

KUARIO Gateway Installation - EN R 24 All rights reserved. No parts of this work may be reproduced in any form or by any means - graphic, electronic, or mechanical, including photocopying, recording, taping, or information storage and retrieval systems - without the written permission of the publisher.

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Uitgever *KUARIO B.V.*

Productie *KUARIO B.V.*

Inhoudsopgave

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Introduction

Introduction

KUARIO Gateway is a solution to give a known third-party application access to the KUARIO payment service. It acts as a KUARIO Order Terminal, and sits between the third-party solution and the KUARIO Cloud Payment service. Third-party solutions can request payment transactions via the KUARIO Gateway.

This manual explains what the KUARIO Gateway solution offers. It will also help you to install and configure the KUARIO Gateway in combination with the Uniflow solution.

🗉 Usage

Registered users of the Uniflow solution are required to pay for their print products. Without the KUARIO Gateway, there is a pre-paid balance stored in Uniflow. When a user prints using the Uniflow solution, an amount will be removed from the Uniflow balance. The downside to this, is that the users can not use these funds outside of the Uniflow solution.

The KUARIO Gateway enables users to use their KUARIO funds in the Uniflow print solution environment, as well as in all other KUARIO enabled pay points. The KUARIO Gateway is authorized to view a users funds within KUARIO and to make a transaction from a users KUARIO balance to the KUARIO Gateway's Merchant. Users that want to use their funds within the Uniflow solution have to accept an agreement with this Merchant via a KUARIO Membership.

When a user has accepted the Membership, the user's KUARIO funds are linked to the KUARIO Site where the Gateway is registered. The last known amount of KUARIO funds is visible in Uniflow credit as an external balance. These funds can now be used to pay for jobs in Uniflow. The balance will be transferred from the KUARIO Account of the user to the KUARIO Merchant.

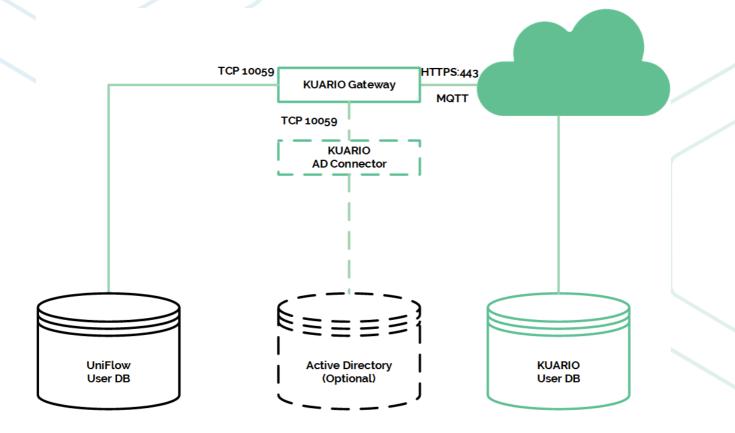
🚺 Note: It is not possible to add credit to a KUARIO Account directly from Uniflow.

• Note: It is not possible to 'see' your KUARIO funds accurately in Uniflow as the user's KUARIO transactions on other sites cannot be monitored. The KUARIO Funds are shown as known the last time a user was 'seen' by the system.

Architectural overview

The payment architecture consists of the following parts:

- The KUARIO Gateway
- UniFlow User DB
- KUARIO Cloud Payment service, with KUARIO users.

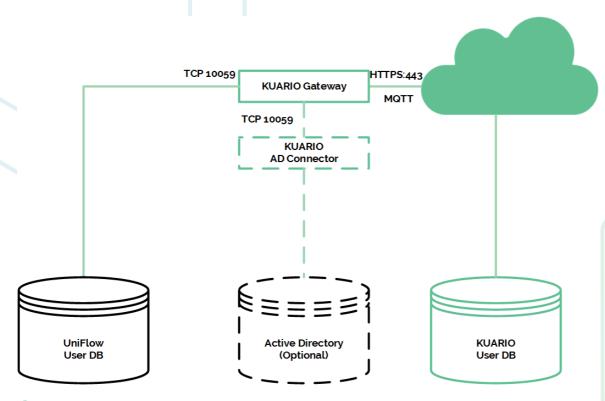


Installation

• Acquiring the software The KUARIO Gateway software is available. Please contact KUARIO Support (support@KUARIO.com) to receive a copy of the software.

KUARIO Gateway

The KUARIO Gateway is the link between the KUARIO plug-in and the KUARIO Cloud Payment service. To use the KUARIO Gateway plug-in, the KUARIO Gateway should be running.



Installing the KUARIO Gateway

The KUARIO Gateway is installed by following these instructions:

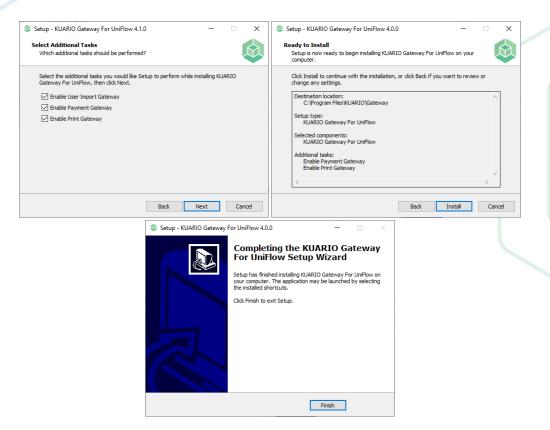
- 1. Start the KUARIO Gateway Setup executable (double-click the KUARIOGatewaySetup-<version>.exe).
- 2. Follow the Setup instructions. Please remember the installation path (usually at C:\Program Files\KUARIO\Gateway), as this is required in one of the following steps.

Setup - KUARIO Gateway For YSoft 4.0.0 - X	Setup - KUARIO Gateway For UniFlow 4.0.0 - X
License Agreement Please read the following important information before continuing.	Select Destination Location Where should KUARIO Gateway For UniFlow be installed?
Please read the following License Agreement. You must accept the terms of this agreement before continuing with the installation.	Setup will install KUARIO Gateway For UniFlow into the following folder.
END-USER LICENSE AGREEMENT	To continue, click Next. If you would like to select a different folder, click Browse.
THE SOFTWARE IS COPYRIGHTED AND LICENSED BY KUARIO BV (NOT SOLD). BY PURCHASING THE SOFTWARE, YOU ARE ACCEPTING AND AGREEING TO THE TERMS OF THIS LICENSE AGREEMENT. THIS LICENSE AGREEMENT REPRESENTS THE ENTIRE AGREEMENT CONCERNING THE SOFTWARE, BETWEEN YOU AND KUARIO BV, (REFERENT OF AS 'LICENSOR'), AND IT SUPERSEDES ANY PRIOR PROPOSAL, REPRESENTATION, OR UNDERSTANDING BETWEEN THE PARTIES. 1. LICENSE GRAIT. LICENSOR heading and you accept, a nonexclusive license to use the software in machine-readable, object code form only, for use	CAProgram Files WUARIO (Sateway Browse
O I accept the agreement	March 10, 100 - Char dalamenta in an ind
I do not accept the agreement	At least 10,4 MB of free disk space is required.
Next Cancel	Back Next Cancel

At this step it is possible to enable a link between the gateway and MS Active Directory. Enable this if you need to put information in the AD (Active Directory) or if you need information from the AD.

Tick the box at KUARIO AD Connector Service, if you need a connection between AD and KUARIO Gateway.

lect Components Which components should be installed?					
elect the components you want to install; o stall. Click Next when you are ready to cor	lear the components	you do not wa	ant to		
KUARIO Gateway For UniFlow	Turide 1				
KUARIO AD Connector Service					
urrent selection requires at least 10,4 MB (



3. After finishing the Setup, please verify that the Gateway is running. There should be a KUARIO icon in the system tray of Windows.

(b) Install on a separate machine

For a more resilient solution and a faster user experience, it is recommended to install the KUARIO Gateway on the same machine as the external system.

NTWare UniFlow

NTWare UniFlow can be directly connected to the gateway, you just need to configure it correctly.

We just need to import the correct certificates into "Trusted Root Certification Authorities certificate store".

Installing the trusted root certificates

- 1. Go to the KUARIO Gateway folder (C:\Program Files\KUARIO\Gateway)
- 2. Find the certificates 'KUARIO.crt' and KUARIORootCA.crt. Follow the rest of the procedure for both these files.

gram Files > KUARIO > Gateway			
Name	Date modified	Туре	Size
documentation	04-Feb-22 14:43	File folder	
locale	04-Feb-22 14:43	File folder	
📙 logs	04-Feb-22 14:43	File folder	
CAStore.pem	08-Jul-19 17:08	PEM File	221 KI
KUARIO.crt	06-Aug-19 10:37	Security Certificate	2 KI
KUARIO.pem	06-Aug-19 10:37	PEM File	2 KI
KUARIOGateway.exe	13-Sep-19 15:05	Application	15.235 KI
KUARIOGatewayGUI.exe	13-Sep-19 15:05	Application	9.160 KI
🔄 KUARIORootCA.crt	06-Aug-19 10:37	Security Certificate	3 KI
🗟 libeay32.dll	13-Sep-19 15:05	Application exten	2.229 KI
ssleay32.dll	13-Sep-19 15:05	Application exten	391 KI
 unins000.dat 	04-Feb-22 14:43	DAT	6 KI
unins000.exe	04-Feb-22 14:43	Application	910 KI

- 3. Double-click the *.crt file.
- 4. When the certificate window opens, choose Install Certificate..... The Certificate Import wizard appears.

