



Coupon Voucher Server Guide

Campaign and Channel Management

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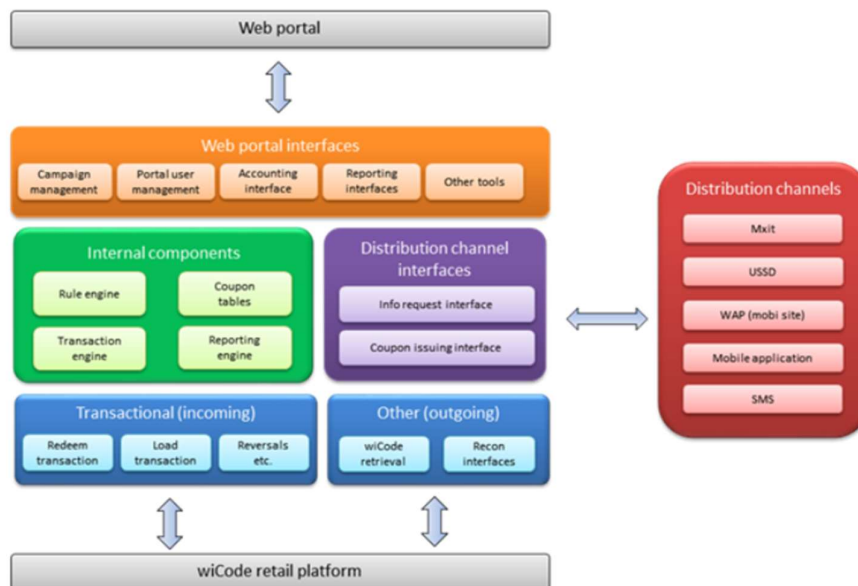
Coupon Voucher Server

What is the Coupon Voucher Server?

The Yoyo Coupon Voucher Server (CVS) is a stored value rule based engine capable of storing complex Coupon, Voucher, and Gift Card Campaign logic. The value proposition of the CVS is heavily based on the real-time transactional interfaces accessed by the wiCode retail platform in order to "switch" Coupon, Voucher or Gift Card transactions from the POS to the CVS for redemption—and all in real-time.

Architecture

The CVS system is a value store system composed of the following internal components:



Rule engine

This is where the Campaign rules are located in terms of which SKU's are linked to a Campaign, the discount of each, which timeframe the Coupon, Voucher or Gift Card is valid for.

Transaction engine

This is a high performance internal switch which load balances traffic from the incoming transactional interfaces from retail and ensures high performance lookups against the rule engine and Coupon tables.

Coupon tables

This is essentially a static configuration of currently "issued" Coupons, as well as archives of redeemed Coupons for a certain Campaign. This is the data store that the reporting engine accesses.



Reporting engine

The reporting engine is a configuration system designed to present data in an elegant way. This system is extremely configurable in terms of the way raw data may be presented for graphing purposes for example.

Surrounding the "core" are three main API interfaces:

Transaction API

Indicated in blue in the image above. The transactional interface is the interface on which the Yoyo Platform authorizes transactions.

Issuer (Distribution) API

The issuer interface is intended for various (mobile) channels to connect to in order to "obtain" a Coupon in the form of a wiCode number.

