

**Lockbox E-View** provides the lockbox customer with convenient and secure WEB delivery of *Lockbox Express* based transaction information, document images, data files and print reports. Transaction history is maintained and accessible with full query capabilities to research, display, and download selected images and data.



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**•To use *Lockbox E-View*, navigate to the assigned web address through your internet browser. If you are using Lockbox E-View for the first time please refer to page 2 for specific First Login instructions.**

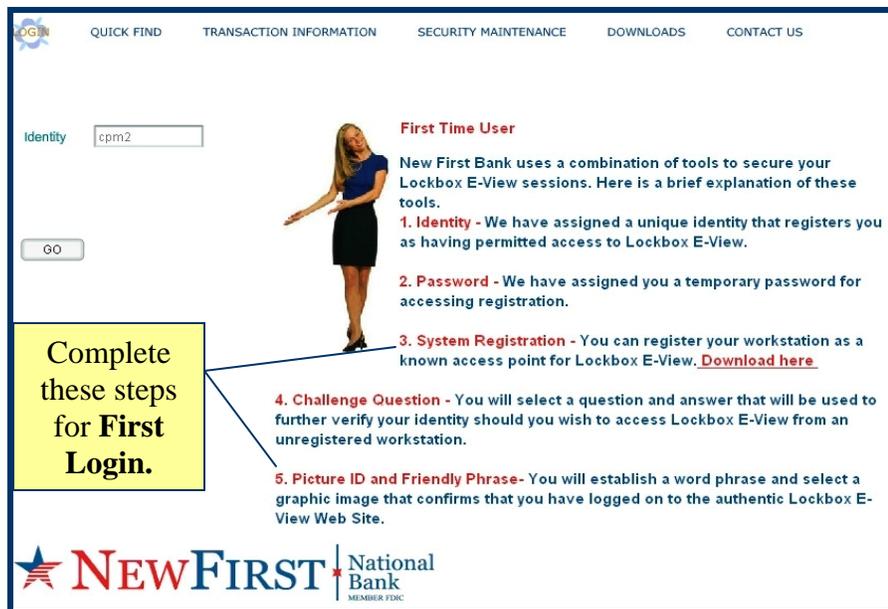
### First Login Instructions

The initial screen displayed when the Lockbox E-View website is launched is the Login Screen.

The user is prompted to enter their Identity Code

*Lockbox E-View has been designed as a secure portal for information delivery. To ensure that the user is verified a few steps must be taken upon initial login to complete the users identity.*

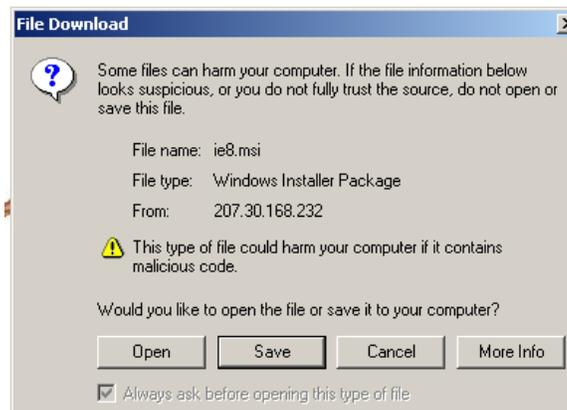
After the Identity Code has been entered a new user will receive an outline of the 5 ways Lockbox E-View assists in keeping the information secure. Numbers 3-5 should be completed upon initial login.



See Steps A thru D below.

#### Step A: Download Register PC Tool

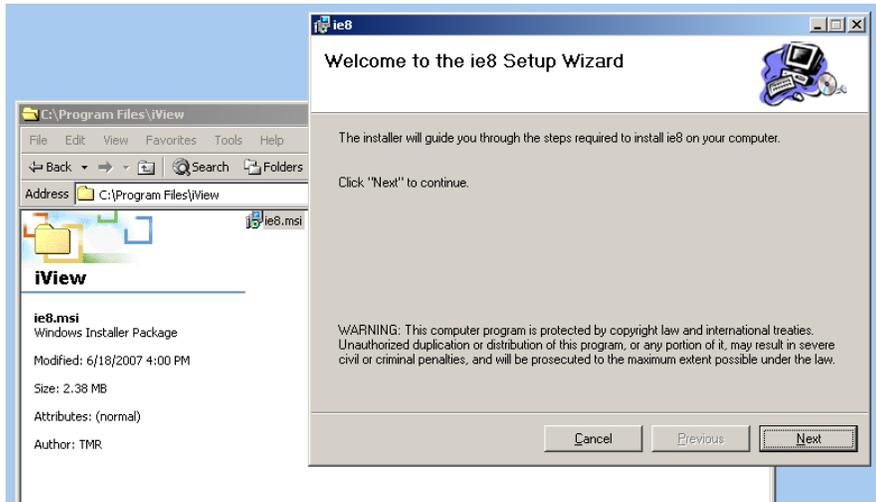
- Select the **Download Here** link from item #3 to register the PC.
- By selecting the link a dialogue box will prompt the user to download a file. Select the **Save** button to save the file to any location of the PC.
- After the file is downloaded double click the file (ie8.msi).



