365Pay App Operator Guide

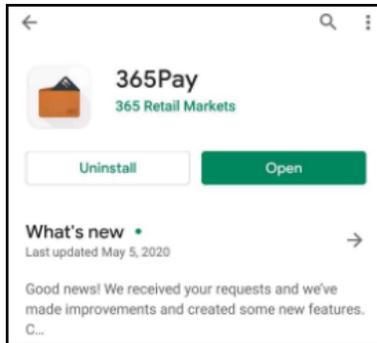# 365Pay Operator Guide

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Introduction to the 365Pay app

365Pay Smartphone app allows consumers to purchase products at various locations that use the Global Market Account (GMA). This app is flexible and easy to use whether purchasing items from a vending machine or a MicroMarket. This document explains how to setup the app and use it at various locations.

Download and Install the 365Pay app

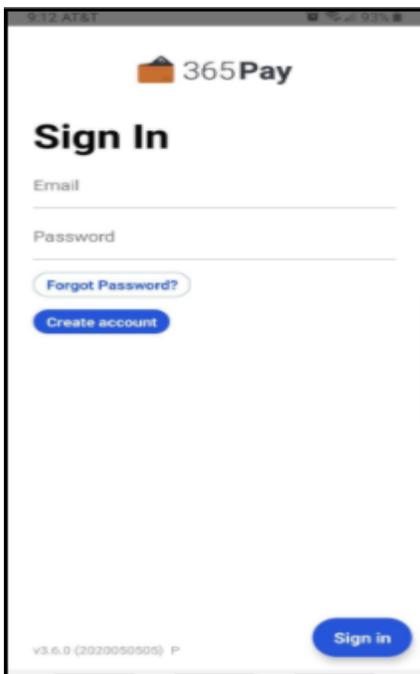1. Download 365Pay from App Store or Google Play Store.

2. Tap **Open**.

Create Account
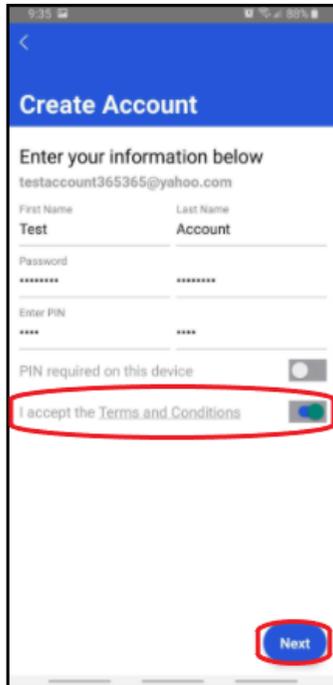
Create a new Account through 365Pay

From the login screen:
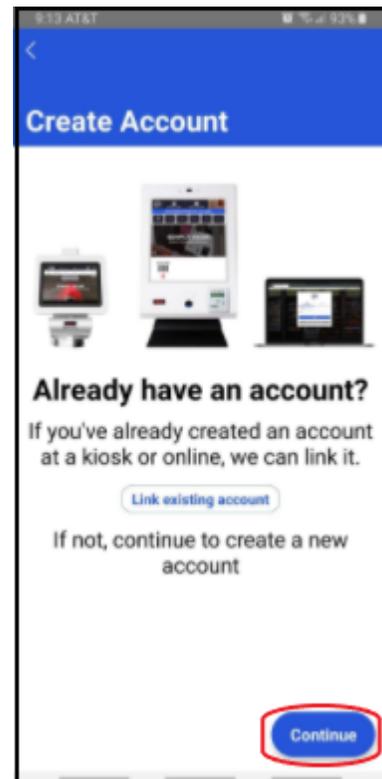
3. Tap **Create Account**.

4. The *Create Account, Before you begin* screen will display. Tap **Got it** in the lower, right corner. The *Privacy Policy* screen will display.