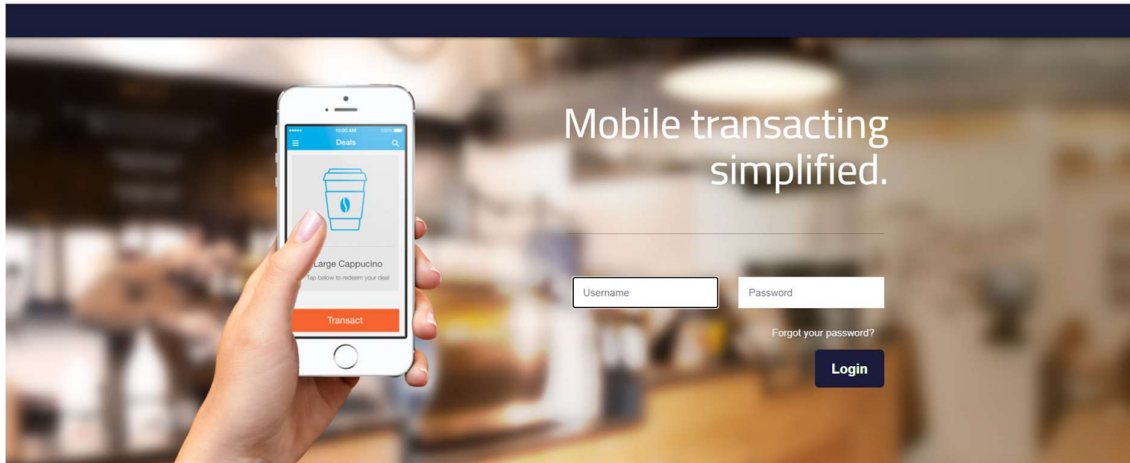
Web Portal API

This interface is intended to be used by the Yoyo CVS portal. It is used to create and report on Campaigns.

Web Portal Interface

The web portal interface is the client-facing interface where the Campaign rules and the Campaign analytics are loaded and reflected, respectively.

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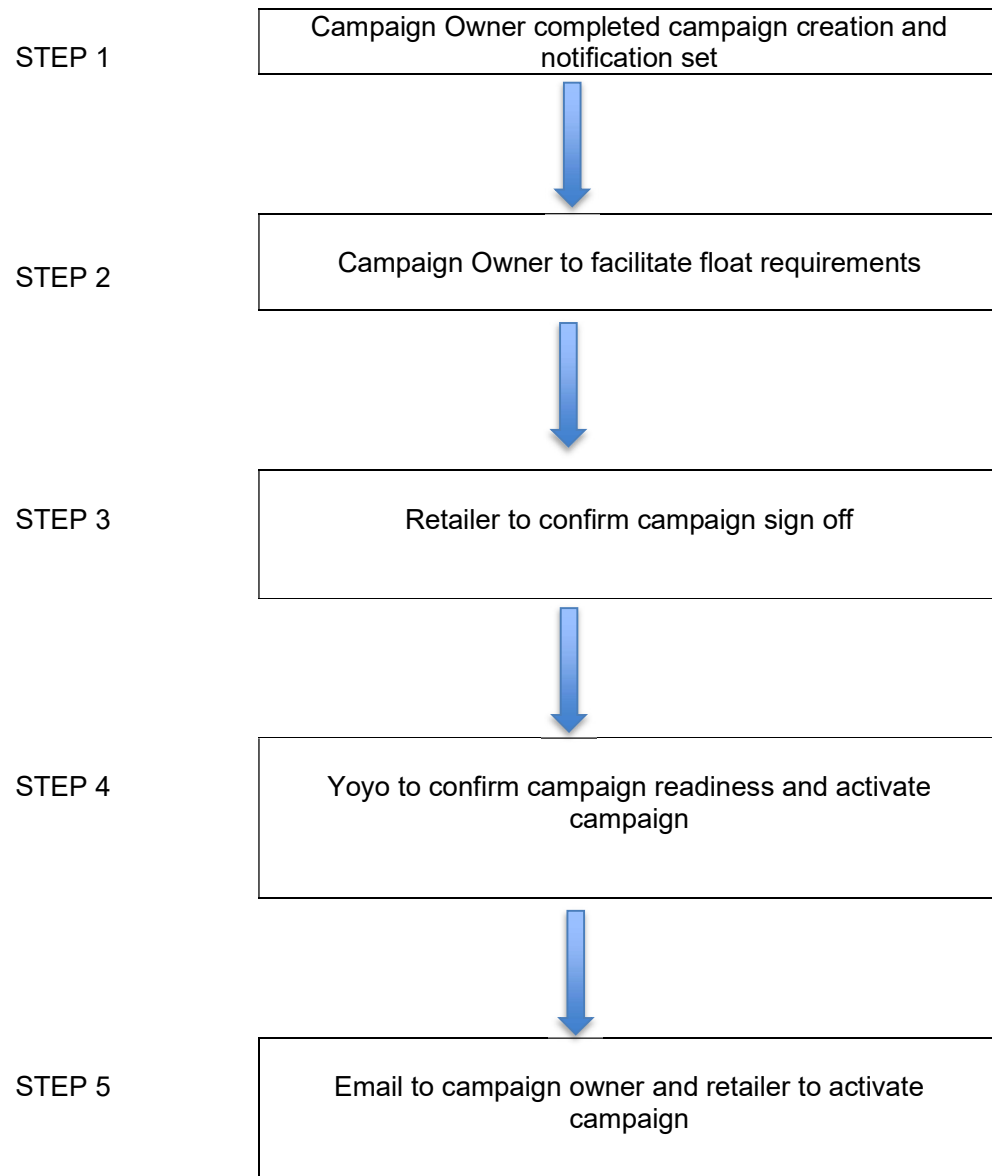
Terminology

