

GMA Migration Instructions

Non-Canteen





Table of Contents

- Purpose 1
- Valet to GMA Migration Process 1
 - 1. Before the GMA Migration 1
 - What is GMA? 1
 - Navigating the GMA Readiness Report 1
 - Communicating to Accounts Needing Attention 2
 - 2. The GMA Migration 3
 - Scheduling the GMA Migration 3
 - The Final GMA Readiness Report 4
 - 3. After the GMA Migration 4
 - The Consumer Experience 4
 - ADM Exclusive Reports 4
 - 4. Escheatment 5
 - What is Escheatment? 5
 - 5. Appendices 5
- Appendix A: Unlocking a Migrated GMA Account 5
- Appendix B: 365 Kiosk Technical Network Requirements 7
 - Network Requirements 7
 - Credit Card Processors 9
- Appendix C: Linking Migrated GMA Accounts to 365Pay 10
 - Scan QR code from Kiosk 11
 - Scan 365Pay (Market) Card 11
 - Manually enter Email & PIN used on kiosk 11
- Appendix D: Using an Account in GMA 12
- Retrieving Account at the Kiosk 12



Purpose

The purpose of these instructions is to outline the steps required to enable a legacy (Valet) kiosk for GMA and migrate existing consumer accounts to GMA.

Valet to GMA Migration Process

1. Before the GMA Migration

What is GMA?

Global Market Account (GMA) is a new account platform managed by 365 Retail Markets. With GMA, the consumer can maintain a single account allowing them to make purchases at all GMA enabled devices across the entire 365 Ecosystem. The following 365 devices are already GMA enabled:

- V5 Kiosk
- Express Tablet
- Mobile Beacon
- AirVend
- Ready Touch

Navigating the GMA Readiness Report

Login to SmartHQ and run the **GMA Readiness Report** for the location that will be migrated. The report is located under the **Customer Service** tab. If there are multi-kiosk linked (MKL) or multi-store linked (MSL) units at the location, all must be converted during the same GMA migration.

The GMA Readiness Report will display as an Excel document and will include the total number of accounts at the location. Accounts will be filtered into one of the following three categories:

- **Accounts Ready for GMA**
 - No further action is required. These accounts will be migrated to GMA.
 - These accounts were used in the last 12 months or were created in the last six months.
 - A fingerprint and/or Scanner ID (keytag) is associated with each of these accounts.
- **Accounts Needing Attention**
 - Action is required by the account holder to prevent a post migration lockout.
 - These accounts were used in the last 12 months or were created in the last six months.



GMA Migration Instructions – Non-Canteen

- These accounts do not have an associated fingerprint or Scanner ID (keytag).
 - Account holders must add one of these two methods of identification.
- See additional details in the section titled [Communicating to Accounts Needing Attention](#) near the bottom of this page.
- **Accounts Excluded from GMA**
 - These accounts will not be migrated to GMA.
 - These accounts were either:
 - Not used in the last 12 months.
 - Or, created more than six months ago and never used.
 - Contact your tax professional regarding escheatment of these funds in accordance with state guidelines.
 - See additional details in section four titled [Escheatment](#).

The report also generates a **GMA Readiness Score** which is calculated as (Ready)/ (Ready) + (Attention). A readiness score of at least 90% is the suggested pre-migration target.

Finally, the report generates a **GMA Transfer Amount** which is calculated as (Ready) + (Attention). Through the GMA platform, 365 becomes the bank. 365 holds all account funding and ensures that sales are attributed to the correct location. The **GMA Transfer Amount** is the total amount that will be transferred to 365. This amount will be withheld from the first GMA disbursement to the location.

[Communicating to Accounts Needing Attention](#)

Using the GMA Readiness Report, work with the client to contact consumers in the **Accounts Needing Attention** category. These consumers are currently typing their UniqueID and PIN for identification at checkout.

In GMA, the **Unique ID** field will be replaced by their email address. Because UniqueID is *not* a transferable method of identification, consumers must add either a thumbprint or a scanner ID (keytag) to their account.

