



Powered by: International Financial Services, Inc.

## Admin User Manual

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***Need Help? Email or call your assigned Partner Success Specialist (PSS)***

**OR**

**Email [help@dtconnex.com](mailto:help@dtconnex.com)**

## Getting Started with DTS Connex

DTS Connex is strictly a web-based product, to access go to <https://dtsconnex.com>.

DTS Connex is accessible from the following internet browsers:

- Chrome
- Internet Explorer
- Safari
- Edge

The following domains should be “whitelisted” to allow users access to DTS Connex and receive emails and notifications; this information should be shared internally with your IT team.

- dtsnotifications.com
- dtsconnex.com
- transactiontracking.com
- ifsdemo.com
- lfsservices.com

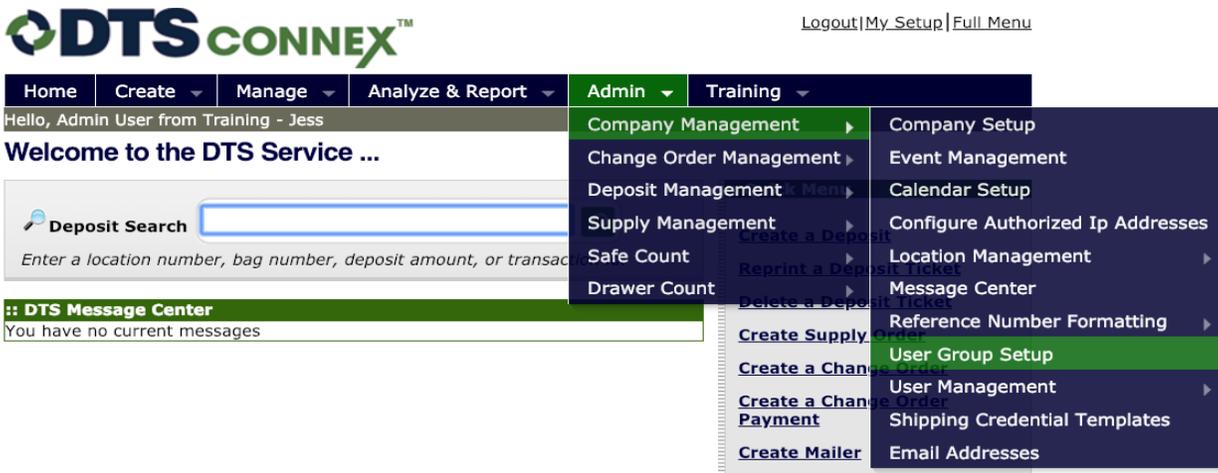
Please verify with your IT team, all devices and browsers that will access DTS Connex company wide, have security protocol TLS 1.2 or greater enabled.

# Create User Groups

Assigning Users to a specific User Group puts the necessary parameters around what a User can see and do in DTS. Admin Users are assigned to the Administrator' User Group, allowing access to all location profiles and transactions as well as user profiles. Admin Users can make changes, if necessary and where applicable, to location profiles and custom templates and add or remove users.

The User Group for End, Store or Location Users, based on your terminology, will only allow those users to create and search transactions for their own store or location. User Groups can also be created for those users that need access to more than one location, such as Region Managers, by adding certain "Area" identifiers to location profiles like Brand, Region, District and/or Sub-District.

Hover over Admin > Company Management, click **User Group Setup**.



- Click **Create New Group**.

## User Group Setup



- Enter the name of the new group, click **Add Group**.

## User Groups

Group Name

**Add Group**

- Assign the “rights” or functions the users in this group will be able to perform by clicking the blue box in the “Rights” column for the appropriate User Group.

## User Group Setup

Create New Group Save

User Group	Add Users	Users Rights	Reports	Dashboard	Training	Notifications	Reminders	Local Admin Groups	Delete Group	Local Admin Managed
Administrators										<input type="checkbox"/>
Deposits										<input type="checkbox"/>
Store User										<input type="checkbox"/>
Verifier										<input type="checkbox"/>

Create New Group Save

The list of rights will appear.

### Edit Rights for Group

Group: Deposits

- Create Deposit
  - Track Deposits and Payments
  - Reporting
  - Administrator
  - Delete Deposit
  - Reprint Deposit or Payment
  - Delete Change Order Payment
  - Complete Deposit
  - Verify Deposit
  - Search Change Order
  - Cancel Change Orders
- Hold CTRL to select multiple entries

Cancel

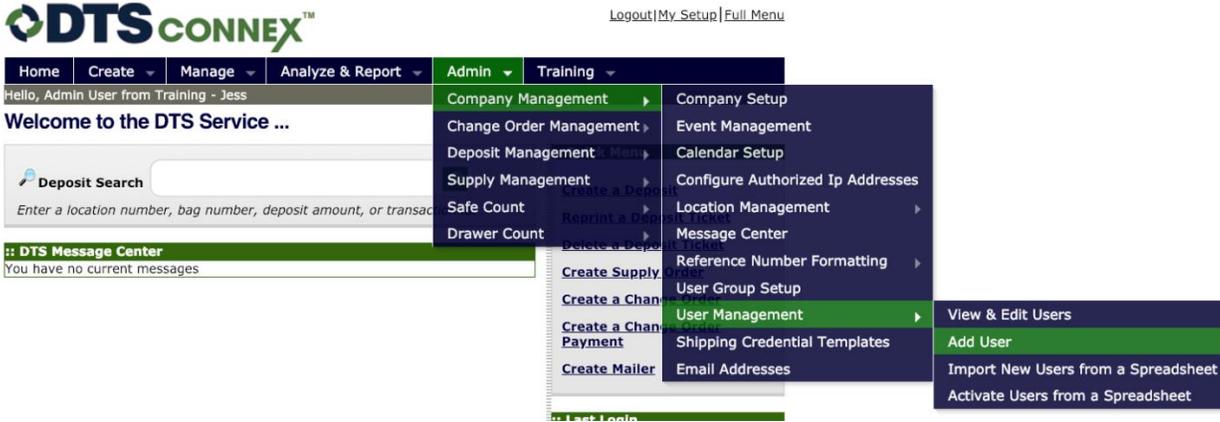
Save

- Holding down the control or command key on your keyboard, click each “right” or function to add to the User Group
- Click **Save**.

# Manually Enter New Users

A single user or a small number of users can be manually added and assigned to a specific User Group or Groups.

- Hover over Admin > Company Management > User Management, click **Add User**.



This screen will appear.