5. Scroll all the way down to the bottom and tap the **gray dot** to the right of "*I agree to the Terms and Conditions*".

6. Tap **Confirm**. The screen at right will display.

7. Tap **Continue**. The *Create Account* screen will display.

8. Enter your **email address** and tap **Send email.** A verification email will be sent to the address provided.

9. A pop-up message will display. Tap **OK** to dismiss the message. The *365Pay Sign In* screen will display.
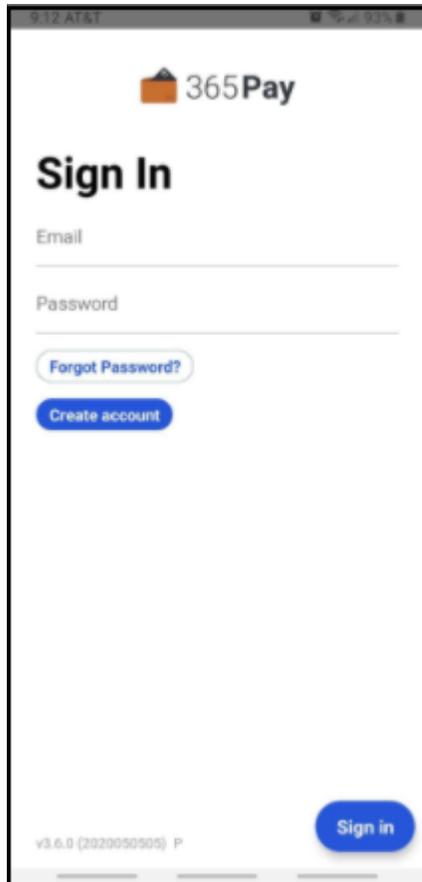
10. Open your email account. An Email Verification message will be in your Inbox.

11. Open the message and tap **FINISH MY ACCOUNT SETUP**.
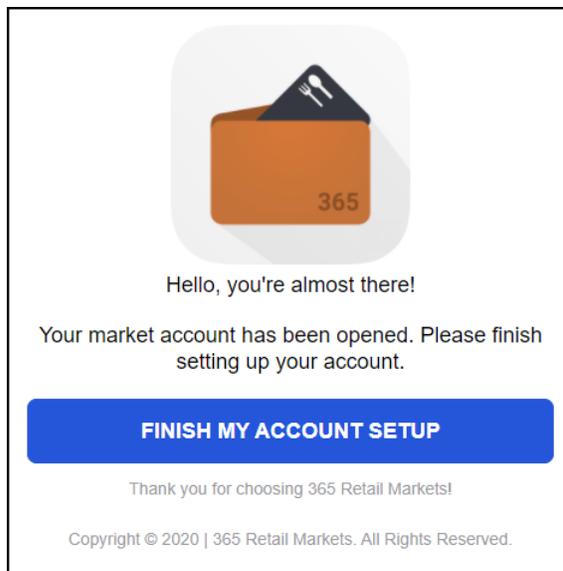
12. USA will be auto-filled in the *Select Your Country* field. Tap **Next.**
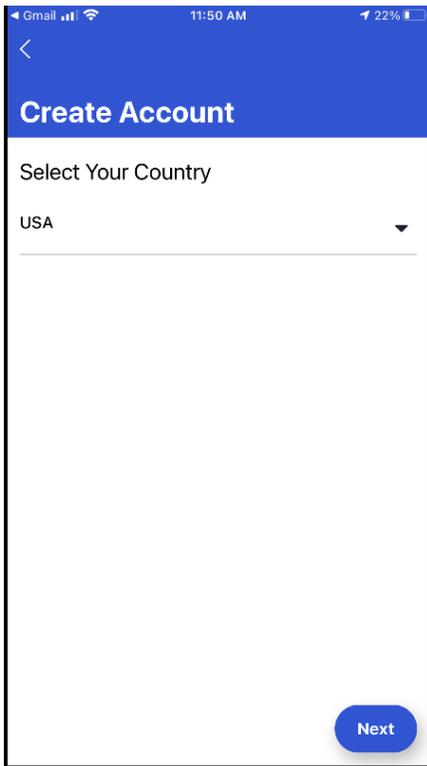
13. The *Create Account* screen will display. Complete all of the fields.
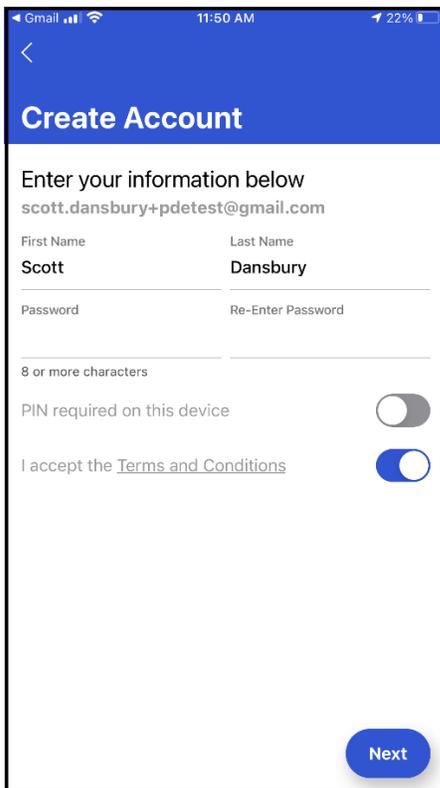
14. Tap the **button** to the right of "Terms and Conditions" to accept them. Tap **Next**.

