



## **Loomis Direct User Guide**

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## Table of Contents

|          |                                                |           |
|----------|------------------------------------------------|-----------|
| <b>1</b> | <b>Introduction.....</b>                       | <b>3</b>  |
| <b>2</b> | <b>Sign In.....</b>                            | <b>3</b>  |
| 2.1      | Sign In Page .....                             | 3         |
| 2.2      | Change Password.....                           | 4         |
| 2.3      | Forgot Password.....                           | 5         |
| <b>3</b> | <b>Launch Pad .....</b>                        | <b>6</b>  |
| 3.1      | Launch Pad Features.....                       | 7         |
| <b>4</b> | <b>Customer Feedback.....</b>                  | <b>7</b>  |
| <b>5</b> | <b>Cash Management Services reporting.....</b> | <b>8</b>  |
| 5.1      | Header menu .....                              | 8         |
| 5.2      | Dashboard .....                                | 9         |
| 5.3      | Reports .....                                  | 11        |
| <b>6</b> | <b>Loomis Direct Support .....</b>             | <b>13</b> |

## 1 Introduction

Loomis Direct provides a single entry point to all Loomis applications including:

- Cash Management Services (CMS) reporting
- SafePoint
- Customer Contact Center

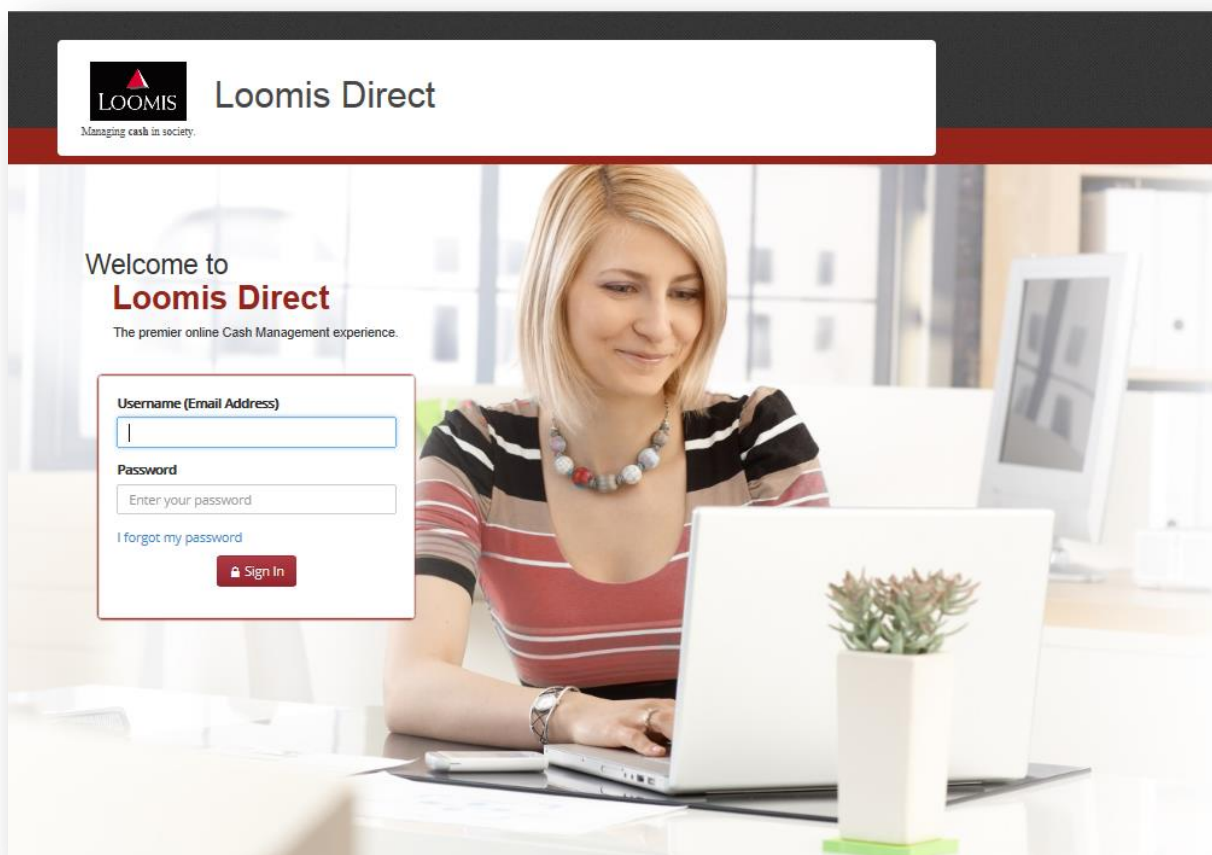
## 2 Sign In

To sign in to Loomis Direct go to the following link:

<https://loomisdirect.loomisusa.com/apps/>

### 2.1 Sign In Page

If this is your first time signing into Loomis Direct, you were provided with a Loomis Direct user name (your email address) along with a temporary password. Enter these credentials in the Sign In page.



## 2.2 Change Password

If this is the first time logging in you will be required to change your password. For security reasons the password you choose needs to meet the following standards:

- Minimum of 8 characters in length
- Must contain the following:
  - 1 or more upper case characters (A-Z)
  - 1 or more lower case characters (a-z)
  - 1 or more numbers (0-9)
  - 1 or more keyboard special characters such as, ! @ # \$ % ^ & \* ( )

## Change Password

New passwords are required to be a minimum of 8 characters in length and must contain the following:

- 1 or more upper case characters (A-Z)
- 1 or more lower case characters (a-z)
- 1 or more numbers (0-9)
- 1 or more keyboard special characters