Populate:

- Username (can be the user's email address, MUST include the @ sign)
- First Name
- Last Name
- Email address
- Choose User Group
  - This is the specific user group that you want this user assigned to. This will dictate what functions the user will be able to perform and access.
- City
- State
- Zip
- User View
  - LIMITED or FULL view. LIMITED view means the user only has access to one or a limited number of locations, FULL means the user has access to all locations, usually an Admin User. If a user has LIMITED view, select the location or locations from the location list, when choosing more than 1 location, hold the command/control key on your keyboard and left click to select each location. Locations do not need to be individually selected for users set to FULL view.
- Time zone

The screenshot shows the 'Add User' form. The form is titled 'Add User' and has a 'Copy From Existing User Template' section. The 'Required' section includes fields for Username, First Name, Last Name, Email, City, State (Abbreviation), and Zip (post code). The 'Optional' section includes fields for Title, Phone (Work), Phone (Mobile), Email, and Email password?. There is also a 'Timezone' dropdown menu set to 'Hawaii (GMT -10:00)'. The 'Auto Update Access to Locations Based on Markets' section is checked. The 'Markets' section lists various locations with checkboxes for selection. The form has 'Cancel' and 'Add User' buttons at the bottom. A status message at the bottom reads 'Status: Please enter user information.'

Log in information can be automatically forwarded to new users from DTS Connex, in two separate emails, that contain:

1. the website URL and username
2. a temporary password the user will be prompted to change immediately

- Place check marks in the boxes labeled Email Username? And Email Password? Prior to clicking **Add User**

**Add User**

**Copy From Existing User Template**

Template:

**Required**

Username	Store123@example	City	Westminster
First Name	Store	State (Abbreviation)	MD
Last Name	123	Zip (post code)	21157
Email	store123@example		
User Type	Company User	User View	Limited
Groups	Administrators Store User Verifier	Locations	0200 - Williamsburg - Que 5140 - Austin - Que 1 Step 8500 - Santa Monica
Hold CTRL to select multiple entries		Hold CTRL to select multiple entries	
Timezone	Eastern Time (US) (GMT -05:00)		

**Optional**

Title		Use as Template	<input type="checkbox"/>
Phone (Work)		Street Address	66 E Main St
Phone (Mobile)		Street Address 2	
Email Username?	<input type="checkbox"/>	Email password?	<input type="checkbox"/>

**Auto Update Access to Locations Based on Markets**

Markets

Hold CTRL and click on multiple items for multiple markets

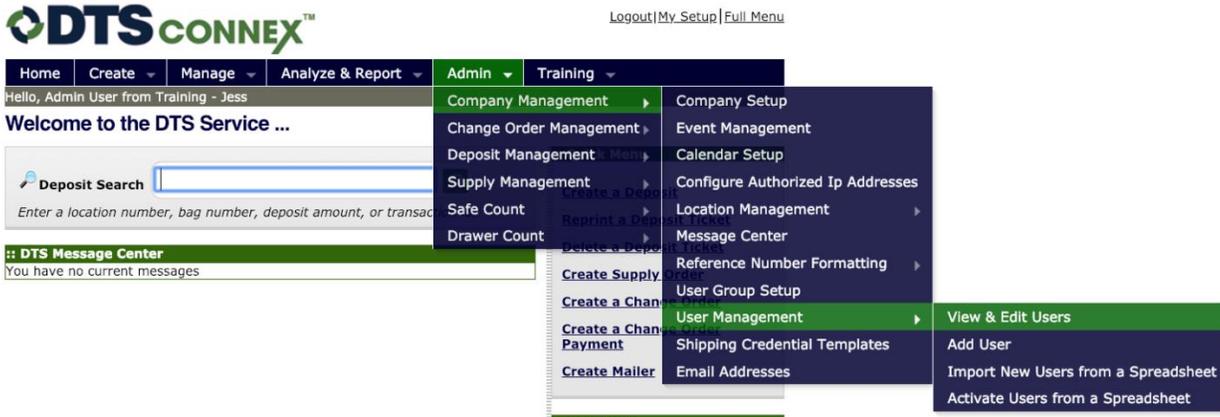
Note: Upon pressing SAVE, the locations this user has access to will be updated based on any markets selected. If you no longer want locations to be selected based on markets, simply click the blank entry at the top of the list. Every night, DTS will automatically update the user's locations to match the location currently in a market. Therefore, if you make a change to a region, district, sub-district in a location's profile, the user's locations will not be updated until that night.

A confirmation will appear on the screen containing the username and temporary password for the new user. The user is now "active" and can log into DTS Connex. Please NOTE: users will not have access to create transactions UNTIL the locations they have been assigned are made active for change orders and/or deposits by the Admin User. Location activation instructions begin on page 25 of this manual.

## Manually Activate Users / Send Welcome Emails

**NOTE: This function is NOT performed by DTS, password resets must be done by an Admin User.**

- Hover over Admin > Company Management > User Management, click **View & Edit Users**.



- Click **ALL** to load a list of all users to the screen.

### User Management



- Click the action box to the left of each user you wish to activate, a check mark will appear.
- Click **Send Welcome Info & Make Active**.

Actions: <a href="#">Make Active</a> <a href="#">Make Inactive</a> <a href="#">Send Welcome Info</a> <a href="#">Send Welcome Info &amp; Make Active</a> <a href="#">Remove Lock</a> <a href="#">New Password</a> <a href="#">Expire Password</a> <a href="#">Delete User</a>												
Action	Edit	User	Last Name	First Name	Username	Locations	Groups	Password Expires	Inactive	Locked Out	Lockout Ends	Email
<input type="checkbox"/>	<a href="#">Edit</a>	0200	Store		store0200@ferguson	0200	Store User	11/7/2018	No	No		<a href="#">Mail</a>
<input checked="" type="checkbox"/>	<a href="#">Edit</a>	5140	Store		store5140@ferguson	5140	Store User	5/27/2018	No	No		<a href="#">Mail</a>
<input type="checkbox"/>	<a href="#">Edit</a>	8500	Store		store8500@ferguson	8500	Store User	5/27/2018	No	No		<a href="#">Mail</a>
<input type="checkbox"/>	<a href="#">Edit</a>	approve	verify		verify@ferguson	All	Verifier	11/5/2018	No	No		<a href="#">Mail</a>
<input type="checkbox"/>	<a href="#">Edit</a>	User	Admin		admin@ferguson	All	Administrators	11/7/2018	No	No		<a href="#">Mail</a>

Actions: [Make Active](#) [Make Inactive](#) [Send Welcome Info](#) [Send Welcome Info & Make Active](#) [Remove Lock](#) [New Password](#) [Expire Password](#) [Delete User](#)

Each user will receive 2 emails; one with the URL to log into DTS Connex and their assigned username. The second email will contain a DTS generated temporary password. The user will be prompted to create their own password when they log in for the first time.

The emails will come from DTS Support. Please ensure that your IT department has whitelisted the email address [dts@ifsservices.com](mailto:dts@ifsservices.com) and the URL <https://www.transactiontracking.com>.