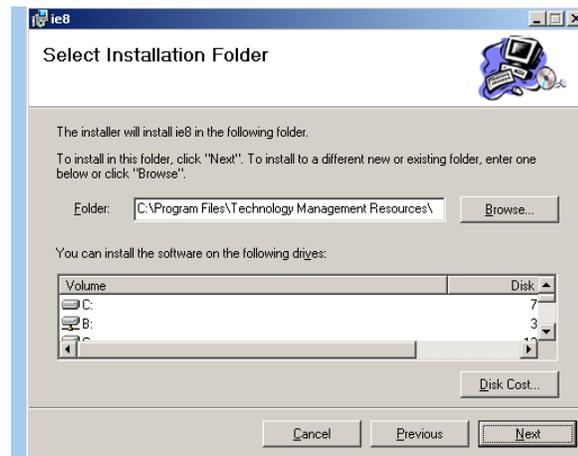
## Lockbox E-View Application Overview

### Step A Continued:

- An install of the PC registering tool must be completed by selecting the **Next** button from the dialogue box.



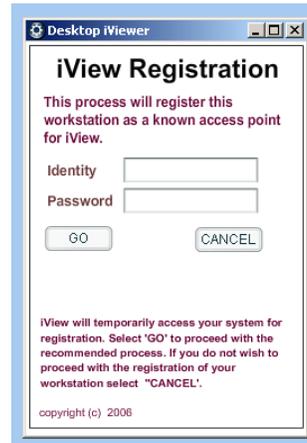
- Select the **Next** button again to confirm the path for the download of the tool to Register the PC.
- Select the **Next** button to begin the installation.
- Select the **Close** button to exit the installation box.



## Lockbox E-View Application Overview

### Step B: Register PC

- Select the Register PC tool from the PC desktop. (ie8.exe)
- The Desktop Lockbox E-Viewer dialogue box will appear. Enter the assigned Identity Code and Password to register the PC.
- Select GO and the application will re-appear.
- **To ensure that PC is registered, close the Lockbox E-View window and re-open the application entering the assigned User ID and Password.**

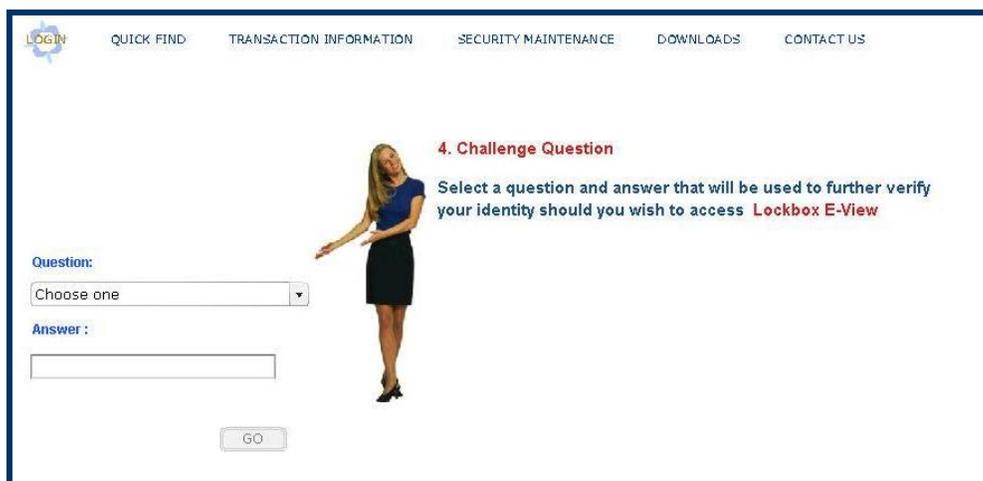


The screenshot shows a window titled "Desktop iViewer" with a sub-header "iView Registration". The text inside reads: "This process will register this workstation as a known access point for iView." Below this are two input fields labeled "Identity" and "Password". There are two buttons: "GO" and "CANCEL". At the bottom, a smaller text block states: "iView will temporarily access your system for registration. Select 'GO' to proceed with the recommended process. If you do not wish to proceed with the registration of your workstation select 'CANCEL'." and "copyright (c) 2006".