15. You will be prompted to enter _optional_ demographic information. Tap **Next** OR Complete the fields and then tap **Next**. The **_Add Credit Card_** screen will display.
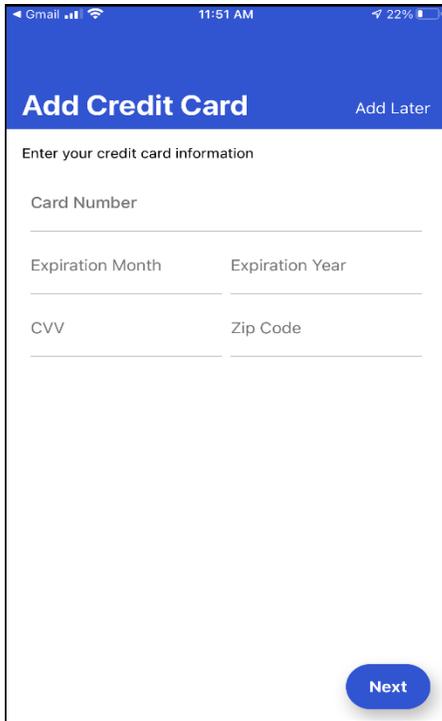
16. You can enter your credit card information and tap **Next** (the following screen will display), or you can choose to set it up later.
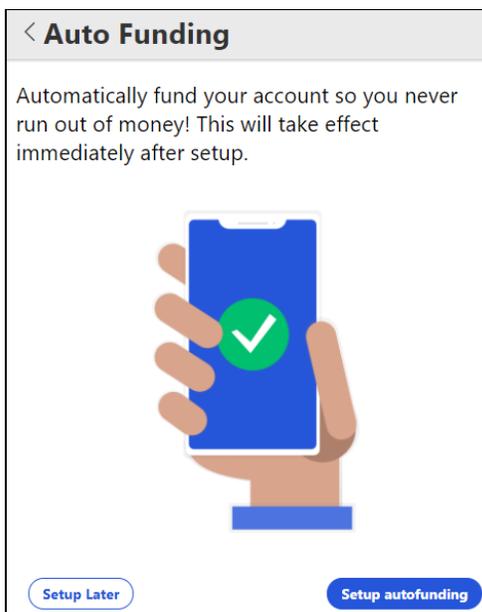
17. Tap **Setup Later** or **Setup autofunding** if you want to set up auto funding now.

