



iCoupon Software Setup Guide

iZone POS Integration v1.24.0 January 2019



| Version | Date | Notes | Author |
|---------|----------|--|-------------|
| 1.0 | 25-01-19 | Final draft guide to support the initial launch of the iCoupon Plugin. | P. Buchanan |
| 2.0 | 22-03-24 | Updates to original setup guide | J. Hennessy |
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Introduction

Document Scope

This guide is aimed at Zonal and client staff that are responsible for installing the necessary system components and configuring all areas of Aztec as required.

Overview

iCoupon is a plugin that integrates with Aztec to facilitate the processing of payments and discounts for customers given iCoupon vouchers.

The iCoupon plugin version released with CLM v1.24.0 enables only payments (tenders) to be processed and discount processing will be added in a future release of CLM.

Prerequisites

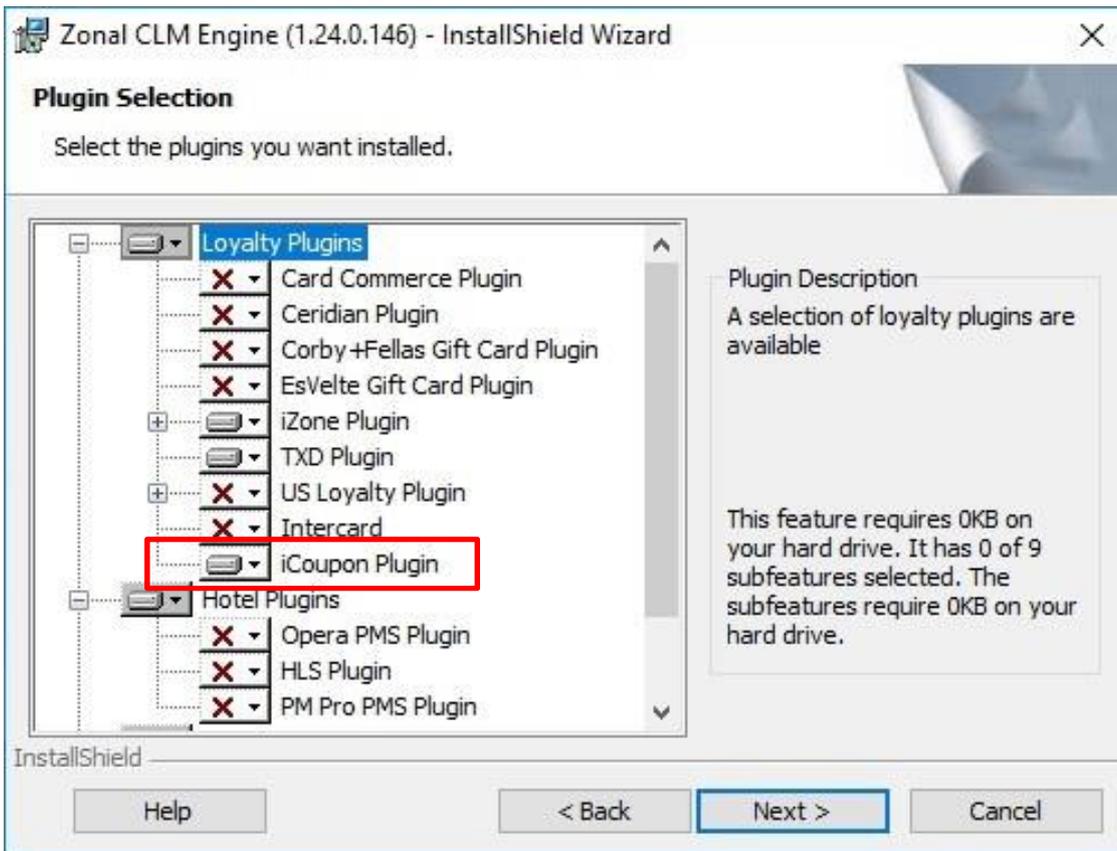
The following applications/versions and services are required to support iCoupon operation within Aztec:

- iZone POS Integration Engine v1.24.0 or later at site
- iCoupon Plugin Software
- Barcode scanner(s) set up for scanning iCoupon vouchers

- Aztec 3.12.2 or later at head office and site
- Any Aztec v3.12.2 sites that wish to operate both iCoupon and TXD vouchers, must run a specific SQL script on each site PC (detailed in *Using iCoupon and TXD Vouchers* on Page 10). Sites of a higher version than v3.12.2 already include this configuration and do not need to run the script.

