

BUSINESS ONLINE PRO HELP

[bancofcal.com](https://www.bancofcal.com)

Topics

- First Time Login
- Login
- Forgot Password
- Transaction Approval and Release – Wires, ACH

March, 2020



FIRST TIME LOGIN

[bancofcal.com](https://www.bancofcal.com)



FIRST TIME LOGIN



- **Navigate to Login:** Start at www.bancofcal.com and select the **Business Banking Login** link which brings you to www.bancofcal.com/upgrade. Then select the **Business Online Pro** login link. Or go directly to business.bancofcal.com.

- **Login page:** At Welcome to Business Online Pro, provide your login information.

- **Company ID** (case sensitive): This will usually be the first 5 lower case alpha-numeric digits of your company name on your statement and the last 4 digits of your tax ID. It will be provided to you by the Bank via email or by your company admin.

- **User ID** (case sensitive): This is the same User ID as you used with Business Online Banking or the ID assigned to you by the Bank or your company administrator, and will be sent to you via email.

- Enter your information and select **Login**.

The top screenshot shows the Banc of California website's 'Login and Upgrade Center'. The navigation bar includes 'Personal Banking Login', 'Business Banking Login', 'Credit Card Accounts', and 'Branch Drive Banking'. A green arrow points to the 'Business Banking Login' link. The main content area has a heading 'Login and Upgrade Center' and a message: 'We're making big improvements. We're upgrading our web and mobile banking to give you more features and a better overall banking experience.' Below this, it says 'Checks online before March 2020 will receive email notices about your upgrade and your assigned upgrade date. Take a moment to learn more below, or login to your current online banking service here.' There are two bullet points: 'Select Classic Business Online Banking if you were online before March 2020' and 'Otherwise, select Business Online or Business Online Pro'. At the bottom, there are three buttons: 'CLASSIC BUSINESS ONLINE BANKING', 'BUSINESS ONLINE', and 'BUSINESS ONLINE PRO'. A green arrow points to the 'BUSINESS ONLINE PRO' button.

The bottom screenshot shows the 'Welcome to Business Online Pro' page. It has a heading 'Welcome to Business Online Pro' and a form with two input fields: '* Company ID' and '* User ID'. Below the fields is a 'Login' button. On the left side, there are links for 'Help for this page', 'Print this page', 'Terms and conditions', 'Privacy policy', and 'Contact us'. At the bottom, there are links for 'Download Business Online Pro Secure Release' and 'Download Business Online Pro PC Tablet'. The footer includes 'Copyright ©2019 Banc of California N.A. (02/27)' and 'Page generated on 08/26/2019 at 4:50 PM EDT'.

FIRST TIME LOGIN

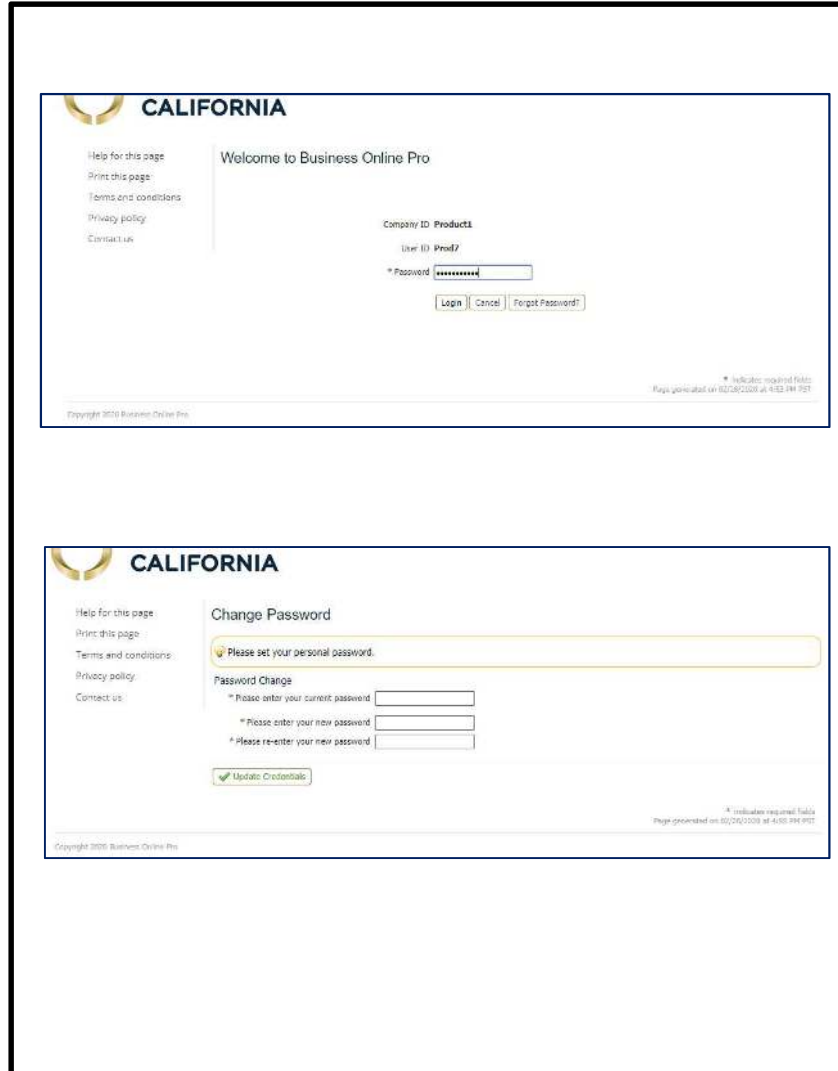
- **Password:** If you are upgrading, use the same case sensitive password you use for Classic Business Online Banking. If you use a token to login to Classic Business Online Banking, use the serial number on your token as the password.