18. Enter your **email address** and tap **Sign in** at the bottom, right. The *365Pay Home* screen will display. You are ready to make purchases.

Connect 365Pay to an existing account

If you have already created an account on the kiosk, follow these steps to link your kiosk account to 365Pay. From the 365Pay login screen:

1. Choose **Create Account**.

2. Tap **Link existing account**.
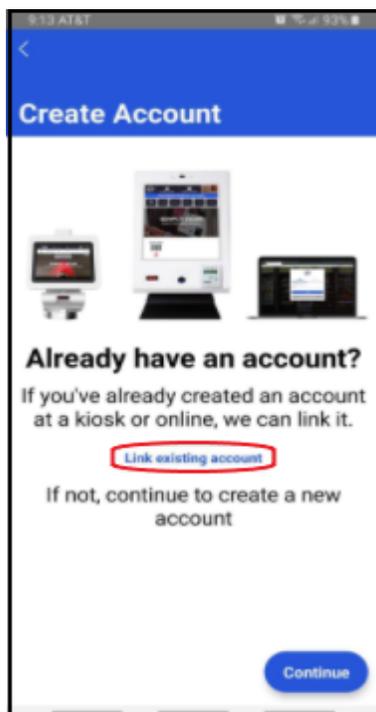
3. Choose a method of linking your account.

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Manage Account

Access the **Settings** section by tapping the **Settings** icon in the bottom, right corner of the 365Pay app. In the **Settings** section you can:

1. View or Change **Personal Info** (name, email, etc.).

2. View your purchase history.

3. Manage your payment methods.

4. Change your password or PIN.

5. View the **Help** (FAQ) section.

6. Contact 365 Support from the **Help** section.

7. Sign out.
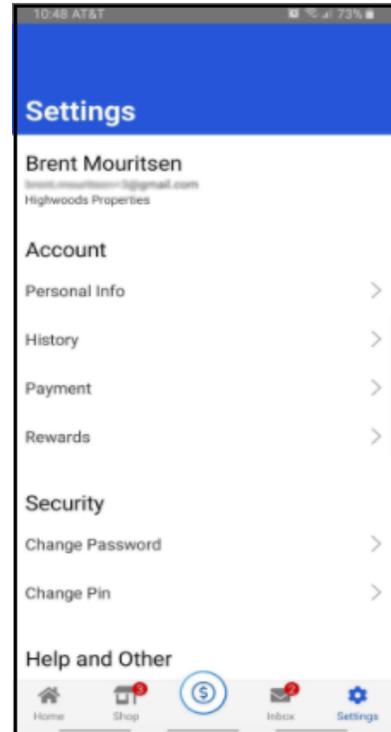
Scan and Pay with the App
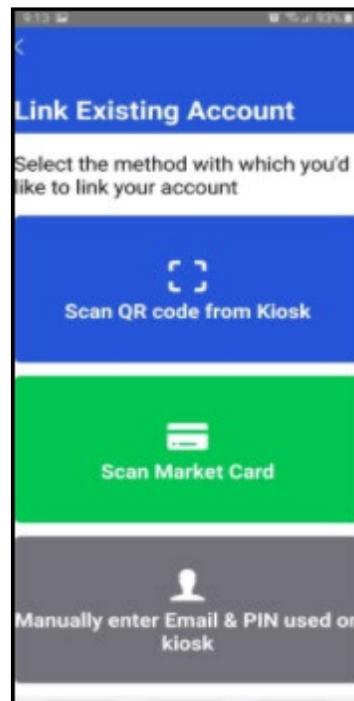
Pay using Bluetooth connection (365Inside)

