

#### Overview

The SmartHQ – V5 Readiness Report is an essential tool for preparing for a Legacy to V5 PC Swap. Running the report for your location will tell you if your location is ready for a PC Swap.

### **Running the Report**

- 1. Login to your **SmartHQ** account to view the **SmartHQ V5 Readiness Report**.
- 2. Select the **SmartHQ V5 Readiness Report** from the bottom of the *Customer Service* column.

Administration	Customer Service	Transactions	Manage Items	Inventory		
Manage Locations Manage Web Users Manage Kiosk Users Kiosk POS Log CC Batch Log Kiosk Sync Log Manage Reason Codes Manage Notifications 365 Help Documents GMA Migration Scheduling	Customer Transactions Customer Information Global Market Accounts Video Surveillance Credit Transaction Log (GMA) Account Funding Summary Account Funding Summary (GMA) Cancel Report Cancel Report Cancel Report Cancel Report GMA Readiness Report V5 Readiness Report	Sold Detail Sold Detail (GMA) Sold Summary Sold Totals Summary Sold Totals Summary Sold Item COGS Event Detail Report (GMA) Cash In Summary Cash In Summary Cash In Kiosk Report Bill/Coin Dispense Report Financial Summary (GMA) Sales Analysis Promotion Analysis Financial Transaction Account Account (GMA) Product	Manage SKU Add New SKU SKU Quick Edit Global Item Change Manage Promotions Inventory Management	Pick List Inventory Analysis Inventory Summary Entry Summary Delete Summary Variance Analysis Item Stockout Report		

**NOTE:** You may need to give yourself permission to view the report. If so, refer to the <u>Granting Access to V5 Readiness Report</u> section of this article. You can view it after you have enabled it in SmartHQ.

- 3. Choose the Location or Kiosk for which you are running the report.
- 4. Click the **Get Data** button.
- 5. The report will display. If any area is NOT green, contact 365 Support at (888) 365-6282.

# **Granting Access to V5 Readiness Report**

1. Log in to **SmartHQ** as an ADMIN user.



2. Select Manage Web Users in the Administration column.

SMART	HQ					
Three Six Five HQ V						
Administration	<b>Customer Service</b>	Transactions		Inventory		
Manage Locations Manage Web Users Manage Klosk Users Klosk POS Log CC Batch Log Klosk Sync Log Manage Reason Codes Manage Notifications 365 Help Documents GMA Migration Scheduling	Customer Transactions Customer Information Global Market Accounts Video Surveillance Credit Transaction Log Credit Transaction Log (GMA) Account Funding Summary Account Funding Summary Account Funchase Summary (GMA) Cancel Report Cancel Report Cancel Report Cancel Report Cancel Report S Readiness Report	Sold Detail Sold Detail (GMA) Sold Summary Sold Totals Summary Sold Item COGS Event Detail Report Event Detail Report (GMA) Cash In Summary Cash In Detail Cash In Kiosk Report Bill/Coin Dispense Report Financial Summary (GMA) Sales Analysis Promotion Analysis Financial Transaction Account Account (GMA) Product	Manage SKU Add New SKU SKU Quick Edit Global Item Change Manage Promotions Inventory Management	Pick List Inventory Analysis Inventory Summary Entry Summary Delete Summary Variance Analysis Item Stockout Report		

- 3. Choose the User who you want to give access.
- 4. Expand **Customer Service** in the Web Permissions column.
- 5. Place a check next to **V5 Readiness Report**.

(365)	Manage W	Veb Users	
Select a Location: All Locations Search: jack.berry@5star-food.com Search Options: All Web Users Get Users Create New User Main Menu Active Only Show 10 V rows per page	User Information   Account Information   Email Address   Catilyn, Kliest@365smartshop.com   User Name   Catilyn, kliest1   First Name   Catilyn   Last Name   Kliest   Password   Update User   Disable User   Delete User	Web Permissions     P   Administration     P   Customer Transactions     P   Customer Information     P   Cradit Transaction Log     P   Crancel Report     P   Cancel Report     P   GMA Readiness Report     P   Transactions     P   Manage Items     P   Inventory	Viewable Locations      1-John Deere Seeding Group     2-Discovery Benefits     4-John Deere Seeding South     5-Sanford IT     6-Bobcat West Fargo     9-Sanford Broadway     10-Discovery Benefits UP     12-Sanford South University     18-Wex Health     19-Lund Boats Paint Area     20-Lund Boats Parts Area     Check All Locations
		Check boxes indicates the Web Reports that the user is allowed to view or edit. To add or remove permissions check or uncheck the appropriate boxes and click "Update Permissions" to the left:	Viewable Manuals

6. Click the **Update User** button.



## **Report Breakdown**

#### **Top Section**

Status	Count	VSH
Total Kiosks at Location	1	VSH320703
Ready	0	
Not Ready	1	VSH320703

The top section will show the following:

- Total Kiosks at Location This gives you the count of kiosks at this location and their serial numbers.
- **Ready** This will give you the count of kiosks the report shows as **Ready for V5** and their serial numbers.
- Not Ready This will give you the count of kiosks the report shows as Not Ready for V5 and their serial numbers.

#### **Bottom Section**

								📓 Export
				Kiosks				
Serial Number	GMA Complete	Unsupported Hardware Check	365Secure Check	Unsupported Integration Check	Interfaces	Product Conflicts	Kiosk User Conflicts	NetworkConflicts
VSH320703	✓	✓	✓	✓	<	✓	✓	✓

The bottom section will show the following:

- Serial Number This is the serial number of the kiosk.
- **GMA Complete** This shows whether a GMA Migration has been completed at the location. If you have not completed a GMA Migration, use the GMA Readiness **Report** to start that process.
- Unsupported Hardware Check This shows whether your kiosk has any hardware that is not supported by V5. For example, the Zebra receipt printer commonly found in a Gen2 kiosk. (The Gen2 kiosk is the model that opens from the back.) You can choose to continue with the PC Swap knowing the receipt printer will not work after the swap or you can replace it with a new V5 Gen3 Kiosk.
- **365Secure Check** This shows whether your kiosk has a 365 Secure Reader installed. A 365Secure Reader is required for a V5 conversion. 365Secure Readers should be ordered separately from the PC Swap.



- **Unsupported Integration Check** This shows whether your location or kiosk is using any integrations that are not supported in V5. For example, it might show User Portal. This is automatically disabled after a GMA Migration.
- Interfaces This shows whether you have any interfaces, such as Lightspeed.
- **Product Conflicts** This shows whether your products are ready for V5. Common conflicts are Missing Barcodes. Any products with a missing barcode will be listed.
- **Kiosk User Conflicts** This shows any Kiosk Users (commonly Drivers) without an email address listed. Users are required to have an email address in ADM. You can find the Kiosk User in SmartHQ and add an email address for them.
- Network Conflicts This shows any network conflicts the location might have with our V5 system. We recommend that you share this document with the location before the swap.

If you have any questions, contact a 365 Fulfillment team member **(888) 365-7382, x4** to review this report with you.