The two emails will appear as follows:

### URL login and username:

DTS Welcome Instructions Inbox x

---

 **DTS Support** dts@ifsservices.com via email.dtsnotifications.com  
to me ▾

.

Welcome to DTS. You have been registered as a user of the website <https://www.transactiontracking.com>

Your username is: .

Your password will be delivered in a separate email. Please contact your company's DTS Administrator or bank representative if you have any questions.

Thank you for using DTS.

### Password:

Your DTS Password Inbox x

---

 **DTS Support** dts@ifsservices.com via email.dtsnotifications.com  
to me ▾

Welcome to DTS. As a registered user of <https://www.transactiontracking.com>, your temporary password is: s5106770

You will be required to change this password at initial login.

Please contact your company's DTS Administrator or bank representative if you have any questions.

Thank you for using DTS.

## Import New Users

The import tool is convenient when adding a large number of new users to the system.

- Hover over Admin > Company Management > User Management, click **Import New Users from a Spreadsheet**



- Click [here](#) to download the New User Import Spreadsheet, users will not be imported unless this specific document is downloaded with each new import.

### Import users

You can upload a list of new users and have them be imported in DTS. Download the Excel upload file [here](#). Be sure to view the instructions worksheet for information. Please leave all columns and worksheet titles as they are or the import will not work.

- Populate the Required fields along with any non-required you wish to assign
  - The username can be any configuration but **MUST** contain the @ symbol and does not require the “.com”.
  - The user group name **MUST** be formatted exactly as the name appears in DTS Connex.
  - The location number links the user to a specific location.
    - NOTE: If a user will have access to more than one location, list all the locations, separated by a comma.
  - The time zone **MUST** be a two-letter abbreviation in all capital letters, i.e.: AT, ET, PT, HT, CT, or MT.

	A	B	C	D	E	F	G
1	<b>Username</b>	<b>First Name</b>	<b>Last Name</b>	<b>Email</b>	<b>City</b>	<b>State</b>	<b>Zip</b>
2	Required	Required	Required	Required	Required	Required	Required
3	store123@example	Store		123 store123@example.com	Westminster	MD	21157
4							

	H	I	J	K	L	M	N
	<b>Password</b>	<b>User Groups</b>	<b>Sub Districts</b>	<b>Districts</b>	<b>Regions</b>	<b>Location Numbers</b>	<b>Time Zone</b>
	Not Required	Not Required	Not Required	Not Required	Not Required	Not Required	Required
		Store User				123	ET

- The password field on this template will not populate a long-term password but can be a “common” temporary password the user will be asked to change when logging in for the first time.

Save this document to your desktop.

## Import Users

From the Import Users Screen:

- Click Choose File. You will be prompted to select a file from your computer.
- If you would like to activate the users as well as send the Welcome Emails that contain the URL, username and temporary password at the same time users are imported
  - Select **Yes** in the box next to Send Welcome Emails.
  - Select **Active** in the box next to Users Active/Inactive.
- If you do NOT want to make the users active and send their welcome emails do not change the setting which reads:
  - **No** in the box next to Welcome Emails.
  - **Inactive** in the box next to Users Active/Inactive.
- Select Import File
  - If anything is not formatted correctly, the screen will display an error message indicating the line number on the import document that needs to be corrected. Please correct this error, save, and go back to the import file process again.
  - If everything imports correctly, the screen will display a message indicating how many users were imported, whether they were made active and if welcome emails were sent.

## Import users

**You can upload a list of new users and have them be imported in DTS. Download the Excel upload file [here](#). Be sure to view the instructions worksheet for information. Please leave all columns and worksheet titles as they are or the import will not work.**

---

### Choose File:

No file chosen

Send Welcome Email:

Users Active/Inactive:

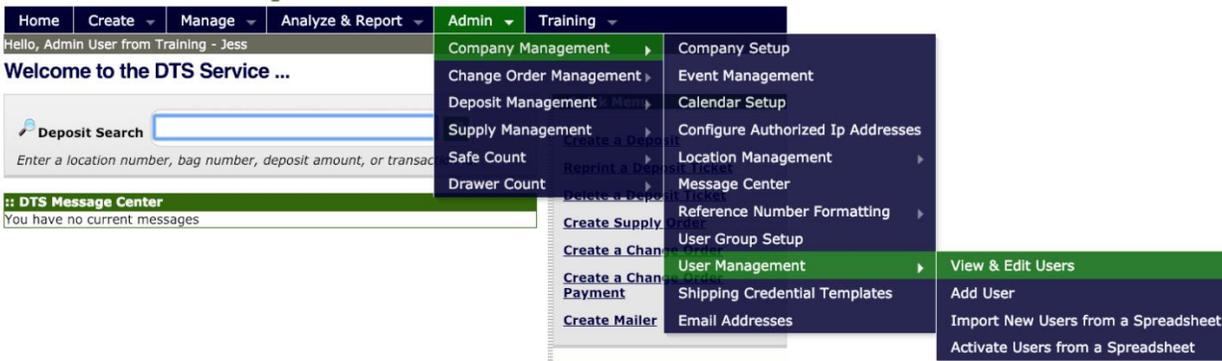
### Import File

# Reset a User Password

**NOTE: This function is NOT performed by DTS, password resets must be done by an Admin User.**

If a user forgets their password, a new, temporary password can be sent to allow the user to reset their forgotten password. It is recommended that you have an internal process in place to direct users how to request a password reset, as DTS will not be able to assist, for security purposes.

Hover over Admin > Company Management > User Management, click **View and Edit Users**.



- Click **ALL** to load a list of all users to the screen. You may also search by the name of the user as long as it matches what was entered into DTS.

## User Management



- Click the action box to the left of each user to enter a check mark for the user or users you wish to send a new password to.
- Click **New Password** from the Actions menu
  - A green message will appear at the top of the screen indicating the number of users who have been sent a new password.

## User Management

Search  Show: All Do: Add User

Search will return users that contain search terms. To search by location, enter a # before the location (i.e. #103). Other options include #all and #full.