Х

g Certificate	×
General Details Certification Path	
Certificate Information	
This certificate is intended for the following purpose(s): • All application policies	
Issued to: KUARIO B.V.	
Issued by: KUARIO	
Valid from 06-Aug-19 to 05-Aug-49	
Install Certificate Issuer Statement	
OK	

- 5. In the wizard, choose Next.
- 🗧 😺 Certificate Import Wizard

Welcome to the Certificate Import Wizard

This wizard helps you copy certificates, ce lists from your disk to a certificate store.	rtificate trust lists, and certificate revocation
A certificate, which is issued by a certificat and contains information used to protect of connections. A certificate store is the syst	
Store Location	
O Current User	
Local Machine	
To continue, dick Next.	
	Next Cancel

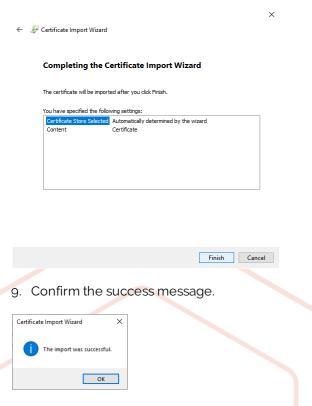
6. Confirm the UAC dialog of Rundll32 with Yes.



7. Then, when you are prompted for the Certificate Store, choose Place all certificates in the following store. Select the Trusted Root Certification Authorities store.

es are kept. , or you can specify a location for d on the type of certificate
d on the type of certificate
Browse
Brow

8. Complete the remaining steps of the wizard and click Finish.



10. Upon completing the wizard, you next want to add the certificate snap-ins using the Microsoft Management Console (MMC).

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Adding certificate snap-ins

- 1. Launch MMC (mmc.exe).
- 2. Choose File > Add/Remove Snap-ins.
- 3. Choose Certificates, then choose Add.

Console1 - [Console Root]					-	
🚟 File Action View Favourites Window H	lelp					_ # ×
(← →) 🔲 🔒 🛛 🗖						
Console Root	Name				Actions	
					Console Root	^
		Add or Remove Snap-ins		×	More Actions	•
		You can select snap-ins for this console from those available on you extensible snap-ins, you can configure which extensions are enabled	r computer and configure the selected set of s d.	nap-ins. For		
			elected snap-ins:			
			Console Root E	dit Extensions		
		ActiveX Control Microsoft Cor		Remove		
		Certificates Microsoft Cor Component Services Microsoft Cor		Move Up		
		Computer Managem Microsoft Cor		Move Down		
		Disk Managerent Microsoft Cor Disk Management Microsoft an Event Viewer Microsoft Cor Folder Microsoft Cor Disk Disk Disk Disk Disk Disk Disk D		Advanced		
		Description:				
		The Certificates snap-in allows you to browse the contents of the o	ertificate stores for yourself, a service, or a c	Cancel		

- 4. Choose My user account.
- 5. Click 'Finish'.

Certificates snap-in			×
This snap in will always manage certificates for:			
My user account			
O Service account			
O Computer account			
	< Back	Finish	Cancel

- 6. Choose Add again and this time select Computer Account.
- 7. Click 'Finish'.

Certificates snap-in				×	
Certificates snap-in					
This snap-in will always manage certificates for:					
O My user account					
O Service account					
 Computer account 					
				_	
	< Back	Next >	Cancel		

8. Move the new certificates from the Certificates-Current User > Trusted Root Certification Authorities into Certificates (Local Computer) > Trusted Root Certification Authorities.

Console1 - [Console Root\Certificates - Current	User\Trusted Root Certification Authoritie	s\Certificates]						_	
File Action View Favourites Window	Help								- 5 >
🗢 🔿 🚈 📰 🔏 🖦 🗙 🖼 🗟 🖬									
🚆 Console Root 🔹	Issued To	Issued By	Expiration Date	Intended Purposes	Friendly Name	Status C	^ A	ctions	
✓ ☐ Certificates - Current User	GeoTrust Primary Certification	GeoTrust Primary Certification Au	17-Jul-36	Client Authenticati	GeoTrust		C	Certificates	
> 🧮 Personal	GeoTrust Primary Certification	GeoTrust Primary Certification Au	19-Jan-38	Client Authenticati	GeoTrust Primary C			More Actions	
Trusted Root Certification Authorities	GeoTrust Primary Certification	GeoTrust Primary Certification Au	02-Dec-37	Client Authenticati	GeoTrust Primary C			More Actions	•
Certificates	GlobalSign	GlobalSign	18-Mar-29	<all></all>	<none></none>		ĸ	UARIO	^
> 🧮 Enterprise Trust	GlobalSign	GlobalSign	18-Mar-29	Client Authenticati	GlobalSign Root CA			More Actions	
> Intermediate Certification Authorities > Active Directory User Object	GlobalSign	GlobalSign	15-Dec-21	Client Authenticati	Google Trust Servic			More Actions	
	GlobalSign Root CA	GlobalSign Root CA	28-Jan-28	<all></all>	<none></none>				
> Trusted Publishers Herein Certificates	GlobalSign Root CA	GlobalSign Root CA	28-Jan-28	Client Authenticati	GlobalSign Root CA				
> Third-Party Root Certification Authoritie	Go Daddy Class 2 Certification	Go Daddy Class 2 Certification Au	29-Jun-34	Client Authenticati	Go Daddy Class 2 C				
Trusted People	Go Daddy Root Certificate Auth	Go Daddy Root Certificate Author	01-Jan-38	Client Authenticati	Go Daddy Root Cer				
Client Authentication Issuers	Hotspot 2.0 Trust Root CA - 03	Hotspot 2.0 Trust Root CA - 03	08-Dec-43	Client Authenticati	Hotspot 2.0 Trust R				
> Cher People	IdenTrust Commercial Root CA 1	IdenTrust Commercial Root CA 1	16-Jan-34	Client Authenticati	IdenTrust Commerc				
Local NonRemovable Certificates	ISRG Root X1	ISRG Root X1	04-Jun-35	Client Authenticati	ISRG Root X1				
MSIEHistoryJournal	KUARIO	KUARIO	05-Aug-49	<all></all>	<none></none>				
> 📋 Certificate Enrolment Requests	Kuario Print	Kuario Print	31-Dec-99	Code Signing	<none></none>				
> 🧮 Smart Card Trusted Roots	🛱 localhost	localhost	17-Jan-23	Server Authenticati	IIS Express Develop				
✓	Microsoft Authenticode(tm) Ro		01-Jan-00	Secure Email. Code	Microsoft Authenti				
> 📔 Personal	Microsoft ECC Product Root Ce		27-Feb-43	<all></all>	Microsoft ECC Prod				
🗸 🚞 Trusted Root Certification Authorities	Microsoft ECC Product Root Ce		27-Feb-43	<all></all>	Microsoft ECC Prod				
Certificates		Microsoft ECC TS Root Certificate		<all></all>	Microsoft ECC TS R				
> 🧮 Enterprise Trust	Microsoft Root Authority	Microsoft Root Authority	31-Dec-20	<all></all>	Microsoft Root Aut				
> intermediate Certification Authorities		Microsoft Root Certificate Authori	10-May-21	<all></all>	Microsoft Root Cert				
> 🧮 Trusted Publishers	Microsoft Root Certificate Auth	Microsoft Root Certificate Authori	· · · · · · · · · · · · · · · · · · ·	<all></all>	Microsoft Root Cert				
> 🧰 Untrusted Certificates	Microsoft Root Certificate Auth		22-Mar-36	<all></all>	Microsoft Root Cert				
> iii Third-Party Root Certification Authoritie	Microsoft Time Stamp Root Cer		22-Oct-39	<all></all>	Microsoft Time Sta				
> iii Trusted People			08-Jan-04	Time Stamping	VeriSign Time Stam				
Client Authentication Issuers Preview Build Roots	QuoVadis Root CA 2	OuoVadis Root CA 2	24-Nov-31	Client Authenticati	OuoVadis Root CA 2				
Preview Build Roots Test Roots	QuoVadis Root CA 2 G3	QuoVadis Root CA 2 G3	12-Jan-42	Client Authenticati	QuoVadis Root CA				
AAD Token Issuer	QuoVadis Root Certification Au	QuoVadis Root Certification Auth	17-Mar-21	Client Authenticati	QuoVadis Root Cert				
> Cther People	SecureTrust CA	SecureTrust CA	31-Dec-29	Client Authenticati	Trustwave	c	~		
< other People >	<	occare and the	51 Dec-25	Count Addrendedus	I GSCHUYC	>			
rusted Root Certification Authorities store contains 8									

Now to continue, please refer to Configuration - NTWare UniFlow.