Term	Description	Example
Campaign Owner	Entity that manages Campaigns	BrandXXX Campaign Owner
Campaign	A specific promotion running in store	Buy 1kg Brand X Sugar for R15.50
Float	Float allocated to a Campaign Owner	R10 000
Coupon	Product Specific discount linked one or multiple SKU's	R5 off Brand X, 250g Peanut Butter
Voucher	Discount on a full purchase in store. Not linked to a product.	R10.00 off your next purchase
Gift Card	A multiple redemption Voucher with variable amounts	You have a balance of R1000, you can use it many times.
Channel	Mobile Delivery Mechanism and customers point of interaction	Mobile App / SMS / .Mobi / USSD / response SMS
Channel Owner	Entity that manages the channel to which the Campaigns are linked	BrandGroup Channel Owner
wiCode	One Time Transaction Code presented to the customer and entered at retailer point of Sale WICODE PRONOUNCIATION { Y-CODE }	12 34 567

Business process overview – Campaign Owner

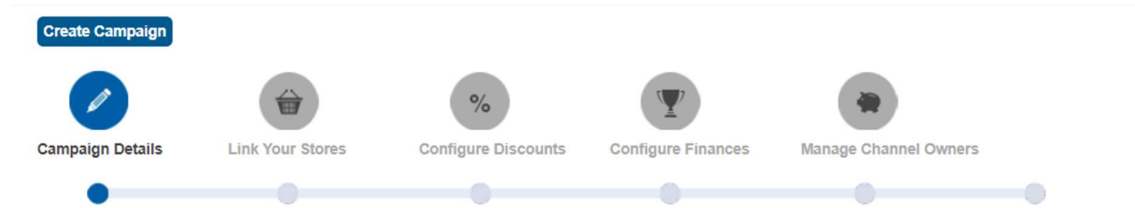
There are 6 steps involved in taking a Campaign live on the CVS system. This ensures security for the retailer to ensure that there is enough stock the required product and that the Campaign has been set up correctly.

Campaign Go Live Process



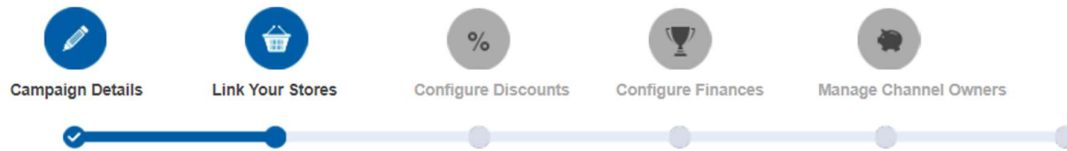
Campaign Setup

Step1: Campaign Details



Field	Description	Example
Campaign Name	Campaign Name	R5 off BrandX 1kg Sugar
Coupons or Voucher	Product specific discount? Yes = Coupon Is this a basket discount? Yes = Voucher	Coupon
Campaign Description for End User	What the Campaign entails – depending on the mobile mechanism (USSD/SMS/App etc.) this could be the description used for the customer.	R5 off BrandX 1kg Sugar
Terms and Conditions	Specific terms and conditions for the Campaign.	Canal Walk store only for the month of June 2013.
Campaign Image URL	Images can be uploaded which get saved Into a Yoyo directory. Only image files can be updated. It is the Campaign Owner's responsibility to ensure that the image is the correct size and dimensions required for the channel.	
Campaign Start to End Date	Date range applicable to the Campaign. <u>Start Date</u> : The earliest date between when a wiCode will be issued OR the code is valid in store. <u>End Date</u> : The last date the wiCode can be redeemed in store.	
Voucher expires in (days)	If the wiCode is valid for a specific period after it is issued (e.g. 24 / 48 hours after issue).	