1. Verify that Bluetooth is turned on.

2. Login to the mobile app.

3. Tap the **Shop** icon to see if you are in range of any market Beacons.

4. View the Planogram and nutritional information for any products at the kiosk.

    OR

    Select the **Machine** OR tap **Add Credit to Machine** to send credit to the vending machine to make a purchase. To add an Order Ahead location, refer to the Order Ahead Consumer Experience section of this document.
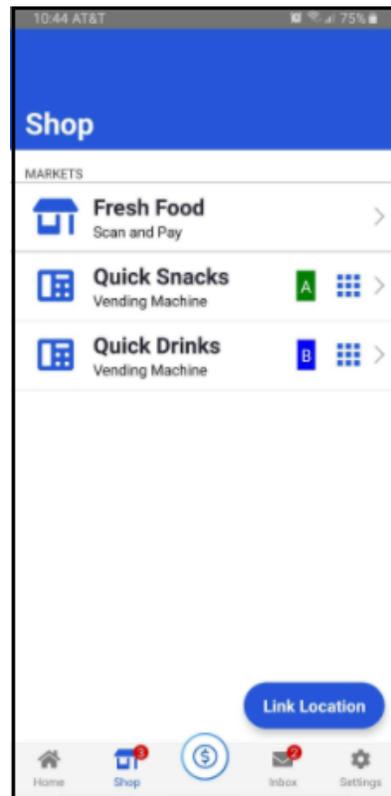
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Pay using QR code (AirVend, MicroMarket)

1. Login to the 365Pay app.

2. Select the items you want to purchase and bring them to the kiosk.

3. Scan the QR code on your phone under the red light at AirVend or MicroMarket.

4. Finish answering the screen prompts to complete your purchase.
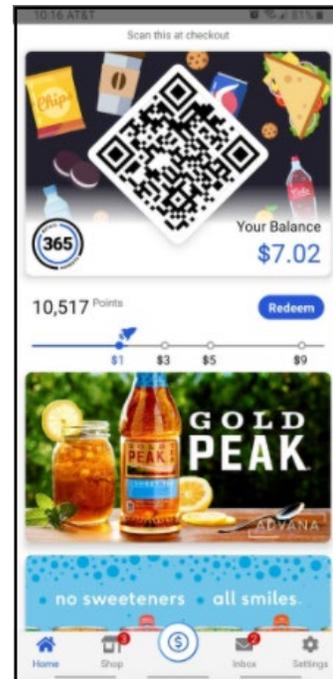
Pay using Shopping Cart functionality (MicroMarket, NanoMarket)

1. Login to the 365Pay app.

2. Select the location you want from the **Shop** icon.

3. Scan your product(s).

4. Select **Checkout** to purchase the item(s).

Signing Up for Payroll Deduct

1. Open the 365Pay app on your mobile phone. The following prompt will display.

If your account is already associated to a home location and that location has Payroll Deduct turned on, the "*Payroll Deduct Now Available*" prompt will display when you enter the app. This prompt will only display the first time after Payroll Deduct has become available in your location.
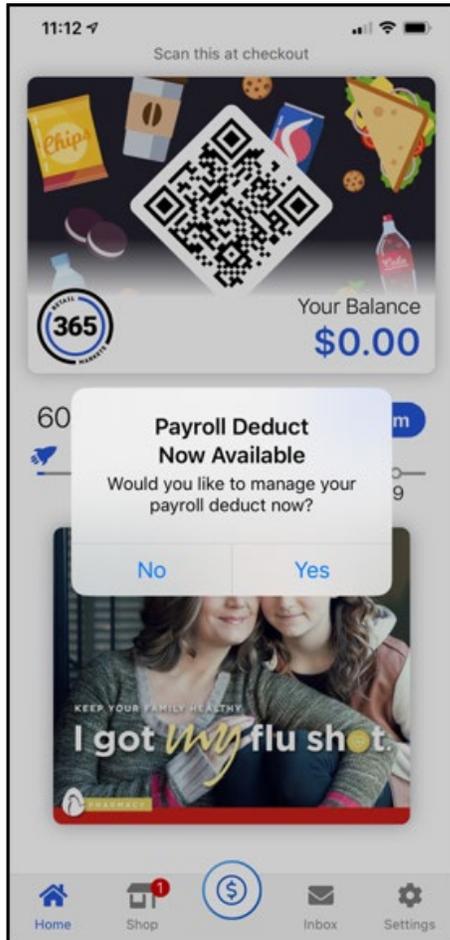
If your tap:

- **No** – you will close the prompt and never see this prompt again when entering the app.

