

Log In Page

The Log In process authenticates a User; only authenticated Users can access i-View application functions.

CITATION™ i-View has been designed as a secure portal for information delivery. To ensure that the user is authenticated, a valid User Name, Password and PIN number are all required.

To Log In, enter a User Name, Password and select the PIN numbers from the key pad then click Log In.



The screenshot shows a web interface for logging in. At the top, there is a 'Log Off' button with a lock icon. Below it is a 'Log In' header. The form contains three input fields: 'User Name:', 'Password:', and 'PIN:'. Below the 'PIN:' field is a numeric keypad with buttons for digits 4, 0, 8, 6, 2, 3, 1, 5, 9, and 7, along with a 'Clear' button. At the bottom left, there is a link for 'Forgot password or pin?'. At the bottom right, there is a 'Log In' button.

- ***User Names are not case sensitive.***
- ***Passwords are case sensitive.***
- ***A User is required to use the randomized key pad (numbered buttons are not in fixed positions, they randomly shift at each log in attempt) to enter a PIN number.***

The initial User Names, Passwords and PIN numbers are provided to the customer by the bank. Passwords and PIN numbers are automatically generated and sent via email when a new User is added. See Adding Users for more additional information.

FIRST TIME LOGIN

Once you have logged in for the first time, go to the User Setting option. Under My Settings, complete the Security Question and Security Question Answer boxes, then you can reset your Password and PIN to those of your choosing.

** NOTE – Passwords should have at least 1 capital letter and one number, ex. Bank1234, 12Banker **

Log Off Home Transaction History User Settings Contact Us

My Settings

Personal Information

E-Mail Address: aclifford@tmrsolutions.com

Security Question: What school did you attend for sixth grade?

Security Question Answer: Sunrise

Password: Change Password

PIN (Personal Identification Number): Change PIN

Cancel Save Changes

You will no longer be required to change your password periodically!! However, if you are unable to successfully recover your password using the steps below you will need to contact the lockbox specialists at NewFirst national Bank for assistance.

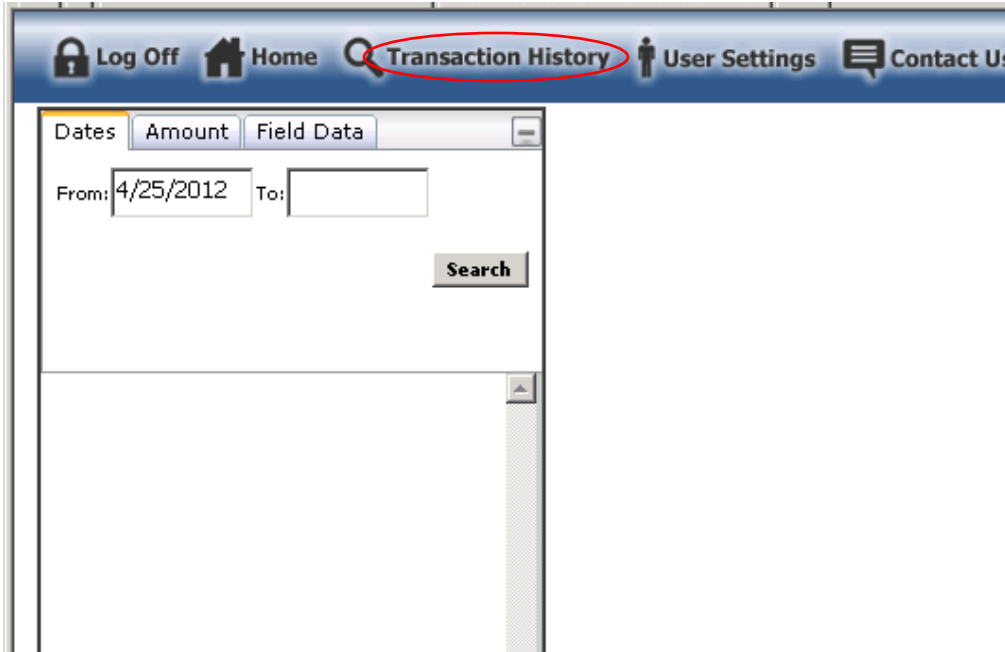
Forgot Password or Pin?