Step 2 :Link your Stores

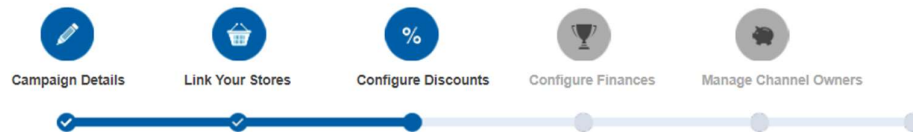


Each Campaign can be linked to pre- authorized merchants and retailers.

Retailer	Subdivisions
ASDA	Eastern Cape
At The Hide Pty Ltd	Free State
Baby City	Gauteng
Barracuda	Gauteng
Beaver Canoe	Kwazulu-Natal
Blue Label Distribution	Limpopo
Bold Body Gym	Mpumalanga
Bootlegger	Northern Cape
Born Fabulous	KwaZulu Natal
Bounce inc	North West
Boxer	Western Cape

Enter store to search

Step 3: Configure Discounts



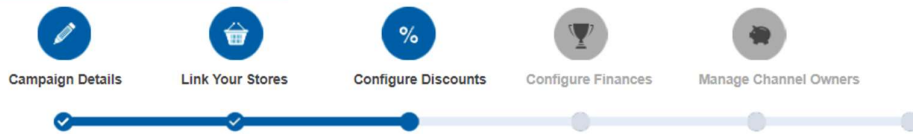
Step 3.1: Configure Discounts – Voucher

For a Voucher Campaign the Campaign Owner can capture their R or % discount. The discount is applied to the **whole basket amount**.

Example 1: R50 Voucher: Customer spends R130 in store, Voucher gives him R50 off, R80 to settle.

Example 2: 10% Voucher: Customer spends R140 in store, Voucher discounts R14, R126 to be paid in by the customer.

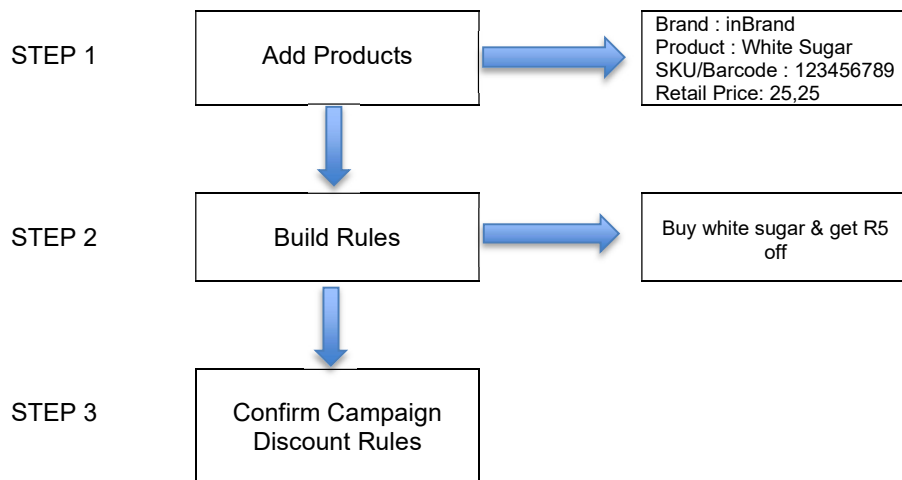
Note: For % off Vouchers, a maximum discount to give the customer can be set by capping the basket amount.



Step 3.2 Configure Discounts – Coupon

For a Coupon Campaign it is important to keep product linking and rules as simple as possible to ensure that all the relevant parties are aligned in what the Coupon entails (e.g. marketing, sales, stock keeping, user communication, user expectation, supplier understanding).

Follow 3 steps when setting up a Coupon Campaign:



Important Note:

- Once you have created and saved rules, you cannot go back and edit them, as once the campaign is live any changes to the discount rules will negatively affect the reporting.
- For % off Coupon Campaigns, the product value [Estimated Retail Price of SKU] captured will be the value that the % discount is calculated from.