Output Active Directory

Install Active Directory by selecting the 'KUARIO AD Connector Service' component in the KUARIO Gateway set up. The AD Connector connects your **A**ctive **D**irectory to the gateway, you just need to configure it. Please refer to <u>'Configuration - Active Directory'</u> 281

Gateway Modules

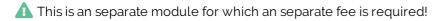
👬 Gateway Modules

The KUARIO Gateway has 3 modules, User Import, Payment and Print. The User Import module, the Payment and Print modules are separate modules and will cost you an separate fee.

L+ User Import

The User Import module enables you to export Users to KUARIO. This is done via *.CSV files. (See <u>Appendix B</u> 36). If you enabled the KUARIO AD Connector Service in the set-up, you can also export your Users from your Active Directory. (See <u>Active Directory GUI</u> 28). To Import a user you must have an ID that enables your application to identify the user (we call that the 'externalIdentifier'), an email address (this is what KUARIO uses as an identifier)

The *.CSV file can be imported in a Membership in the KUARIO manager. (Memberships are groups that a user can be a member of and that may give that user extra rights or options. See <u>Appendix D on how to create a Membership</u> [40]).



📥 Payment

The Payment module can execute payments using KUARIO on the basis of the KUARIO membership and external identifier of the user.

🛕 This is an separate module for which an separate fee is required!

📩 Print

The Print module will send every print jobs send by a KUARIO user that is a member of a certain membership to a predefined external print-queue. That job will have an attached user name that is equal to the external identifier.

A This is an separate module for which an separate fee is required!

Configuration

Link the Gateway in KUARIO

The KUARIO Gateway must be set up in KUARIO before it can be used. The KUARIO Gateway must become a part of a KUARIO Outlet under a KUARIO Site.

Preparation

To manage a KUARIO Site you need to be a Merchant that has Site Management rights.

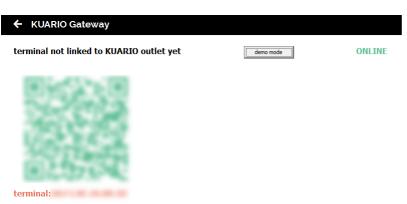
As a KUARIO Merchant, you can link the Gateway to your Site using the Manager at https://manager.kuario.com/ or by linking the Site using the service module in the KUARIO App. For more information about creating a KUARIO Site and /or a KUARIO Outlet, please refer to our KUARIO Manager and KUARIO App manuals and Visual Help guides respectively at our site.

To become a KUARIO Merchant, please contact us via info@KUARIO.com.

We can help you with linking your Gateway to a KUARIO Site. Please contact: <u>support@KUARIO.com</u>. You should include the terminal ID, the preferred language and the preferred currency in your email. Optionally if you have an existing account, you could also let us know the preferred KUARIO Outlet and your account info.

Put the Gateway in KUARIO

 Click on the KUARIO Gateway GUI (it should display "ONLINE"). Copy the terminal ID (MAC-address) if you do not want to use the service module in the KUARIO App. Or scan the QR code using the service module in the KUARIO app.



2. You can start a demo of the software or continue to set up a fully functional, unlimited production version. Click the 'demo mode' button for the demo mode and continue with step 3. Or, for the production version, go to step 6.

← Demo					
	Please select your demo options.				
currency	cbCurrency 💌				
language	cbLanguage 🗸				
GENERAL TERMS AND CONDITIONS					
In demo mode, every order item will have a price managed by KUARIO. KUARIO is entitled to change the item prices at any time. Any amount spent in demo mode will not be paid out. KUARIO does not guarantee refunding of failed order items. KUARIO is not responsible for the management of this terminal. Demo mode can be exited at any time by anyone.					
Additionally, see https://www.kuario.com/terms.					
1	accept start demo				

3. Select the preferred currency for this demo and the preferred language. Click 'accept' to accept the terms and conditions.

🗲 Demo				
		Please select your demo opti	ons.	
	currency	British Pound (GBP, £)	•	
	language	English (United Kingdom)	•	
GENERAL TE	RMS AND CON	DITIONS		
change the ite does not gua of this termina	em pricés at an Irantee refundir al. Demo mode	item will have a price managed y time. Any amount spent in dei g of failed order items. KUARIO can be exited at any time by ar	nó mode will not be is not responsible fo	paid out. KUARIO
Additionally, s	see https://ww	/w.kuario.com/terms.		
		✓ accept	start d	emo cancel
4. Click 'sta	rt demo'.			
← KUARK	0 Gateway			
linked to ou terminal:	tlet:	Insulations Paper of	leave demo	ONLINE DEMO MODE

5. From this moment on, your KUARIO Gateway can be used to make demo KUARIO payments. You are finished, ignore the other steps below.

The demo version is limited on user import, only the first 5 users will be imported from a CSV file or from the AD import service.

At any point you can end the demo mode by clicking 'leave demo'. You should then continue with step 6 to finish the configuration.

Link the Gateway in KUARIO

6. Please either scan the terminal ID QR with the service module of the KUARIO App, or copy it on paper to link the Gateway in the KUARIO Manager (The terminal ID can be found trailing behind 'terminal.' at the bottom of the screen, See example at the bottom of this page).

The KUARIO Gateway will be linked as a terminal to a KUARIO Outlet,

7. Open KUARIO Manager and add an Outlet. The Outlet should have type 'Gateway'. Which is not to be confused with 'Device Gateway'!

OUTLE	rs reports more ✔			
Info	> Terminals	> Extra		
۰	Outlet name My KUARIO Gateway Outlet	:		۲
ወ	Is this outlet active?			~
	CASH REGISTER	MFP		PAY POINT
	LINK TERMINAL	TIMER	COINVALIDATOR	GATEWAY
		ACCESS		LOCKERS
	DEVICE GATEWAY			MULTI CONNECTIVITY
-	Is this outlet for members c	nly?		×=
00 0M	KUARIO Direct			
				© CANCEL NEXT→

8. Give the Outlet a recognisable name. Click 'Next'.

outlets re	eports more 🗸	
Info	> <u>Terminals</u> > Extra	
	My KUARIO Gateway Outlet	
🔽 Order t	erminal	
	Device address	
		8
	Device name	
	My KUARIO Gateway Terminal	\otimes

- 9. Tick 'Order terminal'.
- 10. At 'Device address' put the terminal address (aka MAC-address) you copied at step 1. Make sure to use the delimiter token':' (colon) between each segment (example AA:BB:CC:DD:EE:FF) and upper case letters.
- 11. At 'Device name' enter a recognisable name for the computer running this app. Click 'Next'.

✓ Info > ✓ Terminals > Extra		
My KUARIO Gateway Outlet		
Select the template for this outlet. ^ MFP Template	Ŧ	CREATE NEW +
Select the priceline for this outlet. ^ Default Prijzen	v	CREATE NEW +
Outlet notes (Optional)		
	© CANCE	EL 🗲 BACK 🗸 SAVE

From this moment on, your KUARIO Gateway can be used to make KUARIO payments.

Your KUARIO Gateway GUI should look like this (both Online and linked to an Outlet):

← KUARIO Gateway

Inked to outlet: My KUARIO Gateway Outlet
terminal:

KUARIO Gateway GUI - Linked / Ready to use

Configure the KUARIO Outlet

1. Go to the Outlet settings of your KUARIO Gateway Outlet.

	Q Search	
My KUARIO Gateway Outlet		:
Lockers Too	Edit GR Codes	
MCB 1	i≣ Orders	
Last order activity 5 months ago	SupportSettings	
Our Lockers	Telete	
PayPoint Last order activity 5 months ago		:
This is the name by which I reco	gnize this device	:

My KUARIO Gateway Outlet > Settings

٩	Search	
\$	Enable User Import Gateway	~
¢	Enable Print Gateway	~
٠	Enable Payment Gateway	~

- 2. Select User Import Gateway if you want to be able to import users..
- 3. Select Print Gateway when your Users should be able to print to a designated print queue.
- 4. Select Payment Gateway when they should be able to pay with KUARIO.

Be aware that enabling each of these options will increase your monthly fee.

If you have enabled Print Gateway, you should enter the exact name of the Windows Print queue. If you also need to restrict the memberships that are allowed to print, you should list only the memberships here that are allowed to print.

Note: To restrict printing to a group of Memberships, you must list these Memberships (separated with a semicolon ';') here!

- 5. Enter the exact print queue name.
- 6. If printing to this queue must be restricted list the exact names of the Membership(s) (**separated with a semi-colon** ';') that are allowed to print to this queue (and now must use it).