Old Password

New Password

Confirm Password

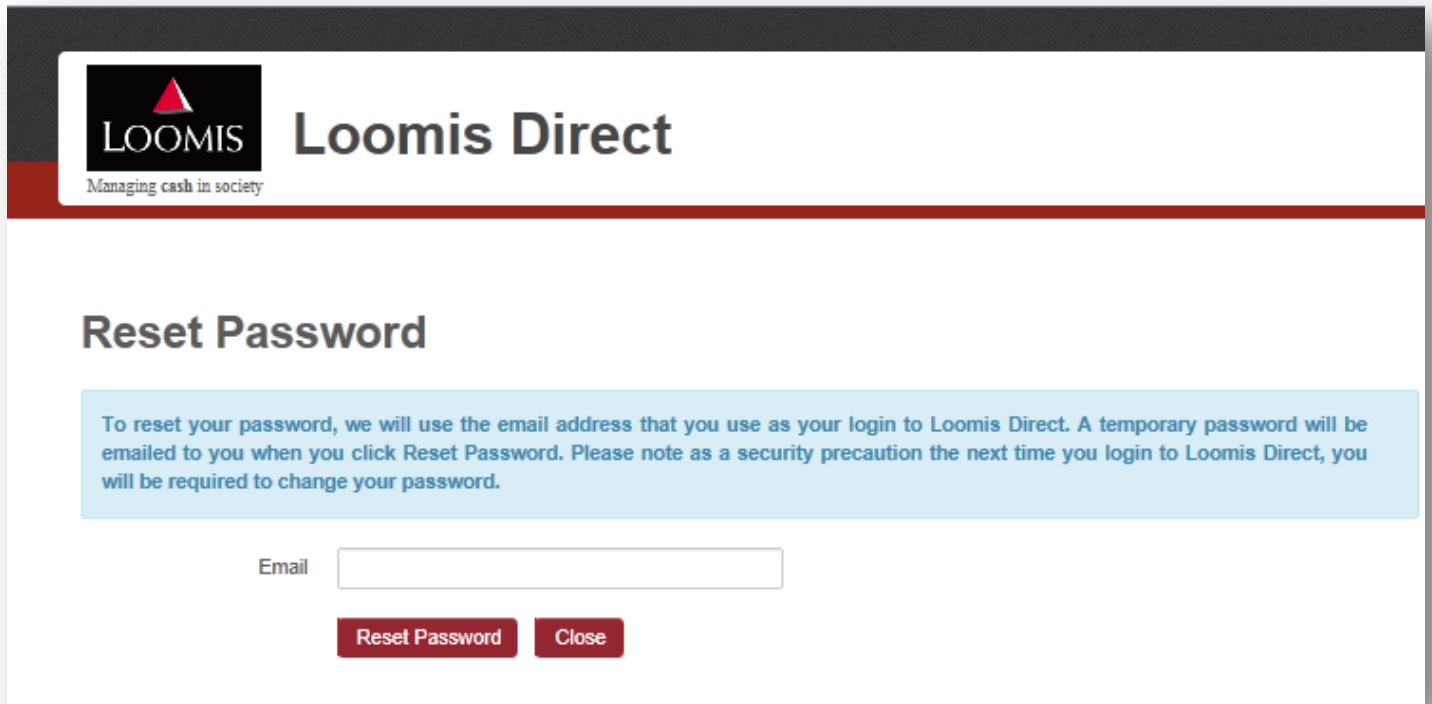
Change Password

Close

After successfully changing your password, you will be redirected to the Sign In page. Enter your user name and password to access the Loomis Direct applications.

## 2.3 Forgot Password

You can reset your password from the Sign In page by clicking on the “[I forgot my password](#)” link. You will be asked for your user name (email address). A temporary password will be emailed to you when you click “Reset Password”. The next time you login to Loomis Direct, you will be required to change your password.



The screenshot shows the Loomis Direct web interface. At the top left is the Loomis logo with the tagline "Managing cash in society". To its right is the text "Loomis Direct". Below this is a red horizontal bar. The main heading is "Reset Password". A light blue informational box contains text about password reset. Below this is an "Email" label and a text input field. At the bottom are two red buttons: "Reset Password" and "Close".

**Loomis Direct**

Managing cash in society

## Reset Password

To reset your password, we will use the email address that you use as your login to Loomis Direct. A temporary password will be emailed to you when you click Reset Password. Please note as a security precaution the next time you login to Loomis Direct, you will be required to change your password.

Email

### 3 Launch Pad

The Launch Pad or Home page is your entry point to Loomis applications. A link to each application you are assigned will be displayed on this page. To access an application, click on the appropriate icon. If you are assigned to only one application, you will not see this page and will be taken directly to that application.