Temporary password is: 3708979500

Otherwise, enter the temporary password provided to you by the Bank or your company administrator. You will have 5 password attempts. (Forgot password will work after your first time login).

- **Change Password:** Enter your temporary password, and then enter and re-enter a new password. Your new password must contain:
 - 8 to 30 Digits
 - 1 Lower Case Letter
 - 1 Upper Case Letter
 - 1 Number
 - 1 Symbol

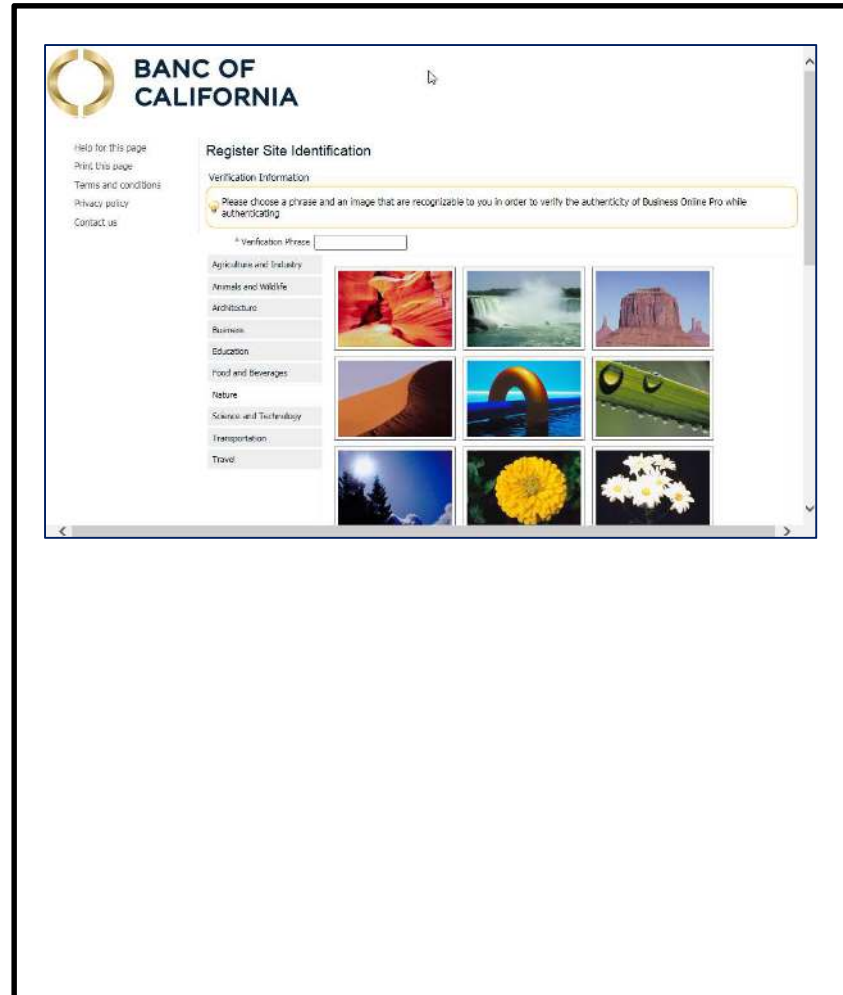


The top screenshot shows the login page for Business Online Pro. It includes a navigation menu on the left with links for Help, Print, Terms, Privacy, and Contact. The main content area has a 'Welcome to Business Online Pro' message and a login form with fields for Company ID (Prodact), User ID (ProdZ), and Password. There are 'Login', 'Cancel', and 'Forgot Password?' buttons. The bottom of the page shows a copyright notice and a page generation timestamp.

The bottom screenshot shows the 'Change Password' page. It features a navigation menu on the left. The main content area has a 'Please set your personal password.' message and a 'Password Change' section with three input fields: 'Please enter your current password', 'Please enter your new password', and 'Please re-enter your new password'. There is an 'Update Credentials' button. The bottom of the page shows a copyright notice and a page generation timestamp.

FIRST TIME LOGIN

- **Verification phrase and Image:**
 - **Verification Phrase** – Enter the phrase that will be presented during each login attempt.
 - **Image Categories** – Select the image that will be presented during each login attempt. Multiple image categories are available. Select the drop down to browse the additional images available
 - When you login, you will see your verification phrase and image to help confirm you are at the correct site and logging in with the correct Company ID and User ID.
 - Select **Submit** at the bottom of the page.



FIRST TIME LOGIN



- When complete, you will arrive at the Business Online Pro Dashboard. If you need help, call us at 855-351-BANC (2262) from 8:30 AM to 5:30 PM Pacific Time on business days.