You can use these two attachments to communicate the necessary action:

- The first, [GMA Conversion Notice - PPT Template](#), is an editable flyer that can be posted at the kiosk.
- The second, [Eblast](#), is sample of eblast text in a Word document that can be pasted into an email and sent to consumers in the **Accounts Needing Attention** category.



The GMA Readiness Report is a dynamic report, so the operator will be able to monitor progress toward the 90% readiness goal by re-running the report at regular intervals before the migration.

Note: At the time of the migration, any accounts remaining in the **Accounts Needing Attention** category *will* be migrated. However, these consumers will be locked out of their account after the migration. They will need to contact a representative at their branch to have their account credentials updated, and their account unlocked. See [Appendix A](#) for details.

2. The GMA Migration

Scheduling the GMA Migration

1. Start by going into the GMA Readiness Report in SmartHQ.

2. When the readiness score reaches 90% or higher, the operator should request a migration by clicking on the Request Migration button. 

Note: Anything lower than 75% for the **readiness score** is not recommended to be migrated.

3. **Things to check before requesting the migration:**

If there is an issue in any of these three areas below, it can cause delays in the migration.

- a. Confirm kiosks are online. (If the location is a part of an MSL Group, be sure that all kiosks in the MSL are online also.)
 - b. Be sure that all GMA ports are open on the host network. See [Appendix B](#) for details. When the request is submitted, an automated email will be generated to alert a 365 Fulfillment representative.
 - c. Must have a readiness score of 75% or higher.
4. The 365 Fulfillment team will receive a migration request email as soon as the request migration button is clicked.

Note: You will not receive a confirmation notification when clicking the **Request GMA Migration** button.

5. A representative will review the migration request and send an email back out to the requester to schedule the migration.

Note: Try to respond within 24 hours to avoid any delays in the migration.

6. After a date of when the migration will take place has been determined, the Implementation team will confirm if the location has the GMA ports open and that the kiosk(s) on online.



7. When Implementation confirms that the location can be migrated successfully, they will proceed with the migration at 4:55am EST on the scheduled day. This will also include a software upgrade enabling the kiosk for GMA. Kiosk downtime will be approximately **three to four minutes**, or the time required for the kiosk to complete an auto-reboot.
8. An email will be sent back to the operator stating the migration has been completed and noting if there were any issues with some accounts not migrating over and be contained in an Exception List.

The Final GMA Readiness Report

Just before the migration, the Accounting Manager should pull a final GMA Readiness Report. This will serve as a record of funds to be escheated. Please see additional details in number four of this document titled [Escheatment](#).

3. After the GMA Migration

The Consumer Experience

After the GMA migration, the change to the kiosk interface is not noticeable to the consumer who already identifies themselves using either a fingerprint or Scanner ID (keytag). The consumer will scan and pay just as they did before the migration. The only noticeable difference is in the account creation workflow for new accounts. A fingerprint or Scanner ID was an optional entry before but is now required.

After the GMA migration, consumers will be able to use the 365Pay mobile app to checkout at the kiosk. Migrated consumers will be able to download the 365Pay app to their Smartphones and then link their existing account to the app. See [Appendix C](#) for detailed instructions.

Note: Consumers should not create 365Pay accounts before the GMA migration as this will result in duplicate accounts.

We recommend that the branch host a grand re-opening event after the GMA migration to alert consumers to the features of 365Pay, and to help consumers through the process of linking their account to the app.

ADM Exclusive Reports

After the GMA Migration, branches will still have access to the existing suite of reporting tools available through SmartHQ. However, there are two GMA reports that are available through the ADM portal only.

1. **Account Adjustment Report** – This report is a record of adjustments made to GMA consumer accounts.



2. **GMA Disbursement Report (EFT GMA Disbursement)** – Because 365 is the bank for GMA, any adjustments made will be reflected in the weekly GMA Disbursement Report.

For example, if a branch completes a payout and close of a GMA consumer account, 365 will make an adjustment to credit the branch for that payout in the next disbursement. Alternatively, if a branch adds a \$2 credit to each account created at a grand opening, 365 will make an adjustment to withhold the total amount credited from the next disbursement

4. Escheatment

What is Escheatment?

Escheatment is the process of turning over unclaimed or abandoned property to a state authority. Individual states have different governing laws related to escheatment.

