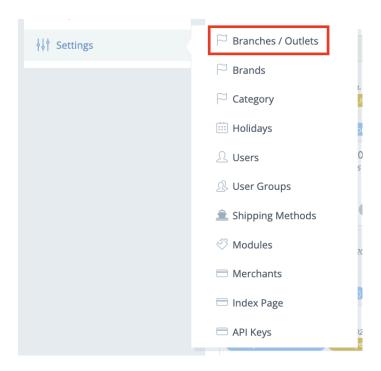
# User Guide - Profile Setting

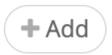
# Getting Started - Adding Branches

To begin creating a campaign, we need to set up Branches. Branches represent additional locations associated with a restaurant chain or brand.

Step 1: Navigate to the Settings menu and select "Branches/Outlets".



Step 2: Click on the "+Add" button located at the top right corner to create a new branch.



#### Step 3: Fill in the required or optional information for the branch.

#### Required Fields:

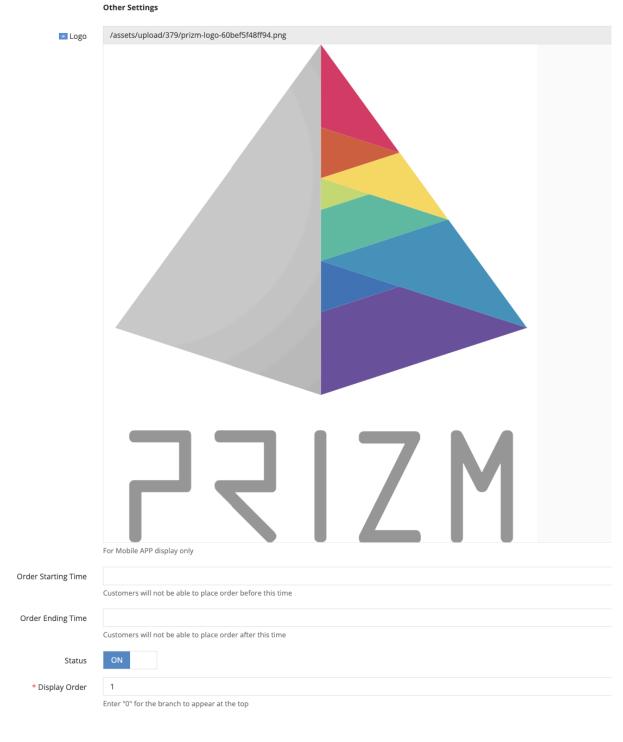
- **Branch Short Code:** This is a system-generated code used to identify the branch within the system. It is for internal use only and will not be displayed on the order page.
- Branch Name: Enter the name of your branch.
- **Country/Region:** Specify the country or region where your branch is located.
- **Display Order:** Determine the order in which this branch will appear in the backend system.

#### Optional but Informative Fields:

- **Email:** Provide the contact email address for your branch.
- Address: Enter the physical location of your branch.
- **Branch/Meal Description:** Add any additional information or description about your branch or the meals offered.
- **Opening Time:** Specify the operating hours for your branch.
- **Email Sender Address:** Enter the email address that will be used as the sender for branch-related emails, typically used for redemption or inquiries.
- **Email Sender Name:** Enter the name that will be displayed as the sender in branch-related emails, typically used for redemption or inquiries.
- **Logo:** Upload the representative image or logo of your branch.

Please note that the "Required Fields" are **necessary for completing the form**, while the "Optional but Informative Fields" provide **additional details** that can enhance the branch's profile.

| * Branch S             | Short Code             | Prizm   |   |
|------------------------|------------------------|---|---|
|                        |                        | System code for branch identification. For system usage only, and will not be displayed on order site.                            |   |
| 💌 * Bra                | nch Name               | Prizm Cafe  |   |
| Telephon               | ne Number              |   |   |
|                        | Email                  | info@prizm.digital  |   |
| Email Inquiry Email Qu | uery String            |   |   |
|                        |                        | (optional) subject=Reservation Query about Prizm Cafe Booking:# {OrderID} &body=Reservation inquiry:                              |   |
|                        | Fax                    | • 27963076  |   |
|                        | FdX                    |   |   |
| Add                    | ress Line 1            | 觀塘海濱道165號 SML Tower 15/F-16/F   |   |
| Add                    | ress Line 2            |   |   |
|                        | City                   |   |   |
|                        | State                  |   |   |
| * Count                | ry / Region            | ■ Hong Kong (香港) ×  | ~ |
| P                      | ostal Code             |   |   |
| ■ Branch / Meal D      | Description            | Three-star Michelin restaurant in Hong Kong   |   |
|                        |                        | To supply customers with branch or meal description details placeholder: e.g., Top Italian three-star Michelin restaurant in town |   |
| Opening Time           | Daily 9am to           | o 6pm   |   |
| , 3                    | For description        | only, and it will not affect the actual shop setting placeholder: e.g., Daily 9-6pm , will be closed for renovation in June.      |   |
| Parking information    | Free Valet P           | arking  |   |
|                        |                        |   |   |
|                        | Notification           | ectings   |   |
| Email Sender Address   |                        |   |   |
| Email Sender Name      |                        |   |   |
| Email BCC Address      |                        | rate addresses with comma with no empty space   |   |
|                        | Order confirma         | ation Email list (BCC) Order confirmation emails will be sent to the addresses listed here  |   |
| Reply-To Email Address | The email addr         | ress where reply message is sent if you want the reply to go to an email address that is different than the Email Sender Address. |   |
| Reply-To Header        |                        |   |   |
|                        | 055                    |   |   |
| Auto Order Report      | OFF<br>Enable this opt | ion will be giving you an email for order reports automatically in mid-night for the coming booked orders.                        |   |



Step 4: Toggle the status to "ON" to activate the branch.