۵	DestinationQueue	✓ ENABLED	
۵	PrintMemberships	✓ ENABLED	
		⊘ CANCEL ✓ SAVE	
7. Click '	Save' to store the settings.		

🌣 Add / Remove Users

Users must be known by KUARIO for them to make payments with the help of KUARIO Gateway. A user in UniFlow is linked to a user in KUARIO via a Membership. When you invite users for this Membership, an email will be sent to the user on a given email address. The user has to accept this Membership to use their KUARIO funds from . A Membership can have an external identifier. For each user that needs to be able to use their KUARIO funds in UniFlow, a Membership with the user's ID as external identifier is required.

To import users from UniFlow to KUARIO (which will automatically invite them) either an Excel *.csv must be used, that is a *.csv file with not comma, but semicolon ';' separated values, this request can then be mailed or placed in the csv directory where it will upload the user information automatically. Alternatively the users could be added manually directly in the KUARIO manager.

In UniFlow, you can set up the ID in UniFlow.

When the Membership of this user is removed, the link between UniFlow and KUARIO is removed. From that moment on the user can no longer see or use their KUARIO funds in UniFlow. A user can decide to remove this Membership via the KUARIO app.

Import Process

With the import process you will generate an invitation for each user in the import to be a member of the KUARIO Gateway membership at your Site.

By joining that membership you will be able to pay with the UniFlow solution. To create a membership invitation an email address of the user is needed and the related .

The user data; and User's email address must be made into a *.csv file. That file is imported into the Gateway by the KUARIO Plug-in and the invitation mails are sent.

Either the invitation email address is known as a KUARIO user and you can accept the invite directly, or the email address is not recognized as a KUARIO user and you can register as a KUARIO User with the email address to which the invitation was sent or if you are an existing user under another email address you can log using that email address as a KUARIO User and accept the invite in that way. See the flow chart below:

Note: At the end of the process the registered KUARIO membership (accepted or not) will consist of the invitation Email Address (A) and the , even when the user already has a KUARIO user account that is linked to a different email address (B) then the invitation Email Address (A).

Import Method

Choose an Import Method. If you need to import many users, you can either import via local CSV or import a CSV file in the KUARIO Manager. If you only need to add a couple of users you can input those directly using the KUARIO Manager.

1. Choose the import method; 'Import via local CSV or CSV file via the manager' -> Go to '<u>Prepare CSV</u>^{[22}], 'Direct Import using the manager' -> Go to '<u>Import using the KUARIO Manager</u>^{[23}].

Prepare CSV

For bulk user imports you must use the 'Automatic Import' or the 'Import Request By Email' methods, these require an Excel *.csv file. We will help you to prepare such a file here.

• Note: If you do not have MS Excel or do not wish to use it, you can create and edit a standard text file with the ** .csv extension yourself, just make sure the file is semicolon separated.

- Preferably use your existing system that holds the information of your users to export the user information into a *.csv. If you have that option, create the *.csv file and continue with '<u>Name the CSV File</u> 23¹.
- 3. If you do not, create a new text file in notepad.exe
- 4. Type the text:

"externalIdentifier;email;externalIdentifierDescription;addExternalIdentifier;mutation;startDateTime;endDateTime;s tatus" These will be the column headers of your file. Each line below is a new row (or record) with member values.

G

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File Edit Format View Help			
externalIdentifier;email;externalIdentifierDescription;addExternalIdentifier;mutation;startDateTime;endDate	eTime	;statu	s ^

In this example the external ID is 10091971, joe@example.com is the email address to which the KUARIO Membership invitation is sent, the description is irrelevant for the system, but we will use "<= Joe's ID in the external application" as a description, and the next column addExternalIdentifier must be set to 1 as it means you are using a Gateway. Mutation should be 'add' as you are adding members, although when you use the csv file locally, this field is ignored, it is only used in the CSV upload method in the KUARIO manager [23]. Joe will be a member from 10/15/2022 at 00:00 through 10/10/2025 at 00:00. The format is: yyyy-mm-ddThh:mm, so startDateTime will be '2022-10-15T00:00' and endDateTime '2022-10-15T00:00' active' to make sure the new member is set to active.

5. Add users, in this format (using the example data above, we will provide the line you would add. You must use your own data): "joe@example.com;10091971;<= Joe's ID in the external application;1;add;2022-10-15T00:00;2025-10-15T00:00;active"

Your notepad file should look like this if you followed the example:

File Edit Format View Help

email;externalIdentifier;externalIdentifierDescription;addExternalIdentifier;mutation;startDateTime;endDateTime;status joe@example.com;10091971;<= Joe's ID in the external application;1;add;2022-10-15T00:00;2025-10-15T00:00;active</pre>

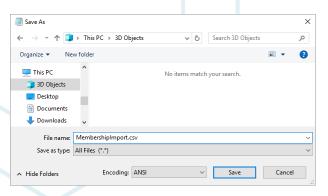
Please change the data to your own data when importing the csv into the KUARIO manager.

6. Go to 'File->SaveAs' and set 'SaveAsType' to 'All Files (*.*)'.

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Name the CSV file

7. Give the file a name, that has meaning for this import, in this example a meaningless generic name "MembershipImport.csv" is used. Make sure to use '.csv' as extension.



8. Optionally you can edit the *.csv file, adding or editing the user information in MS Excel. To see how to do this refer to Appendix A: Edit CSV file in MS Excel 361

If you want to import the CSV file in the KUARIO Manager, please continue to: <u>Import using the KUARIO Manager</u>. Inserting users via a *.CSV file 25.

• Note: To export or delete users a 'csv' folder exist in %ProgramData%\KUARIO beside the 'ini' and 'log' folders. In this 'csv' folder you will find two sub-folders: 'delete' and 'update'.

Note: These directories are checked every minute while the Gateway is running. When a file is read, the Gateway tries to send the data to KUARIO. When this succeeds, the CSV file is deleted. When this fails, you can find the reason in the Gateway log file: C\ProgramData\KUARIO\log\KUARIOGateway.log.

🌣 Import via local CSV

If this is your first time importing users via a CSV file, we recommend you to import just one (test) user before importing a bulk of users.

If you made an error, and user data was imported incorrectly, please use the same CSV and follow 'Delete via CSV 23'

- 9. To add or update the users, copy the CSV file to the update folder C:\ProgramData\KUARIO\csv\update .
- 10. After a while the CSV file should have been deleted, then the operation was a success. If not, please email the *.csv file to support@KUARIO.com. KUARIO Support will help you finish the import task.
- 11. All members in this file will be added, the mutation field is ignored.
- 12. You have finished the import task.

🌣 Delete via local CSV

- 13. To remove this list of users, place the CSV file (with those users) in the delete folder C: \ProgramData\KUARIO\csv\ delete.
- 14. All members in this file will be removed, the mutation field is ignored.
- 15. You have finished the remove users task.

Import using the KUARIO Manager

Memberships are groups that a user can be a member of and that may give that user extra rights or options.

Memberships can be used to grant exclusive access to an Outlet, provide a deduction of the product price or make it possible for the members to use KUARIO as payment source, or lastly to use invoices in stead of direct payments.

They are also commonly used in combination with KUARIO gateways as (in most cases) they link to the external user account via the Membership's 'External Identifier'.

You need to have Site management rights to import users from the KUARIO Manager. As a Merchant, you can invite users to become a Member of your Site via the KUARIO Manager.

- 1. Browse to https://manager.kuario.com
- 2. Log in with your KUARIO Merchant credentials.
- 3. Navigate to the Memberships tab
- 4. Select a Membership, or create one if none exist. (See <u>Appendix D: Create a KUARIO Membership</u> 40)
- 5. Click on next until you find the members list.

Inserting one or more users directly

6. Add members to your membership by adding the email address that they also use for their KUARIO Account. Confirm with the '+' Plus or 'Add item' button

✓ Info → ✓ E-Mail → <u>Memberships</u> (Total: 1 | Accepted: 0)

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				⊘ CANCEL ← BACK	✓ SAVE	

- 7. In the newly added row, edit the External identifier to represent the identifier of the external program. Make sure to check the 'Gateway' box.
- 8. Repeat this for every user and click the 'save'-button when done.

Inserting users via a *.CSV file

9. Another method to insert members is the *.csv import method.
 10. Click the 'Import CSV' button.

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12. You have finished the import task.

• Note: For more information about the import via the KUARIO manager refer to <u>Appendix D in this manual</u> [40] or contact <u>KUARIO support</u>.

NTWare UniFlow

Required before installation

- MS SQL Server Management Studio
- uniFLOW + RPS | 2020 LTS SR4 installation or higher with functioning IIS website
- The instructions of the 'Installation Notes Generic Budget Connector' uniFLOW manual) should be executed from chapter 2 through paragraph 2.3.4.
- uniFLOW Generic Budget Connector (v2.2.0.0 or higher) license
- KUARIO Gateway (v2.0.6 or higher)
- Both KUARIO certificates should be imported from the KUARIO Gateway directory into the "Trusted Root Certification Authorities certificate store".

