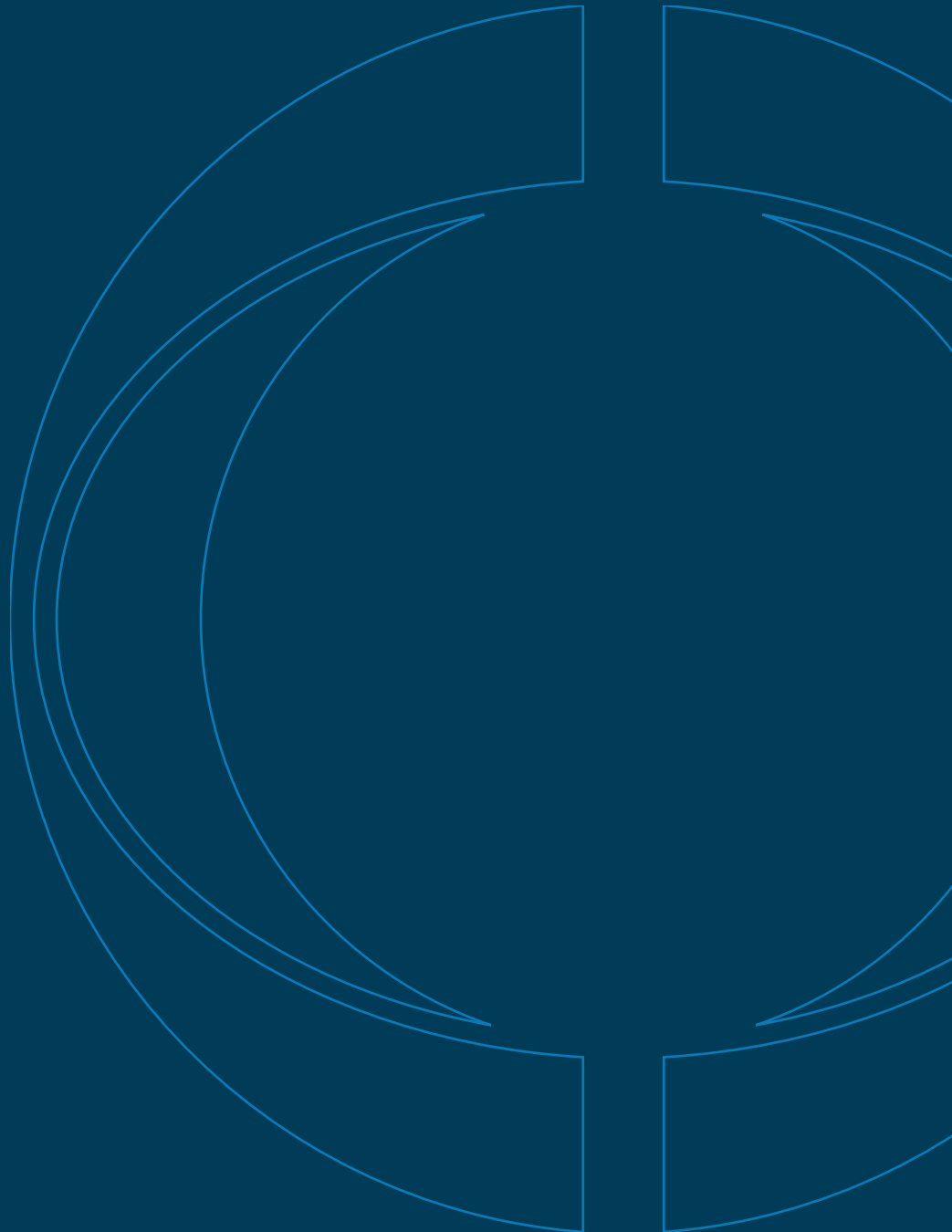




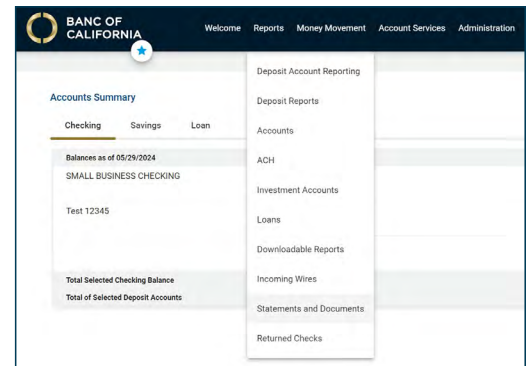
USER GUIDE:  
**STATEMENTS & ALERTS**



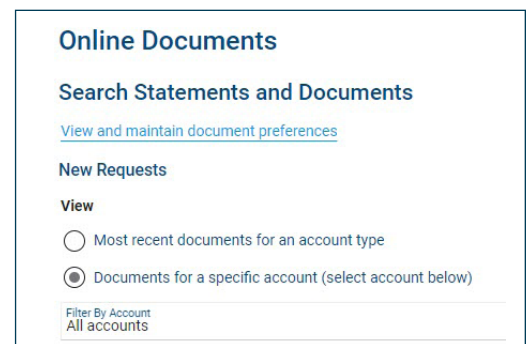
# User Guide: Statements & Alerts

## Enroll in Online Statements.

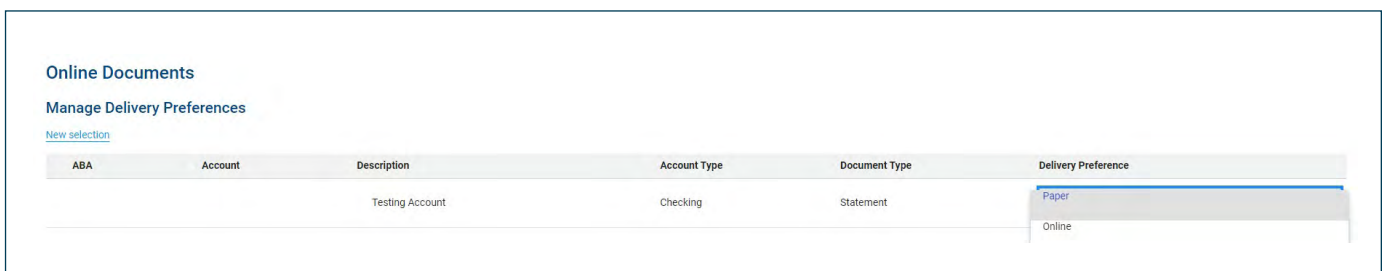
- 1 To enroll in online statements, hover over **Reports** and click **Statements and Documents**.



- 2 On the next screen, click **View and maintain document preferences**.



- 3 Change the delivery preference to **Online** for the notice or statement and click **Continue**.




(Cont'd on next page)

## (cont'd) Enroll in Online Statements.

- Review the service agreement and click **I Agree**, then verify the delivery preference change and click **Save Preferences**. A confirmation message will appear. You'll receive your online statements immediately upon updating your delivery preferences.

