VersaLink®

User Guide

# I. General Information

VersaLink provides unprecedented access to each VersaSafe with remote, real-time monitoring and reporting. VersaLink allows users to remotely:

- View cash levels, both validated and dropped, in order to optimize cash-in-transit visits.
- View, print, and save personnel, shift, and end-of-day audits.
- Update VersaSafe software and bill validator firmware remotely.
- Manage user accounts and VersaSafe settings.
- Dispatch technicians via text message or email notifications.
- Determine the overall health of the VersaSafe and individual components.
- Versatile reporting; users can identify a variety of filters to create reports specific to each business.

Putting these tools in the hands of the customer increases the customer's ability to monitor and control their VersaSafe and their cash management system as a whole.
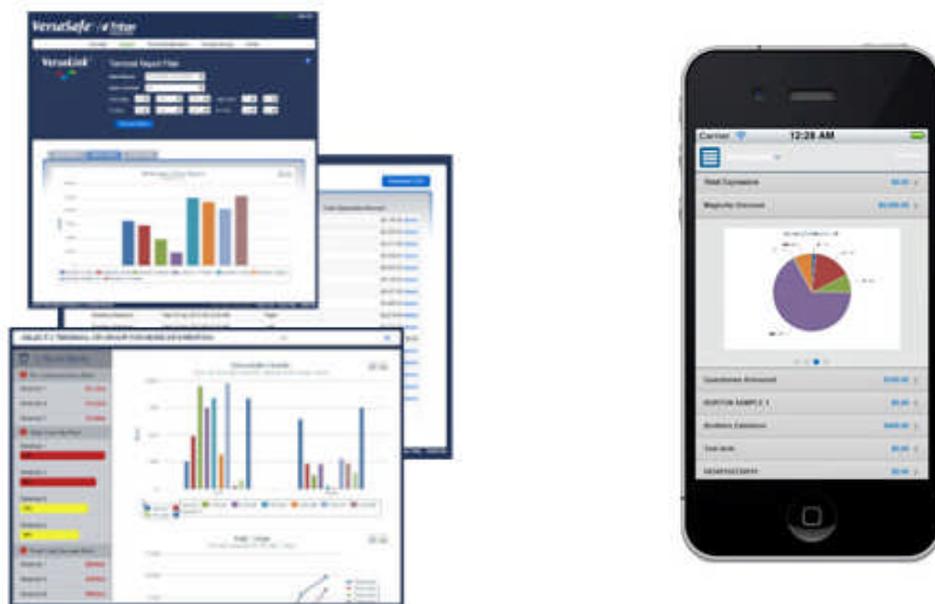
II. Overview

The Overview section of VersaLink is also the default home page. The page consists of a top-level navigation menu, the MY INFO section, the ALERTS segment, VERSASAFE or GROUP selection pull-down, and the VersaSafe Levels and totals by currency type segments.
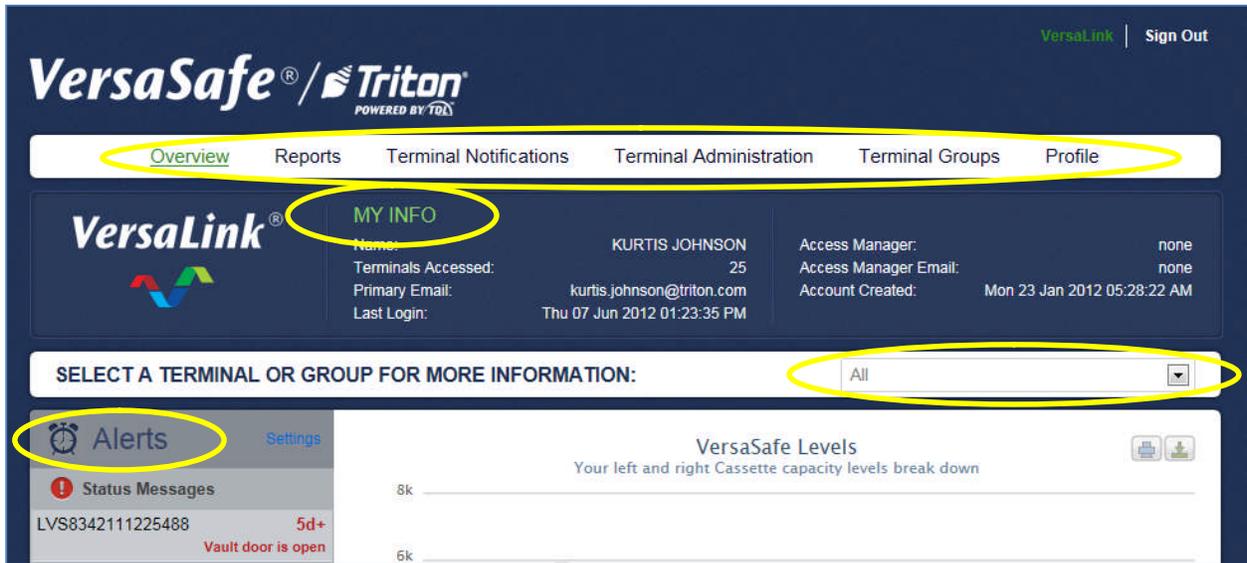
- **Top-level Navigation** — Clicking on an item in the top-level navigation menu will load that section. The available sections are listed below with details to follow.

