

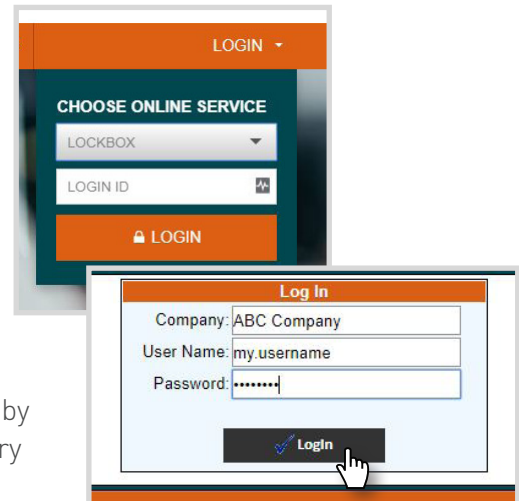
# Lockbox Admin User Guide

## Lockbox Login

### STEP 01/01

Visit [www.starfinancial.com](http://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.



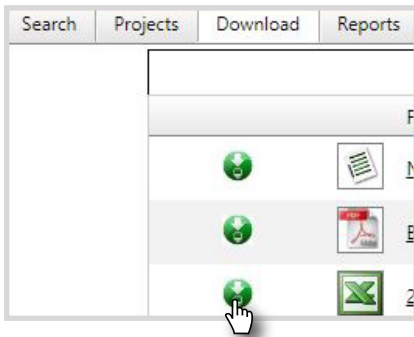
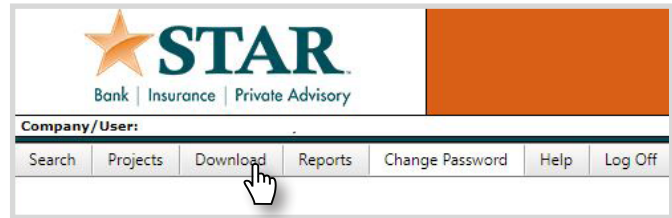
### STEP 02/02

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

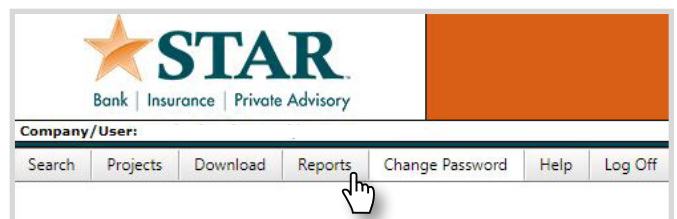
### STEP 01/02

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

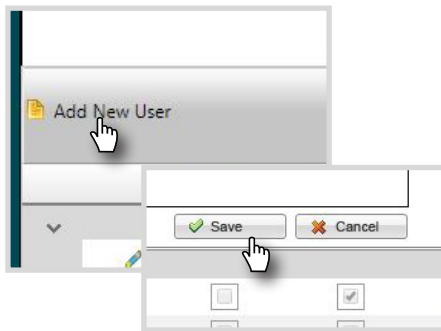
Fill in the attributes for the report you'd like to download. Select the file type you prefer. Then click **Report**.

A screenshot of the report generation form. It includes a 'Projects' dropdown menu set to 'All Selected'. There are 'Start Date' and 'End Date' input fields, both containing '2/23/2021'. To the right of the 'End Date' field is a 'Today' button. Below these is an 'Open report in:' dropdown menu set to 'PDF'. At the bottom of the form are two buttons: 'Report' and 'Cancel'. A mouse cursor is clicking on the 'Report' button.

# User Management

## STEP 01/03

Select **Maintain Users** from the **Administration** menu on the navigation bar.



## STEP 02/03

To add a new user, select **Add New User** from the left side. Complete the user information. Click Save.

## STEP 03/03

**Edit user information** from the User Maintenance screen by clicking the pencil icon to the left of the user.

**Lock Out or Activate users** by checking the box to the right of the user.

**Reset a user's password** by selecting the key icon to the right of the user.