A valid User Name, Password and PIN are required to access the website. However, a User can request a new password and PIN by choosing “Forgot Password or PIN” at the Log In page. The application will authenticate the User based upon a valid User Name and a correct answer to the Users Security Question; this authentication does not allow access to the **i-View** application functions but does send a new Password and PIN number via email.

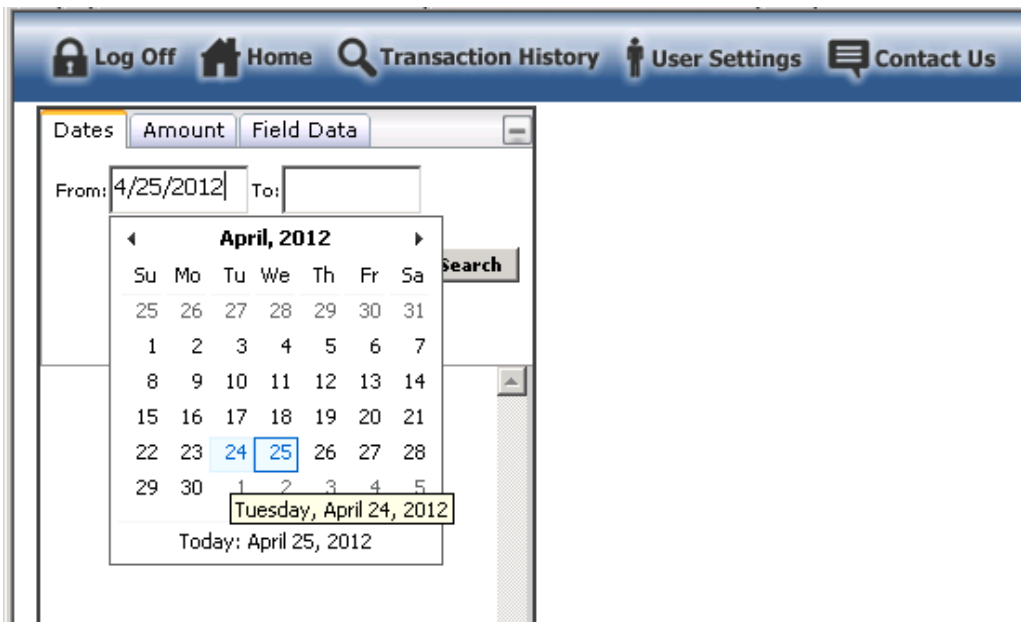
NEWFIRST NATIONAL BANK LOCKBOX SERVICE: I-VIEW 3

DAILY REPORT DOWNLOADING

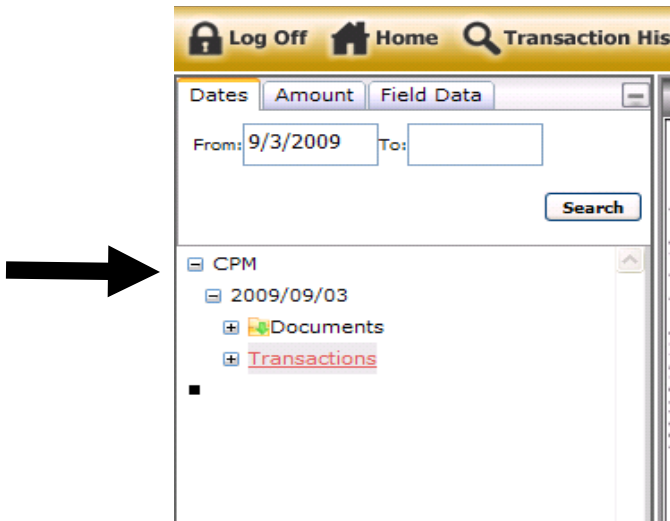
To view or download the daily reports, click on Transaction History.