    - o Overview
    - o Reports
    - o Terminal Notifications
    - o Terminal Administration
    - o Terminal Groups
    - O Profile

- **My Info** — My Info provides data relevant to the user currently logged in.

- **Alerts** — Alerts contains the following sections:

    - o **Status Messages** — This section displays the most current status message received from the VersaSafe, and the elapsed time since that communication, of that status message. Click Show All to expand the section beyond two VersaSafes and Show Less to collapse the selection.

    - o **Last Communication** — This section displays the last successful communication the VersaSafe conducted with VersaLink. VersaSafe communicates in real-time with VersaLink, not on prescribed intervals. Typically, this section reports the last time a user performed a function at the VersaSafe. Click Show All to expand the section beyond two VersaSafes and Show Less to collapse the selection.

- o **Last Pickup Close Report** — This section displays the last pickup close report successfully communicated to VersaLink by the VersaSafe. A Pickup Close report represents the total of both cash deposits (validated cash) and dropped deposits (cash and checks dropped in the drop slot). Click Show All to expand the section beyond two VersaSafes and Show Less to collapse the selection.

- o **Cassette Capacity** — This section displays the percent that each cassette is full, by VersaSafe. Click Show All to expand the section beyond two VersaSafes and Show Less to collapse the selection.

- o **Total Cash Amount** — This section displays the cash presently stored in the VersaSafe. Values are displayed for the left cassette, right cassette, cassette total, and VersaSafe total. The cassette total is a sum of the values for the left cassette and the right cassette. The VersaSafe total is the sum of the left cassette, right cassette, dropped cash, and dropped checks. ***Note—the values for dropped cash and dropped checks represent the amounts entered by the employee responsible for the drop and have not been validated.*** Click Show All to expand the section beyond two VersaSafes and Show Less to collapse the selection.

- o **Overview Page Alert Colors** — The color coding for the ALERTS section is managed by clicking Settings (located right of the ALERTS heading) and selecting values from the drop down boxes on the Alert Settings tab of the Profile section. The Profile section can also be reached by selecting Profile from the top-level navigation and then the Alert Settings tab within the Profile section.

- **VersaSafe or Group Selection** — The pull-down menu in this section drives the initial selection of VersaSafes or groups of VersaSafes for the charts in the segments below. Graphical summaries for each VersaSafe or group of VersaSafes will be displayed. For more on VersaSafe groups, please see the VERSASAFE GROUPS section of this guide.

  - o **VersaSafe Levels** — This segment contains left and right cassette capacity levels for each VersaSafe or group selected in the VersaSafe or Group Selection pull-down box directly above the section. For groups of VersaSafes, VersaSafes can be removed from the displayed chart by clicking the desired VersaSafe name in the legend directly below the chart. When this is done, the VersaSafe name will gray out, and the VersaSafe data will be removed from the displayed chart. To add the VersaSafe back, simply click on the desired grayed out VersaSafe name, and the data will be added back into the chart. The displayed chart can be printed by selecting the print icon in the upper right corner of the graph. The displayed chart can also be downloaded as a PNG, JPEG, PDF, or SVG vector image by clicking the down arrow icon located next to the printer icon in the upper right corner of the displayed chart.

