

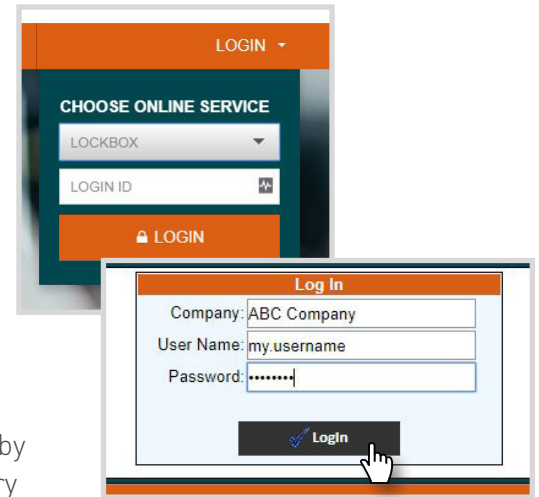
Lockbox User Guide

Lockbox Login

STEP 01/01

Visit www.starfinancial.com and select **LOCKBOX** from the **LOGIN** menu. Enter your **Company**, **User Name**, and **Password**. Then click **Login**.

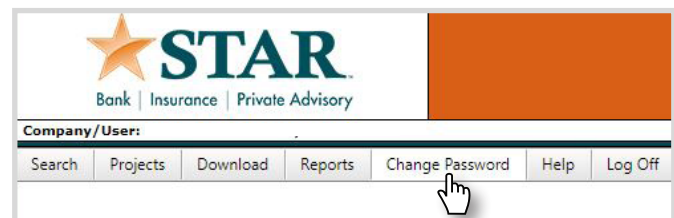
If it is your first login, enter the temporary password provided by the administrator. You will be required to change the temporary password.



Change Your Password

STEP 01/02

Upon login, select **Change Password** from the navigation bar.



Change Your Password

Old Password:

New Password:

Confirm New Password:

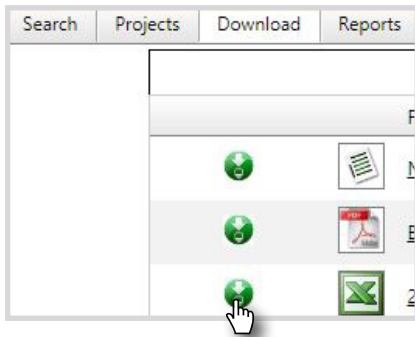
STEP 02/02

Enter your **Old Password**, **New Password** and confirm your **New Password**. Then click **Save**.

Download Extracts

STEP 01/02

Select **Download** from the navigation bar at the top of the screen.



STEP 02/02

Identify the file you would like to download. Then click the green arrow icon to the left of the file.

Download Reports

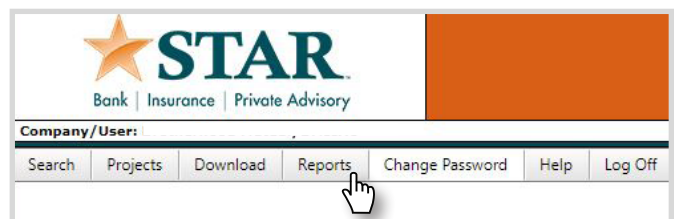
STEP 01/02

Select the type of report you'd like to download from the **Reports** menu on the navigation bar at the top of the screen:

Branch Detail Reports list each scanned Document and Check

Batch Summary Reports list count and sub dollar totals for each scanned batch. This report shows batch group totals as well as grand total.

Work Reports give you an option to select a date range for a count of items scanned and dollar amounts. These reports can be sorted by lockbox project or all.



STEP 02/02

Fill in the attributes for the report you'd like to download. Select the file type you prefer. Then click **Report**.

Projects: All Selected		
Start Date: 2/23/2021	End Date: 2/23/2021	Today
Open report in: PDF		
Report		Cancel