- **Yes** – the *Payroll Deduct* screen will display. Depending on your status, you will see:

  o **Enrollment Pending,** if your payroll information has not yet been entered in ADM.

  OR

  o **Your payroll deduct settings** if your payroll information has been entered into ADM. The settings include your spending limit, pay cycle, and the option to continue or discontinue participating in Payroll Deduct.

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2. Tap **Yes.** The *Payroll Deduct* screen will display showing either of the screens below, depending on your status.
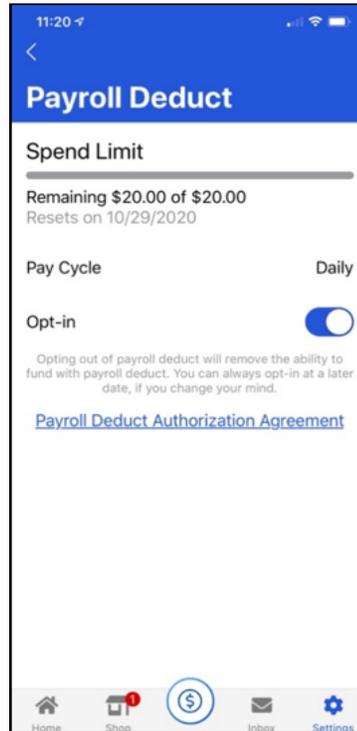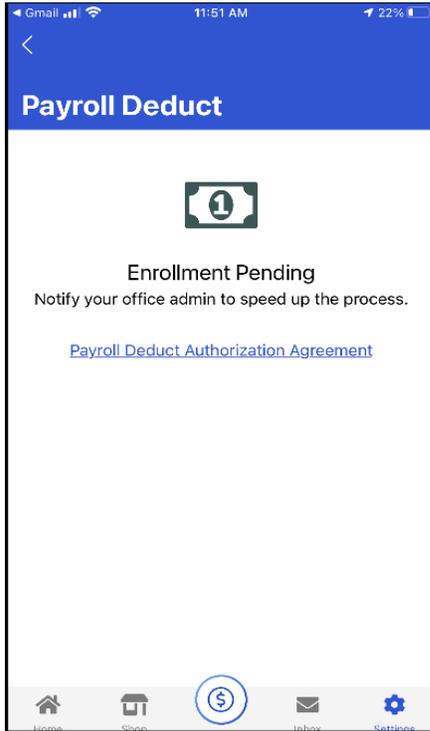
3. Tap the **Payroll Deduct Authorization Agreement** link. The *Payroll Deduct Agreement* screen will display.
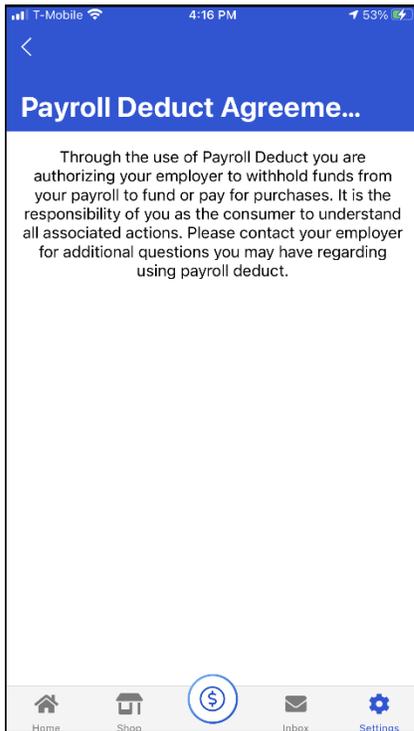
Adding Payroll Deduct as a Payment Method

1. Tap the blue **dollar sign** button ⓢ at the bottom of the screen. A pop-up window will display showing your abbreviated credit card number and other information. Tap your card number. A small pop-up window will display.