  - o **Past 7-day totals report by currency type** — This segment contains the total amount of cash and checks deposited in the VersaSafe for the past seven days for each VersaSafe or group selected in the VersaSafe or Group Selection pull-

down box above the VersaSafe Levels section. Please note that this total includes validated cash as well as dropped or non-validated cash and dropped checks. **Note**—*the values for dropped cash and dropped checks represent the amounts entered by the employee responsible for the drop and have not been validated.* VersaSafes can be removed from the displayed chart by clicking the desired VersaSafe name in the key directly below the chart. When this is done, the VersaSafe name will gray out, and the VersaSafe data will be removed from the displayed chart. To add the VersaSafe back, simply click on the desired grayed out VersaSafe name, and the data will be added back into the chart.

The displayed chart can be printed by selecting the print icon in the upper right corner of the graph. The displayed chart can be downloaded as a PNG, JPEG, PDF, or SVG vector image by clicking the down arrow icon located next to the printer icon in the upper right corner of the displayed chart. In the event that the authenticated user has multiple VersaSafes containing different currency codes multiple charts will be displayed. Each chart will detail one currency code. This will only affect accounts with VersaSafes in multiple countries.

III.   Reports

The Reports section of the VersaLink site will generate reports for the VersaSafes and time periods designated in the VersaSafe Report Filter.

To run a report, select the desired report, select a VersaSafe or group of VersaSafes, select a date range, and click Generate Report. It is usually unnecessary to select a From Time or a To Time unless there is a specific need for reporting with such granular detail. The default filter is set to the current day.

The following reports are available:

- **Day Close Record** — This report displays Day Closes performed within the selected time frame. A Day Close typically represents the cash and check deposits business day. This includes both validated and non-validated currency.

- **Cash Deposit Transaction**— This report displays Cash Deposit Transactions performed within the selected time frame. Cash Deposit Transactions only include those deposits of cash that pass through the bill acceptors (validated cash).

- **Drop Deposit Transaction** — This report displays Drop Deposit Transactions performed within the selected time frame. Drop Deposit Transactions only include those deposits of cash and/or checks made through the drop slot. *Note—the values for dropped cash and dropped checks represent the amounts entered by the employee responsible for the drop and have not been validated.*

- **Bill Acceptor Close** — This report displays Bill Acceptor Closes performed within the selected time frame. A bill acceptor close zeroes the contents of the bill acceptor cassettes. This indicates that the cash has been removed.

- **Drop Close** — This report displays Drop Closes performed within the selected time frame. A drop close zeroes the contents of the dropped cash and checks. This indicates that the dropped cash and checks have been removed.   ***Note**—the values for dropped cash and dropped checks represent the amounts entered by the employee responsible for the drop and have not been validated.*

- **Pickup Close**— This report displays Pickup Closes performed within the selected time frame. The Pickup Close is the close typically performed by cash-in-transit when the contents of the VersaSafe are emptied. This close zeroes out values for validated cash and dropped cash and/or checks. The Pickup Close performs a Bill Acceptor Close, Drop Close, and Day Close (even if Day Closes are scheduled to occur at an earlier/later time). ***Note**—the values for dropped cash and dropped checks represent the amounts entered by the employee responsible for the drop and have not been validated.*

- **User Close**— This report displays User Closes performed within the selected time frame. Users are defined as the individual clerks that deposit funds in the VersaSafe.

- **Status Message**— This report displays VersaSafe status messages received within the specified time frame.   Status messages include any errors that the VersaSafe may have experienced.

For all report types, there are three options for presenting the reported data. Using the Result Type field, users can display the report results on the screen or have the results (in either a PDF or CSV format) emailed directly to the user's email account, by checking the appropriate radio button. Emailed reports can only include a single 24 hour period. For reports displayed on the screen, a number of tabs will result. Depending on the type of report, the tabs include:

- **Report Results** — The columns returned may include the VersaSafe ID, Date and Time of the event, Cash Deposited Amount, Cash Dropped Amount, Checks Dropped Amount, and Total Amount. All columns are sortable by clicking on the arrow to the right of the column header. Clicking details in the Cash Deposited Amount column provides a breakdown by cassette of each denomination that made up that specific deposit. Clicking Download CSV allows the report results to be downloaded in CSV format.