Installation

The iCoupon Plugin is installed via the iZone installer, included in a separate section reserved for plugins. This task is carried out by Zonal Technical Support staff.



Associated Documentation



iCoupon: Site User Guide - This guide is aimed at site staff and describes how to carry out iCoupon tasks on site POS terminals.

Aztec Configuration

Aztec must be configured as described in this section, before the iCoupon Plugin can be used to process iCoupon vouchers.

- Create iCoupon payment method- see Create iCoupon Payment Method on Page 6
- Assign payment method - see Assign Payment Method to Theme(s) on Page 7
- Add all iCoupon buttons to theme - see Assign iCoupon buttons to Theme(s) on Page 8
- Configure iCoupon plugin - see Base Data Configuration on Page 9

Create iCoupon Payment Method

A new payment method is required for the iCoupon Plugin to correctly be used by the POS:

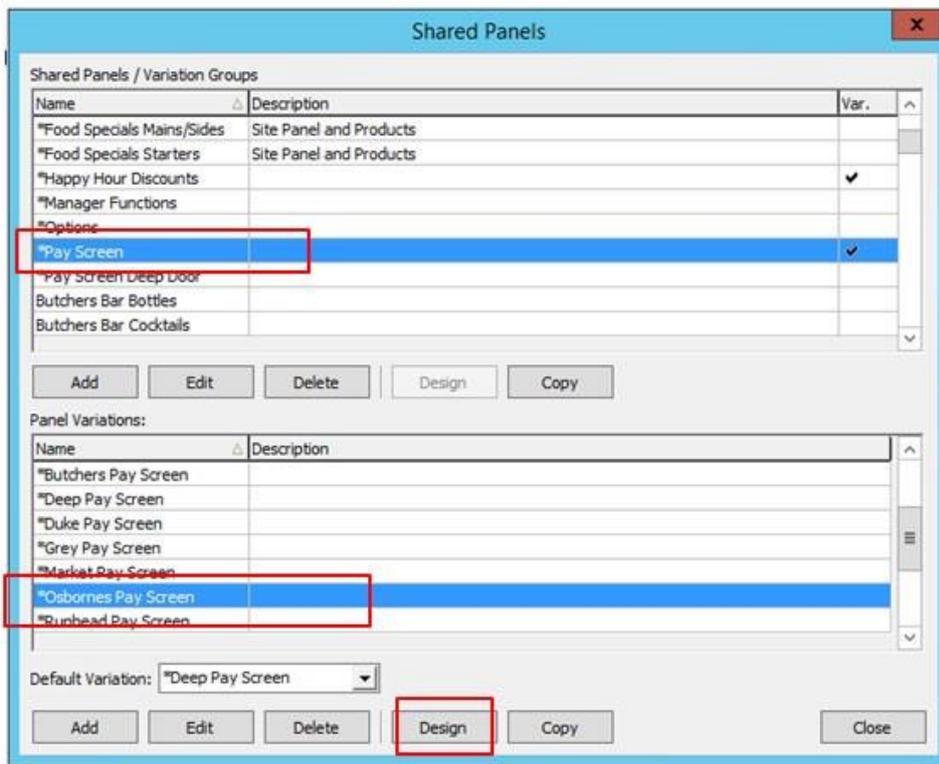
1. From the Head Office Aztec Start Page, open Aztec Finance and select **Configuration | Payment Methods** from the left-hand navigation bar.
2. Click **Add** and create a new payment method as shown in the example below. Select type as 'iCoupon'.

3. In the POS Behaviour group box, a specific product group can be selected or defined to ensure iCoupon vouchers can only be, for example redeemed against food.
4. Also in the POS Behaviour group box, the 'Overpayment is Forfeit' radio button should be selected.