Status ON

Step 5: Proceed to edit the remaining languages, if applicable.



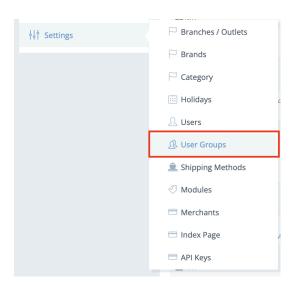
Step 6: Click on the "Save" button to save your changes.



## Getting Started - Adding Users

By adding users to a user group, you can assign varying access rights to different users within the group. This functionality is especially useful for hotels with multiple restaurants or restaurants with different branches. It allows for the **allocation of specific access rights to various managers across different branches**.

Step 1: Navigate to the Settings menu and click "User Group".



Step 2: Click on the "+Add" button located at the top right corner to create a new user group.



Step 3: Fill in the details of the user group.

#### Required Fields:

- **Name:** Enter the name of the user group, such as the name of the restaurant or branch.
- **Title:** Provide the title or role associated with the user group, for example, "Managers" or any other relevant designation.

#### Optional Fields:

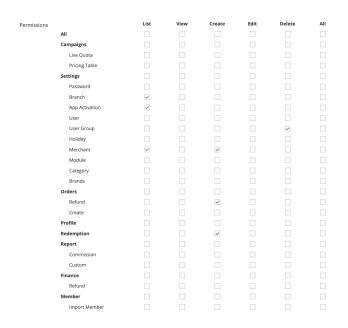
- Description: Add any additional information or description about the user group, if applicable.
- **Sort order:** Determine the order in which this user group will appear in the backend system.

| * Name      | Administration Department |
|-------------|---------------------------|
| * Title     | Admin                     |
| Description | For redemption purposes   |
| Sort Order  | 3                         |
| Example:    |                           |

0

# Step 4: Check the boxes to specify the sections that this User Group should have access to.

- List: To be able to view the listing without the editing access.
- View: Permits viewing without editing privileges.
- Create: Enables the creation of new items.
- Edit: Grants permission to modify existing items.
- **Delete:** Allows the removal of existing items.
- All: Provides access to perform all of the above actions.



Live Quota: The setting to control the availability of all products.



Pricing Table: Access to the pricing table for a specific campaign.

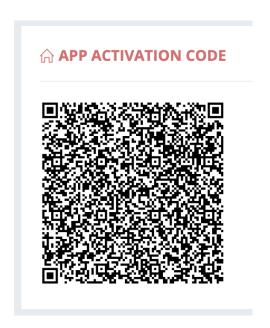


• Password: The access of managing login password for each user account.



• **Branch:** The settings for each branch, including branch details, status, and availability, and more.

• App Activation: The activation of the branch QR code.



• **User:** The settings for each user, including user details, branch assignment, and access, and more.



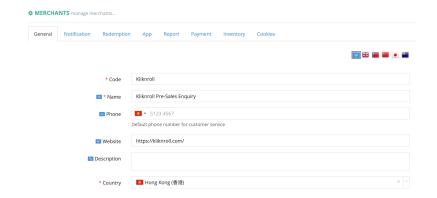
• User Group: The user access permissions for each group.



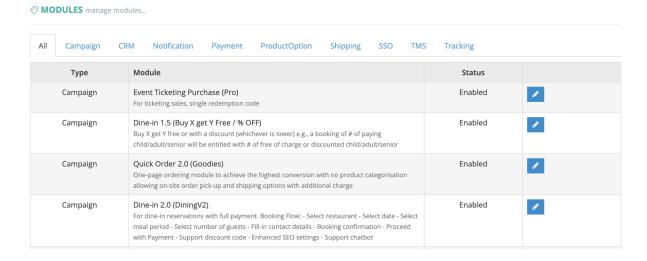
• Holiday: The setting of off-time/closed dates for each branch.



• **Merchant:** The merchant settings in the admin panel, including merchant info, redemption settings, payment methods, and more.



• **Module:** The settings for each module; note that each module has different configurations.



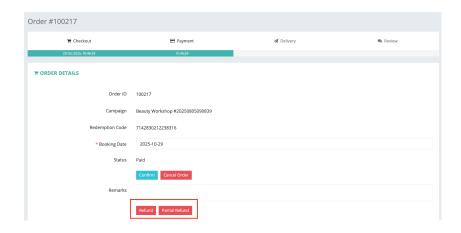
 Categories: The product category settings for each brand. Note that Category is different with product group.