### Step C: Challenge Question

The Challenge Question will only have to be setup on the First Login. It is used when a user decides to access the site from an un-registered PC.

- Select a Question from the drop-down list and fill in the corresponding answer.
- Select **GO** once the Question and the Answer have been chosen.



The screenshot shows a web page with a navigation menu at the top: LOGIN, QUICK FIND, TRANSACTION INFORMATION, SECURITY MAINTENANCE, DOWNLOADS, CONTACT US. The main content area features a woman in a blue dress pointing towards the text "4. Challenge Question". Below this, there is a form with a "Question:" label, a dropdown menu with "Choose one" selected, an "Answer:" label, and a text input field. A "GO" button is located at the bottom of the form.

## Lockbox E-View Application Overview

### Step D: Setup Picture ID and Friendly Phrase

The screenshot shows a web interface with a navigation bar at the top containing links for LOGIN, QUICK FIND, TRANSACTION INFORMATION, SECURITY MAINTENANCE, DOWNLOADS, and CONTACT US. Below the navigation bar is a horizontal scroll of five images. The first image is selected, showing a field of white flowers under a blue sky. The text 'iView (c) 2006' and 'CPM012' is overlaid on the image. To the right of the image is a text input field labeled 'Friendly Phrase:' containing 'CPM012'. Next to the input field are three color selection buttons (white, black, red) and a font size dropdown menu set to '18'. Below the image and text is a 'GO' button. To the right of the image and text is a paragraph of instructions: 'Type a short (one or two words) phrase that you will easily remember and recognize. You may select a color and size that will help you identify this image. You may also drag the phrase to a location on top of your image to further identify this as yours.'

- Select a Picture from the scrolling images.
- Type a Friendly Phrase. The phrase can be moved in the image and can be changed in color and/or font size.
- Select **GO** to complete the First Login requirements.
- On the following screen select the **Lockbox E-View** button to login to Lockbox E-View or the **Cancel** button to exit.

The screenshot shows a web interface with a navigation bar at the top containing links for LOGIN, QUICK FIND, TRANSACTION INFORMATION, SECURITY MAINTENANCE, DOWNLOADS, and CONTACT US. The main content area displays the text: 'Congratulations you have completed Secure User Registration.' Below this is the question: 'Do you wish to open an iView Session?'. At the bottom of the page are two buttons: 'iView' and 'Cancel'.

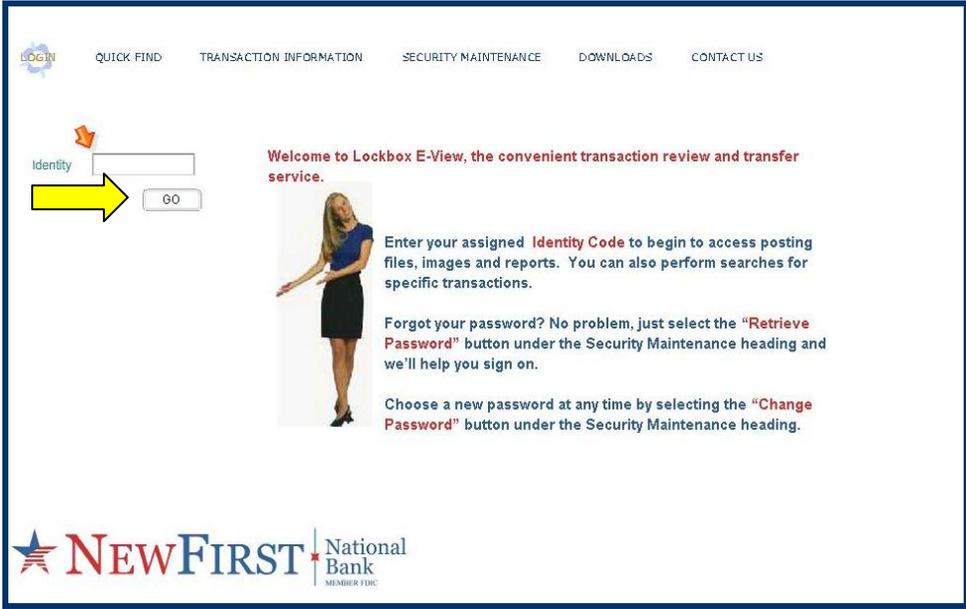
### Section 1: Login

The initial screen displayed when the *Lockbox E-View* website is launched, is the Login Screen.