---

**Actions:** Make Active Make Inactive Send Welcome Info Send Welcome Info & Make Active Remove Lock **New Password** Expire Password Delete User

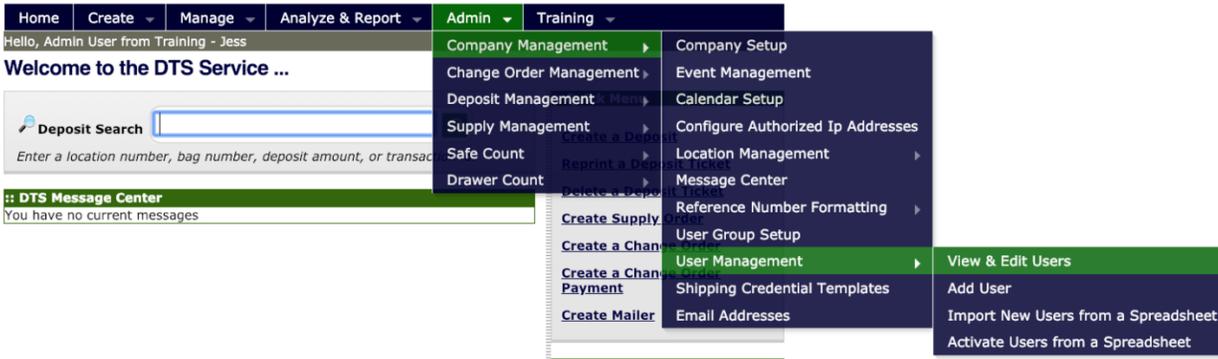
Action	Edit	User	Last Name	First Name	Username	Locations	Groups	Password Expires	Inactive	Locked	Out	Lockout	Ends	Email
<input type="checkbox"/>	Edit	121	Store		121@lowesfood	121	Store User	10/4/2018	No	No				Mail
<input type="checkbox"/>	Edit	123	Store		123@lowesfood	123	Store User	10/5/2018	No	No				Mail
<input checked="" type="checkbox"/>	Edit	136	Store		136@lowesfood	136	Store User	10/4/2018	No	No				Mail
<input type="checkbox"/>	Edit	137	Store		137@lowesfood	137	Store User	10/7/2018	No	No				Mail
<input type="checkbox"/>	Edit	145	Store		145@lowesfood	145	Store User	10/6/2018	No	No				Mail
<input type="checkbox"/>	Edit	149	Store		149@lowesfood	149	Store User	10/7/2018	No	No				Mail
<input type="checkbox"/>	Edit	151	Store		151@lowesfood	151	Store User	10/7/2018	No	No				Mail
<input type="checkbox"/>	Edit	153	Store		153@lowesfood	153	Store User	10/4/2018	No	No				Mail

The user will be emailed a temporary password, the user will be prompted to change the password when they log in for the first time.

## Delete User(s)

**NOTE: This function is NOT performed by DTS, password resets must be done by an Admin User.**

Hover over Admin > Company Management > User Management, click **View & Edit Users**.



- Click **ALL** to load a list of all users to the screen.

### User Management



- Click the action box to the left of each user you wish to delete, a check mark will appear.
- Click **Delete User**.

### User Management

Search  Show: All Do: Add User

Search will return users that contain search terms. To search by location, enter a # before the location (i.e. #103). Other options include #all and #full.

---

**Actions:** [Make Active](#) [Make Inactive](#) [Send Welcome Info](#) [Send Welcome Info & Make Active](#) [Remove Lock](#) [New Password](#) [Expire Password](#) [Delete User](#)

Action	Edit User	Last Name	First Name	Username	Locations	Groups	Password Expires	Inactive	Locked Out	Lockout	Ends	Email
<input type="checkbox"/>	<a href="#">Edit</a>	0200	Store	store0200@ferguson	0200	Store User	11/7/2018	No	No			<a href="#">Mail</a>
<input type="checkbox"/>	<a href="#">Edit</a>	5140	Store	store5140@ferguson	5140	Store User	5/27/2018	No	No			<a href="#">Mail</a>
<input checked="" type="checkbox"/>	<a href="#">Edit</a>	8500	Store	store8500@ferguson	8500	Store User	5/27/2018	No	No			<a href="#">Mail</a>
<input type="checkbox"/>	<a href="#">Edit</a>	approve	verify	verify@ferguson	All	Verifier	11/5/2018	No	No			<a href="#">Mail</a>
<input type="checkbox"/>	<a href="#">Edit</a>	User	Admin	admin@ferguson	All	Administrators	11/7/2018	No	No			<a href="#">Mail</a>

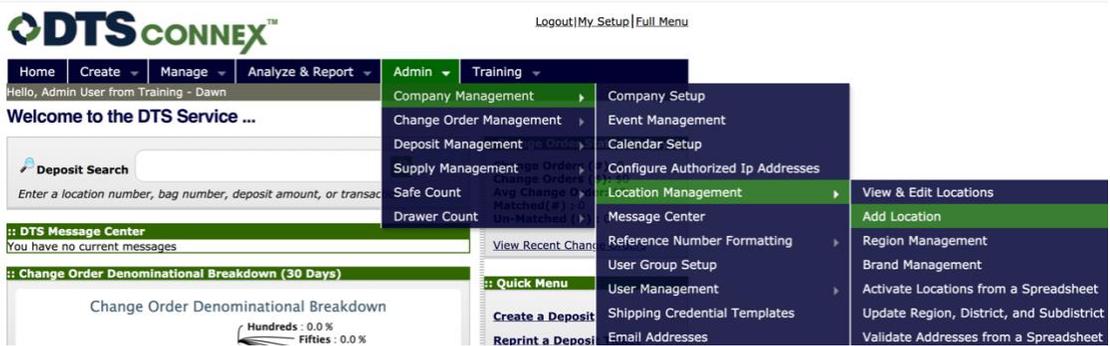
**Actions:** [Make Active](#) [Make Inactive](#) [Send Welcome Info](#) [Send Welcome Info & Make Active](#) [Remove Lock](#) [New Password](#) [Expire Password](#) [Delete User](#)

A confirmation message will appear with how many users have been deleted. At this time, they will be removed from the list of users.

# Manually Enter New Location(s)

Admin Users can enter new location “shells” in DTS Connex. DTS will notify Admin Users when setup is complete after the Bank profile numbers have been added.

Hover over Admin > Company Management > Location Management, click **Add Location**.



This process may vary depending on your company’s specific needs; however, these steps will allow you to enter the most basic information pertaining to each new location you add to the DTS platform.