The screenshot shows the Banc of California Business Online Pro Dashboard. At the top left is the Banc of California logo. To its right is a search bar labeled "Go To:" and a navigation menu with links for "Bulletins", "Resource Center", "Messages", "Help", "Sitemap", and "Log Off". Below the logo is the text "Good Evening First3 Last3 | Last login on Aug 16, 2019 1:52 PM PDT | 1 failed login attempt." A secondary navigation bar includes "Dashboard", "Account Information", "Payments & Transfers", "Stop Payments", and "My Settings". The main content area starts with a welcome message: "Welcome to Business Online Pro" with a link to "Make this my home page".

There are three main panels:

- Navigation Center:** Contains a "Home" button with a house icon.
- Message Center:** Shows counts for "Bulletins" (0), "Messages" (0), and "Notifications" (0), along with a "Send Message" button.
- Action Center:** Lists pending actions: "ACH Approvals Pending" (0), "Wire Approvals Pending" (0), "Transfer Approvals Pending" (0), and "Expired Payments" (2).

At the bottom left is the **Account Center** section, titled "CHECKING" with a sub-header "Data reported as of Aug 28, 2019 7:05 PM PDT". It contains a table with account details:

Account Number	Current Ledger	Available Balance
*4444 XYZ CORPORATION	-\$132.46	-\$132.46
*5556 XYZ CORPORATION	\$1.78	\$1.76
*7657 XYZ CORPORATION	\$0.00	\$0.02

At the bottom right is a promotional banner for "Secure Browser" with a "Learn More" button.




LOGIN

[bancofcal.com](https://www.bancofcal.com)



LOGIN

- **User ID and Password:** Enter your case sensitive Company ID and User ID and select **Login**. Arrive at the Business Online Pro login page from either:
 - www.bancofcal.com/upgrade or
 - business.bancofcal.com
- **Password:** Enter your password that contains:
 - 8 to 30 Digits
 - 1 Lower Case Letter
 - 1 Upper Case Letter
 - 1 Number
 - 1 Symbol
- **Password attempts:** You will have up to 5 attempts to enter the correct password.
- **Site Verification:** Make sure the site verification information picture and phrase are correct. If incorrect, Cancel and try again. An incorrect picture and phrase indicate that your Company ID and/or User ID are incorrect.
- If you can't recall your password, select **Forgot Password**. See the select **Forgot Password** section later in this document.