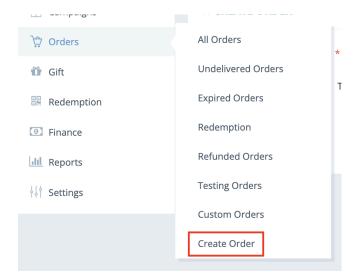
• **Brands:** The brand setup for a single merchant.



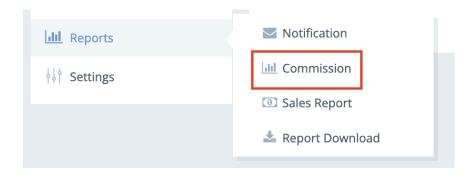
• Refund (Order): The refund settings for each order.



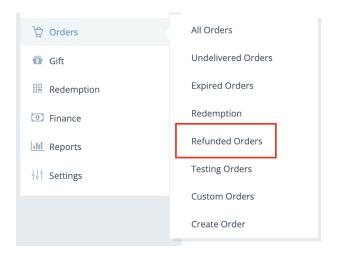
• Create: The access to create orders.



• Commission: The access to commission reports, including order details.

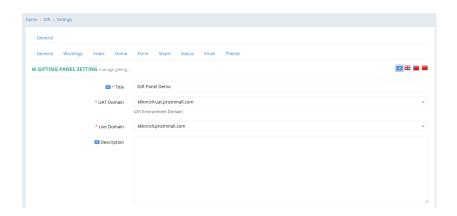


- **Custom:** The access to custom reports created for specific merchants; these appear only if configured.
- Refund: The access to process refund orders.

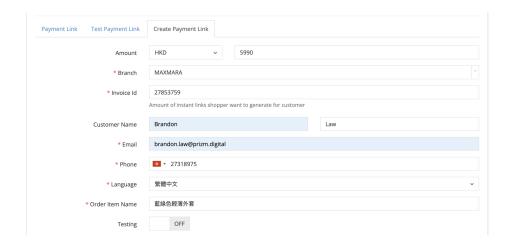


Import Member: The access to import new members into the system via CSV.

• **Gifting Panel:** The settings of the Gift Panel, including wording, form, buttons, theme, and more.



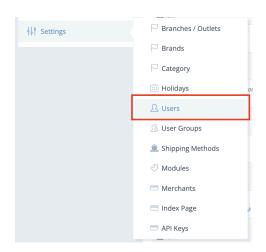
• **Payment Link:** The settings of payment links, including payment item, amount, branch, invoice, and more.



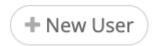
Step 5: Click on the "Save" button to save your user group's settings.



Step 6: After creating the User Group, navigate to the Settings menu and click on "Users".



Step 7: Click on the "+New User" button located at the top right corner to create a new user.



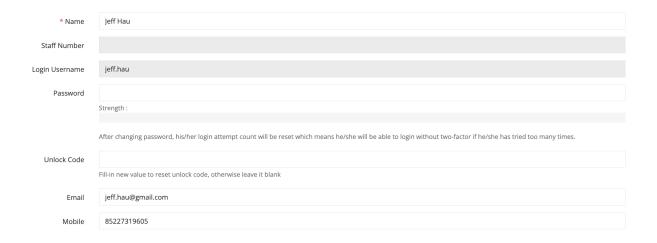
Step 8: Fill in the details of the user.

#### Required Fields:

- Name: Insert the name of the user/staff.
- Staff Number: Insert the staff number for reference purposes.
- Login Username: Insert the unique identifier used to access the account
- Password: Insert the confidential code that grants authorised access.

#### Optional Fields:

- **Unlock Code:** Insert the code to unlock the user. It can be any phrases or numbers. Leave it blank if not applicable
- Email: Insert the email of the user/staff.
- Mobile: Insert the contact number of the user/staff.



Step 9: Toggle the status to "ON" to activate the user.



Step 10: Grant permission to the user and select the user group.

- **All Branches:** Users will be granted permissions for all existing branches and any branches created in the future. Please select the appropriate user group.
- **Specific Branches:** Users will only be granted permissions for specific branches that have been created. For each branch, please select the corresponding user group.



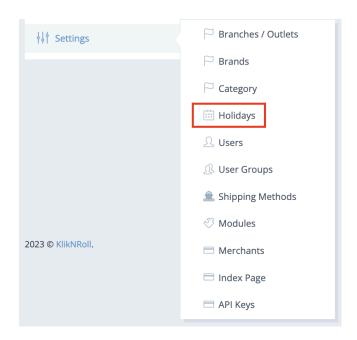
Step 11: Click on the "Save" button to save your user group's settings.



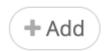
# Adding Holidays

In order to configure the availability of products during specific holidays, you need to follow a series of steps. This guide will walk you through the process of setting up your product settings for holidays.

Step 1: Navigate to the Settings menu and select "Holidays".



Step 2: Click on the "+Add" button located at the top right corner to create a new branch.



Step 3: Insert the general information of the holiday.

- Country: The nation associated with the particular holiday.
- The date: The specific date when the holiday is observed.
- Name: The title or designation of the holiday.



Step 4: Click on the "Save" button to save your holiday's settings.



Step 5: Navigate back to the product tab. Next, locate the product group/child that will be available during the holiday and click on the "Edit" option.



Step 6: Select the "Holiday" option from the Days of Availability (or Available Days) choices to activate the product for the predetermined holidays set in Steps 1-4.

