**Legacy Apps Retirement Project -** **LAR**

**(Internal – FAQs – Project team)**

This document provides relevant information related to the Legacy Apps Retirement project. Read carefully and refer it to people whom this information is of interest.

*\*\*\* Please refer to the following information that can be shared to our customers* [*https://developers.forte.net/soap-to-rest/*](https://developers.forte.net/soap-to-rest/) *\*\*\**

**What is the project about?**

The project aims to retire some of the legacy applications that are no longer supported or compatible with the current IT infrastructure and migrate the customers to a more modern and secure alternative.

**What is the project type?**

This is a migration project - an initiative to decommission and migrate old and outdated applications that are no longer in use or replaced by newer solutions.

**Who are the project team?**

- Project Sponsor(s): Srividya Prasad and Jeanette Mbungo

- Project Manager (PM): Sarim Deaza

- Success Operations Analyst (SOA): Felipe Suárez

 **What is the project business justification?**

The project aims to reduce the operational costs, security risks, and maintenance efforts associated with these legacy applications, as well as to improve the user experience and satisfaction.

**What are the benefits of retiring these apps?**

By retiring these apps, we can reduce the operational costs, security risks, and maintenance efforts associated with them. We can also free up resources and improve the performance and reliability of other solutions offered.

**Which applications/solutions will be retired?**

Batch V2; SOAP; Mobile App; SWP (Checkout, Template, Redirect, EMV).

**What are the timelines? And What are the alternatives for the customers?**

The focus of the project has been to generally communicate to the customers identified for this migration (05OCT23), addressing them by solution:

|  |  |  |  |
| --- | --- | --- | --- |
| **Solution** | **Alternative** | **Status** | **Deadline** |
| Batch V2 | Batch V3 | Already migrated (29AUG23) | Q4 2023 |
| SOAP | REST API | Working on this migration as a **priority**. *\*\*\*Some exceptions have been approved by the project sponsors until May-June 2024. If you have any extension requests, contact the PM or SOA so they can escalate the* *case.\*\*\** | 31 May 2024 |
| SWP (Checkout, Template, Redirect, EMV) | Forte Checkout (FCO) | Working on a viable solution for customers (based on unsigned transactions)*\*\*\*For further information and visibility of customers’ cases contact Krista Garbon or James Ivey. If FCO covers your customer needs, please start the conversations with them\*\*\** | TBD |
| Mobile App | Dex | Waiting for an available alternative. *\*\*\*Some customers have migrated to Dex as* *a viable alternative.* *Identify if your customer’s needs have been covered for that solution, please start working with them\*\*\*\** | TBD |

**Upcoming questions are focused on SOAP as a migration priority under this project.**

**Which will be the project strategy?**

As SOAP migration is the immediate priority, the customers have been segmented into the following matrix (09APR24):

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Customer Group** | **Definition** | **Next Steps** |
| 1 | Ongoing Conversations | Engaged clients with whom we have an active relationship, either in terms of progress updates and timeline definition or those actively working on the migration process. | Send a reminder with detailed dates, a final date, and the start date of penalties. |
| 2 | Non-responsive Customers | Engaged clients who have been initially contacted, some with reminders, but we have not received any response regarding their progress or timeline. | Send a communication with a hard deadline. |
| 3 | Non-engaged Customers | Clients who have not been contacted due to their recent addition to the migration list. *Customers using SOAP for other purposes different to transactions, such as CMIs or calls for pulls and tokens\*.* | Send an initial communication giving them a three-month deadline. |

As a part of the project management, a data report revision is performed every two weeks to identify new customers under the respective solutions, deleted merchants, escalations received, and follow-up emails are sent to the point of contacts (AMs/CSMs) requesting specific information to be tracked on the master file. That allows us to track the progress in the available Power BI report that reflects detailed information, escalations, timeline by customer, and all relevant information provided to the PM or SOA.

Visit the report here: [Legacy Apps Retirement (LAR) Project - Power BI](https://app.powerbi.com/groups/me/apps/0aa297f3-6efc-49af-9c3f-4ae9a47c1142/reports/24c85865-ac10-4976-b8f1-66c423bc81b4/ReportSection9d71f71a7c065b01345a?ctid=194a267b-82ba-4fa6-b6b9-f95966ab3815&experience=power-bi)

**How do I know if I have assigned accounts?**

The PM or SOA will send you bi-weekly follow-ups requesting the progress of those accounts. However, if you want to confirm that information, please contact the PM or SOA for further details.