For amounts under \$50, most states do not require any extensive due diligence period to find or contact the consumer. However, they do require that all relevant documentation and funding is transferred to the state.

When accounts are migrated from the Valet platform to the new GMA platform, the old inactive consumer balances are “left behind” on the old platform and will likely need to be escheated to the state. The state of escheatment is the state of residence of the consumer. However, the available consumer data on the Valet platform does not contain the consumer’s state of residence. Therefore, the branch must escheat these funds to their state of incorporation, which is Delaware.

5. Appendices

[Appendix A – Unlocking a Migrated GMA Account](#)

[Appendix B – 365 Kiosk Technical Network Requirements](#)

[Appendix C – Linking Migrated GMA Accounts to 365Pay](#)

[Appendix D – Using an Account in GMA Version](#)

Appendix A: Unlocking a Migrated GMA Account

Consumer accounts are grouped into the statuses of **Ready**, **Attention**, and **Excluded**. All accounts that are a part of the Ready and Attention groups will be migrated to become GMA accounts. Accounts in the Ready group will be accessible immediately. Accounts in the Attention group will not be accessible without some manual intervention on SmartHQ.

If a consumer's account was migrated to GMA and can no longer be accessed, follow these steps to update the account.

1. In SmartHQ, go to the **Global Market Accounts** option under the **Consumer Service** tab:

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Administration	Customer Service
Manage Locations	Customer Transactions
Manage Web Users	Customer Information
Manage Kiosk Users	Global Market Accounts
Kiosk POS Log	Video Surveillance
CC Batch Log	Credit Transaction Log
Kiosk Sync Log	Credit Transaction Log (GMA)
Manage Reason Codes	Account Funding Summary
Manage Notifications	Account Purchase Summary (GMA)
365 Help Documents	Cancel Report
GMA Migration Scheduling	Cancel Report (GMA)
Organization Devices Report	GMA Readiness Report

- On the **Global Market Accounts** screen, search for the consumer's account and look at the applicable results.

Location	First Name	Last Name	Balance	Scanner ID	Email	User Name	Date Created	Last Transaction
Canteen Corp 1st FI Cafe	SCOTT		\$4.01				6/5/2018	6/15/2018
Canteen Corp 1st FI Cafe	WILLIAM		\$0.00				6/5/2018	6/5/2018
Canteen Corp 1st FI Cafe	ALEX		\$0.00				6/5/2018	6/19/2018

- Select the consumer from the list, which will open their **Account Management** screen.



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- In the **Account Management** screen, you can enter either the consumer's **Email** address OR a barcoded **Scanner ID** (keytag). When the consumer goes to the kiosk, they can type in their email address or scan the barcoded card to access their account. After you have entered information for one of the options, select **Save & Close**. If a consumer has forgotten their PIN, you can also generate a temporary PIN from this screen.

Consumer ID: 8593c10845a4d6726e7b8af7e71cca0a Print

From: 10/3/2017 To: 10/3/2018 Get Data

First Name:
 Last Name:
 Email:
 Scanner ID:
 PIN: XXXX Reset

Balance: \$9.36 Add: Adjust

Loyalty Pts: 4037
 Fingerprint: ✓
 Last Trnx: 10/2/2018
 Created: 1/20/2017

Type	Location	Time	Method	Count	Total	Remaining
Sale	Canteen Corp 1st Fl Cafe	10/2/2018	Account	1	\$2.03	\$9.36
Sale	Canteen Corp 1st Fl Cafe	10/2/2018	Account	1	\$1.01	\$11.39
Sale	Canteen Corp 1st Fl Cafe	10/1/2018	Account	1	\$1.01	\$12.40
Redemption	Canteen Corp 1st Fl Cafe	10/1/2018	Points	0	\$1.00	\$13.41

Time	Quantity	Item	Item Amount
10/2/2018 2:04:43 PM	1	SwtStrtMrshBrBtrSS2.1oz	\$1.99

Tax1 \$0.04
Total \$2.03

Save & Close Payout & Close

Appendix B: 365 Kiosk Technical Network Requirements

This document explains the basic, high-level network requirements for installing a 365 Retail Markets Kiosk. Please contact 365 Support at **888-365-6282** or support@365smartshop.com with any questions related to this document.