General Information			
Location Name <i>Fields with * entered by CLIENT</i>	123 - Baltimore	Address	100 East Street
Location Id	123	City	Baltimore
Location Number	123	State	MD
Location Number (Numeric Only)		Zip	21202
Third Party Identifier	7654321	Country	United States
Alternate Bank Third Party Identifier		Financial Institution	General Bank
Account Description	123	Vault Processor	Gen Vault
Coordinates	0 / 0		
Phone Number (eg. 555-555-1212)	888-555-1111 <i>Optional</i>	<i>Info provided by the bank and entered by DTS</i>	
Additional Identifiers (For Smart Safe)			
Provisional Credit Profile			
Manual Deposit Profile			
Change Order Payment Profile			
Content Removal Profile			
Banking			
Banking Country	United States		
Transportation			
Transportation Provider	American Armored - All Depots		
No Transport Data	<input type="checkbox"/>		
Customer Location Identifier	<i>Needed if utilizing Davis Bankcorp OR Safe&amp;Sound Armored Carriers</i>		
Attention To	<i>When utilizing USPS for change order delivery</i>		
Billing Ref 1	<i>If applicable, info provided by Bank and entered by DTS</i>		
Billing Ref 2			
Deposit Process			
Deposit Process	Regular		
Media Mix Template	Cash and Checks - Mixed - Value		
Foreign Currency Template	Company Default		
Sales Date Display	Yesterday's Date		
Tracking Type	Complete		
Show Signature Lines	Yes		
Prefill Deposits from Remote Device	Don't Prefill Deposits <i>For use with cash counting device</i>		
Device Store Number	123		
Use POS Data	<input type="checkbox"/> <i>For use when POS system is integrated with DTS</i>		
Verify DTS Bag Check Digit	<input type="checkbox"/>		
Hard Maximum Deposit Amount			
Soft Maximum Deposit Amount	0.00		
Shipping Credential Template	Company Default <i>For use when utilizing USPS</i>		
Pickup Special Instructions			
UPS Account Number (Override Company)			

Calendar & Times							
Calendar Template	Company Default						
	<i>Choose Template for Deposit Pick-up Schedule</i>						
	<b>Activity</b>	<b>Mon</b>	<b>Tue</b>	<b>Wed</b>	<b>Thu</b>	<b>Fri</b>	<b>Sat</b>
	<b>Received Carrier</b>	Next Tue	Next Wed	Next Thu	Next Fri	Next Sat	Next Mon
	<b>Received Branch</b>	Next Tue	Next Wed	Next Thu	Next Fri	Next Sat	Next Mon
	<b>Received Vault</b>	Next Wed	Next Thu	Next Fri	Next Mon	Next Tue	Next Tue
	<b>Credited</b>	Next Wed	Next Thu	Next Fri	Next Mon	Next Tue	Next Tue
	<b>Verified</b>	Next Wed	Next Thu	Next Fri	Next Mon	Next Tue	Next Tue
Prepared Cutoff	11		45		PM		
Prepared Cutoff (Saturday-Sunday)	11		45		PM		
Armored Window	12		00		AM	to	11   45   PM
Armored Window (Saturday-Sunday)	12		00		AM	to	11   45   PM
Deposit Processor Received Cutoff	11		45		PM		
Credit Cutoff	11		45		PM		
Verification Cutoff	11		45		PM		
Timezone	Eastern Time (US) (GMT -05:00)						
	<i>Choose Timezone Template</i>						

Reminders	
Deposit Ticket	When Should a MICR Deposit Ticket Reminder Be Displayed
Cash	<input checked="" type="radio"/> Never <input type="radio"/> Only <input type="radio"/> Mixed <input type="radio"/> Always
Checks	<input checked="" type="radio"/> Never <input type="radio"/> Only <input type="radio"/> Mixed <input type="radio"/> Always
Coupons (Food Stamps)	<input checked="" type="radio"/> Never <input type="radio"/> Only <input type="radio"/> Mixed <input type="radio"/> Always

**Areas**

Brand	Brand Name	▼
Region	East	▼
District	10	▼
Sub-District	1	▼

**Supply Ordering**

Supply Template	DTS 9x12 Deposit Bags	▼
Client Number		
GL Account		
Cost Center		
Allow Expedited Shipping	<input type="checkbox"/>	
Allow Change of Address	<input type="checkbox"/>	

**Change Orders**

Delivery Method	Armored Carrier	▼																														
Shipping Template	Company Default	▼																														
Has Recurring Order	<input type="checkbox"/>																															
Recurring Order Template	Company Default	▼																														
	<table border="1"> <thead> <tr> <th>Day</th> <th>1s</th> <th>2s</th> <th>5s</th> <th>10s</th> <th>20s</th> <th>50s</th> <th>100s</th> <th>Pennies</th> <th>Nickels</th> <th>Dimes</th> <th>Quarters</th> <th>Half Dollars</th> <th>\$1 Coin</th> <th>Modified</th> </tr> </thead> <tbody> <tr> <td>Wednesday</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$2,000.00</td> <td>\$0.00</td> <td>Yes</td> </tr> </tbody> </table>	Day	1s	2s	5s	10s	20s	50s	100s	Pennies	Nickels	Dimes	Quarters	Half Dollars	\$1 Coin	Modified	Wednesday	\$0.00	\$0.00	\$2,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Yes	
Day	1s	2s	5s	10s	20s	50s	100s	Pennies	Nickels	Dimes	Quarters	Half Dollars	\$1 Coin	Modified																		
Wednesday	\$0.00	\$0.00	\$2,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Yes																		
Currency Provider	General Bank-Gen Vault	▼																														
Coin Provider	General Bank-Gen Vault	▼																														
Currency VRU ID (Client ID)	54321																															
Coin VRU ID (Client ID)	54321																															
Change Order Location #	123456																															
Minimum Daily Order Amount	0.00																															
Maximum Daily Order Amount	1,000.00																															
Days to Delivery	1 Day (if placed by cutoff)	▼																														
Days When a Delivery Can Take Place (Template)	Mon, Wed, Fri	▼																														
Holiday Delivery Calendar (Template)	No Holiday Delivery	▼																														
Change Order Payment Must Match Change Order Amount	<input type="checkbox"/>																															
Place Change Order Early (night before due)	<input type="checkbox"/>																															
Change Order Preferences Template	Training Standard	▼																														
Requires Approval	<input type="checkbox"/>																															
When change order requires approval, when must the order be placed by	None For use ONLY when approval is required	▼																														

Determined by the Bank

Choose from each list if applicable

Choose if applicable

Remove check marks from both boxes if ordering supplies

Info provided by the Bank and entered by DTS

Click **Save** at the bottom of the page.