Days of Availability



Step 7: Click on the "Save" button to save your product settings. This particular product will be accessible during the holiday season.



# Setting up SMS

SMS confirmation is a feature available for specific modules. After a customer makes a payment, they will receive a confirmation via SMS. You can configure this feature through the Wording tab.

Step 1: Navigate to the "Wordings" Tab.



#### Step 2: Insert the order SMS Message.



- Restaurant name: <!-{\$branch.name}->
- Booking Date: <!-{\$booking\_date}->
- Redemption code: <!-{\$order.redemption\_code}-->
- Order page shorten URL: <!-{\$shorten\_url}->
- Order id: <!-{order.merchant\_order\_id}-->

Step 3: Preview your SMS message. If you made any changes in Step 2, kindly click "SAVE" and refresh the page to see the updated preview.

Step 4: Once confirmed, click on the "Save" button to save your SMS settings.



# Theme Settings

Users have the ability to personalise the colours and designs of different components in their campaign through theme settings. **Each module may possess distinct yet closely related theme settings**.

Step 1: Set up the colours or images of the theme. Kindly refer to the **RED** box or area.

 Header Image
 Hint: The header image will replace the header banner and overlap it. You need to change the header image for all languages.



Header Background Colour
 Hint: The header background colour setting will modify the header of the calendar

#### and date-picker as well.



| 0 | 2023年 六月 |    |    |    |    |    |    |  |    |    | 20 | 23年 七 | 月  |    | 0  |
|---|----------|----|----|----|----|----|----|--|----|----|----|-------|----|----|----|
| E | 3        | _  | =  | Ξ  | 四  | 五  | 六  |  | 日  | _  | =  | Ξ     | 四  | 五  | 六  |
|   |          |    |    |    | 1  | 2  | 3  |  |    |    |    |       |    |    | 1  |
| 4 | 1        | 5  | 6  | 7  | 8  | 9  | 10 |  | 2  | 3  | 4  | 5     | 6  | 7  | 8  |
| 1 | 1        | 12 | 13 | 14 | 15 | 16 | 17 |  | 9  | 10 | 11 | 12    | 13 | 14 | 15 |
| 1 | 8        | 19 | 20 | 21 | 22 | 23 | 24 |  | 16 | 17 | 18 | 19    | 20 | 21 | 22 |
| 2 | 5        | 26 | 27 | 28 | 29 | 30 |    |  | 23 | 24 | 25 | 26    | 27 | 28 | 29 |
|   |          |    |    |    |    |    |    |  | 30 | 31 |    |       |    |    |    |

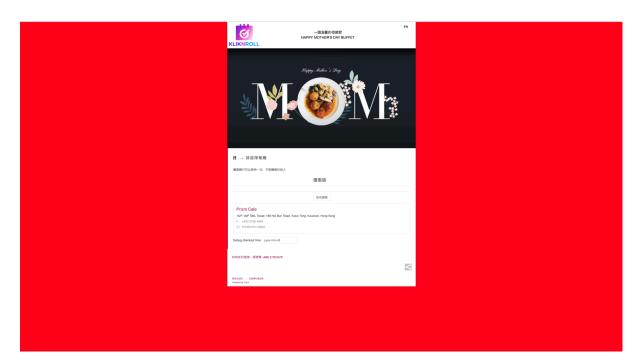
#### • Header Font Colour



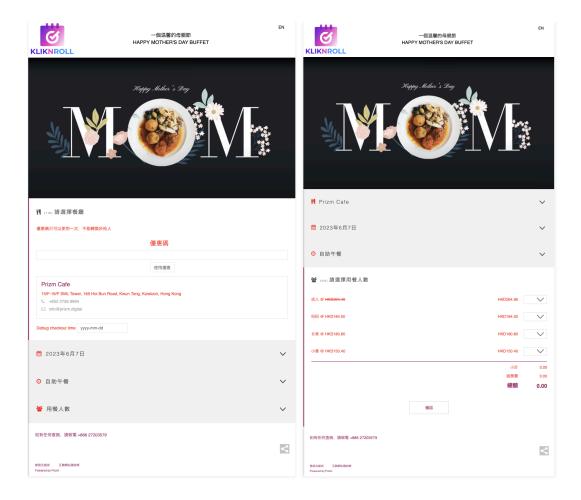
Banner Image
 Hint: You need to change the banner image for all languages.



Body Background Colour



• Body Font Colour



Theme Main Colour

https://drive.google.com/file/d/1qJmOFQ8CarAt2IS3ZIflp8vt0PbNaepI/view?usp=sharing

• Section Active Background Colour

https://drive.google.com/file/d/1SWS82Fe8vv3X4wTE08lgtrq2WOhmXCju/view?usp=sharing

