

GNG 1103

Design Project User and Product Manual



Welcome To OLP!

Startup guide and User Manual

Submitted by:

Project group 16

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List of Acronyms and Glossary

Table 1. Acronyms

Acronym	Definition
OLP	Our Loyalty Program
UI	User Interface

Table 2. Glossary

Term	Acronym	Definition
Our Loyalty Program	OLP	This refers to our companies form of loyalty points
User Interface	UI	The visual aspect of the website which the user interacts with to use our program

1 Introduction

The purpose of this document is to outline how to utilize *Our Loyalty Program (OLP)*'s website and its built-in points conversion system. The user will find detailed instructions and descriptions of how to use the website, and how our conversion system operates behind the scenes.

Our Loyalty Program is a collaboration with *Zafin*, and was the main project of an engineering design course. We expect the audience viewing this document to be any users who are interested in collaborating with us through our client. The document is organized into sections and subsections which will begin by giving the user a basic overview of the product and explaining how to get started in using the *OLP* system as well as explaining each subsystem of the program itself.

Following the '*Overview*' and '*Getting Started*' sections, the user will be given information on how to troubleshoot in the event that they face issues using the program, and will be shown how to access contact information to our support branch. This section will also contain any special considerations or maintenance concerns for the user.

Next, the user will be able to see the product documentation which will outline the bill of materials, equipment lists, instructions and testing information of *OLP*.

The '*Conclusions and Recommendations for Future Work*' section will explain what our plans are for the future in regards to what we as a group took away from this project: lessons learned, how we would like to improve, etc.

The final sections of the document will contain the bibliography and two appendices which will include our design files and any additional appendices.

2 Overview

The problem is that loyalty programs that are offered by financial institutions and other businesses are limited in how consumers can spend the reward points which they have acquired. This issue is an important one because, currently, there is no system which integrates all of these programs into a single ecosystem and allows for horizontal integration between these platforms. This is precisely the issue that our client, *Zafin*, had asked us to resolve.

The user will need a program that has a simple UI, is easy to use, offers the proper functionality that the user will need to convert points from one loyalty program to another. In the ‘Getting Started’ and ‘Using the System’ sections, 3 and 4 respectively, the user will learn how to use the site and the *Airtable*-based conversion system.

What differentiates our product from other competitors is our visual aesthetic and UI, which we felt was a very important focus for us during the design process. Other outstanding features include our affiliate link program, which will be outlined in ‘*Section 4: Using the System,*’ along with our tier upgrade system.

Below, we have included a picture of the final *OLP* prototype:

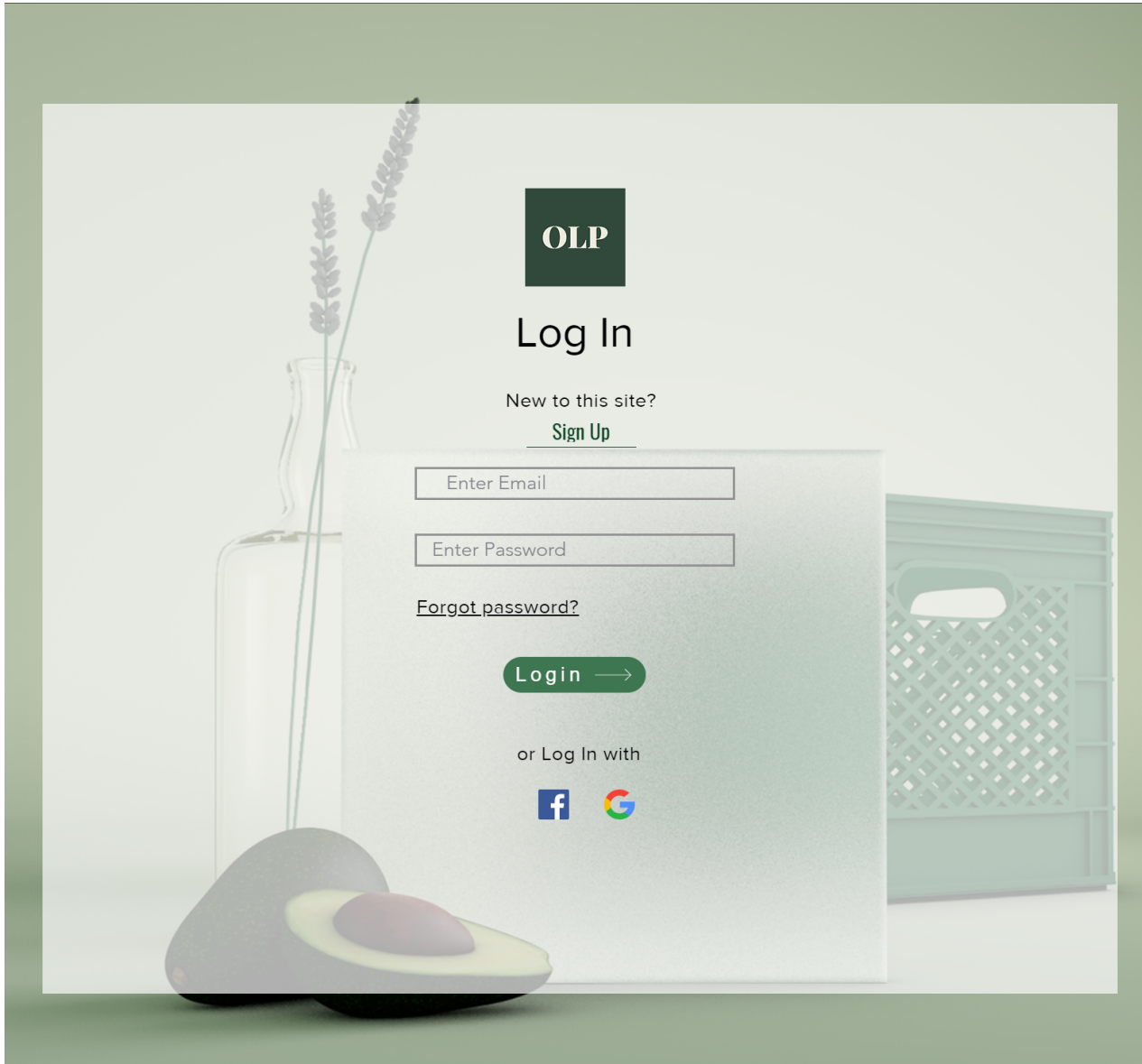


Fig. 2.0.1

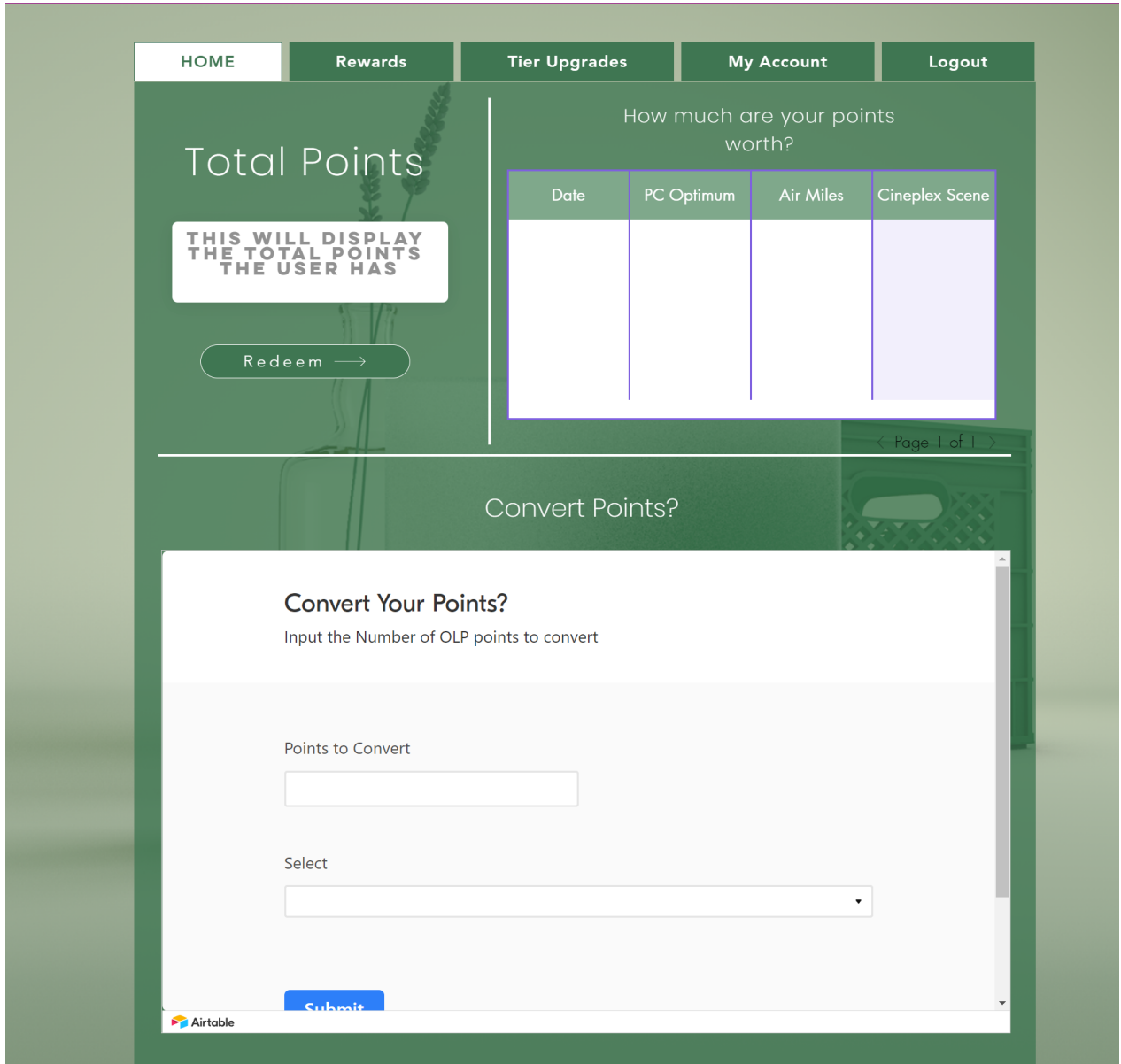



Fig. 2.0.2


HOME Rewards Tier Upgrades My Account Logout

Redeem Rewards




Wireless Earbuds
Cost (OLP points): 200 000
Retail value: \$179.00CAD

REDEEM →




Florist Inc. Gift Card
Cost (OLP points): 50 000
Retail value: \$50.00CAD

REDEEM →




Adidas Ultraboost 4.0
Cost (OLP points): 250 000
Retail value: \$250.00CAD

REDEEM →




Tim Hortons Gift Card
Cost (OLP points): 50 000
Retail value: 50.00CAD

REDEEM →



Steam Gift Card
Cost (OLP points): 100 000
Retail value: \$100.00CAD

REDEEM →



Amazon Gift Card
Cost (OLP points): 25 000
Retail value: \$25.00CAD

REDEEM →

Fig. 2.0.3

HOME Rewards Tier Upgrades My Account Logout

M myoun118 Follow

Tier 0 (current tier)

These are your normal account tier settings, rewards and perks.

Benefits :

- 1x amount of points gained from in-store purchases*
- Weekly deals and discounts from select stores
- Sharing the affiliate link with others will gift you 10000 bonus points!

*Through select affiliated stores

*You already own this product

Purchase

Tier 1

When purchased, you get access to the rewards and perks of a tier 1 account holder.

Benefits :

- 1.25x amount of points gained from in-store purchases*
- Weekly deals and discounts from select stores
- 25% more points are gained when the affiliate link is shared with others

*Through select affiliated stores

Free 14 day trial! Sign up now!