**Online Documents**

**Verify Preferences**

 You are updating the delivery preferences for these account documents. Documents with "Paper" delivery will no longer be available for online viewing.


[Make preference changes](#)

ABA	Account	Description	Account Type	Document Type	Delivery Preference
		Testing Account	Checking	Statement	Online

Save Preferences
Cancel

**Online Documents**

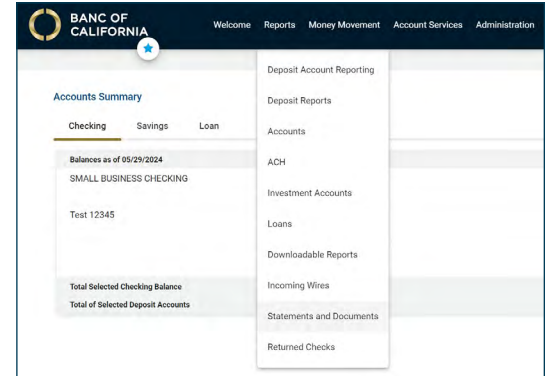
**Delivery Preference Confirmation**

 **Your statement and document preferences have been saved successfully.**

You will automatically receive a message in your online message center when new statements are available for viewing.

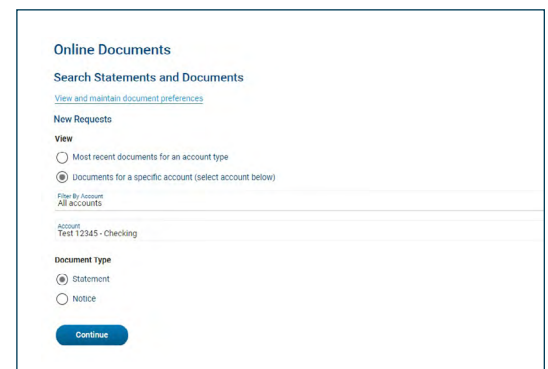
# View & Download Statements.

