



SecureTrust™ PCI Manager Partner Upgrade Plan

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MERCHANT PROGRAM UPGRADE PLAN OVERVIEW

Our small merchant compliance and security solution, SecureTrust™ PCI Manager, is now ready for use. This document outlines the simple steps needed to upgrade your program, offering your clients a new experience that is designed to personalize and streamline their PCI compliance validation. At a high-level, the upgrade steps include:

1. Planning.
2. Execution.
3. Sign-off.

To begin the process, your SecureTrust account executive or assigned project manager will schedule the initial kick-off call with your team to discuss topics that touch on timeline and scope.

Timeline

- *When is the earliest you can upgrade?* If there are no significant constraints, SecureTrust will plan accordingly to ensure optimal merchant and partner experiences. This will help SecureTrust plan accordingly for operations, engineering and marketing initiatives.
- *Are there any “black-out” dates SecureTrust should be aware of?* For example, does your organization institute a freeze on any major product or communication changes at certain times of the year affecting clients/merchants? Conversely are there any timeframes that your organization would prefer major product or communication changes to occur, considering the overall upgrade deadline.

Scope

- SecureTrust will upgrade your entire sponsor program hierarchy together as part of the transition. There may be certain edge cases where we may need to upgrade specific merchant groups at different times, considering the overall upgrade deadline.

A LOOK AT WHAT'S CHANGING

The merchant experience has been enhanced from the ground up to offer new capabilities powered by modern web technologies. Merchants can now use new features that are all designed to make it easier to achieve and maintain compliance, while also allowing for partner customizations. Highlights include:

- Redesigned merchant *PCI Home* dashboard that includes links to commonly used features like scan attestation, certificate download and merchant support interaction.
- The PCI Questionnaire has been updated with a cleaner and improved interface helping merchants achieve compliance, while also making it easier to resolve non-compliant issues faster with new smart PCI gap screen (formerly To Do List).
- New data-driven profiling processes to help select the correct SAQ and an enhanced Wizard engine is designed to save merchants time by auto-populating their SAQ wherever possible.
- Integrated advanced features helping address requirement groups like vulnerability scanning, training, policies and procedures and PCI compliance. Scan attestation enhancements including more clarity and new email notifications to help merchants maintain their attestation.
- New unified Sponsor View experience for admins include enhanced search capabilities, a new custom report builder, deeper integrations with BRAM/GBPP compliance services and more (coming Summer 2020).

Overall the portal user interface has been updated to conform to SecureTrust brand standards.

EXHIBIT A: PORTAL CHANGES SUMMARY

1. The product name is now “**SecureTrust™ PCI Manager**” instead of “TrustKeeper PCI Manager”.

2. The portal URL moving forward will be <https://portal.securetrust.com>¹
The legacy portal URL will **automatically** redirect merchants to their new experience (<https://login.trustwave.com>).

3. The merchant program splash-page will become <https://pci.securetrust.com/ProgramName> (where ProgramName is configurable to your needs).

4. The From-address of the automated service emails will become donotreply@communications.securetrust.com.

5. For information regarding SecureTrust, please point interested parties to <https://securetrust.com>.

¹ White-labeled programs will continue to be supported as usual. By default the domain will be validatepci.com like <https://ProgramName.validatepci.com>. Customizations options are available as well. SecureTrust will handle the setup process on a case-by-case basis or work with the client on an as-need basis (e.g. site certificate configuration).

PARTNER CHECKLIST

Product

- Review the portal key changes summary Exhibit A “Portal Changes Summary” table above.
- Review the [complete upgrade FAQ here](#).

Operations

- Review sponsor program hierarchy and identify communication plan. As a recommendation, partners with multiple sales channels or business units should discuss details with their account executive.
- Confirm internal point-of-contact(s).
- Provide all relevant employees in your organization with training on the product changes. SecureTrust will help with training where needed.