BANC OF CALIFORNIA

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Welcome to Business Online Pro

* Company ID

* User ID

Login

[Download Business Online Pro Secure Browser](#)
[Download Business Online Pro PC Tablet](#)

* indicates required fields
Page generated on 06/25/2019 at 4:58 PM PDT
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Welcome to Business Online Pro

Site Verification
Please verify that you recognize the image and phrase.
Do not enter your password if you do not trust this site.

Scissors and Tie

Company ID: Product1

User ID: Prod7

* Password

Login Cancel Forgot Password?

* indicates required fields
Page generated on 06/25/2019 at 4:58 PM PDT
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LOGIN



- When complete, you will arrive at the Business Online Pro Dashboard. If you need help, call us at 855-351-BANC (2262) from 8:30 AM to 5:30 PM Pacific Time on business days.

The screenshot shows the Banc of California Business Online Pro Dashboard. At the top, there is a navigation bar with the Banc of California logo, a search box labeled "Go To:", and links for "Bulletins", "Resource Center", "Messages", "Help", "Sitemap", and "Log Off". Below this, there is a user greeting: "Good Evening First3 Last3 | Last login on Aug 16, 2019 1:52 PM PDT | 1 failed login attempt." The main navigation menu includes "Dashboard" (selected), "Account Information", "Payments & Transfers", "Stop Payments", and "My Settings". A welcome message reads "Welcome to Business Online Pro" with a link to "Make this my home page".

The dashboard is divided into several sections:

- Navigation Center:** Contains a "Home" button with a house icon.
- Message Center:** Shows 0 Bulletins, 0 Messages, and 0 Notifications. A "Send Message" button is present.
- Action Center:** Lists pending actions: 0 ACH Approvals Pending, 0 Wire Approvals Pending, 0 Transfer Approvals Pending, and 2 Expired Payments.
- Account Center:** Displays a table of checking accounts with columns for Account Number, Current Ledger, and Available Balance. Data is reported as of Aug 28, 2019 7:05 PM PDT.

Account Number	Current Ledger	Available Balance
*4444 XYZ CORPORATION	-\$132.46	-\$132.46
*5556 XYZ CORPORATION	\$1.78	\$1.76
*7657 XYZ CORPORATION	\$0.00	\$0.02

At the bottom right, there is a promotional banner for "Secure Browser" with a "Learn More" button.



FORGOT PASSWORD

[bancofcal.com](https://www.bancofcal.com)



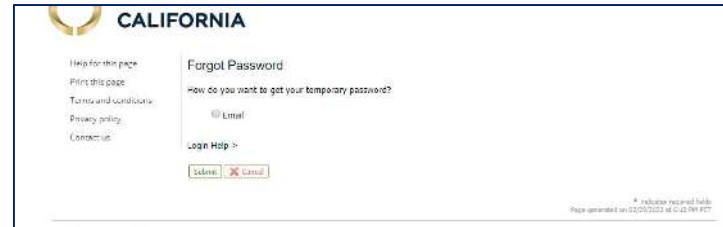
FORGOT PASSWORD

- **Arrive** at the login page from either:
 - www.bancofcal.com/upgrade or
 - business.bancofcal.com
- **User ID and Password:** Enter your case sensitive Company ID and User ID and select **Login**. (See the first time login section for tips on your Company ID and User ID).
- **Site Verification:** Make sure the site verification information picture and phrase are correct. If incorrect, Cancel and try again. An incorrect picture and phrase indicate that your Company ID and/or User ID are incorrect.
- Instead of entering your password, select the **Forgot Password** button.



FORGOT PASSWORD

- **Receive Temporary Password:** Select how to receive your temporary password and select Submit.
- **Find Password:** Find the temporary password sent to you via email or SMS message.
- **Change Password:** Enter the temporary password you received via email or SMS message. Then enter your new password that contains:
 - 8 to 30 Digits
 - 1 Lower Case Letter
 - 1 Upper Case Letter
 - 1 Number
 - 1 Symbol
- Select **Upgrade Credentials**



Email or SMS Message:



FORGOT PASSWORD



- **Successfully Reset Password:** You will arrive here when you have successfully changed your Password. Select the **Login** button.
- **Login Page:** You will be returned to the Welcome page where you can login with your new password.
- If you need help, call us at 855-351-BANC (2262) from 8:30 AM to 5:30 PM Pacific Time on business days.