							Download CSV

Report Results   Report Charts   Report Totals

Terminal ID	Date and Time	User ID	Cash Deposited Amount	Cash Dropped Amount	Checks Dropped Amount	Total Amount
ONLINEALPHA2	Mon 29 Aug 2011 12:00:16 PM	Suzy (22)	$23.00 details	$0.00	$0.00	$23.00
ONLINEALPHA2	Mon 29 Aug 2011 11:57:23 AM	John (11)	$47.00 details	$0.00	$0.00	$47.00
ONLINEALPHA2	Mon 29 Aug 2011 11:55:58 AM	John (11)	$22.00 details	$0.00	$0.00	$22.00
ONLINEALPHA2	Mon 29 Aug 2011 11:53:46 AM	John (11)	$36.00 details	$0.00	$0.00	$36.00
ONLINEALPHA2	Mon 29 Aug 2011 11:52:17 AM	Suzy (22)	$14.00 details	$0.00	$0.00	$14.00
ONLINEALPHA2	Mon 29 Aug 2011 11:50:32 AM	Suzy (22)	$21.00 details	$0.00	$0.00	$21.00
ONLINEALPHA2	Mon 29 Aug 2011 11:48:25 AM	Suzy (22)	$35.00 details	$0.00	$0.00	$35.00
ONLINEALPHA2	Mon 29 Aug 2011 11:46:19 AM	John (11)	$25.00 details	$0.00	$0.00	$25.00
ONLINEALPHA2	Mon 29 Aug 2011 11:45:12 AM	John (11)	$10.00 details	$0.00	$0.00	$10.00
ONLINEALPHA2	Mon 29 Aug 2011 11:25:27 AM	John (11)	$32.00 details	$0.00	$0.00	$32.00

o **Report Charts** — This tab displays a chart detailing the amount of currency in each VersaSafe selected for each day within the designated time period. VersaSafes can be removed from the displayed chart by clicking the desired VersaSafe name in the key directly below the chart. When this is done, the VersaSafe name will gray out, and the VersaSafe data will be removed from the displayed chart. To add the VersaSafe back, simply click on the desired grayed out VersaSafe name, and the data will be added back into the chart. The displayed chart can be printed by selecting the print icon in the upper right corner of the graph. The displayed chart can be downloaded as a PNG, JPEG, PDF, or SVG vector image by clicking the down arrow icon located next to the printer icon in the upper right corner of the displayed chart.
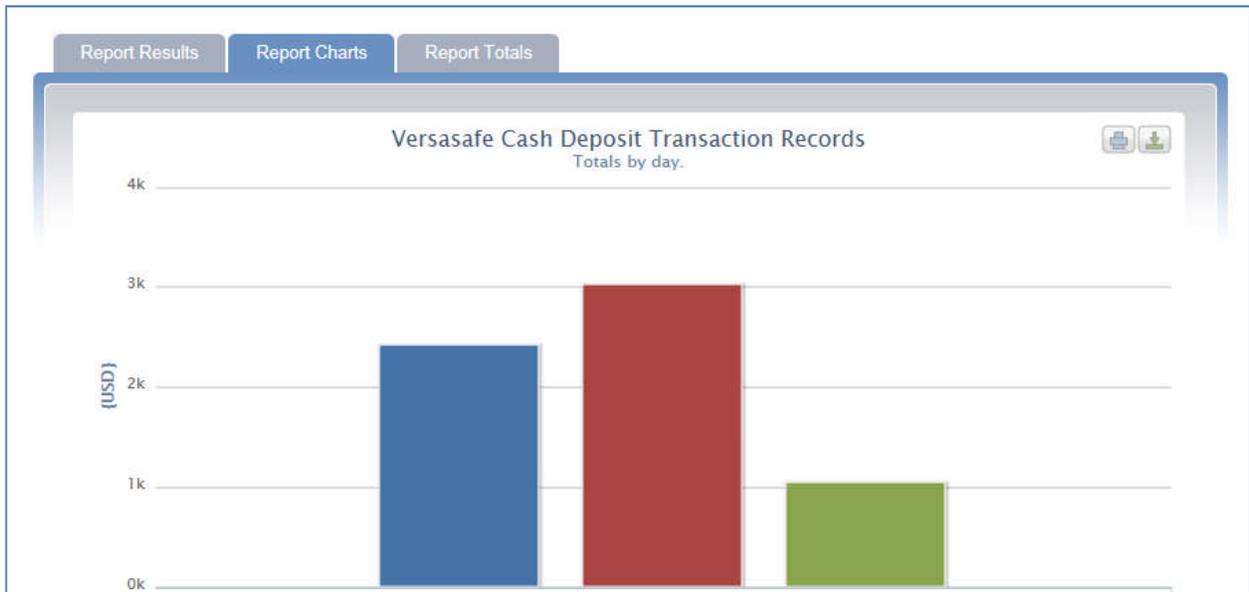
o **Report Totals** — This tab displays the total for all VersaSafes selected within the designated time period. The report is broken down by cassette and denomination for validated cash only and includes totals for dropped cash and dropped checks. One result will be returned for each currency type.