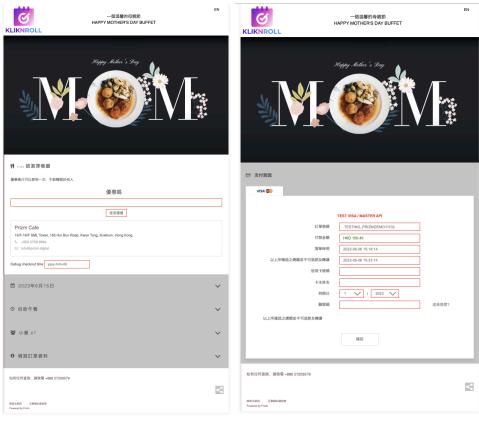
• Section Inactive Background Colour



• Section Inactive Border Colour

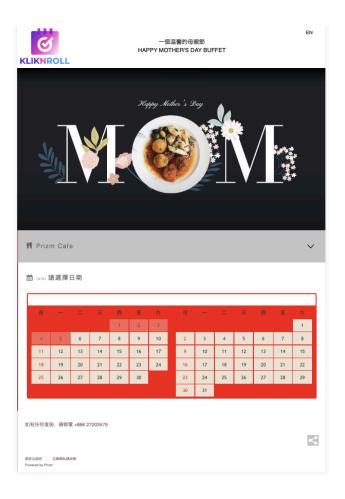


• Input Border Colour





Datepicker Background Colour



#### • Datepicker Selected Date Colour

#### 巤(2/6)請選擇日期

| 日  | _  | =  | Ξ  | 四  | 五  | 六  | 日  | _  | =  | Ξ  | 四  | 五  | 六  |
|----|----|----|----|----|----|----|----|----|----|----|----|----|----|
|    |    |    |    | 1  | 2  | 3  |    |    |    |    |    |    | 1  |
| 4  | 5  | 6  | 7  | 8  | 9  | 10 | 2  | 3  | 4  | 5  | 6  | 7  | 8  |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 | 9  | 10 | 11 | 12 | 13 | 14 | 15 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 | 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 25 | 26 | 27 | 28 | 29 | 30 |    | 23 | 24 | 25 | 26 | 27 | 28 | 29 |
|    |    |    |    |    |    |    | 30 | 31 |    |    |    |    |    |

Datepicker Hover Date Colour



Step 2: Fill in Custom Css if applicable.

 Custom Css: Custom CSS refers to the practice of creating personalised styles for websites by overriding or extending default styles. It allows developers to customise various aspects of a webpage's appearance, such as colours, fonts, spacing, and positioning, by targeting specific HTML elements or classes.

| Custom Css |  |  |  |
|------------|--|--|--|
|            |  |  |  |
|            |  |  |  |

Step 3: To hide the header bar in the campaign interface and confirmation email, simply enable the "Hide Header Bar" option by toggle it to "ON".

| Hide Header Bar | OFF |
|-----------------|-----|
|-----------------|-----|

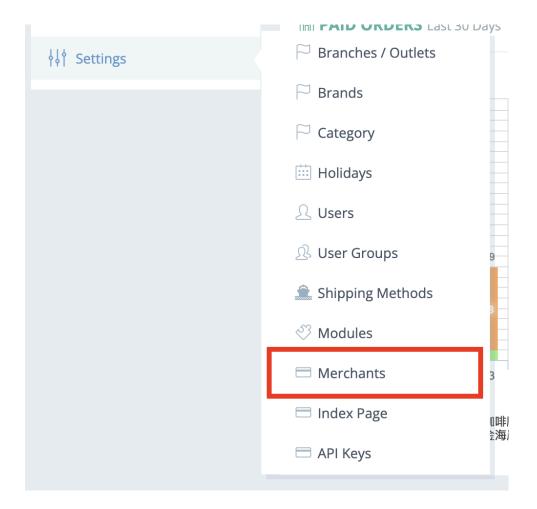
Step 4: Click on the "Save" button to save your theme settings.



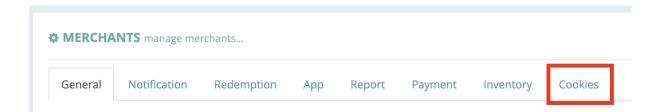
# **Consent Settings**

The purpose of collecting cookie consent is to protect the privacy and data rights of individuals when they visit your landing pages that collect their personal information through cookies.

Step 1: Navigate to "Settings" on the left sidebar and then click on "Merchants."

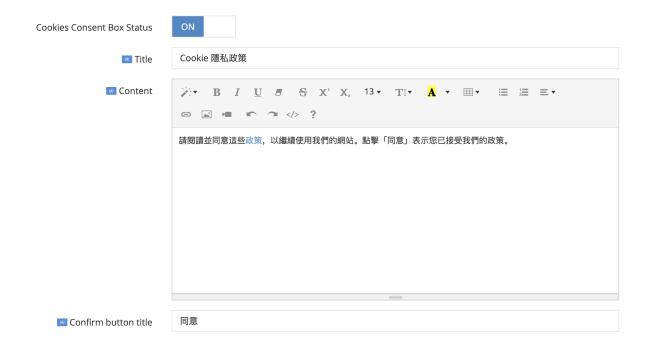


Step 2: Click on the "Cookies" tab in the top bar.



#### Step 3: Fill in the cookie information.

- Cookies Consent Box Status: Toggle the status to "ON" to enable cookies.
- Title: Enter the title of the consent section.
- Content: Provide the terms and conditions for the cookie consent.
- Confirm Button Title: Specify the title for the Call to Action (CTA) button.



Step 4: Click on the "Save" button to save your cookie settings.