The screenshot shows the Loomis Direct Launch Pad interface. At the top left is the Loomis logo with the tagline "Managing cash in society." and the text "Loomis Direct". At the top right, a user profile box displays "Welcome, [Javier Jain](#)" with a red arrow pointing to it from the label "User profile". Below the welcome message are links for "Change My Password" and "Sign Out". The main heading is "Welcome to Loomis Direct". Below this is a paragraph: "Loomis Direct brings you an enhanced customer experience with a single entry point for all your data needs. Click on any one of the applications that you have access to below." followed by a note: "If you do not see an application listed that you should have access to, please contact Loomis Direct Support for assistance." Three application tiles are shown: "Cash Management Services" (with an icon of a cash register and coins), "SafePoint" (with an icon of a cash register and a safe), and "Customer Contact Center" (with an icon of an ATM). A red arrow points from the "Application links" label to each of these three tiles. On the left side, there is a "Feedback" button with a red arrow pointing to it from the label "Customer feedback".

**Loomis Direct**  
Managing cash in society.

Welcome, [Javier Jain](#)  
Change My Password  
Sign Out

## Welcome to Loomis Direct

Loomis Direct brings you an enhanced customer experience with a single entry point for all your data needs. Click on any one of the applications that you have access to below.

If you do not see an application listed that you should have access to, please contact Loomis Direct Support for assistance.

**Cash Management Services**  
Multiple reporting options provide information that complements your information processing capabilities.

**SafePoint**  
Loomis SafePoint End-to-End Solution, provides you with secure cash handling and an easy-to-use reporting system.