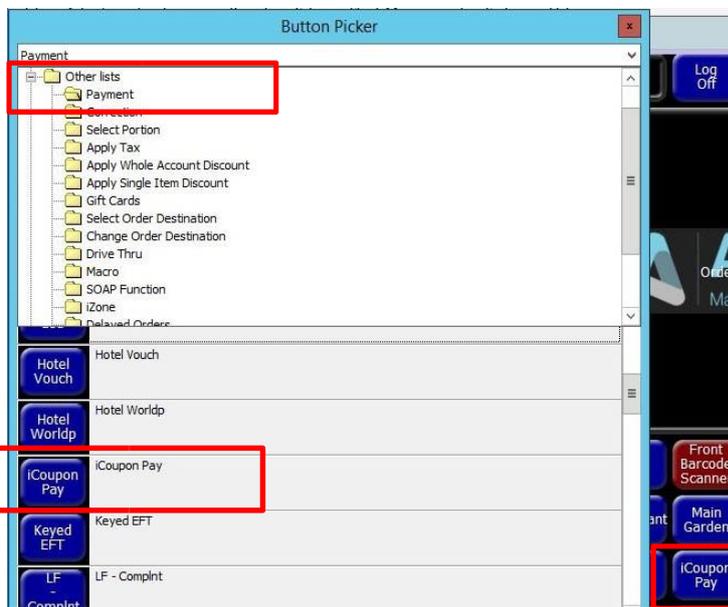
Assign Payment Method to Theme(s)

When the necessary payment method has been created, it must be included on a restricted access or 'hidden' theme panel in Aztec Theme Modelling to allow iCoupon vouchers to be processed.

1. From the Head Office Aztec Start Page, open Aztec Theme Modelling and select **Shared Panels** from the main menu.



2. Select to highlight the required panel in the top pane and the Panel Variation (if applicable) to be changed in the middle pane, and click **Design**.
3. Open the button picker ( locate the new payment method button in the **Other Lists | Payment** folder and add to the panel.