#### Preview:



## Gift Panel Settings

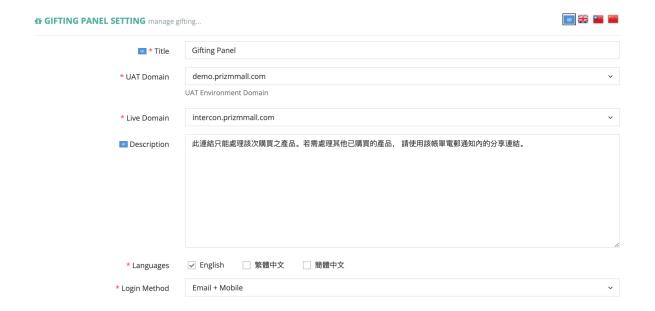
Customers have the option to activate the gift panel, allowing them to send their purchased products to friends or family.

Step 1: Navigate to "Gift" on the left sidebar and then click on "Settings."



Step 2: Set up the general information of your gift panel.

- **Title:** Insert the title of the gifting panel.
- UAT Domain: The UAT Domain is a dedicated testing environment where end-users validate the functionality and performance of a system before it is deployed for actual use.
- Live Domain: The Live Domain refers to the actual production environment or the live system where the software or application is deployed and accessible to end-users for real-world use.
- **Description**: The
- Language: Choose the desired language from the available options: Traditional Chinese, English, and Simplified Chinese.
- Login Method: Select the login method for your gift panel.



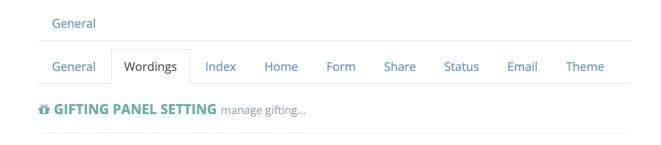
Step 3: Toggle the status to "ON" in your general settings to activate the gift panel.



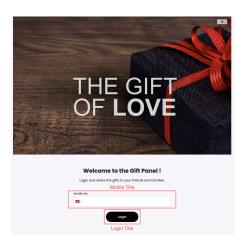
Step 4: Click on the "Save" button to save your gift panel's settings.



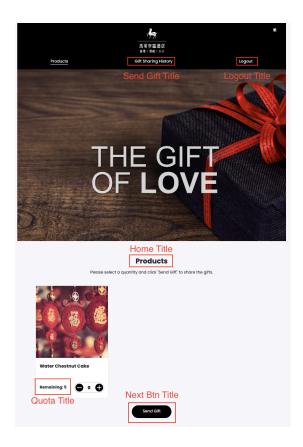
Step 5: Navigate to the "Wording" section in the top bar and input the desired text for the gifting panel.



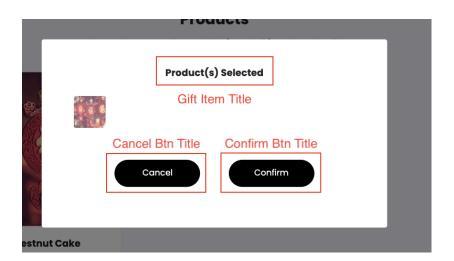
- Login Title
- Mobile Title



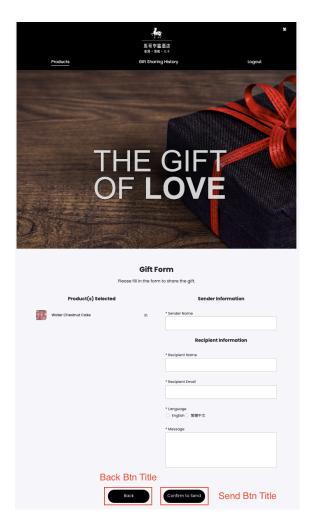
- Home Title
- Send Gift Title
- Logout Title
- Next Btn Title
- Quota Title



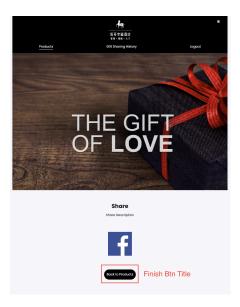
- Gift Item Title
- Confirm Btn Title
- Cancel Btn Title



- Back Btn Title
- Send Btn Title



#### • Finish Btn Title

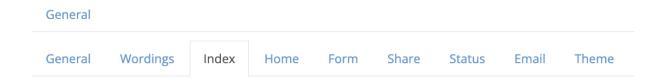


- **Item Reservation Title**
- Reservation Hostory Title
- Quantity First

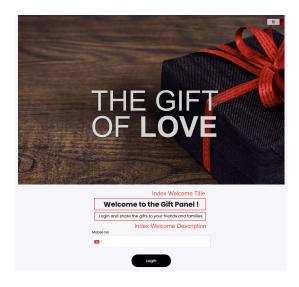
Step 6: Click on the "Save" button to save your wording's settings.



Step 7: Access the "Index" section in the top bar and input the appropriate text for your gifting index panel.