Network Requirements

All connections are initiated from the kiosk and the below FQDN, IP's, and ports need to be open for outgoing bidirectional communication. Remote viewing of the DVR and cameras are the only exception to this rule (see below).

Service	Description	Destination FQDN/IP	Ports
SQL Server	Transfer of Sales Data/Client-Server Kiosk Setup***	74.112.192.251 74.112.192.186 74.112.192.31	TCP: 1920
GMA	Global Market Account	http://gmaapi.365retailmarkets.com http://queprod.readytouch.com:8040/que/sendmsg/svrsalesimple	TCP: 80, 8040
Time Server	NIST Time Server	time-a.nist.gov, 129.6.15.28	UDP: 123

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Service	Description	Destination FQDN/IP	Ports
Windows Update	Windows Update Servers*	windowsupdate.microsoft.com *.windowsupdate.microsoft.com *.windowsupdate.microsoft.com *.update.microsoft.com *.update.microsoft.com *.windowsupdate.com download.windowsupdate.com download.microsoft.com *.download.windowsupdate.com wustat.windows.com ntservicepack.microsoft.com	TCP: 80,443
Operator Websites	Operator using kiosk WiFi for inventory/sales onsite	https://smarthq.365retailmarkets.com https://365smartinventory.com	TCP: 443
LogMeIn	Remote Administration	*.logmein.com 74.201.74.1 - 74.201.75.254 216.52.233.1 - 216.52.233.254 69.25.20.1 - 69.25.21.254 64.94.18.1 - 64.94.18.254 77.242.192.1 - 77.242.193.254 212.118.234.0 - 212.118.234.254 64.74.103.0 - 64.74.103.254 64.94.46.0 - 64.94.47.254 64.74.17.0 - 64.74.17.255 66.150.108.0 - 66.150.108.255 63.251.34.0 - 63.251.34.255 69.25.247.0 - 69.25.247.255 111.221.57.0 - 111.221.57.255 95.172.70.0 - 95.172.70.255 64.95.128.0 - 64.95.129.255	TCP: 80, 443, 12975, 32976, 17771
Payments	Payment Processor	See Credit Card Processors (next page).	N/A
Payments	Certificate Authorities	*.thawte.com, *.geotrust.com, *.ws.symantec.com, *.verisign.com 199.7.48.0/20 – Verisign Net block (Individual IP's available upon request)	TCP: 443
Cooler** (Optional based on service selected)	Temperature Sensor	*.sensorgateway.com (sensorgateway.com, t1.sensorgateway.com, t2.sensorgateway.com)	TCP: 3000

GMA Migration Instructions – Non-Canteen



Service	Description	Destination FQDN/IP	Ports
		192.41.25.11, 192.41.25.12	
DVR** (Optional based on service selected.)	Remote Viewing (Inbound)	Port forwarding is necessary for remote viewing of the DVR. This is an inbound connection mapped to the IP address of the kiosk. All communication is routed directly to the REVO camera system.	TCP: 8016, 8116, 8200, 10019, 12088 Outbound: 10088

Note: IP's are subject to change without notice.

Credit Card Processors

The following list provides all essential networking, port, and IP requirements for 365 Retail Markets most popular payment processors supported by CreditLine Manager.

**** Only the IP's and ports listed for your processor are required ****

Provider	Destination FQDN / IP	Ports
Heartland Payment Systems (HPS) (PCI 3.1 Compliant)	httpstxns.secureexchange.net, test.httpstxns.secureexchange.net, httpsprod.secureexchange.net, httpstest.secureexchange.net 65.118.49.32, 12.130.236.228, 65.118.49.31, 12.130.236.165	TCP: 443
Fifth Third – 5/3 (PCI 3.1 Compliant)	prod.ssl53.com, cert.ssl53.com 64.57.149.24, 64.57.149.26	TCP: 443
First Data / Bank of America (PCI 3.1 Compliant)	vxn1.datawire.net, vxn.datawire.net, staging1.datawire.net 205.167.140.10, 216.220.36.75, 65.110.169.83	TCP: 443
OTI 365 Secure Cloud 9 Payment Gateway Supporting: USAT (PCI 3.1 Compliant)	link.c9pg.com 72.13.8.1	TCP: 5568, 5556, 5557, 5558, 11911

***Windows Update** – For security purposes, the IP address for the Windows Update website constantly changes and it is not a fixed address. There is no official publication of the IP addresses. We normally advise against defining IP addresses on the firewall for this purpose. Instead, we suggest either allowing all outbound connections to http and https ports or defining the DNS addresses as permitted destinations for traffic through the firewall.