- 1 Hover over **Reports** and select **Statements and Documents**.

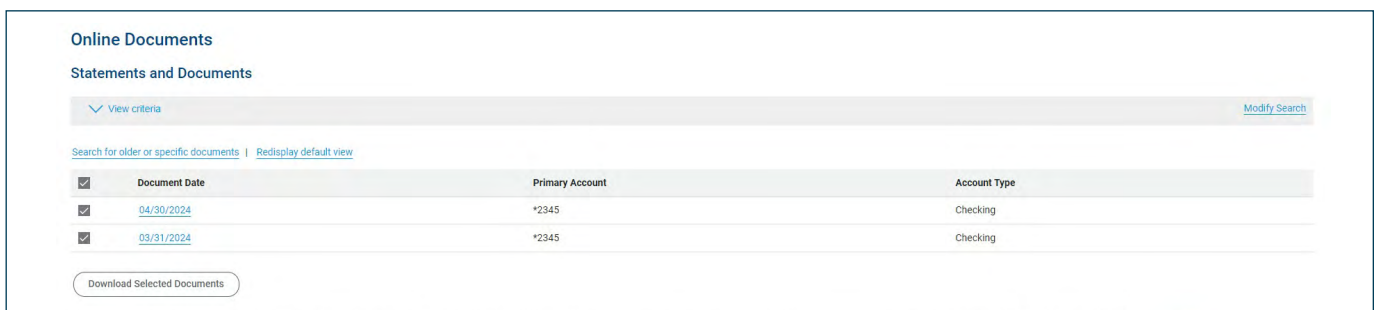


- 2 Under **View**, select: Most recent documents for an account type > Checking accounts or Savings accounts or Documents for a specific account (select account below) > Filter By Account > Account.

- 3 Then select **Statement** and click **Continue**.

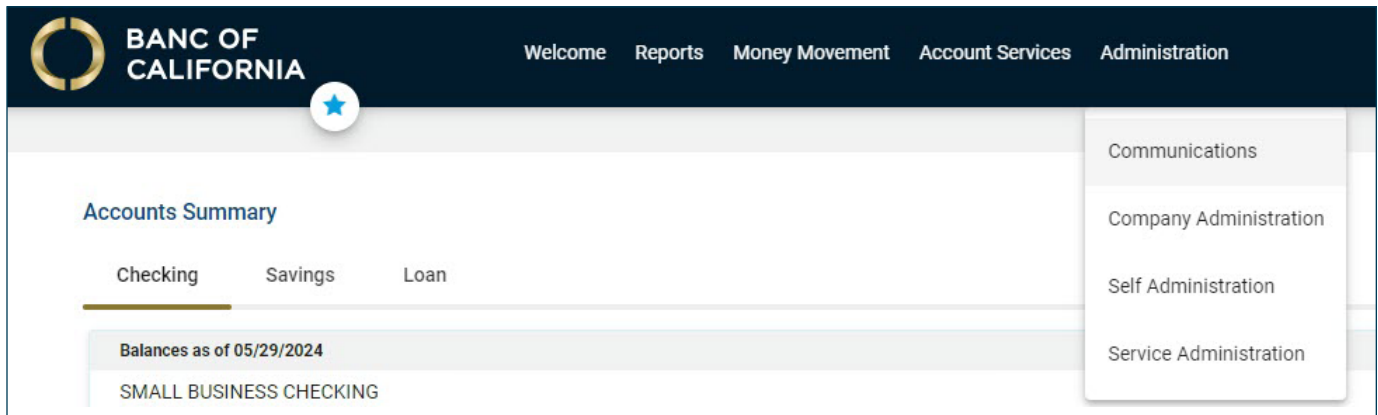


- 4 Click on a statement date to view a specific statement. You can print or download the statement from the new window. You can also download one or more statements by selecting the box beside the desired statement(s) and then click Download Selected Statements. A PDF (for one statement) or zip file (for multiple statements) will download.