Report Results	Report Charts	Report Totals

Currency Type: USD
Total Amount: $2,342.00
Cash Deposited Amount: $2,342.00

Cassette	$1	$2	$5	$10	$20	$50	$100
Left	6	0	16	6	36	4	0
Right	6	0	16	12	31	1	4
Total	12	0	32	18	67	5	4

o **Report Results** — The columns returned are VersaSafe ID, Date and Time of the message, Status Code, and Status Message. All columns are sortable by clicking on the arrow to the right of the column header. Clicking Download CSV allows the report results to be downloaded in CSV format.

Report Results				**Download CSV**
Terminal ID	**Date and Time** ▼	**Status Code**	**Status Message**	
ONLINEALPHA2	Fri 26 Aug 2011 02:11:06 PM	195	Receipt Printer Out of Paper.	
ONLINEALPHA2	Tue 23 Aug 2011 08:58:15 AM	195	Receipt Printer Out of Paper.	
		1/1		

IV. Terminal Notifications

The VersaSafe Notifications section of VersaLink displays the VersaSafes that are owned by or delegated to the authenticated user.   This section allows for the creation of email and SMS notification for a variety of VersaSafe conditions, reports, and actions. The options are to Edit Notification Settings for All VersaSafes or to edit each VersaSafe separately. It is possible to use the edit all function and then go into specific VersaSafes to make granular changes at the VersaSafe level. *Note — Whenever the Edit Notification Settings for All VersaSafes is utilized, it will reset all VersaSafes to match the settings in that section.*   To Edit Notification Settings for All VersaSafes, click Edit at the end of the Edit Notification Settings for All VersaSafes row. To edit an individual VersaSafe click Edit at the end of the desired VersaSafe row.

VersaSafe Notifications have three tabs: Notification Settings, Transaction Notifications, and Exclusion Times.

- **Notification Settings**

  o **Notification Language —** Select the notification language you prefer.

  o **Cassette Level Trigger —** A notification alert message will be sent at the selected percent full level for cassettes.

  o **VersaSafe Total Cash Amount Trigger** — A notification alert message will be sent when the total cash amount has exceeded the selected threshold. Total cash will include manually dropped cash and checks.

  o **Cassettes Total Cash Amount Trigger —** A notification alert message will be sent when the total amount of validated cash in the cassettes has exceeded the selected amount.

  o **Left Cassette Cash Amount Trigger —** A notification alert message will be sent when the total amount of validated cash in the left cassette has exceeded the selected amount.

  o **Right Cassette Cash Amount Trigger —** A notification alert message will be sent when the total amount of validated cash in the right cassette has exceeded the selected amount.

  o **No Deposit Alert** — When there has been no deposit activity within the selected time frame, a notification alert will be sent.

  o **No Communication Alert** — Select the communication report alert period. When there has been no VersaSafe communication or report activity of any kind, a notification alert will be sent.

  o **Re-notification Frequency** — Set the frequency of how often you would like to receive ongoing alert notifications. All conditions requiring alerts will cause alerts to be re-sent at the frequency chosen in this setting.

  o **Email for notifications** — This segment allows for the adding and removal of email address to be utilized for notifications. Type the desired email address in the box provided, click Add Email Address, and click Update. To remove an email address, deselect the check box by the email address and click Update.

  o **Number for text notifications** — This segment allows for the adding and removal of phone numbers to be utilized by the SMS notification service. Select the appropriate country for the mobile phone, type the number (including area code) in the box provided without spaces or non-numeric characters, click Add Mobile Number, and click Update. To remove a mobile number, deselect the check box by the mobile number and click Update.

o **Deactivate Notification Settings** — If you desire to temporarily deactivate notifications, click Deactivate Notification Settings. This will temporarily deactivate notifications to all email addresses and mobile numbers listed.