**Customer Contact Center**  
Create and manage service requests and custom reports, view company announcements, and access our knowledgebase.

**Feedback**

**Customer feedback**

**Application links**

### 3.1 Launch Pad Features

#### User Profile

By clicking on your name displayed in the upper right corner of any page in Loomis Direct, you can change your password and log out of Loomis Direct.

#### Application Links

A link to each application you are assigned is displayed on the Launch Pad. To access an application, just click on the appropriate link.

#### Customer Feedback

Help us to improve Loomis Direct by using the Feedback button to submit any comments or suggestion about your Loomis Direct experience.

#### Additional Links

If you want to learn more about Loomis, there are several links at the bottom of the Launch Pad that provide additional information about Loomis, the products and services we offer, and how to contact Loomis. Links to our privacy policy and terms of use for Loomis Direct are also provided.

## 4 Customer Feedback

As a Loomis customer, we value your opinion and encourage you to leave comments and suggestions on how we can improve your Loomis Direct experience.

### Customer Feedback

As our customer, we value your opinion.

Please enter your suggestions (up to 1200 characters) and send them to us. If you do not wish to continue, click Cancel.

Email

Customer

Name of Customer

Application

--- Select Application --- ☐

Feedback

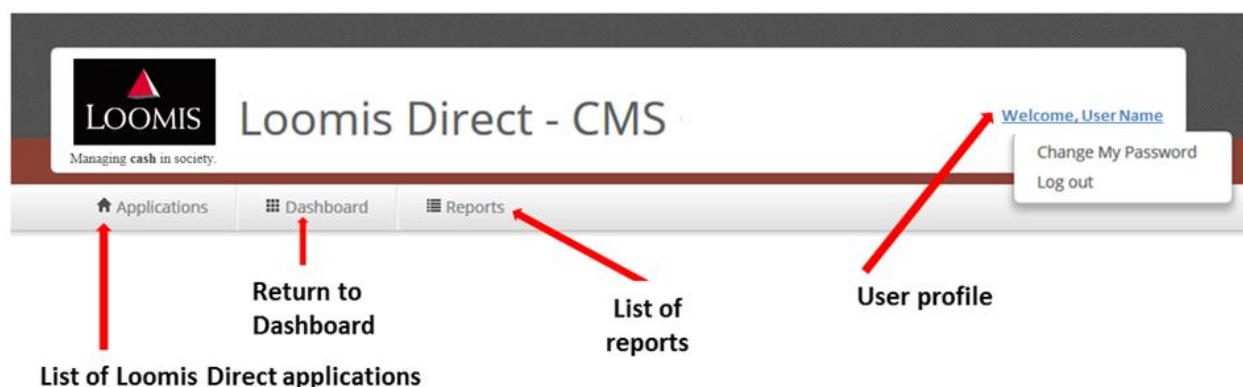
1200 characters left.