Note: Yellow denotes a required field

**Status:**  
 Copyright 2019 International Financial Services, Inc. All Rights Reserved. Server: Patent Pending.

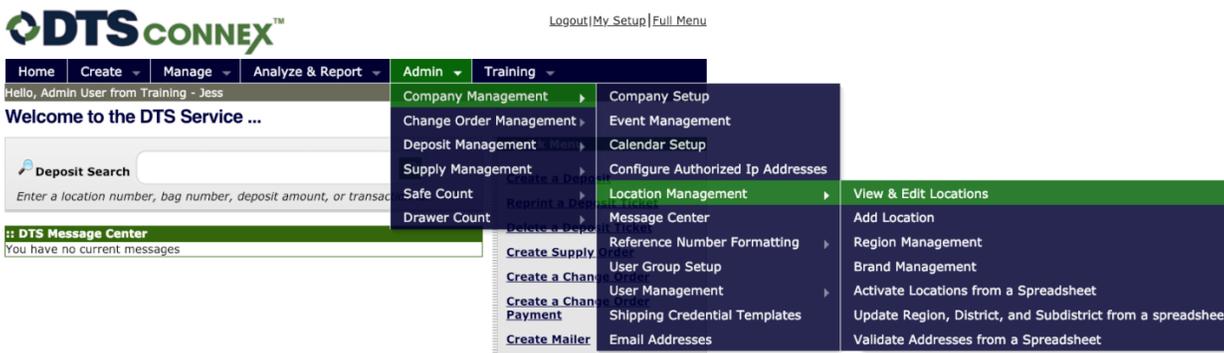
## Manually Activate Location(s)

**NOTE: This function is NOT performed by DTS, activating locations must be performed by an Admin User.**

**NOTE: Activating locations will prompt the location to be included in the billing process.**

Before a user can create transactions in DTS the location(s) must be made active. This is the last step in the process before going live and can only be done after setup is complete with all bank profile information. The Admin User is the only user with the ability to activate/deactivate locations. This ensures that locations are not using DTS before everything is ready. This method is convenient for activating small amounts of locations.

Hover over Admin > Company Management > Location Management, click **View and Edit Locations**.



- Click **ALL** to load a list of all locations to the screen.

Hello, Admin User from Training - Jess

### Location List

Search   **All** Starts With: 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 0 | Add

Note: Search will return location numbers that contain some or all of the terms entered.

Actions		
<a href="#">Make Active for Deposits</a>	<a href="#">Make Active for Change Orders</a>	<a href="#">Make Active for Deposits AND Change Orders</a>
<a href="#">Make Inactive for Deposits</a>	<a href="#">Make Inactive for Change Orders</a>	<a href="#">Make Inactive for Deposits AND Change Orders</a>
<a href="#">Delete Location(s)</a>		

Click one command, based on the tools you are using, after check mark is in action box for all locations you are activating.

Action	Edit	Endpoint Number	Name	ID/DTS REF	Company	City	State	Inactive for Deposits	Inactive for Change Orders
<input checked="" type="checkbox"/>	<a href="#">Edit</a>	18	18 - Franklin Marshal College Bookstore	18	Training - Jess	Lancaster	PA	Yes	Yes

Will change to "No" after command is selected from above.

Click the action box to the left of each location number you wish to activate, a check mark will appear.

- Dependent on the tools you will be utilizing in DTS; click **Make Active for Deposits**; **Make Active for Change Orders**; **Make Active for Deposits and Change Orders**.

The final two columns will be changed from Yes to No; no longer inactive for the tools you are using.

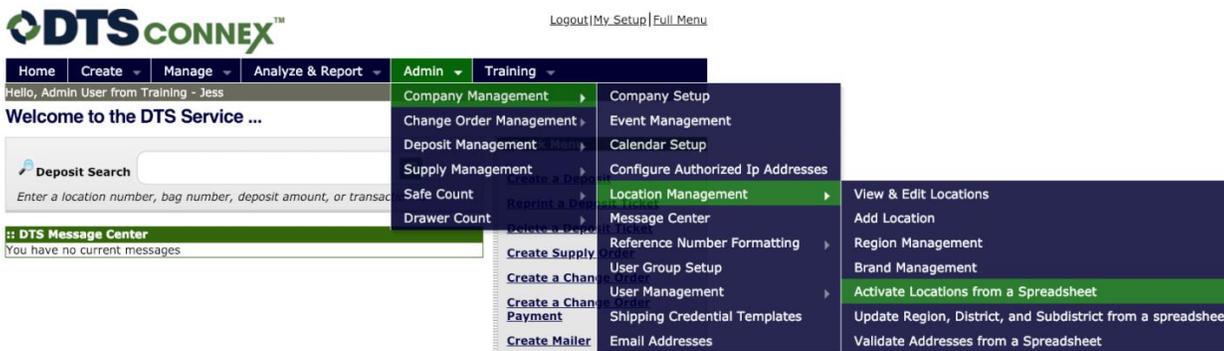
## Activate Locations from a Spreadsheet

**NOTE: This function is NOT performed by DTS, activating locations must be performed by an Admin User.**

**NOTE: Activating locations will prompt the location to be included in the billing process.**

Before a user can create transactions in DTS the location(s) must be made active. This is the last step in the process before going live and can only be done after setup is complete with all bank profile information. The Admin User is the only user with the ability to activate/deactivate locations. This ensures that locations are not using DTS before everything is ready. This method is convenient for activating small amounts of locations. This activation method is convenient for activating large amounts of locations.

Hover over Admin > Company Management > Location Management, click **Activate Locations from a Spreadsheet**.



- Click [Here](#) to download the spreadsheet.

### Import Locations and Activate/Deactivate

You can upload a list of location numbers and tell DTS whether the deposits and change orders should be active or inactive. Download the Excel upload file [here](#). Be sure to view the instructions worksheet for information. Please leave all columns and worksheet titles as they are or the import will not work.

Populate:

- The location number of each location that you wish to activate.
- Yes, in the column for Deposits (if applicable).
- Yes, in the column for Change Orders (if applicable).

	A	B	C
1	Location Number	Active for Deposits (Yes/No)	Active for Change Orders (Yes/No)
2	<b>Required</b>	<b>Required</b>	<b>Required</b>
3	123	Yes	Yes
4			

Save this to your desktop.

## Activate the Locations:

From the “Activate Users from a Spreadsheet” screen:

- Click **Choose File**. You will be prompted to select a file from your computer. Choose the file which you have saved to your desktop.
- Click **Check File**.

## Import Users and Activate/Deactivate

You can upload a list of users and tell DTS whether the users should be active or inactive. Download the Excel upload file [here](#). Be sure to view the instructions worksheet for information. Please leave all columns and worksheet titles as they are or the import will not work.

---

### Choose File:

Choose File No file chosen

**Check File**

A confirmation message will appear with how many locations were made active.

## Manually Deactivate Location(s)

**NOTE: This function is NOT performed by DTS, deactivating locations must be performed by an Admin User.**

**NOTE: Inactive locations WITH transaction history will continue to be included in the billing process.**

If a location will no longer be using DTS Connex, you can deactivate these locations but keep the transaction history in the system. This method is convenient for deactivating small amounts of locations.

Hover over Admin > Company Management > Location Management, click **View & Edit Locations**.



- Click **ALL** to load a list of all locations to the screen.
- Click the action box to the left of each location number you wish to deactivate, a check mark will appear.
- Dependent on the tools you will be utilizing in DTS click **Make Inactive for Deposits; Make Inactive for Change Orders**.