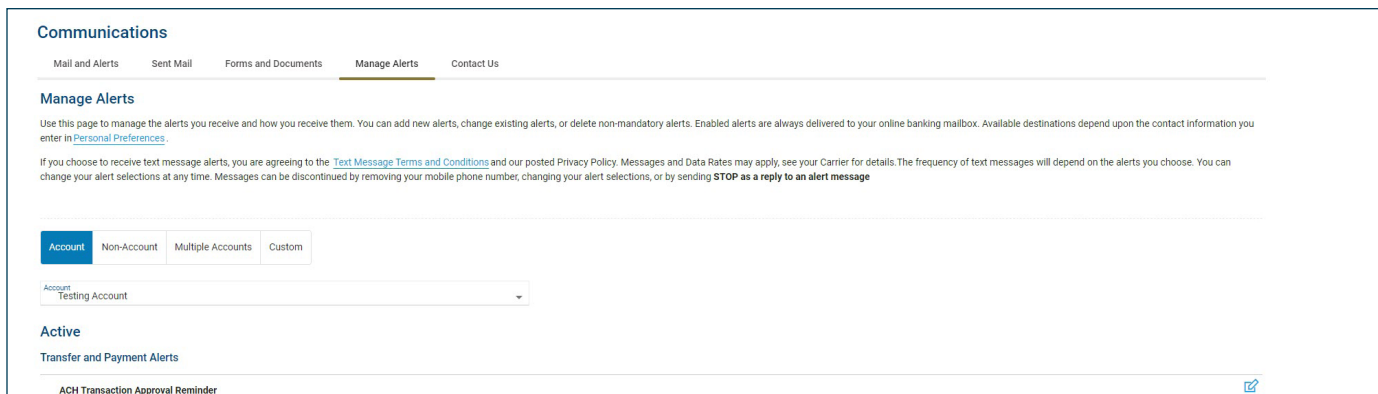


# Add Alerts.

- 1 To add alerts, hover over **Administration** and select **Communications**.

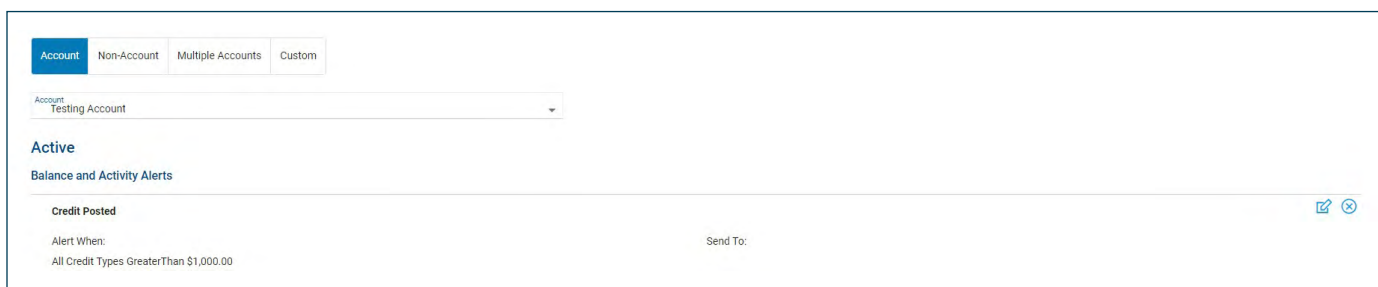


- 2 Select **Manage Alerts**, then select alert type: Account, Non-Account, Multiple Accounts or Custom.



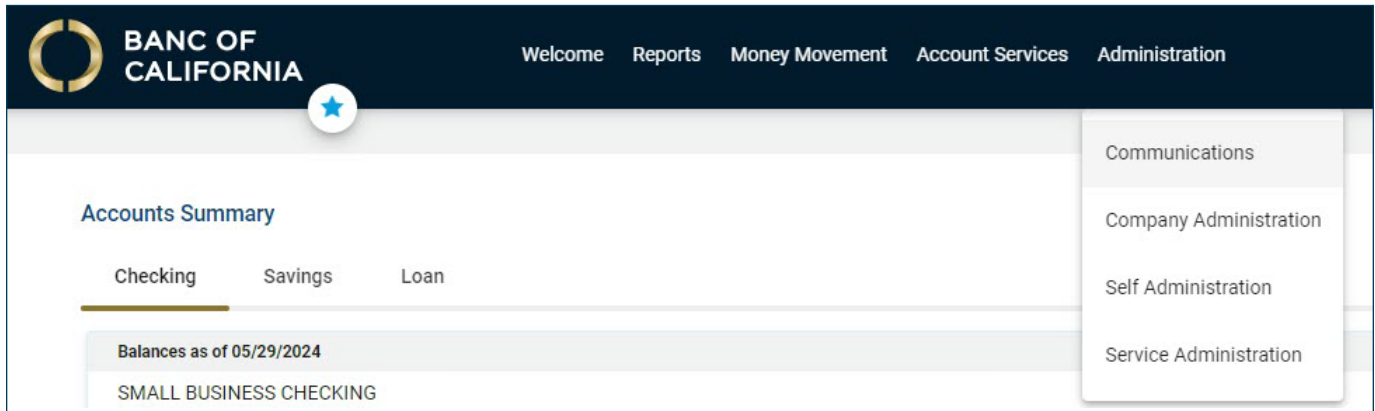
- 3 Scroll down to view the different alert categories and select the **(+)** to add any alerts you want to enable for that account. Enter any required information, select your email and click **Add**. Once added, the alert will appear under the **Active** section.