In the date fields click in the first box and select the date for the reports you wish to view/download. Then click SEARCH.



The box below shows the results appearing on the left. Click the plus sign next to your company name, then the dated subfolder will appear. Click the plus sign next to it, then the Documents and Transactions subfolders will appear.



To continue to download all reports as usual, there are two options:

Option 1: Click the folder with the green arrow next to Documents. This will let you download the entire day's reports as a zipped folder to your computer.

Option 2: Click the plus sign next to the Documents folder, and it will then list each report and data file for that day. You may then click on the blue diskette icon next to only those you need to save it to your computer.

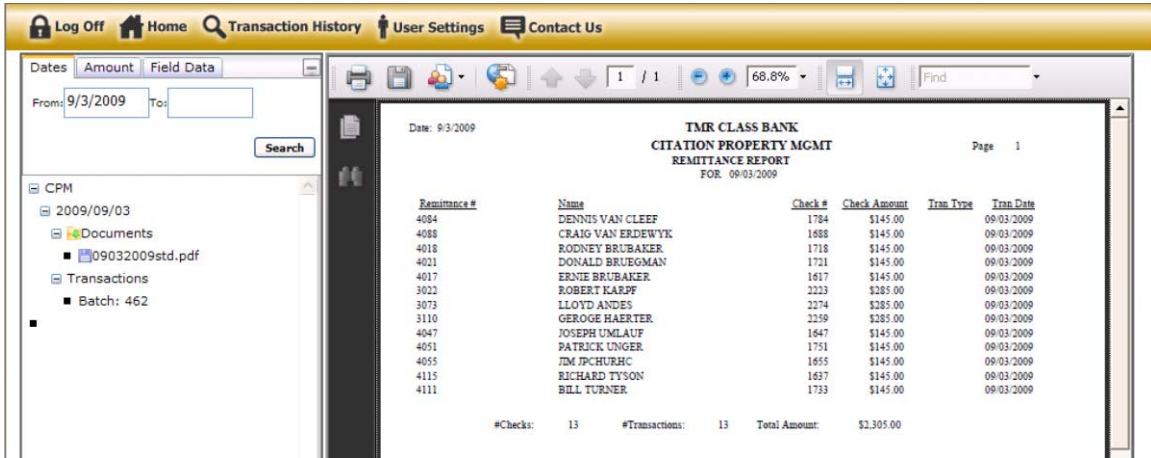
HINT: If you do not see the file download window, your system may have security features enabled to protect you from unauthorized file downloads. Below is a typical Internet Explorer security message.

A screenshot of an Internet Explorer security message. It features a blue diskette icon on the left and the text: "To help protect your security, Internet Explorer blocked this site from downloading files to your computer. Click here for options..."

Clicking on the message as indicated, provides a temporary option for downloading files.

NOTE: You may have to select the date and folders again. Check with your IT personnel to see if they can adjust this for you.

To view the reports without downloading them, you will just click once on the **name** of the report (not the blue diskette), and it will open the report in the IV3 window for you to view!