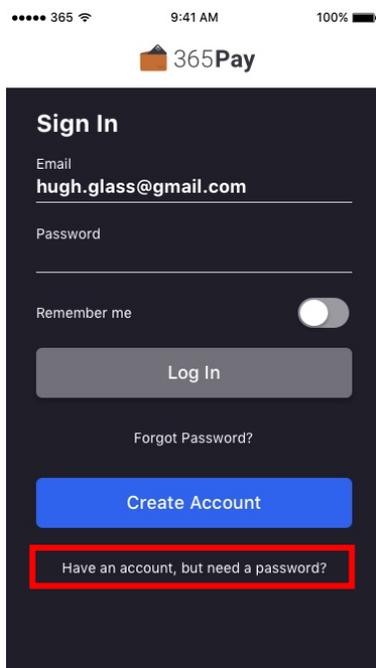
****Optional Based on Services Selected** – These services are necessary for the functionality of the kiosk and are optional to the operator. If the services are purchased and need to function correctly, the corresponding FQDN/IP's and ports must be opened as described in the tables above.

*****Transfer of Sales Data and Client-Server Kiosk Setup** – Port 1920 is used for transferring sales data to our SQL production server every five minutes. SQL databases are located on the kiosk as well. When two kiosks are setup in one location, client-server is used. Use 1920 port forwarding from the client kiosk to the server kiosk that has the database. If a kiosk is ever without the internet, consumers will still be able to use their accounts for purchasing items.

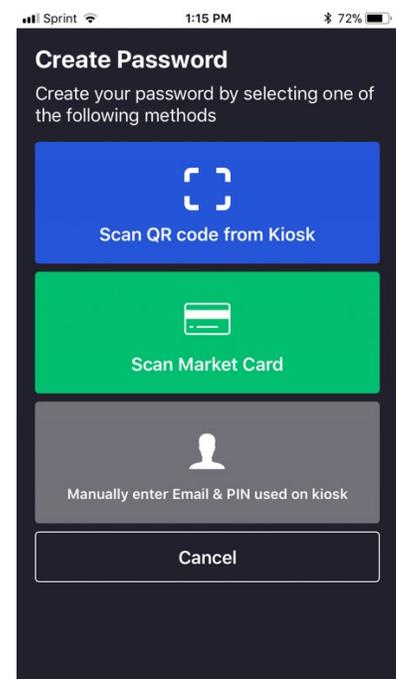
Appendix C: Linking Migrated GMA Accounts to 365Pay

After the GMA migration, consumers will have access to the 365Pay mobile app. It is extremely important that consumers link their current account to the app and do not create a new account. This action would result in the existence of two separate (duplicate) accounts that cannot be easily merged. **For this reason, we recommend that 365Pay be introduced to a location only after a GMA migration has taken place.**

When a consumer is ready to start using the mobile app, they will search for **365Pay** in their respective app store. 365Pay is available on both the iOS and Android platforms. After the consumer has downloaded the app, they will be able to link their newly converted GMA account from the kiosk to the app. To complete this process, the consumer must perform the following steps:



1. The **Sign In** screen of 365Pay, has an option that says: "I have an account but need a password". Consumers who want to link from their kiosk account should select this option.
2. On the **Create Password** screen, there are three paths (detailed below) that consumers can follow to start the linking process. They should select the most convenient or applicable option to complete the process.