Configuration

ì

In the uniFLOW software the setting at the 'Budget mgmt. system' page must be configured as followed:

- 1. Start the uniFLOW server configuration on the uniFLOW server using this URL: http://localhost/pwserver.
- 2. Click the 'Server Config.' menu-item.
- 3. Click the 'Interface' item.
- 4. Click the 'Budget mgmt. system' page.

The following options should already be preselected at their respective fields:

- Budget Management System= Universal Budget Manager
- Default Budget Plug-in= uniFLOW Generic Budget Connector

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*		Settings for 'uniFLOW Generic Plu	gin'
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	HTTP Request Timeout in ms		
HTTP	Read Write Timeout	100000	
	HTTP Read and write timeout in ms	Debug	
Log Le	vel	Debug	

5. Insert at the 'Web Service URL' field, the IP address of the KUARIO Gateway server, the port number 10059 and '/BudgetService': This should be:

https://127.0.0.1:10059/BudgetService

- 6. The retry time at 'Pending Transaction retry time' should be set to 5.
- 7. Insert '%USER.Default_CardNumber%' at the 'User identification token' field.
- 8. Insert 'KUARIO' at the 'Customer Code' field.
- 9. Select the option 'ERROR' at the 'Log Level' field.
- 10. Click the 'Save' button.

Cive Directory GUI

Note: Before continuing with this section please make sure that your KUARIO Gateway is now <u>online</u> and <u>linked!</u> (See Appendix C) [39].

Look for the 'KUARIO AD Connector' link in the start menu under your KUARIO Gateway entry. Start the 'KUARIO AD Connector', a window named 'KUARIO AD Connector service' will now open.

start the "KUARIO AD Connector", a window nam	ied KUARI 1	
KUARIO AD Connector Service - [templates]	- 🗆 ×	
KUARIO AD Connector Service works with templates. You can add, edit and delete templates below. All templates that are set active will be processed by the service. If you edit an active template, the service will be stopped first. When ready you will be		
asked to start the service again.		
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-	Delete template	Template name myNewTemplate
-	Edit template	Template description My new template
	Edit properties	[Template active]
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	Close	
Click Add Template		2. Enter the template's name and description, click OK
IVUARIO AD Connector Service - [templates]	- 0 ×	S KUARIO AD Connector Service - [templates] - X
KUARIO AD Connector Service works with templates. You can add, edit and delete templates below. All templates that are set active will be processed by the service. If you edit an active template, the service will be stopped first. When ready you will be added to start the service again.		KUARID AD Connector Service works with templates. You can add, edit and delete templates below. All templates that are set active will be processed by the service. If you edit an active template, the service will be stopped first. When ready you will be asked to start the service again.
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Select your template.		4. Click 'Edit Template'.
KUARIO AD Connector Service - [templates]	- 🗆 ×	, S KUARIO AD Connector Service - [templates] - D X
Select a source where you want your data to be imported from. Press next afterwards to go to the settings for your selected so	urce.	LDAP settings LDAP server Anonymous Login
Template description My new template		LDAP base path Fetch DNs Use SSL
Select data import source		Example: OU=Users,OU=KUARIO,DC=KUARIO,DC=local LDAP dialect User name Active Directory
LDAP server C CSV file		Liser name Active Directory
		LDAP port 389 LDAP version 3 Preview data Fetch all attributes
Import interval (seconds, minimum 30) 300		Custom fiter
		LDAP server - specifies IP address or DNS name of the destination LDAP server. LDAP port - a TCP/IP port used to connect to the destination LDAP server.
Ν		Usual for the regular connection (connection of the Usual Information Connection of the regular 0 389 - For regular connections (con-secured) 0 63- For secured connections (SL)
2		However, in some cases a system administrator may configure a server to listen to another port type.
		LDAP vestion - specifies the version of protocol to be used to perform all operations with the server. The version can be either 2 or 3. Version 2 is deprecated and has to be used only to connect to old LDAP servers, such as LMICH and OperLDAP 1.X. In most cases the version should be 3.
		LDAP base path - the 'root' point to bind to the server. In case with LDAPv3 servers you can leave this field empty to connect to the server RootDSE.
		Fetch DNs - usually LDAPv3 servers publish their list of the top level contexts available. To get this list, just press the button. Note: If you connect to an LDAPv2 server, you have to know your naming context to bind to.

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5. Confirm or edit the template's description, click Next.

Cancel

Next

6. Fetch the DN's, and enter the user name and password.

Cancel Previous Next

KUARIO AD Connector Service - [templates]		X S KUARIO AD Connector Service - [templates]		
LDAP setings [D.0.30.254 LDAP server [D.0.30.254 LDAP setors [D.0.30.254	Fetch DNs / Use SSL	Select the fields you want to use in the import. Just select the fields you really need, to speed up the import process.	ently selected fields:	. ,
Example: OU=Users, OU=KUARIO, DC=KUARIO, DC User name RND'Administrator Password *********	LDAP dialect	page page	r AccountName	
LDAP port 389 LDAP version 3 Custom filter LDAP server - specifies IP address or DNS name of the destination LDAP server	Preview data	logorNourt logorNourtstation w mai n@hager		
LDAP port - a TCP/IP port used to connect to the destination LDAP server. Usually there are two standard ports used by an LDAP server to listen to:		mastbredby mastbredby mastbredbe mastbredbe mastbredbe mastbredbe madeltene modeltene modeltene		
Version 2 is deprecated and has to be used only to connect to old LDAP server should be 3. LDAP base path - the 'root' point to bind to the server. In case with LDAPV3 se Fetch DN= - usually LDAPV3 servers publish their list of the top level contexts to	rs, such as UMICH and OpenLDAP 1.X. In most cases the version ervers you can leave this field empty to connect to the server RootD	msCOM-UserPartitionSetLink		
correct to an LDAPv2 server, you have to know your naming context to bind accountExpires		moDS-AllowedToDelegateTo moDS-Alprox-Immed-Subordnates moDS-AssignedAuthYPolicysia moDS-AssignedAuthYPolicysia moSS-AuthoriteXateAlADC		
	Cancel Previous Next	Einish Cancel Previous	Next	Finish

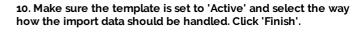
7. Click 'Preview' to preview a sample of the data.

8. Select the fields with the email, membership and External Identifier data. You will need these at the next step.

KUARIO AD Connector S	Service -	- 🗆 ×	. 🕸 KUARIO AD Connector Service - [templates]		-		×
Subscription E-mail External Identifier Start Time End Time External Identifier Description Add External Identifier Status	Example Membership Fried KUARIO value		Al settings are completed. Press Finish to save the changes and dose the template edit screes ✓ Template active Import data G changed since last import data again G changed since last imported record (24-Sep-19 16:46:05) C Once All G changed since 24-Sep-19 ✓ 16:46:05 ↔ Last update officet (in minutes) Format of dates in text fields Yyyy+mm-dd	.	[≱		
			Log successfully imported records				
	index Top		C	ancel Previous	Next	Fini	ish

A Note: Make sure that before this step your KUARIO Gateway is now <u>online</u> and <u>linked</u>!

9. Set up the link fields. Make sure to use a fixed KUARIO value. Refer to <u>'Appendix A: Using fixed KUARIO values</u>' ^[34] for more information.



Confirm	×
?	The AD Connector service was stopped during editing of the templates. Do you want to start the service again?
	Yes No

11. Reboot the service

Testing

Isting the configuration

Check the log files

Make sure to check the log files for error messages.

Useful log files:

Application KUARIO Gateway

 $\label{eq:log_kuard} \ensuremath{\texttt{ProgramData}}\ensuremath{\texttt{KUARIO}}\ensuremath{\texttt{log}}\ensuremath{\texttt{KUARIO}}\ensuremath{\texttt{suremath}}}}}}}}}}}}}} \ensuremath{\begin{tabular}{c} \begin{tabular}{c} \begin{tabular}} \begin{tabular}{c} \begin{tabul{suremath{\texttt{suremath{\texttt{suremath{\texttt{suremath{\texttt{suremath{\texttt{suremath{\texttt{suremath}}}}}}}}}} \begin{tabular}{c} \begin{tabular}{c} \begin{tabular}} \begin{tabular}} \begin{tabular}{c} \begin{tabular}{c} \begin{tabular}}} \begin{tabular}{c} \begin{tabular}} \begin{tabular}{c} \begin{tabular}} \begin{tabular}{c} \begin{tabular}}{c} \begin{tabular}{c} \begin{tabular}{c$

The KUARIO Gateway is the link between the KUARIO plug-in and the KUARIO Cloud Payment service. In this log you will find all the relevant process messages.

Troubleshooting

Troubleshooting

Sometimes things do not work out as expected, if so please read through this section before contacting your service organisation or dealer. Chances are you are able to solve the issue yourself.

The section is set up in a Symptom - Prognosis - Resolution format, that is; first the symptom is given, then the possible causes and then the resolution for those causes.