2. Tap **Add New Payment**. The *Payment* screen will display showing that your request to use Payroll Deduct is either pending or active.
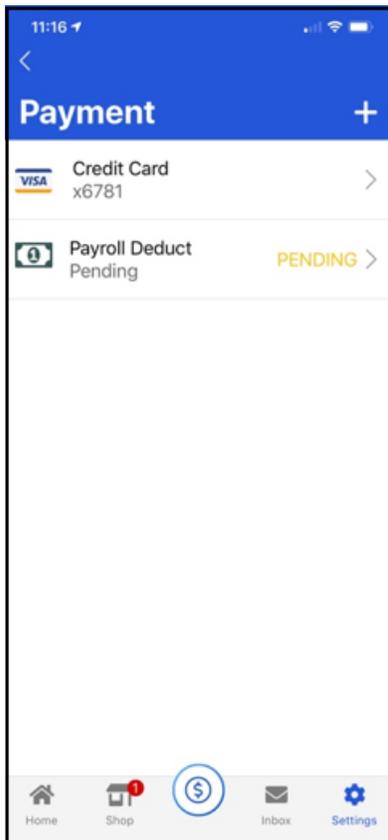
Order Ahead Consumer Experience

Note: The consumer needs to have the app installed and have their account registered. See Download and Install the 365Pay app or Create Account if needed.

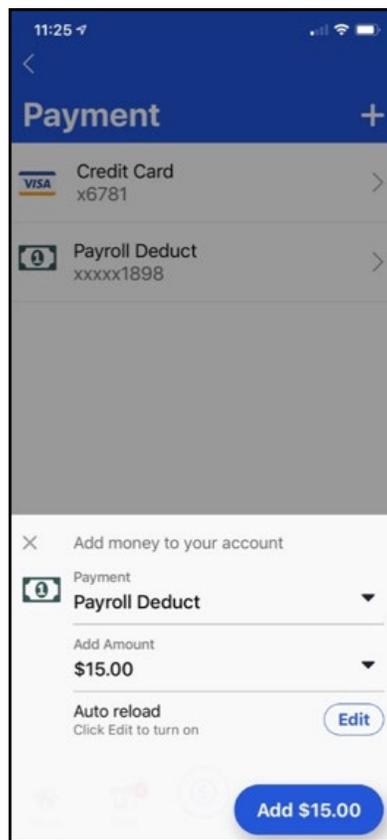When your location is enabled with **Order Ahead**, your consumers will need to know the **Location Code** for your location. This will be provided by the 365 Implementation team for you to provide to your consumers. When the consumer has a registered account and has a location code, they can follow the steps below:

1. Log into the **365Pay** app.

2. Select the **Shop** button at the bottom of the screen.

3. Select **Link Location**.

4. Enter the six-digit **Location Code** provided by the organization.

5. Select the **desired location**.
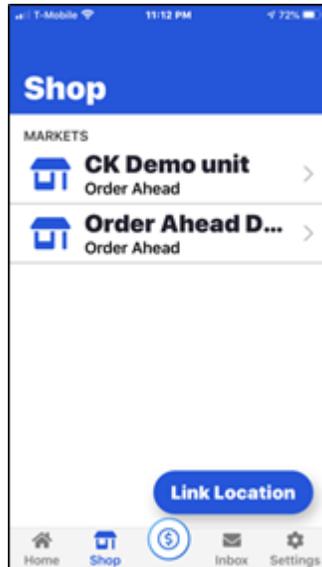
6. Select a **pickup time**.

7. When a pickup time has been selected, the menu options will display. Consumers can search by typing key words in the **Search** field or by sliding through the categories on the menu and selecting the item(s) they want to order.