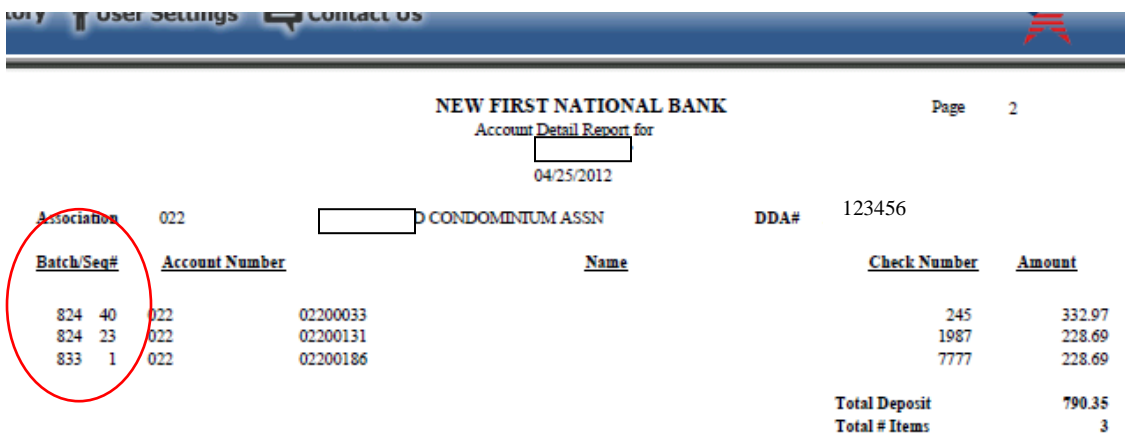


Researching Transactions

One feature of the IV3 system is the ability to do research by using the reports for searching the transaction files. The transaction files hold images of the checks and coupons that are included in each day's deposits.

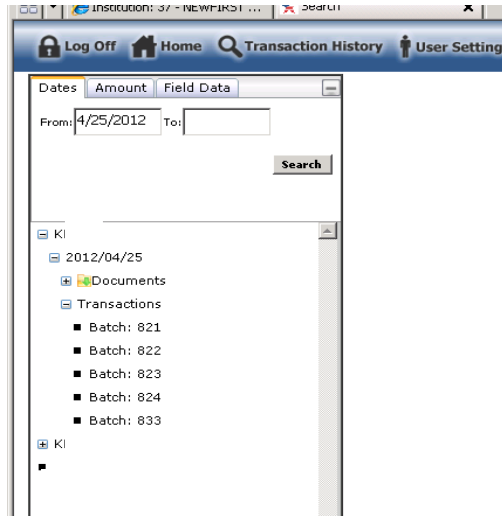
To search for an item we will start with a basic search using the information on a report.

Each individual item listed on a report has a Batch and Sequence number.