Send Feedback

Cancel

## 5 Cash Management Services Reporting

### 5.1 Header Menu



#### Applications

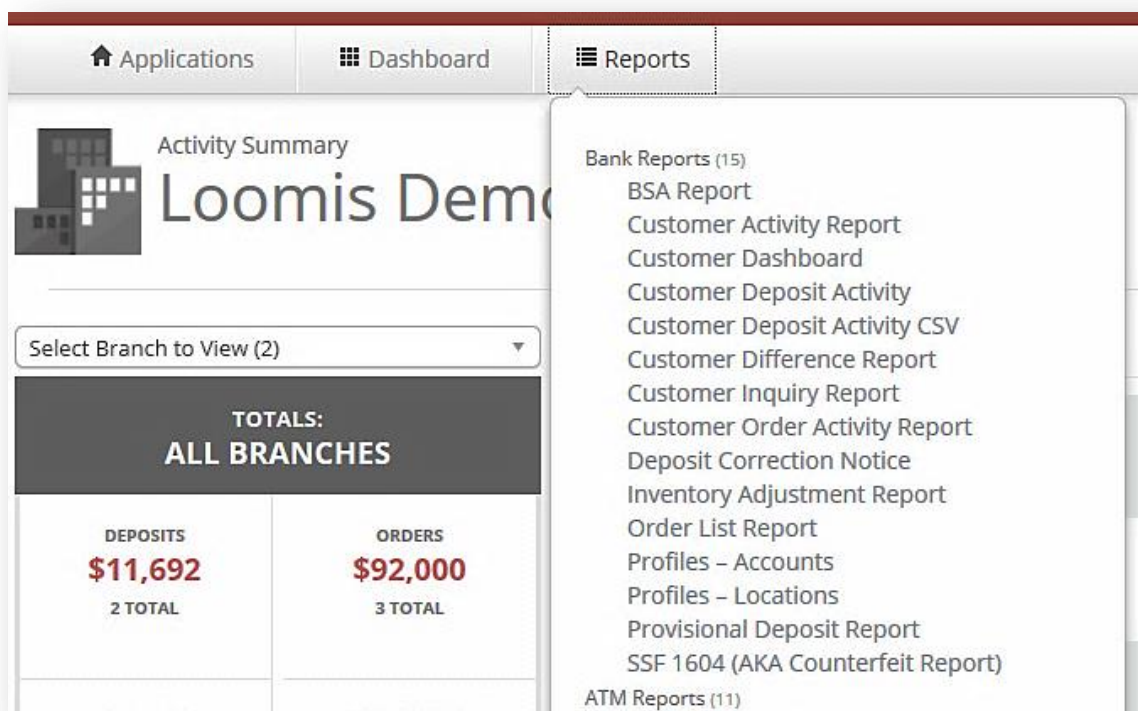
The Applications menu displays links to all Loomis Direct applications you were granted access to. If CMS Reporting is the only application you have access to, clicking on "Home" link will take you to the Dashboard, otherwise you will be taken to the Launch Pad.

#### Dashboard

Clicking on Dashboard takes you to the Dashboard.

#### Reports

Clicking on Reports displays the list of reports you have access to.



## User Profile

Click on your user name if you want to change your password or sign out of Loomis Direct.

## 5.2 Dashboard

The Dashboard will assist you in determining your deposits, orders, residuals, and adjustments for the day. It will show if all branches have completed their processing and made their reports available for view by selecting from the Reports menu or by clicking on the reports shortcuts corresponding to each report.

**Date selector**

**Branch selector**

**Activity summaries**

**Sorting options**

**Branch filter**

**Reports shortcuts**

| TOTALS: ALL BRANCHES                    |                                      |  |  |  |  |
|-----------------------------------------|--------------------------------------|--|--|--|--|
| DEPOSITS<br><b>\$11,692</b><br>2 TOTAL  | ORDERS<br><b>\$92,000</b><br>3 TOTAL |  |  |  |  |
| RESIDUALS<br><b>\$39,560</b><br>3 TOTAL | ADJUSTMENTS<br><b>\$0</b><br>0 TOTAL |  |  |  |  |
| BRANCH COMPLETE<br><b>100%</b>          |                                      |  |  |  |  |

| BRANCHES         |                            |                            |                            |                       |                        |
|------------------|----------------------------|----------------------------|----------------------------|-----------------------|------------------------|
|                  | DEPOSITS                   | ORDERS                     | RESIDUALS                  | ADJUSTMENTS           | Activity               |
| LOS ANGELES 1210 | <b>\$11,692</b><br>2 TOTAL | <b>\$0</b><br>0 TOTAL      | <b>\$0</b><br>0 TOTAL      | <b>\$0</b><br>0 TOTAL | <b>Yes</b><br>COMPLETE |
| SACRAMENTO 1235  | <b>\$0</b><br>0 TOTAL      | <b>\$92,000</b><br>3 TOTAL | <b>\$39,560</b><br>3 TOTAL | <b>\$0</b><br>0 TOTAL | <b>Yes</b><br>COMPLETE |

## Date Selector

By default the dashboard displays the activity for the previous day. You can select the current date or any previous day and the dashboard will be automatically refreshed.