- Index Welcome Title
- Index Welcome Description

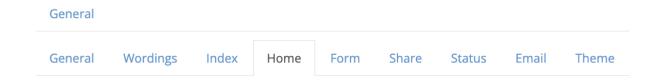


- Email
- Index Bottom Remark

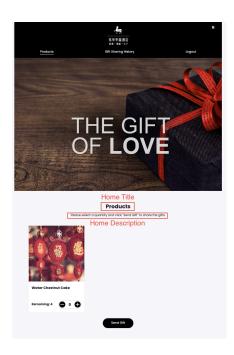
Step 8: Click on the "Save" button to save your index' settings.



Step 9: Access the "Home" section in the top bar and add text to customize the wording for the homepage of your gifting panel.



- Home Title
- Home Description



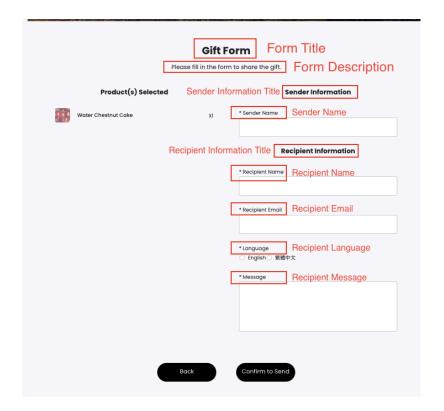
Step 10: Click on the "Save" button to save your home's settings.



Step 11: Navigate to the "Form" section in the top bar and input the desired text for your gifting form.

# General General Wordings Index Home Form Share Status Email Theme

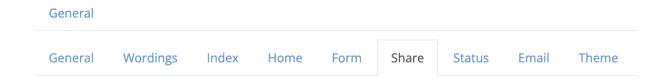
- Form Title
- Form Description
- Sender Information Title
- Recipient Information Title
- Sender Name
- Recipient Name
- Recipient Email
- Recipient Language
- Recipient Message



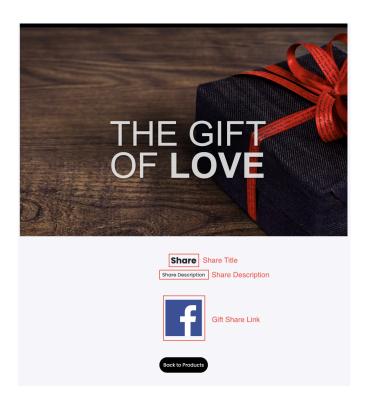
Step 12: Click on the "Save" button to save your form's settings.



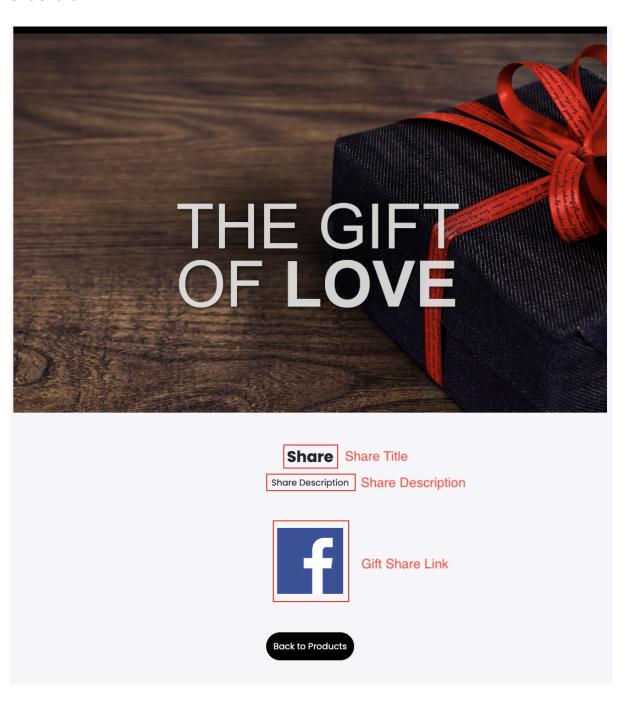
Step 13: Access the "Share" section on the top bar and add text to customize the wording that appears after sharing your gifts.



- Share
- Share Descriptions



#### Gift Share Link

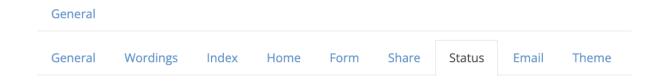


- Gift Share Titles
- Gift Share Message

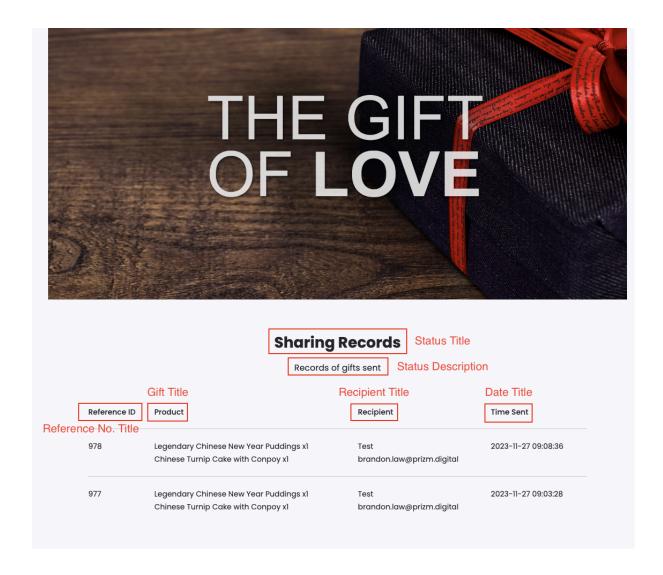
Step 14: Click on the "Save" button to save your share's settings.