- The user is prompted to enter their Identity Code and then Password.
- Each new user is assigned a unique Identity Code and Password.
- Enter the assigned Identity Code.

After the Identity Code has been entered the user will either be prompted to:

1. Enter the **Password**.
2. Enter the **Challenge Question**. This means the PC is not registered. If the user wishes to register the PC after Login they can select the Download Registration program from the Downloads heading.



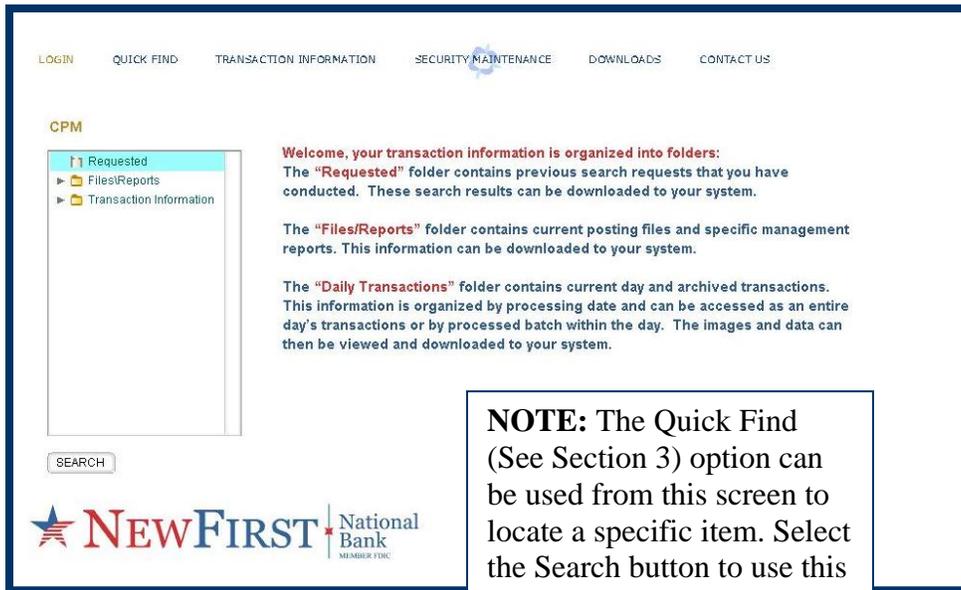
The screenshot shows the login interface for Lockbox E-View. At the top, there is a navigation menu with links: LOGIN, QUICK FIND, TRANSACTION INFORMATION, SECURITY MAINTENANCE, DOWNLOADS, and CONTACT US. The main content area features a login form on the left with an "Identity" label, a text input field, and a "GO" button. A yellow arrow points to the "GO" button. To the right of the form, there is a welcome message: "Welcome to Lockbox E-View, the convenient transaction review and transfer service." Below this, there is a photograph of a woman in a blue top and black skirt. To the right of the photo, there are three lines of instructional text: "Enter your assigned Identity Code to begin to access posting files, images and reports. You can also perform searches for specific transactions.", "Forgot your password? No problem, just select the 'Retrieve Password' button under the Security Maintenance heading and we'll help you sign on.", and "Choose a new password at any time by selecting the 'Change Password' button under the Security Maintenance heading." At the bottom left, the logo for NEWFIRST National Bank is displayed, with "NEWFIRST" in large blue letters, "National Bank" in smaller blue letters, and "MEMBER FDIC" in small black letters below it.

# Lockbox E-View Application Overview

## Section 2: Activities

After Login, displayed on the left hand side of the screen is a directory with folders that contains past and present transaction activity.

- The standard folder options displayed are: Requested, Files/Reports, and Transaction Information.