APPROVE AND RELEASE TRANSACTIONS

WIRES, ACH

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APPROVE AND RELEASE TRANSACTIONS



Security token software and a second user are usually needed to Approve and Release Wires and ACH transactions.

Approval and Release:

In Business Online Pro, Wires and ACH transactions must also be **Approved and Released** or they will not be sent. The **Release** function gives you control over when transactions are sent. After a transaction is successfully Approved and Released, make sure the status is **Completed**.

- Find Wires or ACH Approvals Pending:** The number of pending transactions They will display in your **Action Center** when you sign on to Business Online Pro. Click the items with 1 or more pending transactions to approve.
- Payment Activity:** The link will take you to the **Payments & Transfers** section in **Current Activity**. Scroll down the page to see your transactions.
- Approve:** Select **Approve** for transactions individually or select the checkbox to the right of each transaction and select the **Approve** button for the entire section. If you entered the transaction, another user may need to approve it depending upon your Company's settings.
- Release:** Wire and ACH transactions must be released or they will not be sent. Select the **Release** button for all transactions you would like to submit to the Bank. Check the transaction status to ensure it was successful.
- You can also select **Approve and Release**.

The top screenshot shows the 'Action Center' with the following items:

- 0 ACH Approvals Pending
- 0 Wire Approvals Pending
- 0 Transfer Approvals Pending
- 0 Expired Payments
- 0 Users Locked Out

The bottom screenshot shows the 'Payment Activity' table with the following data:

Payment Activity	ACH Payments	Wire Transfers	Account Transfers	ALL TRANSACTIONS
PENDING	\$0.01 (1)	\$0.00 (0)	\$0.00 (0)	\$0.01 (1)
COMPLETE	\$0.00 (0)	\$0.00 (0)	\$0.02 (1)	\$0.02 (1)
ALL	\$0.01 (1)	\$0.00 (0)	\$0.02 (1)	\$0.03 (2)

The bottom screenshot also shows a transaction detail view for 'ACH-00001763' with a status of 'Pending Approval' and a 'Completed' status for another transaction.

APPROVE AND RELEASE TRANSACTIONS



Security Token Software

You need to download and install security software to approve ACH and Wire transactions.

Select an available software option at www.bancofcal.com/upgrade, download the software, install it, and use the 8-digit software activation key provided to you by the Bank or your Company administrator to activate it.

Here are the options to approve transactions:

- **Standard Browser:**
 - Login with your Password
 - Approve with the Mobile App (or PC) Token code
- **Secure Browser** (recommended):
 - Login with the Secure Browser PIN you set up
 - Approve with your Password
- **Mobile Banking App:**
 - Login with the Mobile App PIN you set up
 - Approve with the same PIN

If you need help, call us at 855-351-BANC (2262) from 8:30 AM to 5:30 PM Pacific Time on business days.

Go to www.bancofcal.com/upgrade and select the Security Token Software link

Software Type	Advantage	How You Use It	Get the Software
Secure Browser	Our recommended and highest PC security option, the secure browser doesn't require a separate token code. This makes logins and approvals faster.	1. Login with this secure browser. 2. Approve transactions with your customized passcode 3. Allows different users to login using the same browser installation.	Find the Secure Browser download link on the Business Online or Business Online Pro login pages.
Mobile Token App	Take this portable token wherever you take your mobile or tablet device. It generates a token code to use in your standard browser session.	1. Login with your Internet Explorer, Chrome, Firefox, or Safari browser. 2. Use your Mobile Token App code to approve transactions when prompted in your browser.	Get this app: Download on the App Store GET IT ON Google Play Or, search for Banc of California Business Token
Mobile Banking App	Secure banking on your mobile phone or tablet, this app doesn't require a separate token, enables faster logins or approvals, and allows fingerprint and face recognition login.	1. Login with the Mobile App. 2. Approve transactions with your customized passcode. 3. App dedicated to a single user, the phone owner.	Get this app: Download on the App Store GET IT ON Google Play Or, search for Banc of California Business



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