## Branch Selector

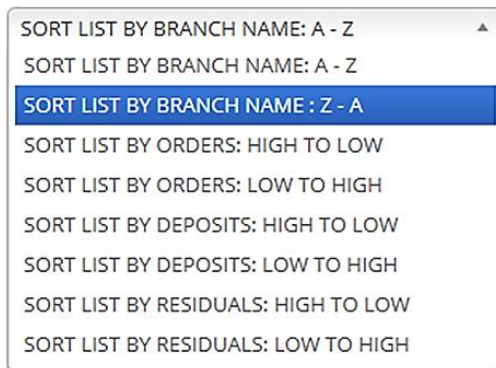
By default the totals for all branches are displayed. You can select a single branch to view.

## Activity Summaries

Totals for deposits, orders, residuals, and adjustments are displayed so you can determine the status of processing at all branches or a single branch. The percent of branch completion is also displayed.

## Sorting Options

The Dashboard provides you a number of ways to sort information so it is more meaningful to you.



## Branch Filter

Type a letter and only the branches with that initial will be displayed. Continue typing to narrow the selection.

## Reports Shortcuts

From the Dashboard you can run or download your reports in a variety of formats.

Shortcuts:

- Execute
- Download
  - PDF
  - Excel
  - CSV

BRANCHES

SORT LIST BY BRANCH NAME: A - Z

Clear

|                      | All Branches<br>Deposit                                                       | All Branches<br>Orders                                                      | All Branches<br>ATM Deposit                                                    | All Branches<br>Inventory Adj                                               | All Branches<br>Activity                                      |
|----------------------|-------------------------------------------------------------------------------|-----------------------------------------------------------------------------|--------------------------------------------------------------------------------|-----------------------------------------------------------------------------|---------------------------------------------------------------|
| <b>All branches</b>  | DEPOSITS<br><b>\$11,692</b><br>2 TOTAL<br><small>Report PDF Excel CSV</small> | ORDERS<br><b>\$0</b><br>0 TOTAL<br><small>Report PDF Excel CSV</small>      | RESIDUALS<br><b>\$0</b><br>0 TOTAL<br><small>Report PDF Excel CSV</small>      | ADJUSTMENTS<br><b>\$0</b><br>0 TOTAL<br><small>Report PDF Excel CSV</small> | COMPLETE<br><b>Yes</b><br><small>Report PDF Excel CSV</small> |
| <b>Single branch</b> | DEPOSITS<br><b>\$0</b><br>0 TOTAL<br><small>Report PDF Excel CSV</small>      | ORDERS<br><b>\$92,000</b><br>3 TOTAL<br><small>Report PDF Excel CSV</small> | RESIDUALS<br><b>\$39,560</b><br>3 TOTAL<br><small>Report PDF Excel CSV</small> | ADJUSTMENTS<br><b>\$0</b><br>0 TOTAL<br><small>Report PDF Excel CSV</small> | COMPLETE<br><b>Yes</b><br><small>Report PDF Excel CSV</small> |

## 5.3 Reports

The Reports menu allows you to run a variety of reports to satisfy your business needs.

The following report is a sample of the Customer Deposit Activity report.

The screenshot shows the 'Customer Deposit Activity' report interface. At the top, there is a navigation bar with 'Report Options', 'View Report', and 'Download' buttons. A red arrow points from the text 'Display report parameters' to the 'Report Options' button. Another red arrow points from the text 'Execute report' to the 'View Report' button. A third red arrow points from the text 'Download options' to the 'Download' button, which has a dropdown menu showing 'Excel', 'CSV', and 'PDF' options.