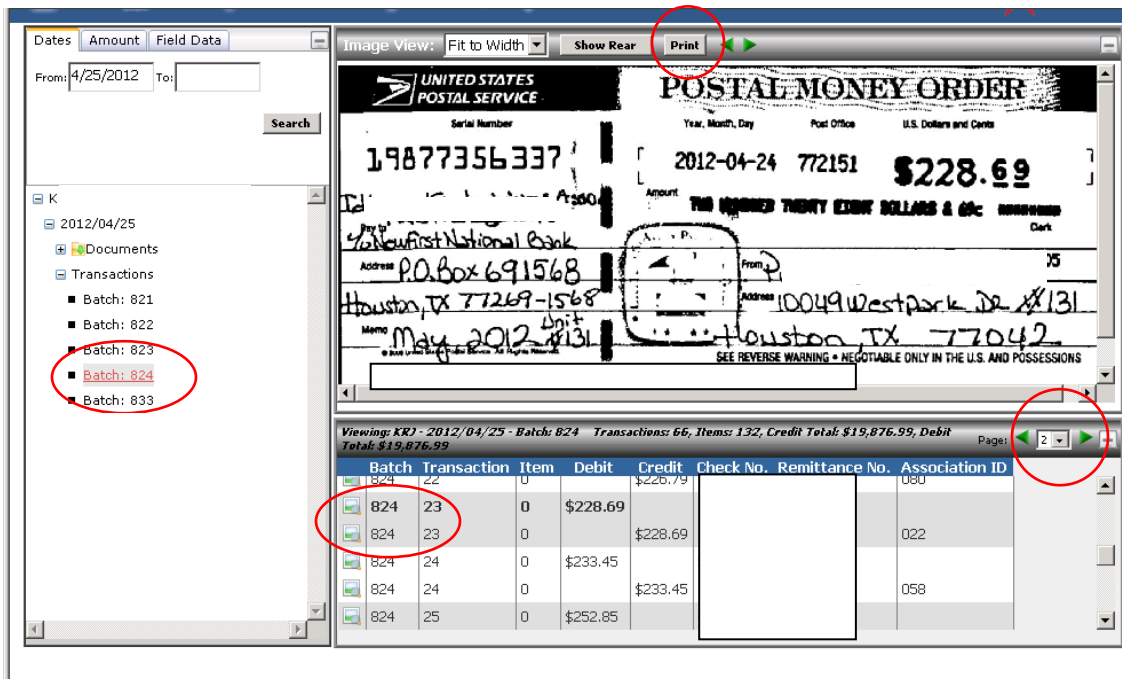


This will be the location of the item in the Transaction section. For example, using the image of the report above, we will search for the second item: Batch 824, Sequence 23.

Click on the plus sign next to the Transaction subfolder. It will then list each batch for that day.



Click on the batch number for the one you are researching for. It will then pull up the images in the window on the right.



Scroll down the bottom listing until you find image 23 and click on the photo icon (there will be 15 images per page, so use the green arrows on the right to go to the next page). In most cases there will be two lines for each one. The second line is the image of the coupon (if available – the photo icon will appear at the beginning of the line if an image is available). You can click on the photo icon on the second line to view it. You may also print the image if necessary using the print button above the image!

Searching for Checks

To search for a check that you are not sure what day it was deposited, or that may have been deposited to the wrong account, you can use the AMOUNT tab to search an item.

****Note:** If you have several checks that are the same dollar amount this will not be the most helpful method. Instead, use the FIELD DATA method below. ******

FIELD DATA SEARCH

The Field Data tab will let you search by criteria using the information contained on your report. The fields you can use are: [Account Number](#), [Name \(if applicable\)](#), [Check Number](#), or [Amount](#).

Say for example, you needed to see a copy of a check for a specific property. The property number is 20300103, as shown on the report.

NEW FIRST NATIONAL BANK
 Account [Redacted]
 05/04/2012

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Association 203 [Redacted] DDA:

Batch/Seq#	Account Number	Name	Check Number	Amount
1005 1	20300011		2241	325.02
1003 12	20300018		1578	198.92
1004 7	20300066		336	301.17
1010 10	20300080		7777	202.35
1003 32	20300087		1375	202.35
1007 3	20300099		9999	2,460.54
1005 20	20300103		17781927	301.17
1005 38	20300104		194182749	301.17
1010 9	20300134		7777	335.24
Total Deposit				4,636.93
Total # Items				9

Enter the account number as shown below, then select the date or date range. Then click Search.

Dates | Amount | **Field Data**

20300103 In: All Fields

Match Whole Field Match Case

Restrict by date range.

Date From: 5/4/2012 To: []

Search

Then, utilizing the + sign next to the search results, you can pull up the image that was found.

The screenshot displays a web-based financial application interface. At the top, there is a navigation bar with links for 'Log Off', 'Home', 'Transaction History', 'User Settings', and 'Contact Us'. Below this, a search panel on the left contains filters for 'Dates', 'Amount', and 'Field Data'. The 'Dates' filter is set to '20300103' and 'All Fields'. A search button is visible. The main area shows a check image with the following details: Account number, amount of \$301.17, date 'May 03, 2012', and payee information for 'NORTHERN TRUST'. The check amount is written as 'THREE HUNDRED ONE AND 17/100 DOLLARS'. Below the check image, a table displays transaction details for the batch 1005-20.

Batch	Transaction	Item	Debit	Credit	Check No.	Remittance No.	Association ID
1005	20	0	\$301.17		17781927		
1005	20	0		\$301.17			203

That is the basics of the new IV3 system!

If there is anything you are having trouble locating, please feel free to contact us as always and we will gladly assist you!

832-344-2067 – Lockbox Department