More information about why a process might have gone wrong can be found in the log files, scroll to the end of this section to learn more.

Prognosis: There is no (reliable) connection from the KUARIO Gateway to KUARIO Resolution:

A - Check if the KUARIO Gateway Service can connect to KUARIO.

- Browse to '<u>https://kuario.com/</u>' on the same machine to make sure requests to KUARIO are not blocked.
 a) If you can't, the connection is blocked.
 - b) Check your firewall and security settings to see if KUARIO is blocked or try to solve this issue with your network manager.

Prognosis: The KUARIO Gateway is not (yet) linked to a KUARIO Outlet E Resolution:

B - Check if the Gateway is linked to an Outlet

1)

1) If the terminal is not yet linked, please follow this section of the manual to <u>link the terminal</u> 15].

Prognosis: The KUARIO User is not a part of the Membership E Resolution:

C - Make sure the Membership process has been concluded successfully.

- The KUARIO User is not yet invited for the Membership.
- a) Invite the KUARIO User for the Membership.
- 2) The KUARIO User has not (yet) excepted the Membership.
 - a) Remember the KUARIO User to accept the Membership.
 - b) Log in as the user in the KUARIO App or on the KUARIO website.
 - c) Navigate to Settings -> Account -> Memberships
 - d) Check if there are any Unapproved Memberships
 - e) Confirm that the KUARIO User has accepted the Membership. If not remind him again.
- 3) If the process cannot be completed successfully, ask for help with the Membership request with KUARIO Support.

Prognosis: The KUARIO User is invited for a Membership under the wrong KUARIO Site. Resolution:

- D The KUARIO User is invited for a Membership under the wrong KUARIO Site.
- 1) Make sure the invitation is sent from the correct KUARIO Site.

Q Symptom(s): I had a import configuration error, that I resolved but now the users are still not imported

Prognosis: Users that failed to be imported will not be tried in future runs. **Resolution**:

- E Set the import date back before any failed tries
- Set the import date to a date prior to the imports that failed because of the faulty configuration. Select 'Changed 1) since' and set the date.

& KUARIO AD Connector Service - [templates]			-		×
Al settings are completed. Press Finish to save the changes and dose the template edit ✓ Template active	screen.				
Changed since last imported record (24-Sep-19 16:46:05) Once All					
C Changed since 24-Sep-19 v 16:46:05 · · · · · · · · · · · · · · · · · · ·					
Format of dates in text fields			Ç		
Log successfully imported records					
	Cancel	Previous	Next	Fini	sh

2) Start the import process again.

Q Symptom(s): Other issues

• Prognosis: This issue cannot be solved without external help

E Resolution:

- F Please open the log files.
- 1) If after carefully examining these files, the issue cannot be resolves by you or your team, please contact KUARIO support (support@KUARIO.com) to help you further on your way.

Log files

If you run into trouble please examine these files carefully as they should contain very useful information.

Useful log files:

KUARIO Gateway

Application

%ProgramData%\KUARIO\log\KUARIOGateway.log

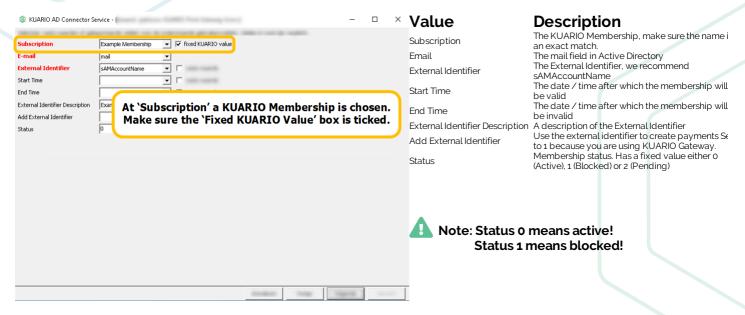
The KUARIO Gateway is the link between the KUARIO plug-in and the KUARIO Cloud Payment service. In this log you will find all the relevant process messages.

Appendix A: Using fixed KUARIO values

Appendix A: Using fixed KUARIO values

I Warning: Before continuing with this section please make sure that your KUARIO Gateway is now <u>online</u> and <u>linked! (See Appendix C)</u> अगे

In the KUARIO Active Directory Connector you should leave the 'fixed KUARIO value' box ticked.



The 'Subscription' refers to KUARIO memberships. KUARIO Memberships are part of their site. When you connect KUARIO Gateway to a site, you have access to the memberships of that site.

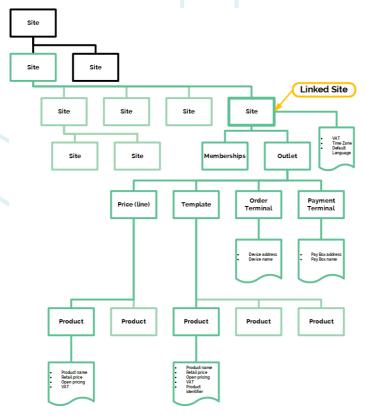
Memberships

Memberships are groups that a user can be a member of and that may give that user extra rights or options.

Memberships can be used to grant exclusive access to an Outlet, provide a deduction of the product price or make it possible for the members to use KUARIO as payment source, or lastly to use invoices in stead of direct payments.

They are also commonly used in combination with KUARIO gateways as (in most cases) they link to the external user account via the Membership's 'External Identifier'.

1. Select a membership from the 'Subscription combo box'.



- 2. At 'Email' select the Active Directory field that holds the user's email address.
- 3. At 'External Identifier' enter the External Identifier (an unique non-KUARIO identifier for the user. We recommend using 'sAMAccountName' (This is the user's log-on name for older Windows OS's).

Membership period

'startDateTime' and 'endDateTime' are DateTime stamps (by default?) in the 'yyyy-mm-ddThh:mm' format, that indicate for what period this user is a member of this membership. Before or after this date this user will not be a member of this membership. This is useful working with users that arrive and/or leave your organisation at a time known beforehand. Like a student with a membership that grants him access to rooms in his school or university.

- 4. The 'start time' and 'end time' can be left empty, this means that the membership is forever (or until it is revoked).
- 5. At the 'External Identifier Description' A description of the sort of identifier for clarity. Like 'Student number' if the identifier is a student number.

The user's should be in the 'external Identifier' column). 'addExternal Identifier' should be 1, indicating that you are using a KUARIO gateway.

6. Set 'Add External identifier' to '1' as you are using the KUARIO Gateway.

Status

The last field 'status' allows you to let the member have a non-active status, a member can be active. An active member can normally use the perks of it's membership. A blocked member cannot use it's membership. The status 'Pending' is used for specific application for the period that the application is evaluating if the user's membership is granted/revoked. The status 'Pending' is a system status and should not be imported as a value! This field should have the value 'active' (or 0) unless instructed otherwise.

7. Set the status to 0. This means that the membership is active.

Appendix B: Edit CSV file in MS Excel

🔰 Appendix B: Edit CSV file in MS Excel

1. Open the created *.csv file.

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2. Like in Notepad headers and values are separated by semicolons. But to comfortably work with these files in Excel we will take the next steps.

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- 3. Open Excel.
- 4. Go to the 'Data' tab.
- 5. Click 'From Text/CSV'.
- 6. Browse to the created * .csv file.

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externalldentifier	email	externalldentifierDescription	addExtern	alldentifier			
10091971	@inepro.com	Studentnummer		1			
null				null			

7. Excel will automatically detect the format and settings, please check if these are correct and click 'Load'.

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- 8. The document will now be opened in a way that is easy to scroll trough and to edit.
- 9. Make sure you only have eight headers and that they are named according to the table above. They should be in this order and match with the corresponding user data (email should be the user's email address as used in his KUARIO account. The user's should be in the 'externalIdentifier' column). 'addExternalIdentifier' should be 1, indicating that you are using a KUARIO gateway.

Mutation

The mutation field is ignored when using the local import via CSV. It is used when importing CSV files via the KUARIO Manager. It should be set to 'add' when you want the member to be added, and to 'delete' when you want an existing user to be deleted. The last three fields ('startDateTime', 'endDateTime' and 'Status') are optional.

Membership period

'startDateTime' and 'endDateTime' are DateTime stamps (by default?) in the 'yyyy-mm-ddThh:mm' format, that indicate for what period this user is a member of this membership. Before or after this date this user will not be a member of this membership. This is useful working with users that arrive and/or leave your organisation at a time known beforehand. Like a student with a membership that grants him access to rooms in his school or university.

Status

The last field 'status' allows you to let the member have a non-active status, a member can be active. An active member can normally use the perks of it's membership. A blocked member cannot use it's membership. The status 'Pending' is used for specific application for the period that the application is evaluating if the user's membership is granted/revoked. The status 'Pending' is a system status and should not be imported as a value! This field should have the value 'active' (or 0) unless instructed otherwise.

• Note: The first row (with the headers) is ignored by the import functionality, so this should not contain (user) import information.