The final two columns will be changed from No to Yes; inactive for the tools you are using.



Action	Edit	Endpoint Number	Name	ID/DTS REF	Company	City	State	Inactive for Deposits	Inactive for Change Orders
<input checked="" type="checkbox"/>	<a href="#">Edit</a>	0200	0200 - Williamsburg - Que	0200	Ferguson	Williamsburg	VA	No	No
<input type="checkbox"/>	<a href="#">Edit</a>	5140	5140 - Austin - Que 1 Step	5140	Ferguson	Austin	TX	No	No
<input type="checkbox"/>	<a href="#">Edit</a>	8500	8500 - Santa Monica	8500	Ferguson	Santa Monica	CA	No	No

## Deactivate Locations from a Spreadsheet

**NOTE: This function is NOT performed by DTS, deactivating locations must be performed by an Admin User.**

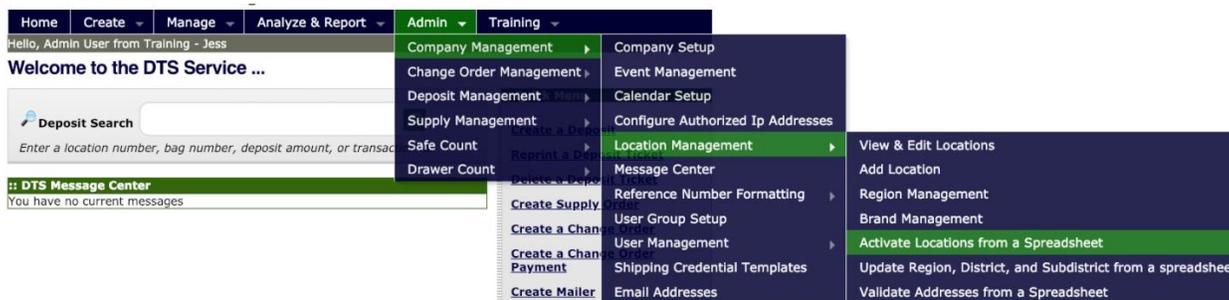
**NOTE: Inactive locations WITH transaction history will continue to be included in the billing process.**

If a location will no longer be using DTS Connex, you can deactivate these locations but keep the transaction history in DTS.

This method is convenient for deactivating large amounts of locations.

### Download the Spreadsheet

Hover over Admin > Company Management > Location Management, click **Activate Locations from a Spreadsheet**.



- Click [Here](#) to download the spreadsheet.

### Import Locations and Activate/Deactivate

You can upload a list of location numbers and tell DTS whether the deposits and change orders should be active or inactive. Download the Excel upload file [here](#). Be sure to view the instructions worksheet for information. Please leave all columns and worksheet titles as they are or the import will not work.

Populate:

- The location number of each location that you wish to deactivate.
- No, in the column for Deposits (if applicable).
- No, in the column for Change Orders (if applicable).

	A	B	C
1	Location Number	Active for Deposits (Yes/No)	Active for Change Orders (Yes/No)
2	Required	Required	Required
3	123	No	No
4			

Save this to your desktop.

## Deactivate the Locations

From the Activate Users from a Spreadsheet screen:

- Click **Choose File**. You will be prompted to select a file from your computer.
- Choose the file saved to your desktop.
- Click **Check File**.

### Import Users and Activate/Deactivate

You can upload a list of users and tell DTS whether the users should be active or inactive. Download the Excel upload file [here](#). Be sure to view the instructions worksheet for information. Please leave all columns and worksheet titles as they are or the import will not work.

---

**Choose File:**

Choose File No file chosen

**Check File**

A confirmation message will appear with how many locations were made inactive.

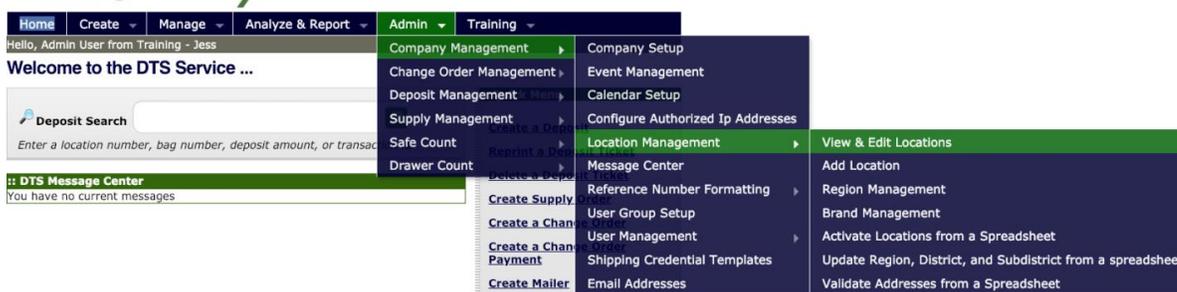
## Delete Location(s)

**NOTE: This function is NOT performed by DTS, deleting locations must be performed by an Admin User.**

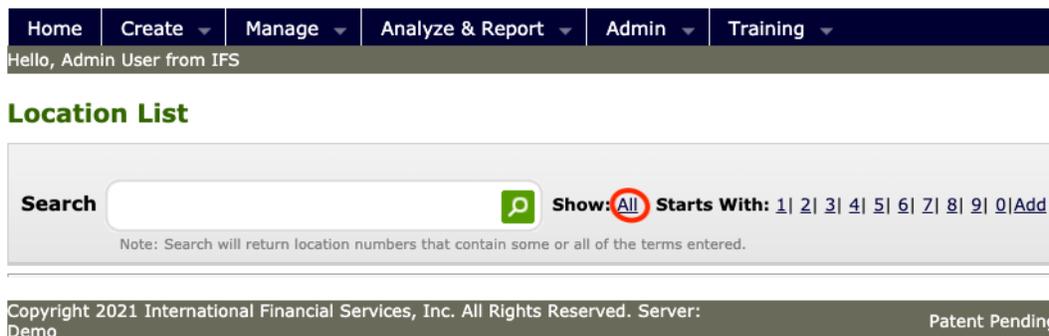
**NOTE: Deleted locations will be removed from the billing process.**

**NOTE: Deleting a location will also remove ALL history related to the location; take caution when deleting locations, DTS is not able to reproduce the history of a location once it has been deleted.**

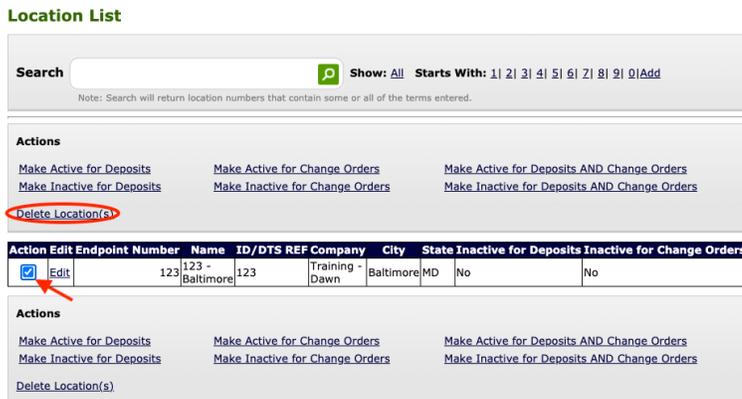
Hover over Admin > Company Management > Location Management, click **View & Edit Locations**.