| Notification Settings | Transaction Notifications | Exclusion Times |

Terminal Notifications

Notification Language:	U.S. English
Cassette Level Trigger:	50% Full
VersaSafe Total Cash Amount Trigger:	$5,000.00
Cassettes Total Cash Amount Trigger:	$5,000.00
Left Cassette Cash Amount Trigger:	$2,500.00
Right Cassette Cash Amount Trigger:	$2,500.00
No Deposit Alert:	1 Hours
No Communication Alert:	1 Hours
Re-notification Frequency:	1 Hours

Emails for notifications:

Add Email [   ] Add Email Address

Number for text notifications:

Add Mobile United States (1) [ ] [   ] Add Mobile Number

Update   Deactivate Notification Settings

- **Transaction Notifications** — This tab allows for the setting of Transaction Notifications. These notifications are sent upon communication of the event from the VersaSafe. To receive a notification for any of the available records, check the box next to the desired record. ==*Note — Cash Deposits and Drop Deposits may occur frequently.*==

- **Exclusion Times** — This tab allows the authenticated user to set exclusion times for notifications. No notifications will be sent during the exclusion period. Notifications will not be caught up at the end of the exclusion period. For information concerning the VersaSafe during an exclusion period, please log on to VersaSafe and run the desired report. To set an exclusion time, select the day and time for the exclusion to begin and the date and time for the exclusion to end, and click add. To remove an existing exclusion, click Delete at the end of the row for the exclusion. ==*Note — Exclusions cannot be edited and must be deleted and recreated instead.*==

V.   Terminal Administration

The VersaSafe Administration section of VersaLink displays the VersaSafes for which the authenticated user is assigned as **owner**. The section displays VersaSafe ID, date of Last update, the Original Manufacturer's Sales Order Number, and the Manufacturer's Original Ship Date. All columns are sortable by clicking on the arrow to the right of the column header. To edit the information for a VersaSafe, click Edit at the right end of the row for the desired VersaSafe. Once within the edit dialogue, VersaSafes may be selected from the pull-down menu in the upper right of the section.

The Edit segment of the VersaSafe Administration section contains five tabs: Delegation, Ownership, Information, User Aliases, and User Groups. ==*Note — These tabs and the associated settings are set per VersaSafe.*==

- **Delegation** — This tab allows the authenticated user to grant access to a VersaSafe in VersaLink to another person by entering their email address. If the user being granted access already has an account on TritonATM.com, ATMGurus.com, or VersaSafe.com, they will receive an email informing them the VersaSafe has been added. If the user being added does not currently have an account, they will receive an email with a username and password as well as a link to follow to VersaSafe.com to register.

- **Ownership** — This tab allows a VersaSafe owner to transfer ownership of a VersaSafe to a user or a company. ==*WARNING—THIS TRANSFER IS PERMANENT! YOU ARE RELINQUISHING CONTROL OF YOUR TERMINAL! ** Caution: once this is completed you will have no further access to this account or functions of this VersaSafe.*== To transfer ownership to another user, type the email address of the user into the box to the left of the Transfer button. To transfer ownership to the user's company, type the email address of the user into the box to the left of the Transfer button, check the box next to Transfer ownership to this user's company and click Transfer.

- **Information** — This tab allows for the creation of a VersaSafe Alias and the entry of VersaSafe Location Information. The VersaSafe Alias allows a more user friendly name to be aliased to the VersaSafe ID. Customers often choose restaurant and store names or locations for a VersaSafe Alias. To enter an alias, type the desired name in the field and click Update. VersaSafe location information can be typed in the appropriate field and updated by clicking Update. ==*Note — The Left and Right Cassette capacity must be correctly selected on this tab for accurate reporting of percentages.*==

Delegation	Ownership	Information	User Aliases	User Groups

Terminal Alias for: ONLINEALPHA2 ❓

[   ] [Update]

Terminal Location Information

Business Name:	[ ]
Street Address:	[ ]
City:	[ ]
State:	[ ]
Zip Code:	[ ]
Country Code:	[ ]
Contact Name & Title:	[ ]
Contact Email:	[ ]
Contact Phone Number:	[ ]
Contact Fax Number:	[ ]
Left Cassette Capacity:	1000 Bills ▼
Right Cassette Capacity:	1000 Bills ▼

[Update]

- **User Aliases** — This tab allows for the creation of User Aliases for VersaSafe users. The VersaSafe currently uses a numeric designation for users at each VersaSafe. This tab allows for a more user friendly user alias to be created for reporting purposes. If the tab displays nothing except the Update button, then there are no users currently created at the VersaSafe. Once users have been created at the VersaSafe, users will appear in this tab along with the opportunity to type an alias. To alias a VersaSafe user, type the desired alias in the box to the right of the VersaSafe user and click Update.