• Note: Rows with the email address 'example@kuario.com' are ignored by the import functionality, so these should not contain (user) import information.

Warning: The status 'Pending should not be entered in the *.csv file!

Header Name	Description	Allowed Values
email	The email address of the KUARIO User	A valid email address.
		The value must be unique if it is a personal identifier. In this case the field 'addExternalIdentifier' must be set to '1'.
externalldentifier	The external identifier is used by an external system via the KUARIO Gateway to identify a user or a group f users	Group identifiers do not need to be unique as multiple persons can be members of a group or membership.
		All identifiers may contain the full range of alphanumeric values.
externalIdentifierDescription	A description of the sort of identifier for clarity. Like 'Student number' if the identifier is a student number.	A text description of the identifier.
addExternalldentifier	Internal KUARIO value, must be set to 1 to use KUARIO Gateway	1 or 0
mutation	Add or Delete this member	'add' or 'del'
startDateTime	The start of a membership period	DateTime in format 'yyyy-mm-ddThh:mm'
endDateTime	The end of a membership period	DateTime in format 'yyyy-mm-ddThh:mm'
status	The membership status. It can be Active, Pending or Blocked. 'Pending' is a reserved system status, do not use it.	'active' or 'blocked'

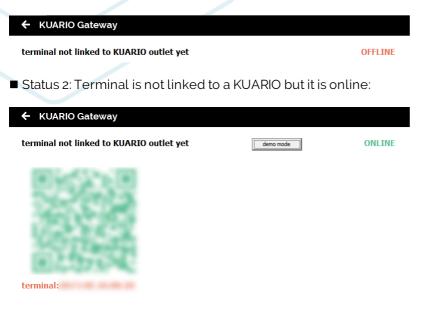
10. Now add you can add/edit users and check if everything is correctly listed.

- 11. Remember that the file will become the membership name in KUARIO. So if you need to add to an existing membership, make sure the name is the exact same.
- 12. If the document is satisfactory, we can now export it to KUARIO.

Appendix C: My terminal status

Appendix C: My terminal status

Status 1: Terminal is not linked to a KUARIO Outlet and is not Online:



■ Status 3: Terminal is online and linked to a KUARIO Outlet:

← KUARIO Gateway		
linked to outlet:		ONLINE
terminal:	leave demo	DEMO MODE

Appendix D: Create a KUARIO Membership

Appendix D: Create a KUARIO Membership

Add Membership

- 1. Open the KUARIO Manager.
- Go to Main Menu -> Memberships.
 Add a Membership, click + ADA ('+ Add').

Memberships

+ ADD	INVITE LINKED ID'S
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Q Search

- 4. Name the Membership.
- 5. Check the box if you want to allow invoicing (by default it should remain unchecked as you would not) want to allow invoicing).

Note: With invoicing your users will to not pay directly, rather their transactions are stored and the Merchant will be responsible to charge these costs to the user.

- 6. If the members may enjoy a generic (over all available products) deduction you can enter the deduction percentage here.
- 7. Click 'NEXT→'.

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			10		ng allowed							
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										© CANCEL NEXT ÷		

8. KUARIO Email message, select the language for our default message. Or create your custom message yourself.
9. Click 'NEXT '.

✓ Info > <u>E-Mail</u> > Memberships (Total: 0 | Accepted: 0)

	Our	Group				
Ż	Language English	New user email	Existing user email			
3	Custom invitation email content (leave empty for standard email) Please fill out this field	membership yo self-service kio You can accept 1. downloading bottom of this e 2. register your 3. after registra via the pop up i Note: when you	invited to become a s u will be able to pay f sks. your membership by the KUARIO mobile a mail. self with the same em tion & opening the ap nside the app. already have a KUAR ial Member you need	For products & The products & The product of the pr	services at o ore. Links are eve sent this ept your men d you want t	different e at the mail to nbership
				⊘ CANCEL	← ВАСК	NEXT

10. Add members to your membership by adding the email address that they also use for their KUARIO Account. Confirm with the '+' Plus or 'Add item' button

🗸 Ir	nfo 🔉 🗸 E-M	ail > <u>Memberships</u> (Total: 1 Acce	pted: 0)		
		Our Gro	ир			
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\searrow	g.green@mysite.com	GGreensIdentifier				
				⊘ CANCEL	← ВАСК	✓ SAVE

11. Another method to insert members is the *.csv import method, explained in the next section.

Import via CSV

17 onaylor@bestmailclient.com

18 pproctor@bestmailclient.com

OsNa002016

PaPr002017

Oscar Naylor is a male from Sheffield

Patty Proctor is a female from Huddersfield

12. Click the 'Import CSV' button.

✓ Info > ✓ E-Mail > Memberships (Total: 1 | Accepted: 0) Our Group ▲ IMPORT CSV ✤ DOWNLOAD CSV TEMPLATE i Q Search @ e-mail external identifie Description Gateway 👕 ALL g.green@mysite.com GGreensIdentifier \sim To Import a CSV file via the manager it should be formatted like this: externalIdentifier;email;externalIdentifierDescription;addExternalIdentifier;mutation; startDateTime(yyyy-mm-ddThh:mm);endDateTime(yyyy-mm-ddThh:mm);status Gerald Green; g.green@mysite.com; name; 0; add; 2021-05-01T00:01; 2025-05-01T00:01; active externalldentifier externalldentifierDescription 1 email addExternalIdentifier mutation startDateTime endDateTime status add or del yyyy-mm-ddThh:mm identifier yyyy-mm-ddThh:mm active or pending or blocked example@kuario.com description aarcher@bestmailclient.com AIAr002002 Alberto Archer is a male from Livingston 1 add 2021-05-01T00-01 2025-05-01T00-01 active 3 1 add bbailey@bestmailclient.com BeBa002003 Beryl Bailey is a female from West Bromwich 2021-05-01T00:01 2025-05-01T00:01 active 5 ccarter@bestmailclient.com ChCa002004 Chris Carter is a male from Crewe 1 add 2021-05-01T00·01 2025-05-01T00-01 active DeCa002005 2021-05-01T00:01 2025-05-01T00:01 6 dcarver@bestmailclient.com Debby Carver is a female from Morecambe 1 add active echaplin@bestmailclient.com ErCh002006 Ernesto Chaplin is a male from Fochabers 1 add 2021-05-01T00:01 2025-05-01T00:01 active 8 fchandler@bestmailclient.com FICh002007 Florence Chandler is a female from Kingswinford 1 add 2021-05-01T00:01 2025-05-01T00:01 active gcooper@bestmailclient.com GoCo002008 Gordon Cooper is a male from Londe 1 add 2021-05-01T00:01 2025-05-01T00:01 active 10 hfletcher@bestmailclient.com HeFI002009 Helene Fletcher is a female from Wellingborough 1 add 2021-05-01T00:01 2025-05-01T00:01 active 11 ifrobisher@bestmailclient.com IsFr002010 Isaac Frobisher is a male from Manchester 1 add 2021-05-01T00:01 2025-05-01T00:01 active 12 jgardner@bestmailclient.com InGa002011 Joyce Gardner is a female from Aberdare 1 add 2021-05-01T00-01 2025-05-01700-01 active KiHo002012 2021-05-01T00:01 2025-05-01T00:01 13 khooper@bestmailclient.com Kirk Hooper is a male from Stoke-on-Trent. 1 add active Leslie Kellogg is a female from Swansea. 14 lkellogg@bestmailclient.com 1 add 2021-05-01T00:01 2025-05-01T00:01 LeKe002013 active 2025-05-01T00:01 15 mleach@bestmailclient.com MiLe002014 Michael Leach is a male from Boston. 1 add 2021-05-01T00:01 active 16 nmachin@bestmailclient.com NaMa002015 Nadine Machin is a female from Chesterfield 1 add 2021-05-01T00:01 2025-05-01T00:01 active