Part 1: Add Products

Configure Discounts

Campaign: Dummy Campaign

Bulk Rule Upload

Bulk Upload
Bulk Upload Async

Filter Products

Enter Product here
Enter SKU here

Brand
inBrand
Product
White Sugar
SKU/Barcode
123456789
Retail Price
23,25

Search
Create Product

Brand	Product	SKU/Barcode	Retail Price	Status	Action

Part 2: Build Rules

Create Discount Rule

☒ Amount Discount
 ☐ Percentage Discount

Create Rule

Brand	Product	SKU/Barcode	Retail Price	Qty	Action
inBrand	White Sugar	123456789	2325	1	Remove

Discount Rule products: Every item that needs to be in the basket must be in this list. This would vary for different Campaigns: Buy 2 get R5 off [would require the item to be twice in this list], Buy Product A get R5 off [item appears once as above], Buy Product A and Product B and get R2 off [both Product A and Product B will be in the list].

Part 3 : Confirm Campaign Rules

Create Discount Rule

☒ Amount Discount
 ☐ Percentage Discount

Create Rule

Brand	Product	SKU/Barcode	Retail Price	Qty	Action
inBrand	White Sugar	123456789	2325	1	Remove

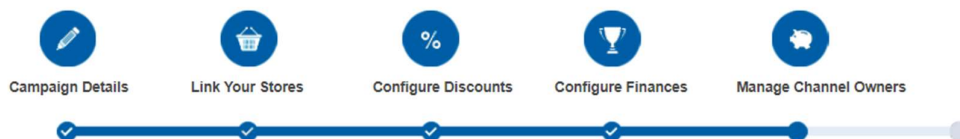
Filter Discount Rule

Search Discount Rule

Search

Discount Rule	Discount (Amount)	Discount (%)	Status	Action
123456789	5.00	0%	Active	Deactivate

Step 4 : Configure Finances



The Campaign Owner is able to select whether the stores will be settled with funds, or not. When 'Settle Funds to Store': Yes = Stores / Head office to be paid daily or weekly as per retailer setup. Even if a Campaign is not settled, if it is a reward Campaign, float is required.

Configure Finances

Settlement percentage (what percentage of discount to settle the store)

Third party settlement percentage (what percentage of discount will be settled to the store via a third party)

Third party settlement reference

Select float to use

☐ Campaign Owner Float ☒ Campaign Float

Max number of vouchers to be issued

Max number of vouchers to be issued per day

Max number of vouchers per customer

(0 denotes no limit)

Max number of redemptions per customer per day

(0 denotes no limit)

Max number of vouchers per basket ⓘ

(0 denotes no limit)

Min Basket Value

Max Basket Value

(0 denotes no limit)

Max Discount Amount

(0 denotes no limit)



Field	Detail	Example
Max number of vouchers to be issued	Maximum number of Vouchers allowed to be issued for the full duration of the Campaign	1 000 - maximum number of Vouchers issued for the Campaign
Max number of Vouchers to be issued per day	Selected if the Campaign has a per day limit of issued wiCode	
Max number of vouchers per customer	Number of Vouchers each customer is allowed to redeem.	1 : Each customer can only redeem once.

Campaign Float: Float balance is updated with every redemption in store. It is essential to ensure that there is enough float and to consider topping up a float if redemption rate is higher than expected.

Settled Campaign: client provides funds upfront for Campaign to Yoyo to settle retailer on redemption

Non-settled Campaign: client settles with retailer directly, no funds to Yoyo *on condition that retailer and finance department confirm the merchant/VSP/ Campaign combination supports non settled Campaign configuration.

Step 5 : Manage Channels



Each Campaign Owner will have visibility to see the Channel Owners that are linked to their profile. The Channel Owner is then responsible for linking it to a specific channel [customer facing delivery mechanism]. The Vouchers / Coupon will only be able to be issued once a channel has been linked by the Channel Owner.

Manage Channel Owners

	All None
DealHound	<input type="checkbox"/>
Frikkie	<input type="checkbox"/>
MichSczLoyalty	<input type="checkbox"/>
POSprvider	<input type="checkbox"/>
Training	<input type="checkbox"/>
wiGroup	<input checked="" type="checkbox"/>
ZappQA	<input type="checkbox"/>

Reporting

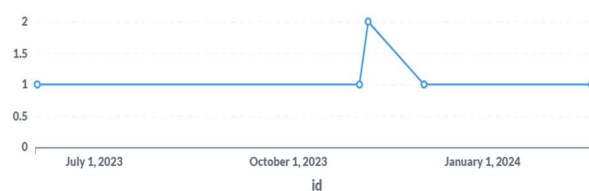
There are multiple authenticated levels for viewing reports on the Yoyo web portal. Role based reporting for departments such customer care, finance and management where access to the finer Campaign details and editing of Campaigns is not necessary.

