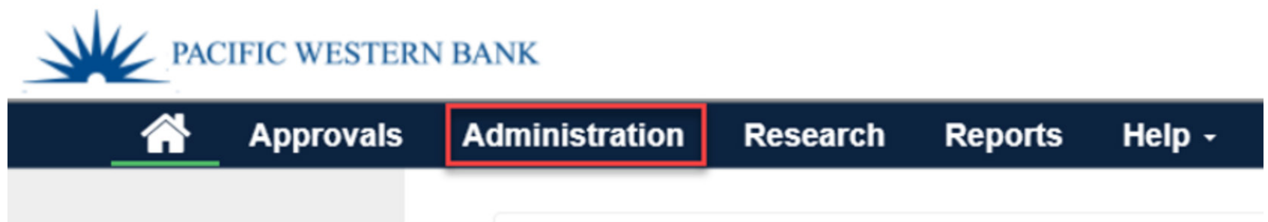
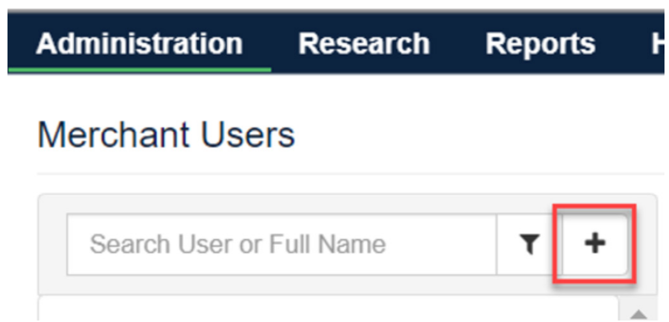
3. In Online Banking for Business, hover over the Account Services menu drop-down and then click Remote Deposit Check Capture.
4. This will bring you to the PWB Remote Deposit portal where you can begin administering users.
5. Click Administration from the menu bar.



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



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
   - Timezone – The preferred timezone 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

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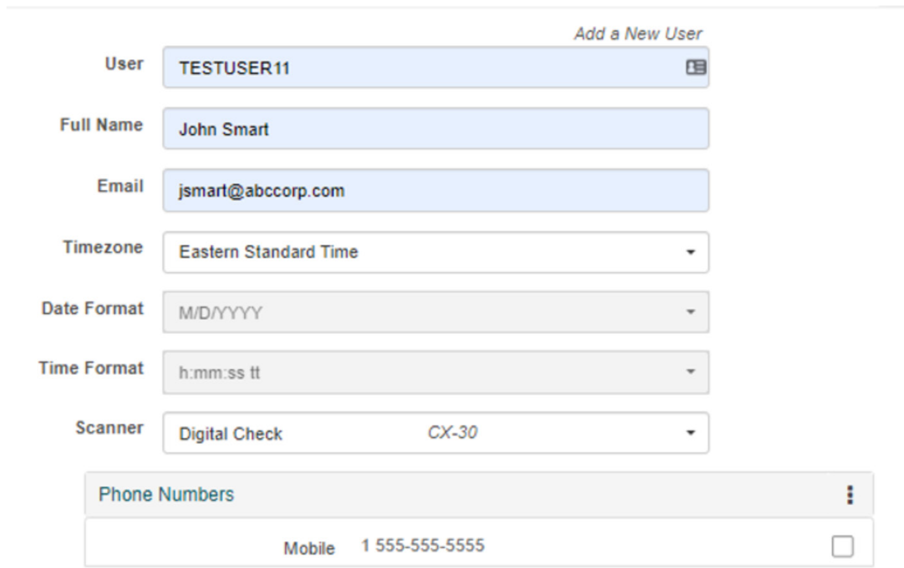
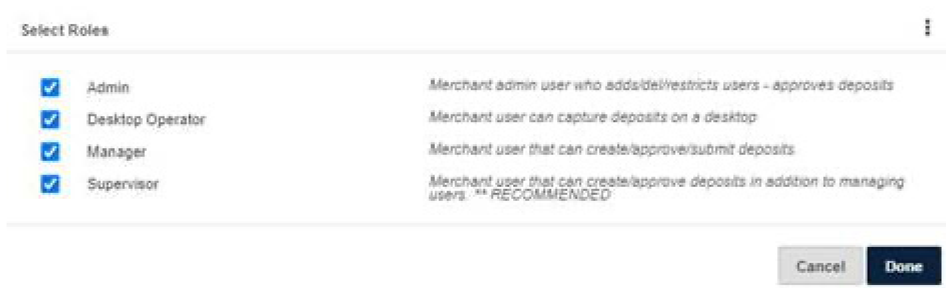