Below the navigation bar, the report title 'Activity Report - Customer' is displayed. The report parameters are listed:

- Customer: Loomis Demo
- Inventory: COMMERCIAL TESTING MVID
- Account No:
- Account Location No:
- Credit Date:
- Processing Date:
- Activity Date: 8/19/2014 to 8/19/2014

The main data table is as follows:

| Account                                | Account Location                                       | Deposit ID  | Declared Total | Currency Total | Coin Total | Verified Cash | Checks   | # of Envelopes | Verified Total | Difference |
|----------------------------------------|--------------------------------------------------------|-------------|----------------|----------------|------------|---------------|----------|----------------|----------------|------------|
| TESTING ACCOUNT<br>No: 12011201        | COMMERCIAL TEST<br>LOCATION 1<br>No: 789335 ID: 123123 | 3456        | 6,497.15       | 6,497.00       | 0.15       | 6,497.15      | 0.00     | 0              | 6,497.15       | 0.00       |
|                                        |                                                        | Loc Total:  | 6,497.15       | 6,497.00       | 0.15       | 6,497.15      | 0.00     | 0              | 6,497.15       | 0.00       |
|                                        |                                                        | Acct Total: | 1              | 6,497.15       | 6,497.00   | 0.15          | 6,497.15 | 0.00           | 6,497.15       | 0.00       |
| TEST SUB ACCT TYPE 5<br>No: 4944543211 | TEST COMMERCIAL<br>LOCATION 2<br>No: 10004568 ID: 1004 | 5678        | 5,200.00       | 5,195.00       | 0.00       | 5,195.00      | 0.00     | 0              | 5,195.00       | -5.00      |
|                                        |                                                        | Loc Total:  | 5,200.00       | 5,195.00       | 0.00       | 5,195.00      | 0.00     | 0              | 5,195.00       | -5.00      |
|                                        |                                                        | Acct Total: | 1              | 5,200.00       | 5,195.00   | 0.00          | 5,195.00 | 0.00           | 5,195.00       | -5.00      |
| Inv Total:                             | Total                                                  | 2           | 11,697.15      | 11,692.00      | 0.15       | 11,692.15     | 0.00     | 0              | 11,692.15      | -5.00      |

At the bottom of the interface, the user information 'User: javier.jain@us.loomis.com' and the report creation timestamp 'Report Created: 8/19/2014 4:21:11 PM' are displayed.

### Report Options

If you need to change the default criteria for running a report, click on the "Report Options" link to view the available parameters that you can use to modify how the report is run.

# Customer Deposit Activity

Page  of 2

Customer ☐ All 1 Customer (s) or select from the list below

Loomis Demo X

Inventory Type ☐ All 2 Inventory Type (s) or select from the list below

Select Some Options

Branch ☐ All 0 Branch (s) or select from the list below

Select Some Options

Inventory ☐ All 0 Inventory (s) or select from the list below

Select Some Options

Start Date

End Date

Account No Start

Account No End

Location Number Start

Location Number End

Display "Other Misc"

Display Currency Detail

Credit Date Start

Credit Date End

Display Coin Detail

Display Coin Bags

Display "Food Stamps"

Display Reason Codes

Display Processing Date

Display Memo

Difference Limit

Memo Field Search

Seperate by Account Type

Display Envelope Detail

Deposit Type

## Activity Report - Customer Deposit

Customer: Loomis Demo  
Inventory: COMMERCIAL TESTING MVID  
Account No:  
Acct Location No:

Click on the checkbox for each parameter to show all the available values. You can remove values as needed by clicking its "X".

All date fields have a calendar icon next to them. If you click on this icon, a calendar will appear that allows you to select a date.

On some reports, you will see the option to “display” certain transactions or fields. Some default to Yes and some to No. You can adjust these values to meet your requirements.

On the example report, you can determine if you want to search by Credit or Processing Date by entering a date range. You also have the option of narrowing down the results of the report by specifying an Account or Location number range.

### **View Report**

After you have adjusted the parameters, click the “View Report” link to execute the report.

### **Download**

You can select to export a report to PDF, an Excel spreadsheet, or a CSV file.

## **6 Loomis Direct Support**

If you need help, you can contact Loomis Direct Support by sending an email to

**[loomisdirectsupport@us.loomis.com](mailto:loomisdirectsupport@us.loomis.com)**