- Click **ALL** to load a list of all locations to the screen



- Click the action box to the left of each location you wish to delete, a check mark will appear.
- Click **Delete Location(s)**.



A confirmation message will appear with how many locations have been deleted and removed from the list of locations.

# Search Change Orders

Hover over Manage, click **Search Change Orders**.

The screenshot shows a top navigation bar with tabs: Home, Create, Manage, Analyze & Report, Admin, and Training. The 'Manage' tab is active, and its dropdown menu is open, showing options: Search Deposits and Payments, Search Transport, Search Change Orders (highlighted in green), and Search Mailers/Shipments. Below the navigation bar, there is a 'Deposit Search' input field and a 'Change Order Stats (30 Days)' summary box showing 3 Change Orders (#) and \$614 Change Orders (\$).

Search for a specific location's change orders, based on requested delivery date, between a specified timeframe by adding the location number in the search bar and setting the date range. See the next page to use keywords and examples to narrow the search even further.

The screenshot shows the top navigation bar with tabs: Home, Create, Manage, Analyze & Report, Admin, and Training. The 'Manage' tab is active. Below the navigation bar, there is a user greeting: 'Hello, Admin User from IFS'.

## Search Change Orders

The screenshot shows the search interface. A search bar is present with a magnifying glass icon. To the right of the search bar is a date range selector with 'From' and 'To' labels. The dates '7/28/2021' and '8/5/2021' are highlighted with red circles. Below the search bar are dropdown menus for 'Bank' (set to 'All') and 'Carrier' (set to 'All'). A red arrow points to the search bar. Below the search bar is a text prompt: 'Enter a location #, an amount, a carrier name, etc. You can also enter keywords. [Show Keywords](#) OR [Show Examples](#)'.

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The screenshot shows the top navigation bar with tabs: Home, Create, Manage, Analyze & Report, Admin, and Training. The 'Manage' tab is active. Below the navigation bar, there is a user greeting: 'Hello, Admin User from IFS'.

## Search Change Orders

The screenshot shows the search interface. A search bar is present with a magnifying glass icon. To the right of the search bar is a date range selector with 'From' and 'To' labels. The dates '7/28/2021' and '8/5/2021' are visible. A calendar popup is open for August 2021, showing the dates 1 through 31. A red arrow points to the calendar. Below the search bar are dropdown menus for 'Bank' (set to 'All') and 'Carrier' (set to 'All'). A text prompt is visible: 'Enter a location #, an amount, a carrier name, etc. You can also enter keywords. [Show Keywords](#) OR [Show Examples](#)'.

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## Search Change Orders

🔍

🔍

**From** 6/13/2019 📅
**To** 6/21/2019 📅

Bank 
Carrier

Enter a location #, an amount, a carrier name, etc. You can also enter keywords. [Show Keywords](#) OR [Show Examples](#)

### Keywords

Click on one of the keywords below and it will be added to the search terms

- [Match](#)
- [Has Payment](#)
- [No Payment](#)
- [Rejected](#)
- [Placed](#)
- [Approved](#)
- [Awaiting Approval](#)
- [Not Approved](#)
- [Transferred](#)
- [Not Transferred](#)
- [Confirmed](#)
- [Not Confirmed](#)
- [Cancelled or Deleted](#)
- [Recurring Order](#)
- [Delivered Order](#)

[Clear search box](#)

### Examples

**Basic Examples**

- 3489 => Shows activity for location 3489, for the amount \$3,489, or with a bank confirmation of 3489
- 23549.22 => Shows activity for the amount for \$23,549.22.
- D39384234 => Shows DTS order confirmation D39384234
- 2357 => Shows the bank order confirmation 2357
- a>3500 => Shows activity where the the amount was more than \$3,500
- a<2200 => Shows activity where the amount was less than \$2,200
- Rejected => Shows orders that were not accepted by the bank
- Confirmed => Shows orders that have been confirmed
- Recurring XXXX => Shows orders, including recurring orders, for the location(s) following the word recurring.
- Rejected 2200 => Shows ordre rejected where either the amount was \$2200, the location # was 2200
- #55 => Beginning a number with a # will only search for locations that contain that number.
- #!100 => Beginning a number with a #! will only search for locations exactly matching that number.
- \$300 => Beginning a number with a \$ will only search for change orders for that amount



Click for list

Keywords and Examples can be typed in the search bar to narrow the search. As an Admin User you have view of ALL locations, one of the most widely used search keywords is adding #! before the location number. An example, #!100 will produce ONLY change orders for location 100 for delivery within the specified date range, change orders created for \$100 will not be included.

The change order search results that populate on the screen can also be downloaded into an Excel spreadsheet for your convenience. Once the results of your search are produced click **Download** to view the information in the spreadsheet format.

## Search Change Orders

🔍

🔍

**From** 11/30/2020 📅
**To** 8/6/2021 📅
±

Bank 
Carrier

Enter a location #, an amount, a carrier name, etc. You can also enter keywords. [Show Keywords](#) OR [Show Examples](#)

Next Page >>
Now showing 100 records at a time (1 up to 100 on-screen)
Download

#	# (Numeric)	Delivery Date	Order Amount	DTS Confirmation #	Vendor Confirmation #	Change Order Detail	Payment Detail	Status	Scheduled Fulfillment Date
🕒	123	7/23/2021	\$100.00	0012300737		<a href="#">Detail</a>		Placed	7/21/2021
🕒	123	7/22/2021	\$100.00	0012300736		<a href="#">Detail</a>		Placed	7/20/2021

## **Additional Topics and Tools**

DTS Connex has many other tools and features including:

- Reporting functions
- Automatic notifications
- Messaging functions
- Change Order Verification tool
- Cash in Transit tools
- SNAPS image recording
- Deposit bag and supply ordering
- Partner integration abilities for cash counting and POS systems
- Store Cash tools
  - Safe Count
  - Drawer Count
  - Drawer Reconciliation
  - Safe InSites

If you have interest in any of the topics or tools above, please reach out to your assigned Partner Success Specialist or email [help@dtsconnex.com](mailto:help@dtsconnex.com).