8. Next to Roles, click the horizontal ellipsis and check one or more of the following roles and click Done:
    - Admin - Merchant admin user who can add, delete, and restrict user access in addition to approving deposits.
    - Desktop Operator - Merchant user who can only scan deposits.
    - Manager - 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**



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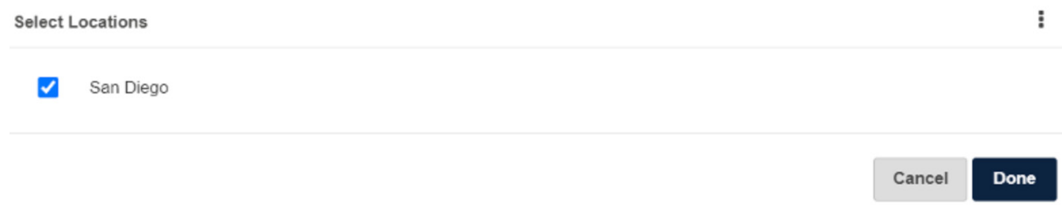
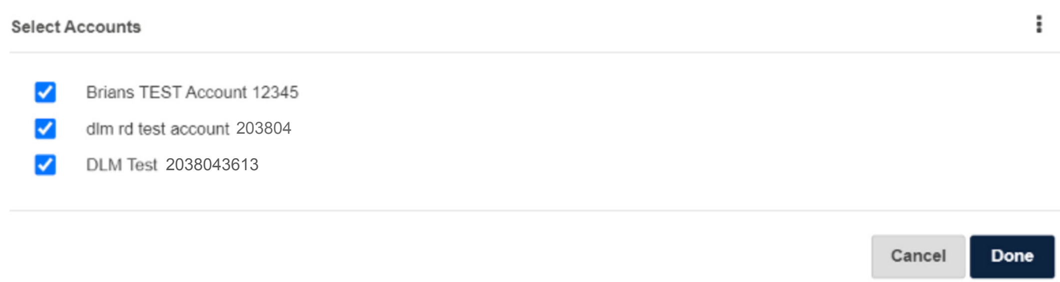
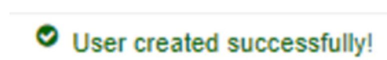
9. Next to Locations, click the horizontal ellipsis and check one or more of the locations and click Done. You can also click the vertical ellipsis and click Select All to enable all locations.



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

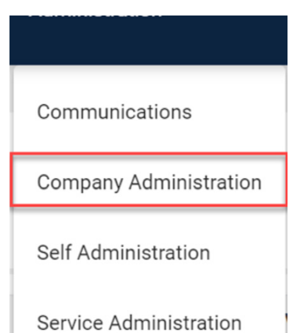


11. Click Save when ready to finalize user profile.
12. A success message will appear once the user is created.



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.



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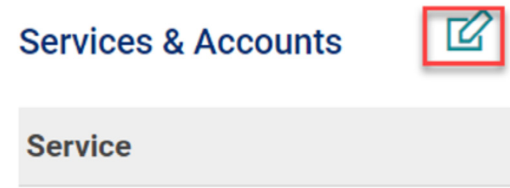
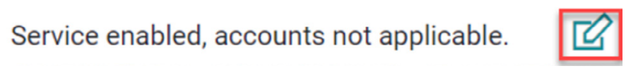
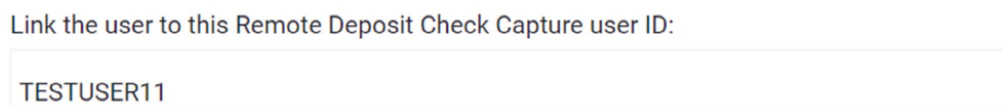
2. Select the user by clicking the User ID. Under the Services & Accounts section, click the Edit Services & Accounts icon as seen below.



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



5. Enter in the User name that was assigned to the user in PWB 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 PWB Remote Deposit using the link within Online Banking for Business.

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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.

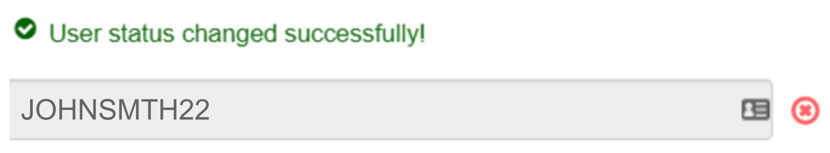
Re-enabling a user

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 enable from the left Merchant Users pane.
2. Click the vertical ellipsis in the top-right corner of the page, and then select Delete User.

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