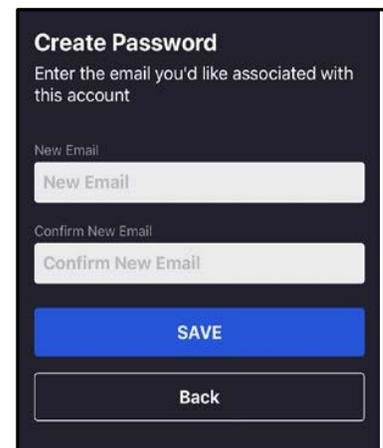
Scan QR code from Kiosk

1. A consumer logs into their account at the newly migrated kiosk.
2. They select **Scan QR code from Kiosk** on 365Pay app.
3. They scan the QR code shown on the **Manage Account** screen.
4. They enter their email address on 365Pay, if an email is not already associated with the account.
5. They create and confirm a password.
6. They have the option to add a payment method and fund the account.



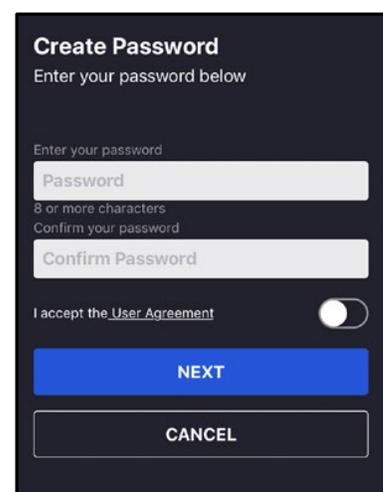
Scan 365Pay (Market) Card

1. A consumer selects the **Scan 365Pay Card** on 365Pay app.
2. They scan the barcoded 365Pay card associated with their account.
3. They enter the **account PIN**.
4. They enter their **email address** on 365Pay. An email may or may not be associated with the account.
5. If not, they can create and confirm a password.
6. They have the option to add payment method and fund the account.



Manually enter Email & PIN used on kiosk

1. A consumer selects **Manually enter Email & PIN used on kiosk** on 365Pay app.
2. They enter their **email address** and **PIN** for the existing account. An email may or may not be associated with the account.
3. If not, they can create and confirm a password.
4. They have the option to add a payment method and fund account.





Appendix D: Using an Account in GMA

If a consumer was using:

- **A fingerprint** – Their fingerprint will be brought over to GMA and they can continue to use it to make purchases at the kiosk.
- **A scanner ID (keytag)** – Their scanner ID will be brought over to GMA and they can continue to use it to make purchases at the kiosk.
- **A unique ID** – Their unique ID will no longer be supported as an account identifier in GMA. They will need to add a fingerprint or Scanner ID to their account before the conversion takes place.
- **An email address** – All email addresses will be brought into GMA; however the consumer must verify their email before it is usable. Consumers will receive an email to their address on file and will have to validate the email. This will happen for all email addresses, regardless of how they were added to an account.
- **[MyMarketAccount.com](#)** – Their email and password will be brought over to GMA. The email must still be verified before it is usable.

If a consumer wants to use the 365Pay mobile app, and:

- They are already using [MyMarketAccount.com](#), they can use the same email and password to login.
- They already have a GMA account at the kiosk, they can link their accounts by:
 - Scanning the QR code from the **Manage Account** screen on the kiosk with the app.
 - Scanning their 365Pay card with the app.
 - Entering their verified email and PIN into the app.
- Does not have an account anywhere, they can create a new account on the app using their email address.

Retrieving Account at the Kiosk

After a GMA Migration has been completed, the Retrieve Account functionality can then be enabled on the Legacy kiosk. The feature will allow users who were in the **Ready to Migrate** OR **Needs Attention** status to manually update their account at the kiosk if they can no longer access it.

Note: Accounts that were not migrated (**Excluded Accounts**) cannot be retrieved at the kiosk.

To use this feature, consumers will:

1. Go to **Manage Account** on the kiosk.

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2. Select the **Retrieve Account** option.

3. Enter their **Username** and **PIN**.

If entered successfully they will be able to associate either a **fingerprint** or **barcoded scancard** to their account.

This feature enables consumers to update their account so they can continue to use it after a migration instead of the operator having to manually update the account on SmarHQ.

For a complete guide on this process, see this article: [Legacy GMA Retrieve Account](#).