Step 15: Access the "Status" section in the top bar and input text to customize the wording for your sharing history.



- Status Title
- Status Description
- Reference No. Title
- Gift Title
- Recipient Title
- Date Title

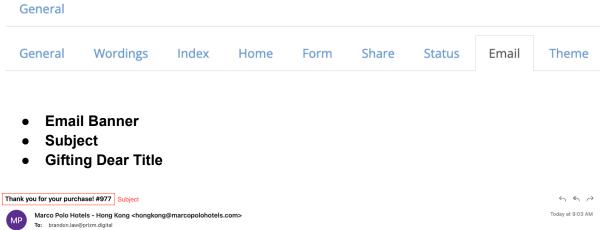


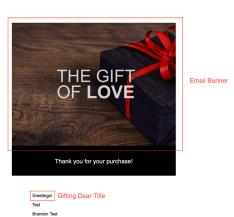
#### Status Bottom Remark

Step 16: Click on the "Save" button to save your sharing history's settings.

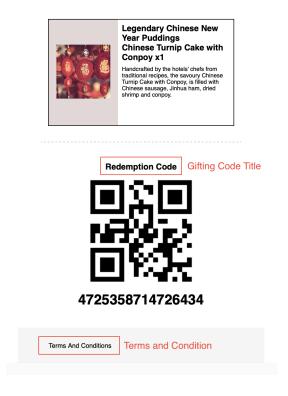


Step 17: Navigate to the "Email" section on the top bar and customize the wording and image for gifting emails.





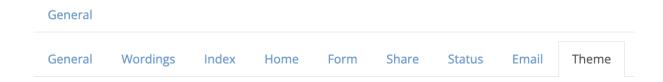
- Terms and Condition
- Gifting Code Title



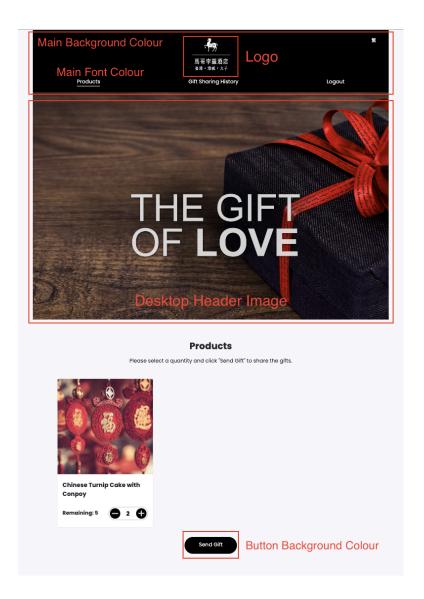
Step 18: Click on the "Save" button to save your email's settings.



Step 19: Access the "Theme" section in the top bar and customize the theme for your gift panel.



- Logo
- Desktop Header Image
- Main Background Colour
- Button Background Colour
- Main Font Colour



#### Button Hover Background Colour

Step 20: Click on the "Save" button to save your theme's settings.



Step 21: Create a campaign <u>HERE</u> and switch the gift panel status to "ON" in your general settings to activate the gift panel exclusively for that particular campaign.





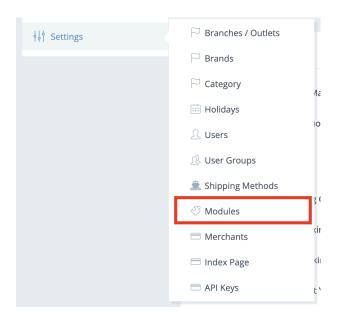
Step 22: Click on the "Save" button to save your campaign's settings.



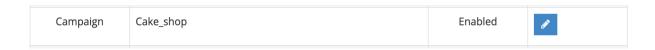
# Module Settings - Cake Shop Module

In this section, we'll configure the selection for Product Tags, Product Filters, Product Brands, and Product Images for the Cake Shop Module. This setup must be completed before moving on to product settings. Please note, this setting is exclusive to the Cake Shop Module.

Step 1: Navigate to "Settings" on the left sidebar and then click on "Module".



Step 2: Find the Cake Shop Module and click on the pencil icon located on the right.



Step 3: Navigate the Product Tags and fill in the key and value.

- **Key:** The label for the specific tag
- **Value:** The tag that will be displayed in the backend settings and serve as the navigation for the product category on the front end.



Step 4: Fill in the key and value of the Product Filters.

- **Key:** The label for the specific Product Filter.
- Value: The filter that will be displayed in the backend settings and used as the product label on the front end.



Step 5: Fill in the key and value for the Product Brands. Product Brands are used when there is more than one branch within the e-commerce store, allowing customers to identify which products are sold by each branch.

- Key: The label for the specific brand or branch.
- Value: The branch name that will be displayed in both the backend and the front end.



Step 6: Fill in the key and value for the Product Image Gallery Count to specify how many product images can be uploaded and displayed.



Step 7: Click on the "Save" button to save your Cake Shop Module's settings.