Marketing

Any in-house collateral will need to be updated to reflect the new SecureTrust brand and relevant portal details. Changes to consider may include:

- Email templates.
- Program micro sites (or other virtual collateral).
- Statement Messages ([sample here](#)).
- Datasheets ([sample here](#)).
- Portal How-to Guides (workflow, screenshots, etc.).
- Welcome kit collateral (if applicable) ([sample here](#)).

Remember to update the portal URL, splash page URL, custom support phone number and email address on all your materials (if applicable). Review the “**A Look at What’s Changing**” section above.

A copy of the SecureTrust logo can be [downloaded here](#).



Note: The SecureTrust Marketing team is here to assist you with this process. Once all collateral has been updated, please send to SecureTrust for review.

MESSAGING THE UPGRADE TO YOUR MERCHANTS

To ensure an optimal upgrade experience for merchants, we have created a series of marketing materials to help educate them on the changes. Please review the materials below, note that content and timing may be adjusted according to your requirements.

EXHIBIT B: MARKETING SAMPLES

Merchant Upgrade Template (Partner version) [sample here](#).

Email Communications Templates [sample here](#).

Portal Login Pop-ups Message [sample here](#).

Educational Guides

- Link to the [PCI Manager Quick Start Guide](#) will be included in both the notification emails and pop-ups.
 - A complete step-by-step guide is [available here](#).
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Promotional Tools

- An updated [Program Introduction and Getting Started Guide](#) is available for all net-new merchants added to your program.
 - A [SecureTrust PCI Manager datasheet](#) is also available upon request.
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Merchant Splash Page will be updated with the SecureTrust brand and existing co-branding will be transferred to the new page along with custom email, phone number and custom content (if applicable).

- <https://pci.securetrust.com/demo> is an example of the new template.
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Automated Service Emails

On the day of the system upgrade, email templates (e.g. account, status updates, expiry notifications, etc.) will be updated with SecureTrust branding, where applicable. Changes will include the following:

- All references to “Trustwave” (name & logo) will be replaced with “SecureTrust”.
- All references to “TrustKeeper PCI Manager” will be replaced with “SecureTrust PCI Manager”.
- The From-address of the automated service emails will become donotreply@communications.securetrust.com.
- Relevant call-to-action buttons will be updated to use the new portal URL (where applicable).

If you would like your emails to be co-branded, please send a request with your logo to marketing@securetrust.com. A copy of all emails are available for [download here](#).

WHAT IS NOT CHANGING

Running a merchant compliance program is no small endeavor and we understand a change like this may involve multiple business areas and functions. We are committed to ensuring a smooth transition so your SecureTrust team will be providing guidance along the way. Things that will *not* be changing as part of this transition include:

- Merchant's ability to use the contracted services (e.g. PCI certification, vulnerability scanning).
- Merchant account history and credentials are not impacted and will continue to work as usual.
- Access to historical documents will be maintained.
- Your account management team and any committed service level agreements, where applicable.
- Maintenance of the legacy portal will continue per corporate policy.

FREQUENTLY ASKED QUESTIONS (FAQ)

Review the [most recent upgrade FAQ here](#).

Q: What branding should my merchants expect to see in the new portal?

A: Merchants will see the new "SecureTrust™ PCI Manager" branding. In December of 2018, the compliance and risk management business unit of Trustwave was rebranded under the name "SecureTrust, a Trustwave division. As part of the rebrand, our portal name has been updated accordingly. This change was first introduced to your merchants last December and will be reiterated in the pre-upgrade communications and all future marketing materials (emails, guides, etc.). For more information, [click here](#).

Q: When can my program be upgraded?

A: Typically, a 45-day lead time is expected prior to the upgrade.

Q: What browsers are supported for the new portal?

A: The four major so-called "evergreen" browsers are officially supported: Google Chrome (recommended), Mozilla Firefox, Apple Safari, Microsoft Edge. A browser guide may be provided upon request.

Q: What are the upgrade steps?

A: The upgrade process starts with a kickoff call and a project plan detailing tasks and completion dates. *You will need to identify a target sponsor for upgrade (entire sponsor will be upgraded at one time)*. Additional marketing support provided, in the form of communications and portal messages, leading up to and after the upgrade.