- **User Groups** — This tab allows for the creation of user groups.

  - **Creating a new user group** — To create a user group, type the name of the new user group under the New User Group heading and click Add. To add user aliases to the group, click Show/Hide Details next to the User Group name under Edit VersaSafe Groups. When details are shown, all user aliases will be displayed. Check the box next to the desired user alias to select user aliases. Click Update User Assignments at the bottom of the VersaSafe listing when all user aliases have been selected.

- o **Managing existing user groups** — To manage existing user groups, utilize the tools located under the heading Edit User Groups. To change the group name, type the new name in the box where the existing name is displayed and click Update Name. To add or remove user aliases from a group, click Show/Hide Details next to the user group name under Edit User Groups. When details are shown, all user aliases will be displayed. Check or uncheck the box next to the desired user aliases to select or remove users. Click Update User Assignments at the bottom of the user listing when all users have been selected. To delete the group, click Delete Group at the end of the row displaying the group name. To hide group details click Show/Hide Details.

VI.   Terminal Groups

The VersaSafe Groups section of VersaLink allows VersaSafes to be assigned to groups to simplify reporting. The authenticated user can organize VersaSafes associated with your account into groups for multiple VersaSafe activity reporting. VersaSafes assigned to your account can be associated with more than one group. Groups you set up will then be available in the drop down report menu for group reporting activity.

- **Creating a new group** — To create a group, type the name of the new group under the Add New VersaSafe Group heading and click Add. To add VersaSafes to the group, click Show/Hide Details next to the VersaSafe name under Edit VersaSafe Groups. When details are shown, all VersaSafes delegated to the authenticated user will be displayed. Check the box next to the desired VersaSafe names to select VersaSafes. Click Update VersaSafe Assignments at the bottom of the VersaSafe listing when all VersaSafes have been selected.

- **Managing existing groups** — To manage existing groups, utilize the tools located under the heading Edit VersaSafe Groups. To change the group name, type the new name in the box where the existing name is displayed and click Update Name. To add or remove VersaSafes from a group, click Show/Hide Details next to the VersaSafe name under Edit VersaSafe Groups. When details are shown, all VersaSafes delegated to the authenticated user will be displayed. Check or uncheck the box next to the desired VersaSafe names to select or remove VersaSafes. Click Update VersaSafe Assignments at the bottom of the VersaSafe listing when all VersaSafes have been selected. To delete the group, click Delete Group at the end of the row displaying the group name. To hide group details, click Show/Hide Details.

VII.   Profile

The Profile section of VersaLink is comprised of four tabs: User Settings, Alert Settings, Notification Settings, and Company Profile. If you are authenticated to VersaSafe.com utilizing your Triton partner site account (www.tritonatm.com) or an ATMGurus site account (www.ATMGurus.com), you will only see three tabs. The Company Profile information will be pulled from and managed on your primary site.

- **User Settings** — This tab allows the authenticated user to modify the My Information settings and change their password for VersaSafe.com. If you are authenticated to VersaSafe.com utilizing your Triton partner site account (www.tritonatm.com) or an ATMGurus site account (www.ATMGurus.com), you will be asked to manage your account settings at the account settings page on that site. VersaSafe.com is capable of using credentials from either of those sites to authenticate users. If this is the case, VersaSafe.com will provide a link to the necessary site to simplify the process.

- **Alert Settings** — The Alert Settings tab allows the authenticated user to set alert levels for the Alert section of the Overview Page. The alert levels control when information is displayed in green for normal, yellow for warning, and red for critical.

- **Notification Settings** — The Notifications Settings tab allows the authenticated user to add and remove email addresses and phone numbers that will be utilized for email and text alerts in the VersaSafe Notifications section. Multiple phone numbers and email addresses can be added on this tab.

- **Company Profile** — This tab allows the authenticated user to enter company information and company contact information. If you are authenticated to VersaSafe.com utilizing your Triton partner site account (www.tritonatm.com) or an ATMGurus site account (www.ATMGurus.com), you will only see three tabs. The Company Profile information will be pulled from and managed on your primary site.