- 4 To edit or delete an alert, select either the edit icon or the X icon on the right side.

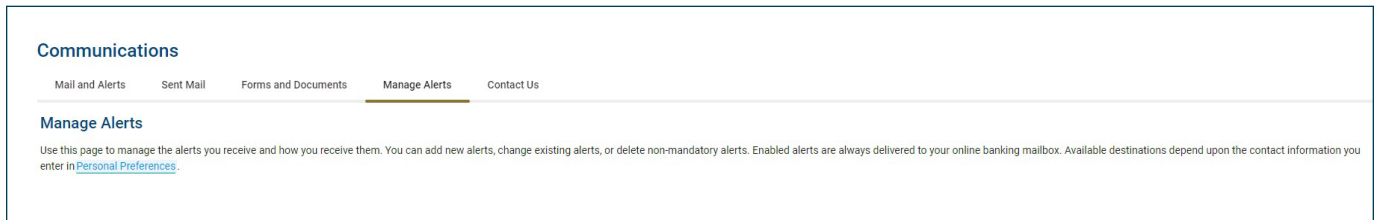


# Manage Contact Info.

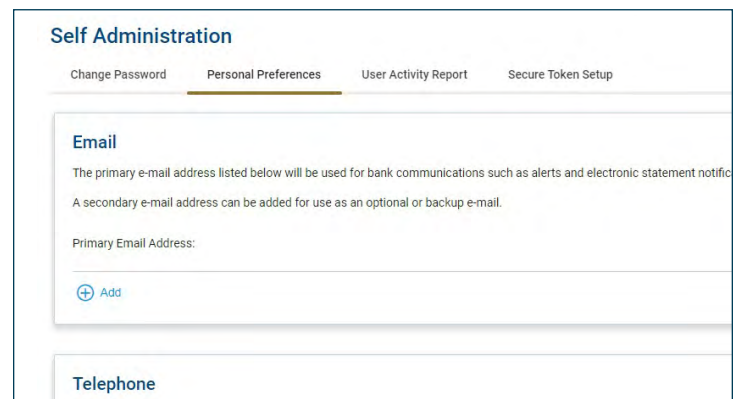
- 1 To manage contact info, hover over **Administration** and select **Communications**.



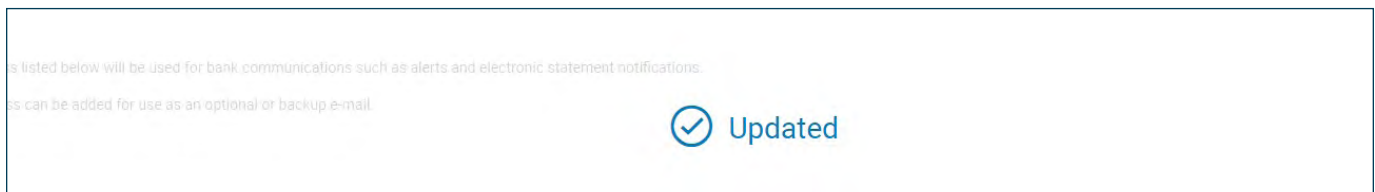
- 2 Select **Manage Alerts**, then click **Personal Preferences** link below **Manage Alerts**.



- 3 Click **Add** under Email or Telephone.