Q: How long does the upgrade take?

A: On the pre-determined date, the upgrade process will run overnight during regular production deployment windows. Multiple partners may be upgraded on the same day.

Q: If a merchant is reporting into a sponsor that is upgrading, will that merchant also be upgraded?

A: No, only merchants whose Program Sponsor is the upgrading sponsor will be upgraded.

Q: What happens if the merchant has an in-progress SAQ at the time of upgrade?

A: Merchants must complete the SAQ prior to the upgrade – progress is not retained in the new portal.

Q: What happens if a merchant has scans scheduled on the day of the upgrade?

A: Scans that are scheduled to run on the day of the upgrade will run once the upgrade is complete.

Q: What communications, if any, are planned to talk about scan attestation for applicable merchants?

A: Two new emails are being introduced to cover the scan attestation requirement and will be sent to all users on the merchant account. These email templates will follow the rules:

15, 7 and 1-day prior to scan attestation expiry date.

1, 15, 30, 45, 60, 75 and 90-days post scan attestation expiry date.

Q: What happens to disputes on scans that run prior to the upgrade?

A: Merchants that need to file disputes should file them no later than 7 days prior to upgrade and will be processed before the upgrade. Approved disputes will carry over to the new system, but merchant will not see dispute history in the UI.

Q: What about merchants that are PCI Expiring close to the upgrade date?

A: Merchants that are PCI Expiring within two weeks of the upgrade date should be notified, followed by a notification after the upgrade to remind them to monitor their compliance status and take action as required.

Q: What about merchants that were pre-registered in the current portal but had not completed registration prior to the upgrade?

A: After the upgrade, these merchants will receive new pre-registration emails with a link to the upgraded portal that will allow them to complete registration. *The original registration links will not work. To complete the registration merchants must use the new links sent after the upgrade.*

Q: Will merchants be locked out of the portal for the upgrade?

A: There is no planned outage time for merchants. However, if a merchant is logged into the portal at the time of the upgrade, they will be logged out.

Q: Is the sponsor/partner experience changing with the upgrade?

A: Sponsor administrators will not experience a change to their view at this time. Sponsor users will continue to use the existing portal to manage their merchant portfolio until an upgraded Sponsor View is released.

Q: What is the process for merchants that cannot be upgraded?

A: An entire sponsor must be upgraded at a time. If some merchants in the sponsor cannot be upgraded, they will be placed in a “holding” sponsor until they become eligible to be upgraded. *Merchants that have additional services like TVM will not be upgraded at this time and will be*

identified in the planning phase.

Q: Would I be able to distinguish which portal experience a merchant is using (where applicable)?

A: Yes, there will be a flag to identify the portal the merchant account is using. For example, Merchant Compliance search and Merchant Detailed Report (MDR) have been updated with a new column to call out the portal version.

Q: Is there a new URL for merchant portal login?

A: Yes. Merchants will log into the upgraded portal by visiting – <https://portal.securetrust.com>.

Q: What changes should the merchant be prepared for?

A: If a merchant accesses the current portal after upgrade, they will be redirected to the new portal. All active merchants will be upgraded completely, including compliance status and reports. Historical reports will be retained for a period of three years, with some flexibility based on partner needs.

Q: Will branding be available in the new portal?

A: Branding will continue to function. If the partner has branding today, merchants will see the same theme and colors they see today in their branded portal.

Q: Will Single Sign On be available in the new portal?

A: Yes. This is partner-specific and additional discussions will be required closer to the upgrade.

Q: Are there changes to boarding/reporting feed in the new portal?

A: Boarding and reporting feed setup has not changed and will continue to function as before.

Q: Will there be changes to Fast Track SAQ stencil templates and custom wizards?

A: SAQ Stencil templates will not change after the upgrade. Custom wizards are partner-specific and will need additional discussions prior to upgrade. All Fast Track options will continue to provide the same reduced scope experience as was in the current portal. For questions, please contact your account executive or assigned SecureTrust project manager.

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