***Note:*** *If you find any customer not listed on the project* *MIDs, you are responsible to report it to the PM or SOA. The success of this project depends on everyone as a team.*

**What do I do if I have assigned accounts?**

A suggested path to start the conversations is:

1. Notify the customers about the retirement and migration plan and provide them with information and guidance on how to prepare for the transition.

Managed customers must receive general notification based on their contact preferences or CSM/AM indications. Identify in the report if the customer has not received the communication, let the PM or SOA know with whom they will collaborate (same for unmanaged accounts not notified).

Some CSMs/AMs decided to notify the customers by themselves based on the relationship type we have with them (remember that you are the expert with the accounts assigned that knows everything about those relations), notifying merchants and partners who may be affected by the change, and providing them with alternative options or support during the transition period.

1. Identify what the customer's needs are and the use of SOAP for their needs.
2. Identify if you need help from the Solutioning team or Technical Support to receive guidance on the solution that can be offered to the customer and engage them.
3. Once you are clear about the customer's path, start the conversations based on the talking points described in the question below.
4. Notify the successful migration to the PM or SOA.

**What are the suggested talking points?**

* Explain the benefits of migrating from SOAP to REST, such as improved performance, security, and compatibility.
* Assure the clients or partners that we have taken all the necessary steps to ensure a smooth and seamless transition, and that we will provide them with all the support and resources they need to migrate their applications.
* Direct them to the migration guide and the API documentation that we have prepared for them, which have detailed instructions and examples on how to switch from SOAP to REST calls.
* Encourage them to test their applications using the sandbox environment before deploying them to production, and to report any issues or feedback to us as soon as possible.
* Remind them of the deadline for completing the migration, which is the end of May to avoid disruptions to their service.
* Reinforce that CSG Forte will be glad to assist them.

**What are the technical changes to be considered?**

* Changes in integration protocol: With the migration to the REST API, there will be changes in the integration protocol, including differences in message format, endpoint URLs, and communication methods. This may require adjustments to the customer’s integration code and workflows.
* Testing and validation: To ensure a smooth transition, we recommend testing your integration against the new REST API. As CSG Forte, we will provide access to testing environments, documentation, and support resources to assist customers in validating the compatibility and functionality of their integration.

**What is SOAP?**

The **S**imple **O**bject **A**ccess **P**rotocol is a messaging protocol that allows programs that run on disparate operating systems such as Windows and Linux to communicate using Hypertext Transfer Protocol HTTP and is Extensible Markup Language - XML.

**What are the benefits of using REST over SOAP?**

*Improved performance, security, and compatibility.*

REST API integration has additional functionalities/resources compared with SOAP. REST API performs and scales better, and we have added other functionalities for this system, that will be continually updated to manage more payment methods and value-added services, not supported by SOAP.

With REST API the merchants will get access to Disputes via Api call, access to value added services: Forte Verify and Authenticate and Digital wallets (Apple Pay and Google Pay are currently available for merchants processing credit cards with Fiserv).

**Which resources are available?**

* [Developer Documentation - REST API Set up](https://www.forte.net/devdocs/api_resources/integrating.htm)
* [REST API Endpoints (forte.net)](https://www.forte.net/devdocs/api_resources/rest_endpoints.htm)
* The postman collection with examples of the Rest calls and responses: [Forte REST API v3](https://restdocs.forte.net/)

**What will happen once the hard cutoff date is due?**

While SOAP services won't be deprecated immediately after the May deadline, a hard deadline of July 31st is set for the SOAP sunset. Beyond this date, SOAP calls for transactions, pulls, and CMI among merchants and partners will yield error messages. This disruption could cause downtime, impacting users' ability to process payments effectively. Additionally, penalties may apply for non-compliance with the May deadline, unless clients have previously requested an extension and shown diligent migration efforts.

 **Who can I contact if I have questions?**

If you have any questions or issues related to the project, you can contact the PM or SOA. If they are related to technical matters on customer integrations, please contact our Tech Support team engaged to this project (Luke, luke.idaszewski@csgi.com or Bradley, bradley.lives@csgi.com). They will be happy to aid you and address your concerns.