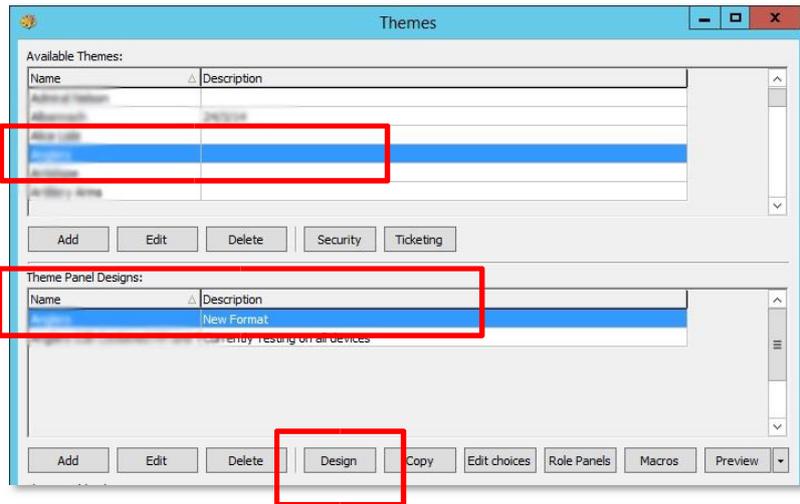


4. Click **Close** and **Close** again to return to the Aztec Theme Modelling main menu.

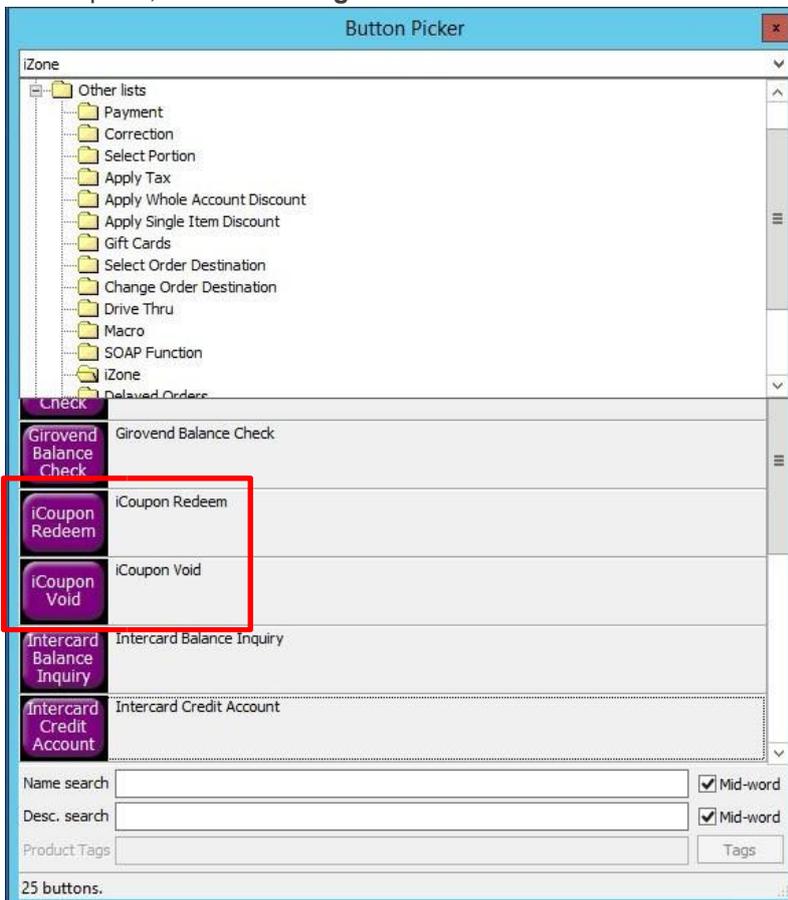
Assign iCoupon buttons to Theme(s)

To enable POS operators to process an iCoupon voucher, the relevant buttons must be included on all the required theme panels in Aztec Theme Modelling.

1. From the HO Aztec Start Page, open Aztec Theme Modelling and select **Themes** from the main menu.



2. Select to highlight the Available Theme in the top pane and the theme panel design to be changed in the middle pane, and click **Design**.



3. Select the panel to which the new buttons are to be added. Open the button picker (), locate the new buttons in the **Other Lists | iZone** folder and add to the panel.
4. Click **Close** and **Close** again to return to the Aztec Theme Modelling main menu.

Base Data Configuration

CLM configuration for the iCoupon plugin must be setup in the Aztec Back office.



Only Zonal technical Support staff can enter the required URLs and security details for this section of plugin configuration.

1. Log into Aztec using your username and password.



2. Select the Base Data module icon on the Aztec Start page.

3. Select **Estate Structure | [Site Tree Node] | CLM Tab**.

4. Select iCoupon from the CLM Plugin Settings section.

CLM Plugin Settings

Plugin:

* Url:

* Client Id:

* Client Secret:

* Location Ref:

* Service Provider Ref:

* Trading Outlet Ref:

* Trading Outlet Name:

Discount Id:

5. Enter all URLs, security and references as necessary.

6. Select **Save** when complete and exit Aztec Base Data.

Please note:

- *Plugin URL* must end with forward slash “/” (eg: <https://icoupon.global/api/>).
- *Trading Outlet Ref* must be unique to each site and communicated with iCoupon. This must also be numeric only.

Send changes to site

For any new Theme and Base Data settings made at Head Office to take effect at site, you must perform a comms as follows:

1. Select **Communications** from the Aztec Start Page.
2. Click **Create Job**.
3. Select the required site(s) and click **Next**.
4. Select the appropriate job options and click **Next**.
5. Enter a suitable timeout and click **Finish**.

Site PC Configuration

Using iCoupon and TXD Vouchers

For Aztec v3.12.2 site systems that use both iCoupon and TXD vouchers, a script must be run on all Site PCs to ensure the Aztec POS uses the same PostTicket API call to CLM for both TXD and iCoupon vouchers.

The new SQL script is called ***TxdPluginSettingsHOAndSite.sql*** and is located in the normal installation folder.

Sites of a higher version than Aztec v3.12.2 already include this configuration and do not need to run the script.

Additional Notes:

- When posting payment, iCoupons 'object reference' must match Aztec's Payment Method ID.
- From iCoupon side, API account needs to be granted permission to use a specific API for this to work.
- The CLM service must be restarted along with Comms and STP after any HO plugin changes.