The Campaign Owner has access to the following report views:

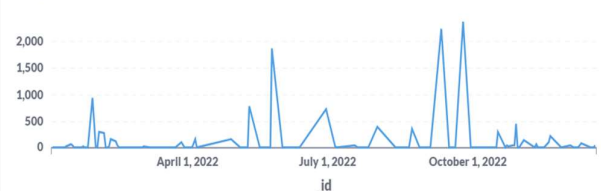
Dashboard View

The dashboard view provides a summary view of ALL Campaigns for that Campaign Owner.

MongoDB: Voucher Redeemed Count Daily Timeseries



MongoDB: Voucher Issued Count Daily Timeseries



MongoDB: Voucher Basket and Processed Amount Daily Timeseries

● basket_amount ● processed_amount



Campaigns Rand Performers

Allows the Campaign Owner to monitor the Campaigns which have the higher Rand performers vs the non-performers.

Campaigns Redemption Performers

Allows the Campaign Owner to monitor the Campaigns which have the highest redemption performers vs the non-performers.

Channels – Issued vs Redeemed

Allows the Campaign Owner to monitor which Campaigns are driving the customers in store to redeem Coupons.

Business process overview – Channel Owner

For a wiCode to be issued a Campaign needs to be linked to a channel Issuer ID, thus the Channel Owner log in profile has the ability to create multiple groups and multiple channels within groups.

Adding a new group:

Add new Group

Name

Callback Notification

None

Callback URL

Evaluate

Campaigns

Hide campaign (%)

100

Link Campaigns by default

☐ Yes

Allow Mobile Number Transactions

☐ Yes

Cancel

Save

Add new Channel

Name

Interface ID

New Password

SMS Mobisite URL

Sms On Issue

Optional

Cancel

Save

Groups can be used for different business cases; mostly they are used for different types of Campaign grouping such as and Mobile Application or a Website.

Linking Campaigns to Groups

yoyo

[Coupons](#)
[Gift Cards](#)
[Subscriptions](#)
[Channels](#)
[Delete Customers](#)
[My Account](#)
[Logout](#)

Campaigns

Issues and Redemptions

User: POSproviderChannelOwner

Campaigns

Link Campaigns to Groups

Categories & Ranking

Filter Campaigns

Channel Group

POSProviderSMS

Campaign Type

Coupon

Excluded Campaigns

	Id	Name	Campaign Owner	Start Date	End Date	State
<input type="checkbox"/>	50737	Apparel Booster Sportsmans Warehouse 75% (R750 Cap)	DSYActiveGearApparelBoosterSWCampaignOwner	2020-11-19	2032-12-31	Activated
<input type="checkbox"/>	52436	BabyCity Integration	BabyCityCampaignOwner	2023-02-17	2024-12-31	Activated
<input type="checkbox"/>	52517	Vista POS test Campaign	POSproviderCampaignOwner	2023-05-22	2024-05-29	Activated
<input type="checkbox"/>	52821	R10 Off SPUR Burger	POSproviderCampaignOwner	2023-10-19	2024-10-31	Activated
<input type="checkbox"/>	52851	Apple iPad 10th Gen 64GB WiFi	POSproviderCampaignOwner	2023-11-15	2024-11-30	Activated
<input type="checkbox"/>	52939	Shell coupon testing campaign	POSproviderCampaignOwner	2024-02-13	2024-05-31	Activated
<input type="checkbox"/>	53009	Toys R Us Discovery Car Seat POS SKU testing 20%	POSproviderCampaignOwner	2024-03-13	2024-07-31	Activated
<input type="checkbox"/>	53043	10% Off SPUR Burger (Set Price) New SKU	POSproviderCampaignOwner	2024-04-19	2025-04-30	Activated



Linking Campaigns to Groups with Categories

yoyo

CouponsGift CardsSubscriptionsChannelsDelete CustomersMy AccountLogout

CampaignsIssues and Redemptions

User: POSproviderChannelOwner

Campaigns

Link Campaigns to Groups

Categories & Ranking

Filter Campaigns

Channel GroupPOSProviderSMSis

Campaign TypeCoupon

CategoryAll

Create Category

Included Campaigns

Rank	Id	Name	Campaign Owner	Start Date	End Date	State
No data available!						