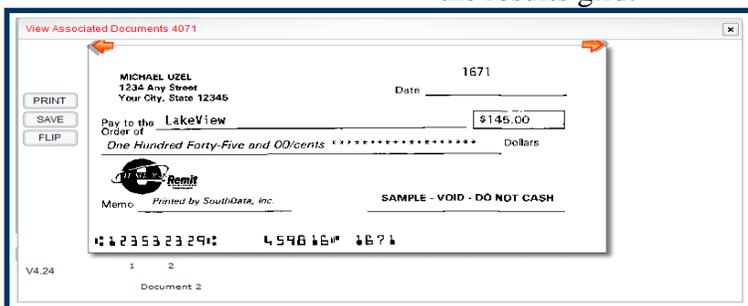
**NOTE:** The Quick Find (See Section 3) option can be used from this screen to locate a specific item. Select the Search button to use this feature.

- The **Requested** folder contains previous search requests that you have conducted. These search results can be downloaded to your system.

- To view the contents of this folder select the triangle to the left of the Requested folder and a list of previous searches will be displayed.
- The previous stored searches will be available for a 24 hour time period and will be erased after the 24 hours has expired.
- Results from previous search requests can be viewed, printed or saved.
- To work with a specific item select (double-click) that line within the results grid.

Date	Association	Name	Amount	Remit	Se
04/13/2006	DPW	VERLAND_APT	\$285.00	3092	22
04/13/2006	MTS	JOHN_CUTTELL	\$335.00	5065	14
04/13/2006	MTS	HARRY_DABAGI	\$335.00	5122	14
04/13/2006	MTS	CRAIG_CURLEY	\$335.00	5050	14
04/13/2006	MTS	JOSEPH_DALLE	\$335.00	5081	14
04/13/2006	GRA	THOMAS_TOOMB	\$250.00	1033	18
04/13/2006	GRA	JAMES_TOMPKE	\$250.00	1029	19
04/13/2006	GRA	JEFF_HERBREC	\$165.00	1078	19
04/13/2006	GRA	ROBERT_BABCO	\$250.00	1117	18
04/13/2006	GRA	LAWRENCE_HER	\$165.00	1096	18
04/13/2006	DPW	HARVEY_GUSTA	\$285.00	3035	14
04/13/2006	LKV	WILLIAM_VAN	\$145.00	4091	16
04/13/2006	DPW	W_APPEL	\$285.00	3088	22

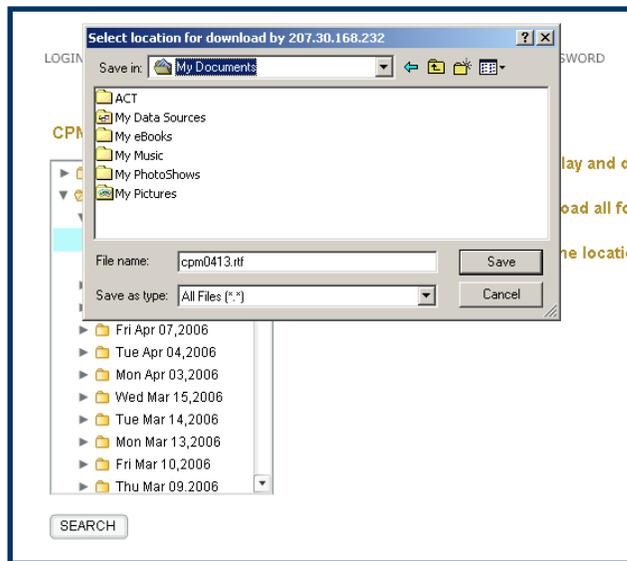
Download Data    Download Images



## Lockbox E-View Application Overview

Activities continued

- The **Files/Reports** folder contains current posting files and specific management reports that have been generated from *Lockbox Express* applications. This information can be downloaded to your system.
  - To download a Data File or Report select the triangle to the left of the Files\Reports folder and then choose a date from the list of available days folders. Each report or data file that was submitted for that date will be contained inside the folder.
  - Select the specific item within the dated folder and a dialogue box will appear. Select a target location on your computer system to download the selected item for viewing or storage purposes.
  - Select **Save** and the information will be transferred to the target location on your computer system.



- The **Transaction Information** folder contains current day and archived transactions. This information is organized by processing date and can be accessed as an entire day's transactions or by processed batch within the day. The images and data can then be viewed and downloaded to your system.
  - To view batches that were submitted for specific days, select the triangle to the left of the Transaction Information folder and then choose a date from the list of available day's folders. Each day will have a list of batches to choose from or an option to select the Entire Day.

