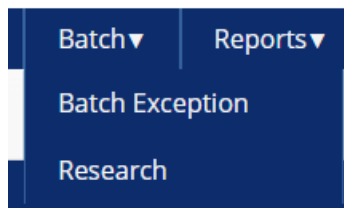


## BancFirst Lockbox Archive

### Research

❖ Research

- Select the Batch option from the Menu Bar.
- Select Research from the dropdown.



- Users can search transactions based on any custom fields captured for your account. Choose a date range, enter any additional search criteria, and then click Search.
  - Client Name is your Company Name
  - Account Name = CID in eArchive platform. Users can select a CID/sort from this dropdown to narrow results.
    - To view all items available for a date or date range, leave Account Name on ALL.

Research \* Required Information

Search Research File Details

Bank Name	BANCFIRST.BANCFIRST *	Client Name	ALL
Payment Type	Select	Transaction Type	Select
From Date	08/30/2023 *	To Date	08/30/2023 *
Account Name		ALL	
Batch Number		To	

Check Data Check Amount Remittance Name Expected Amount Remittance # Change of Address OCR Scanline Payor Validation	To	Check Serial # Remit Amount Remittance # Invoice # OCR Scanline Change of Address Amount_Paid CHADD
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RESEARCH FILE STATUS
SEARCH
CLEAR

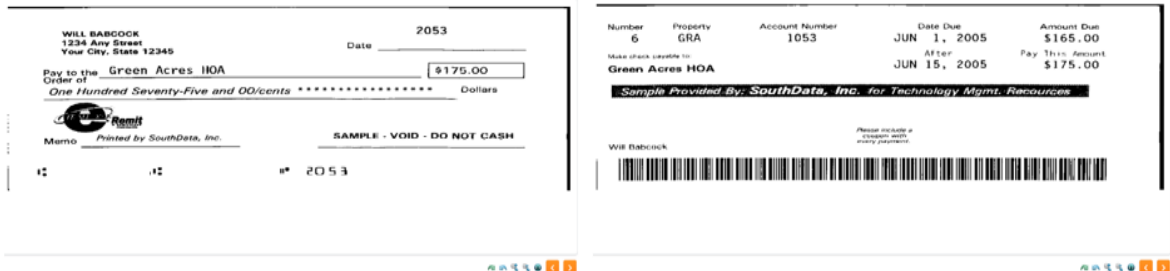
- To obtain more specific search results enter more detailed information. Example: Entering 175.00 in the check amount field will narrow the results to check amounts containing 175.00.
  - \*\* Remit Amount = Invoiced Amount

- Results are displayed below the query box.
  - To view all images of items associated with a query, click the checkbox in the column header labeled **Select**, then click [View Image](#).
- To view specific images from the query, click the checkbox to the left of the desired line item, then click [View Image](#) to display the items associated with the selected transaction(s).

Select	Seq	Batch No	Run No	Batch Date	Association ID	Check Amount	Check Data	Check Serial #	Expected Amount	Invoice #	Remit Amount	Ren
<input type="checkbox"/>	1	175	175	08/30/2023		878.42			25.00		878.42	2200
<input type="checkbox"/>	3	175	175	08/30/2023		878.42			878.42		878.42	2200

[EXPORT DATA](#)
[VIEW IMAGE](#)

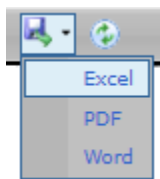
- Once the desired image(s) is displayed, click the right arrow to view any remittance documents associated with that transaction. Continue to use the arrows to view all selected items until finished.



- Options to view the images are: [Reset Image](#), [Zoom Out](#), [Size Dropdown](#), [Zoom In](#), [Rotate 90° Left](#), [Rotate 90° Right](#), [Flip Image \(rear\)](#), [Previous Image](#), [Print](#), [Previous Image](#) and [Next Image](#).



- To print the selected image, select **PRINT**.
  - After selecting Print, a new tab will be opened in your web browser.
  - In the new window, a grey action bar will show users the number of pages in the queue to print as well as arrows to allow users to navigate through the images generated.
  - To Print Images, or save images, click on the Floppy Disk icon in the grey action bar and click on the desired format. Options are Excel, PDF, or Word.



- After desired format is selected, the output file will be downloaded to the Browsers downloads menu. Items can then be saved to the desired location or printed.
- To export the line item data for a query, checkmark **Select** in the header to select all or select specific line items then click on **Export Data** to download a csv file. This will be available in your browser downloads for further review. Once exported, the file can convert from csv to excel.

<input type="checkbox"/> Select	Seq	Batch No	Run No	Batch Date	Association ID	Check Amount	Check Data	Check Serial #	Expected Amount	Invoice #	Remit Amount	Ren
<input type="checkbox"/>	1	175	175	08/30/2023		878.42			25.00		878.42	2200
<input type="checkbox"/>	3	175	175	08/30/2023		878.42			878.42		878.42	2200

EXPORT DATA VIEW IMAGE

**BancFirst**

**Loyal**

*To Oklahoma & You.™*

## **For Assistance**

For further assistance with password or PIN resets, research assistance, or general questions, please call our Commercial Client Services department at 405-270-4785 or email at [ClientServices@BancFirst.bank](mailto:ClientServices@BancFirst.bank).

To schedule training, please reach out to our BancFirst Treasury Training Team at 405-218-4141 or by email at [TreasuryTraining@bancfirst.bank](mailto:TreasuryTraining@bancfirst.bank).

For assistance with lockbox processing, please reach out to our Lockbox team at [lockbox@BancFirst.bank](mailto:lockbox@BancFirst.bank).