   Note: If an item has modifiers (toppings, condiments, etc.), they will display after the item has been selected. When the consumer has adjusted the modifiers to their liking, they should tap **Add Item**.

8. A small icon will display at the bottom of the screen indicating that items have been added to their cart. Consumers should select that icon to checkout.
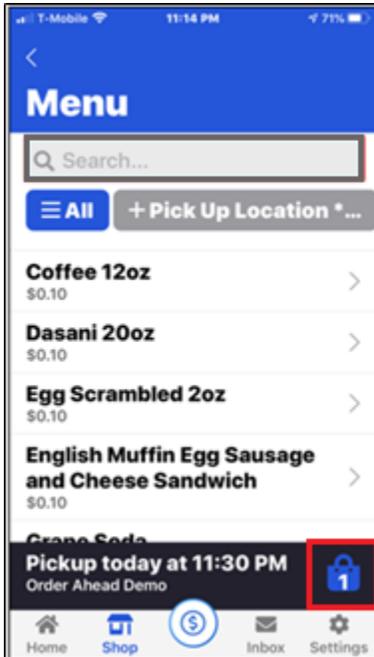
9. At this time, consumers can change to another pickup time, as long as it is still available. When they have verified that their order is all set, they should select **Checkout**.

10. The consumer will be presented with a prompt to choose email receipt if they want one.

11. Select **Done**. When the consumer selects **Done**, the order is sent to the ReadyTouch device and eventually to the CKDS.

12. The consumer will receive the following messages from the app as their order is received and prepared

    - **Order Received** = Order is placed but prior to the lead time, it has not been sent to the CKDS.

    - **Preparing Order** = Order is sent to CKDS (pickup time - lead time).

    - **Order Ready** = Order is bumped.

Consumer's Experience in the Café

1. If the location has a **Now Serving** screen, the screen will display the consumer orders as they come into the CKDS. Orders will not be shown on the **Now Serving** screen until they display on the CKDS.

2. When the consumer order is **ready** or the **kitchen staff needs to ask a clarifying question**, the consumer's order will **flash green**, slide out of the **Preparing** section, and slide into the **Now Serving** section of the screen.

- The Order will be prominently displayed at the top of the **Now Serving** screen.

- When the consumer has responded to the order call and the order is handed to them, the consumer's order will be removed from the **Now Serving** screen.

FAQ

Q: I don't see any Machines in the Machines list, what should I do?
A: Verify that Bluetooth is turned on in the mobile device settings.

Q: Can I still make a purchase if I have no funds loaded on my account?
A: Yes. When you connect to the machine, you will be presented with two options:

- **Make a one-time purchase**, which will apply the charge directly to the credit card on file.

- **Add funds to your account**, which will allow you to recharge your account to make the purchase.

Q: How do I view the Planogram for a Vending Machine?
A: Tap on the **yellow square icon** to the right of the Machine name on the Machines list.

Q: How do I view the nutritional information for a product I would like to vend?
A: Tap on the **yellow square icon** to the right of the Machine name on the Machines list, then tap on the **product image** to view the nutritional information for that product.

Q: Can I view details of purchases I have made in the past?

A: Yes.

1. Go to **Account Settings** by tapping on the hamburger icon in the upper, left corner of the screen.

2. Select **Account History** to view previous purchases.

If you tap on a purchase, another screen will open detailing what item(s) were purchased along with any taxes that were included in the purchase. You can also filter between purchases and funds by selecting **Purchases** or **Funding** depending on what you want.

Q: Can I delete a credit card after it has been added to my account?

A: Yes.

1. Go to **Account Settings.**

2. Tap the **Manage Cards** link.

3. Select the **credit card** you would like to delete.

4. Tap the **Delete Card** button at the bottom of the screen.