9 rredman@bestmailclient.com	RaRe002018	Rafael Redman is a male from Leicester.	1 add	2021-05-01T00:01	2025-05-01T00:01	active
0 ssawyer@bestmailclient.com	SaSa002019	Sandy Sawyer is a female from Colyton.	1 add	2021-05-01T00:01	2025-05-01T00:01	active
1 ttrinder@bestmailclient.com	ToTr002020	Tony Trinder is a male from Belfast.	1 add	2021-05-01T00:01	2025-05-01T00:01	active
2 vward@bestmailclient.com	VaWa002021	Valerie Ward is a female from Londen.	1 add	2021-05-01T00:01	2025-05-01T00:01	active
3 wfielder@bestmailclient.com	WiFi002022	William Fielder is a male from Chesterfield.	1 add	2021-05-01T00:01	2025-05-01T00:01	active
4 afisher@bestmailclient.com	AnFi002023	Andrea Fisher is a female from Bolton.	1 add	2021-05-01T00:01	2025-05-01T00:01	active
5 bforester@bestmailclient.com	BaFo002024	Barry Forester is a male from Chesterfield.	1 add	2021-05-01T00:01	2025-05-01T00:01	active
cgravenor@bestmailclient.com	ChGr002025	Chantal Gravenor is a female from St Albans.	1 add	2021-05-01T00:01	2025-05-01T00:01	active
7 dlocksmith@bestmailclient.com	DeLo002026	Dean Locksmith is a male from Mallaig.	1 add	2021-05-01T00:01	2025-05-01T00:01	active
8 epaige@bestmailclient.com	ErPa002027	Erin Paige is a female from Burry Port.	1 add	2021-05-01T00:01	2025-05-01T00:01	active
9 fpiper@bestmailclient.com	FePi002028	Felix Piper is a male from Oldbury.	1 add	2021-05-01T00:01	2025-05-01T00:01	active
0 gquilter@bestmailclient.com	GaQu002029	Gabrielle Quilter is a female from Bourne End.	1 add	2021-05-01T00:01	2025-05-01T00:01	active
1 hskinner@bestmailclient.com	HuSk002030	Humberto Skinner is a male from Coventry.	1 add	2021-05-01T00:01	2025-05-01T00:01	active
2 iwaxman@bestmailclient.com	InWa002031	Ingrid Waxman is a female from Brentwood.	1 add	2021-05-01T00:01	2025-05-01T00:01	active

1 add

1 add

2021-05-01T00:01

2021-05-01T00:01

2025-05-01T00:01

2025-05-01T00:01

active

active

The example above creates a member identified with email address '<u>g.green@mysite.com'</u>, with an external identifier 'Gerald Green', a description 'name'. The external Identifier will be added in the member information, even though 'addExternalIdentifier' is set to false! The member is not allowed to use KUARIO Gateway, because 'addExternalIdentifier' is set to 0. Normally 'addExternalIdentifier' will be set to '1' so the member can use KUARIO Gateway.

Note: If 'addExternalIdentifier' is set to 0 the 'externalIdentifier' string will still be added to the member information. However the member is not allowed to use KUARIO Gateway. That means that user can not use KUARIO as an external payment system, (because it must be linked via his 'externalIdentifier'), through a third party application, using KUARIO Gateway.

Note: Refer to the KUARIO Gateway manual for more information about this.

13. Select your CSV file and click 'Open'.

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🖶 Downloads	*	12-9-2017	0	19-Jan-18 11:37	File folder
Documents	*	13-10-2017	0	26-Jan-18 16:26	File folder
Pictures	*	21-7-2017	0	19-Jan-18 11:37	File folder
Kabels	×	26-9-2017	0	19-Jan-18 11:37	File folder
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The members should now be added to your membership.

Completing creating a new Membership

When you have added the members, it is possible to also add external identifier. An external identifier can be used to create a subgroup of users in you membership. In the example below two groups are created one has the external ID '50', the other group has the ID '150'. These ID's combined with the membership ID may be exported to external administrative systems, showing the usage of certain groups without showing their email addresses, thus complying to privacy concerns.

	Our Gro	oup		
DRT CSV			OWNLOAD CSV TEMPLAT	i
Search				
E-mail				+
e-mail	external identifier	Description	Gateway	A
g.green@mysite.com	GGreensIdentifier			
aarcher@bestmailclient.com	150	Alberto Archer is a ma	le f	
bbailey@bestmailclient.com	150	Beryl Bailey is a femal	e fr	
ccarter@bestmailclient.com	150	Chris Carter is a male	fror	
onaylor@bestmailclient.com	50	Oscar Naylor is a male	e frc	
pproctor@bestmailclient.com	50	Patty Proctor is a fema	ale 🗆	
rredman@bestmailclient.com	50	Rafael Redman is a ma	ale 🗆	
ssawyer@bestmailclient.com	50	Sandy Sawyer is a fem	nale 🗆	
ttrinder@bestmailclient.com	50	Tony Trinder is a male	fro	

When a *.csv is imported using the startDateTime(yyyy-mm-ddThh:mm), endDateTime(yyyy-mm-ddThh:mm) or status field, then these fields can also be edited for other members.

14. Tick the check box if you are using KUARIO Gateway, in this case the external identifier must be exactly the same as the user's ID in the external system connected with KUARIO Gateway.

✓ Info > ✓ E-Mail > <u>Memberships</u> (Total: 31 | Accepted: 0)

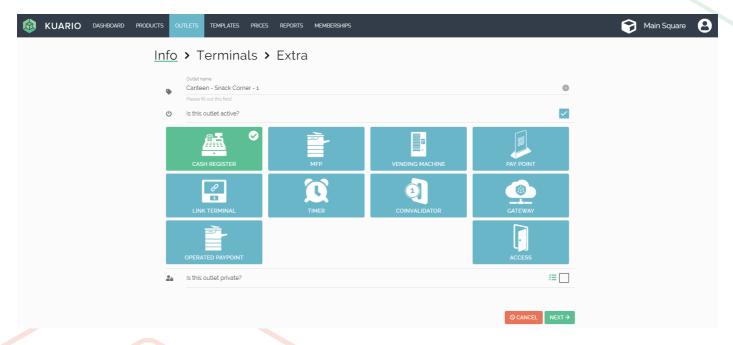
Our Group

Search								
E-mail								
e-mail	external identifier	Description	Gateway	Valid from	Valid till	status	TALL	
k.dgraaf@inepro.com	KoosHisExternalId	Description		-	-	Active	~	
aarcher@bestmailclient	AlAr002002	Alberto Archer is a		01-05-2021 00:01	01-05-2025 00:01	Active	•	
bbailey@bestmailclient	BeBa002003	Beryl Bailey is a fe		01-05-2021 00:01	01-05-2025 00:01	Active	•	
ccarter@bestmailclient	ChCa002004	Chris Carter is a m		01-05-2021 00:01	01-05-2025 00:01	Active	•	
dcarver@bestmailclient	DeCa002005	Debby Carver is a	\checkmark	01-05-2021 00:01	01-05-2025 00:01	Active	•	
echaplin@bestmailclien	ErCh002006	Ernesto Chaplin is		01-05-2021 00:01	01-05-2025 00:01	Active	•	
fchandler@bestmailclie	FlCh002007	Florence Chandle	\checkmark	01-05-2021 00:01	01-05-2025 00:01	Active	•	
gcooper@bestmailclien	GoCo002008	Gordon Cooper is	\checkmark	01-05-2021 00:01	01-05-2025 00:01	Active	•	
hfletcher@bestmailclie	HeFl002009	Helene Fletcher is		01-05-2021 00:01	01-05-2025 00:01	Active	•	

15. When you need to edit the member period, the member period dialogue will show. Here the start and end of a period can be determined.

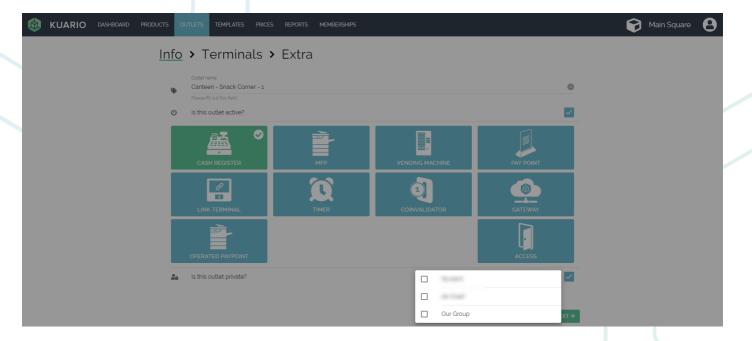
Chai	nge memb	er tir	nes	close
E-mail aarch	ner@bestmailclie	nt.com		
ä	From date 01-May-202		00:01	DISABLE START TIME
â	Till date)1-May-2025		00:00	DISABLE END TIME
				CANCEL UPDATE

16. Click 'SAVE' to save the Membership.



Set exclusive access to an Outlet

- 17. Go to Outlets.
- 18. Select an Outlet that you want the Membership to have exclusive access to.
- 19. Tick the box 'Is this Outlet private?'. A pop-up selection list will appear. 20. Select the appropriate Membership(<u>s</u>) from that list.
- 21. Make sure the box is checked, click 'NEXT-'.



22. Click 'NEXT→'.

PRODUCTS OUTLETS	TEMPLATES PRICES REPORTS MEMBERSHIPS	
🗸 Info	> <u>✓ Terminals</u> > Extra	
order-t	terminal Device address Please fill out this field Device name	0
	S CANCEL ←	BACK NEXT →
Version 3.0.2	24 - 48	

23. Click ' SAVE' to save the Outlet Settings.

PRODUCTS OUTLETS TEMPLATES PRICES REPORTS MEMBERSHIPS			
✓ Info ➤ ✓ Terminals ➤ <u>Extra</u>			
Select the template for this outlet.			Ţ
Select the priceline for this outlet.			•
	⊘ CANCEL	← BACK	✓ SAVE

24. The Outlet can now only be used by members of the Membership(s) you selected for it. Other users cannot use it.

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