



Initial Balance Enhancements in ADM

Grand openings can play a pivotal role in ensuring a successful market launch by generating interest and buzz. A great way to build that anticipation is by guiding consumers to create an account on the 365Pay app or MyMarketAccount.net before the go-live so they are ready to make purchases at the grand opening. 365 has added more functionality on the **Location Summary** page in ADM to provide even more options to reward consumers for creating that account.

With the Initial Balance feature, consumers who create an account at the kiosk or associate their new account from the app or online, can now receive funds or loyalty points on their account. Using the new Initial Balance Date field, you can set and forget these actions so only consumers who go to the market by the set date will receive the funds or points. This feature is a great way to generate exclusivity in the market and can help drive a successful grand opening!

Initial Balance Value

The **Initial Balance** field is on the **Location Summary** page in ADM. When a value is entered into this field, all consumers who associate this location as their Home Location OR who create an account, will automatically receive the funds added to their balance. This is a great alternative to adding funds to all accounts through a consumer upload as only real, active consumers will have their balance credited. The below image shows the functionality in ADM.

A screenshot of the ADM interface showing three fields: 'Initial Balance' with a value of '2.00', 'Initial Balance End Date' with a value of '06/01/2020', and 'GMA Loyalty' with a value of 'Off'. Each field has a small question mark icon to its right.

Initial Loyalty Point Balance

Another option is the Initial Point Balance. If GMA Loyalty is enabled for a location, there will be an **Initial Point Balance** field on the **Location Summary** page in addition to the **Initial Balance** field. When a value is entered into this field, all consumers who associate to this location as their Home Location OR who create an account, will automatically receive the loyalty points to their loyalty balance.

ADM/V5 Initial Balance Enhancements – External



The Initial Point Balance concept can be used independently or in conjunction with the Initial Balance, allowing for complete control over to consumer incentives. The below image shows the functionality in ADM.

A screenshot of a web form for configuring initial balances. It contains four rows of input fields: 'Initial Balance' (empty), 'Loyalty Point Balance' (500), 'Initial Balance End Date' (06/01/2020), and 'GMA Loyalty' (On). Each field has a light gray border and a small question mark icon to its right. The 'Initial Balance End Date' field includes a calendar icon on the left.

Initial Balance End Date field

A new field, **Initial Balance End Date**, has been added to the **Location Summary** page. You can enter a date in this field to set when the Initial Balance and/or Initial Point Balance will expire. This feature provides a "set and forget" functionality for when the specific date the Initial Balance and the Loyalty Point Balance will no longer be applied to consumer accounts. The field defaults to "None", meaning the Initial Balance will run indefinitely. When a date from the picker is selected, at the end of the day (11:59 pm local time), the Initial Balance and Loyalty Point Balance will go to zero and will no longer apply to the accounts. This field is not required when saving changes to the **Location Summary** page or when setting an Initial Balance.

Impact on EFT: GMA Disbursement Report

Fees will be applied to a location if the Initial Balance or Loyalty Point Balance is used.

- For the Initial Balance, the total amount of funds added to consumer accounts will be charged on the EFT: GMA Disbursement Report in the *Adjustments* column.
- If the Loyalty Point Balance is used, there will be a fee of \$.02 for every 100 points given to consumers. For example, if a consumer receives an initial loyalty balance of 1,000 points, the operator will be charged \$.20 for a loyalty fee. This fee will funnel into the existing *Loyalty Fee* column on the EFT: GMA Disbursement Report.