

# 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'.

Save Discard			
Details			
Payment Method Details		POS Display Details	e.
* Payment method name:	iCoupon Pay	Generate button text:	Automatically from name
Payment method description:			O Manually
		POS button text:	iCoupon
Account code: (1)			Pay Pay
Use fixed payment amount:			
Barcodes unique per account: ④		POS Behaviour	
Туре:	iCoupon	Product group:	food only 🗸
0		Open cash drawer:	
Amount of		Auto print receipt:	
Diad as seed as state	00.03	Restrict orderline corrections: (1)	
rixed payment amount.	20.00	Overpayment is:	Forfeit
Declaration Details			
Auto declare:			

- 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.



Name	Description	Var.	1
"Food Specials Mains/Sides	Site Panel and Products		1
"Food Specials Starters	Site Panel and Products		-
"Happy Hour Discounts		~	
Manager Functions			
*Optionc		4	
Pay Screen		~	
Pay Screen Deep Door			
Butchers Bar Bottles			_
Butchers Bar Cocktails			
Add Edit	Delete Design Copy		
Add Edit	Delete Design Copy		
Add Edit Panel Variations: Name 4 "Butchers Pay Screen	Delete Design Copy		1.
Add Edit Panel Variations: Name TButchers Pay Screen TDeep Pay Screen	Delete Design Copy		] 2
Add Edit Add Edit Canel Variations: Name  Dutchers Pay Screen  Duke Pay Screen	Delete Design Copy		].
Add Edit Add Edit Canel Variations: Name Deep Pay Screen "Deep Pay Screen "Duke Pay Screen "Grey Pay Screen "Grey Pay Screen	Delete Design Copy		
Add Edit Add Edit Canel Variations: Name Deep Pay Screen Deep Pay Screen "Duke Pay Screen "Grey Pay Screen "Market Pay Screen "Market Pay Screen	Delete Design Copy		
Add Edit Add Edit Canel Variations: Name  Dutchers Pay Screen  Duke Pay Screen  Couke Pay Screen  Agrey Pay Screen  Agrey Pay Screen  Couke Pay Screen  Couk	Delete Design Copy		
Add Edit Add Edit Canel Variations: Name Dutchers Pay Screen Duke Pay Screen Grey Pay Screen Market Pay Screen Duke Pay Screen Screen Duke Pay Screen Cosbornes Pay Screen Bunhead Pay Screen Cosbornes Pay Screen Cosborne	Delete Design Copy		

- 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.

Button Picker	×
Payment	~
Dther lists	<u>^</u>
Carrestion     Select Portion     Apply Tax     Apply Whole Account Discount     Apply Single Item Discount     Gif Cards     Select Order Destination     Cange Order Destination	=
Drive Thru     Macro     CooP Function     Icone     Icone     Delawed Ordere	
Hotel Vouch	=
Hotel Worldp	
iCoupon Pay Pay	Barcoscar
Keyed EFT	ant Gard
LF - Compint	iCou Pa

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.



<b>9</b>	Themes 📃 🗖	x
Available Themes:		
Name	Description	^
Administ Teleson		
Abarrah	26/204	
Altar Little		
Angle 1		
Landing Street		
the same is not a		~
Add Edit	Delete Security Ticketing	
Theme Panel Designs:		
Name	Description	^
Angleis	New Format	
a best of the second second	samenay resung on an devices	=
		~
Add Edit	Dalata Dasima Cany, Edit shairaa Dala Dasala Marsaa Dravinu	
Adu Edit	Delete Design Copy Edit choices Role Panels Macros Preview	-

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**.

Button Picker	×
iZone	¥
Cher lists	^
Correction  Correction  Apply Tax  Apply Whole Account Discount  Gift Cards  Change Order Destination  Change Order Destination	Ξ
	~
Check Delayed Orders Girovend Balance Check Balance Check	=
iCoupon Redeem	
iCoupon Void	
Intercard Intercard Balance Inquiry Balance Inquiry	
Intercard Intercard Credit Account Credit Account	-
Name search I Mid Desc. search I Mid	-word
Product Tags	gs
25 buttons.	

- 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:	iCoupon	~	
* Url:			
* Client Id:			
* Client Secret:			
* Location Ref:			
* Service Provider Ref:			
* Trading Outlet Ref:			
* Trading Outlet Name:	l		
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: <u>https://icoupon.global/api/</u>).
- *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.