Date	Association	Name	Amount	Remit	Sel
04/13/2006	DPW	VERLAND_APT	\$285.00	3092	22
04/13/2006	MTS	JOHN_CUTTELL	\$335.00	5065	14
04/13/2006	MTS	HARRY_DABAGI	\$335.00	5122	14
04/13/2006	MTS	CRAIG_CURLEY	\$335.00	5050	14
04/13/2006	MTS	JOSEPH_DALLE	\$335.00	5081	14
04/13/2006	GRA	THOMAS_TOOMB	\$250.00	1033	18
04/13/2006	GRA	JAMES_TOMPKE	\$250.00	1029	19
04/13/2006	GRA	JEFF_HERBREC	\$165.00	1078	19
04/13/2006	GRA	ROBERT_BABCO	\$250.00	1117	18
04/13/2006	GRA	LAWRENCE_HER	\$165.00	1096	18
04/13/2006	DPW	HARVEY_GUSTA	\$285.00	3035	14
04/13/2006	LKV	WILLIAM_VAN	\$145.00	4091	16
04/13/2006	DPW	W_APPEL	\$285.00	3088	22

## Lockbox E-View Application Overview

Activities continued

- From the Batch Review screen the items can be viewed, printed, flipped (to see reverse side) or saved, if the specific line item within the results grid is selected (to select the item double-click it).



### Section 3: Quick Find

To search for a particular item the Quick Find feature enables the user to search for images by multiple query options.

- The available query options are date range, amount range or any field of data (Check Data, Check Serial, Remittance #, Amount, Name, User Fields, etc.) captured.
- Under the selection “Request Name” you can type a portion of the customer’s first or last name to provide a narrowed list of names from which to make your selection.

LOGIN QUICK FIND TRANSACTION INFORMATION SECURITY MAINTENANCE DOWNLOADS CONTACT US

Identity null  
Password  
GO

Find a Transaction

**QUICK FIND** searches transactions by a specific date or range of dates; by a specific amount or range of amounts and by specific values within check and remittance information. You may want to name your request under “Request Name” to make it easy to identify.

**Note:** If you plan to download your search results, select the “Prepare Images for Download” box here and save an extra step following the search.

**NEWFIRST** National Bank  
MEMBER FDIC

**NOTE:** If you plan to download your search results, select the **Prepare Images for Download** option below the search criteria fields to save an extra step following the search.

- Once the search criteria are entered select the Go button to query and display the results.
- The result of the searches data and/or images can be downloaded to the system at the discretion of the user.
  - Each specific image can also be viewed, printed or saved if the specific line item within the results grid is selected (to select the item double-click it).

## Section 4: Change/Retrieve Password

To change the account password, select the Security Maintenance heading from the menu bar at the top of the screen and choose the Change or Retrieve Password option.

### Change Password

The screenshot shows the 'SECURITY MAINTENANCE' section of the NewFirst National Bank website. The navigation bar includes 'LOGIN', 'QUICK FIND', 'TRANSACTION INFORMATION', 'SECURITY MAINTENANCE', 'DOWNLOADS', and 'CONTACT US'. The 'SECURITY MAINTENANCE' link is highlighted with a blue gear icon. Below the navigation bar, there are four input fields: 'Identity', 'Current Password', 'New Password', and 'Re-enter New Password'. An orange arrow points to the 'Identity' field. To the right of the fields, there is a 'GO' button. The text on the page reads: 'SECURE Please enter your current Identity Code and Password.', 'Please enter your new password.', and 'Please re-enter your new password.'. At the bottom, the NewFirst National Bank logo is displayed.

- Enter your current Identity followed by the Current Password.
- Now type the new Password and then Re-enter the new Password to verify that it was typed correctly.
- Select the Go button to complete the Change Password function.

### Retrieve Password

The screenshot shows the 'SECURITY MAINTENANCE' section of the NewFirst National Bank website. The navigation bar includes 'LOGIN', 'QUICK FIND', 'TRANSACTION INFORMATION', 'SECURITY MAINTENANCE', 'DOWNLOADS', and 'CONTACT US'. The 'SECURITY MAINTENANCE' link is highlighted with a blue gear icon. Below the navigation bar, there is one input field labeled 'Identity'. An orange arrow points to the 'Identity' field. Below the field is a 'GO' button. The text on the page reads: 'In order to fully secure your information, we request that you contact Customer Service at 281-517-4633 to request a new password.'. At the bottom, the NewFirst National Bank logo is displayed.

- Contact Customer Service at 281-517-4633 to request a new password.