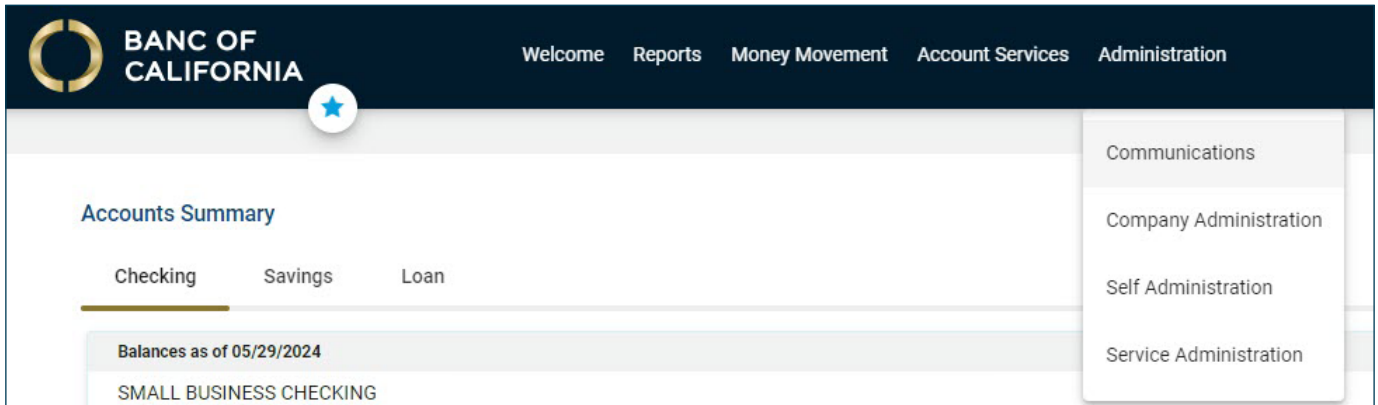


- 4 Enter the information and click **Update**. To edit existing contact info, select the edit icon. Make changes to the information and click **Update**. A confirmation will appear.



# View Messages and Alerts.

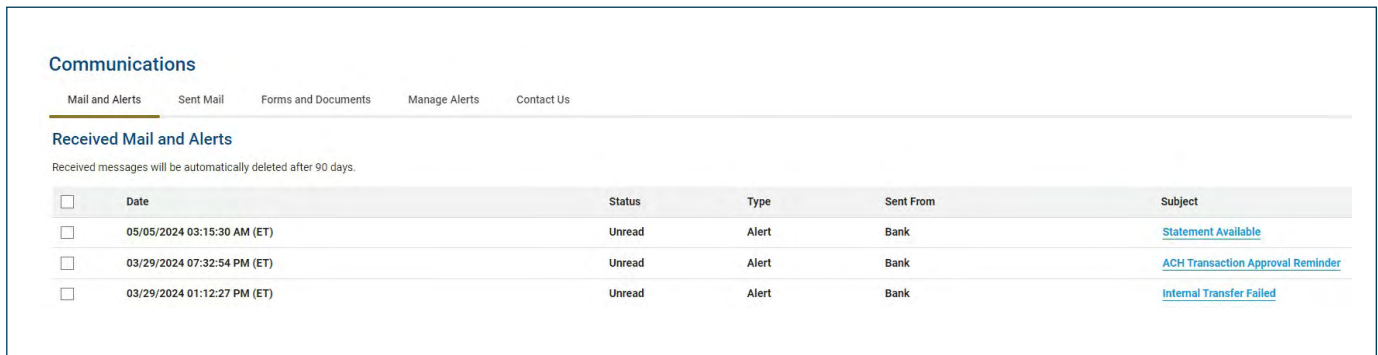
- 1 Hover over **Administration** and select **Communications**.



The screenshot shows the Banc of California website navigation bar. The 'Administration' menu item is highlighted, and a dropdown menu is open, showing the following options: Communications, Company Administration, Self Administration, and Service Administration. The 'Communications' option is selected.

- 2 Messages and alerts will appear under the **Mail** and **Alerts** section.

**Note:** Received messages will be automatically deleted after 90 days.



The screenshot shows the 'Communications' section of the website. It includes a sub-menu with 'Mail and Alerts' selected. Below the sub-menu, there is a section titled 'Received Mail and Alerts' with a note: 'Received messages will be automatically deleted after 90 days.' A table lists the received messages and alerts.

<input type="checkbox"/>	Date	Status	Type	Sent From	Subject
<input type="checkbox"/>	05/05/2024 03:15:30 AM (ET)	Unread	Alert	Bank	<a href="#">Statement Available</a>
<input type="checkbox"/>	03/29/2024 07:32:54 PM (ET)	Unread	Alert	Bank	<a href="#">ACH Transaction Approval Reminder</a>
<input type="checkbox"/>	03/29/2024 01:12:27 PM (ET)	Unread	Alert	Bank	<a href="#">Internal Transfer Failed</a>