Purchase

Fig. 2.0.4

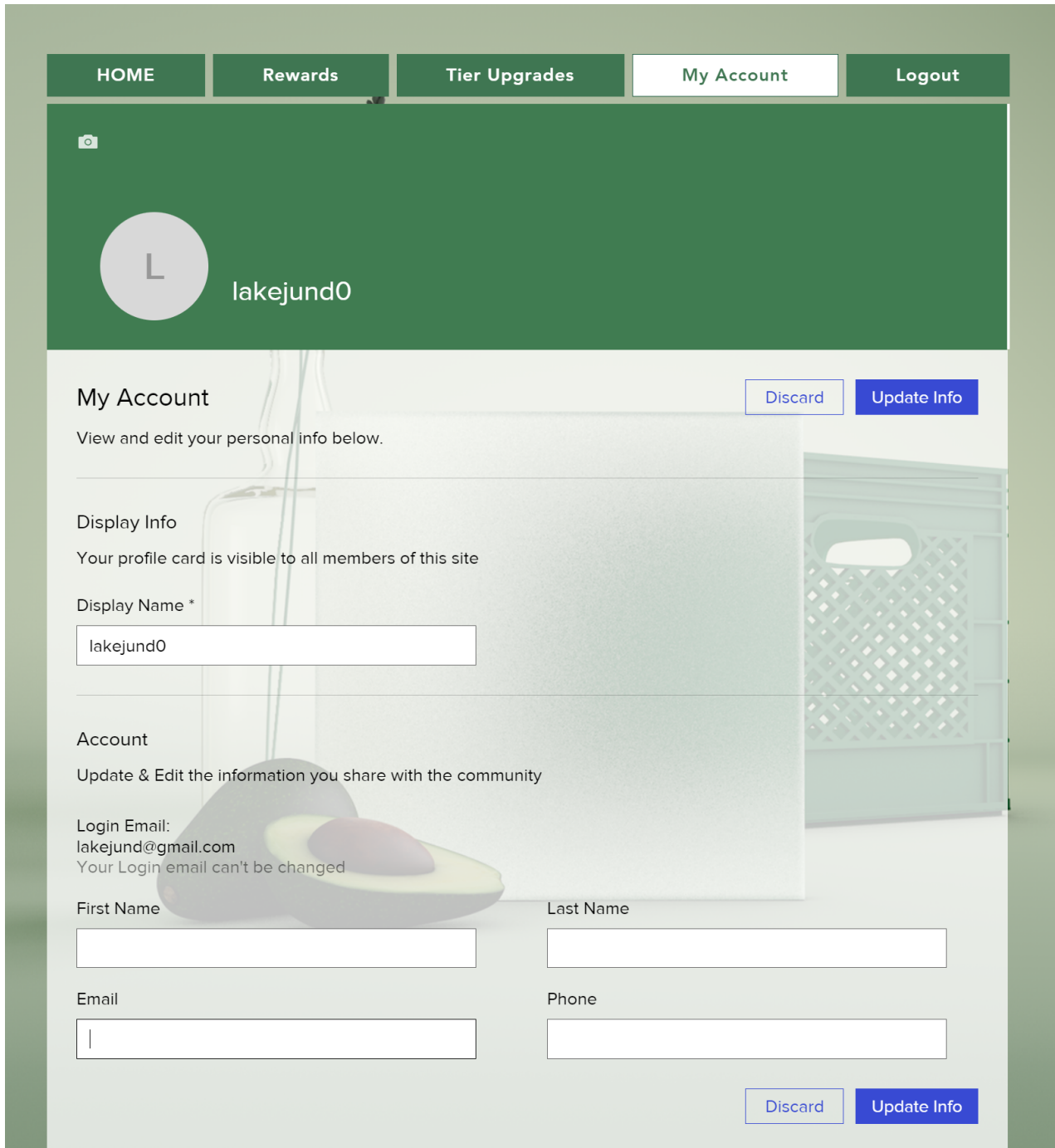


Fig. 2.0.5

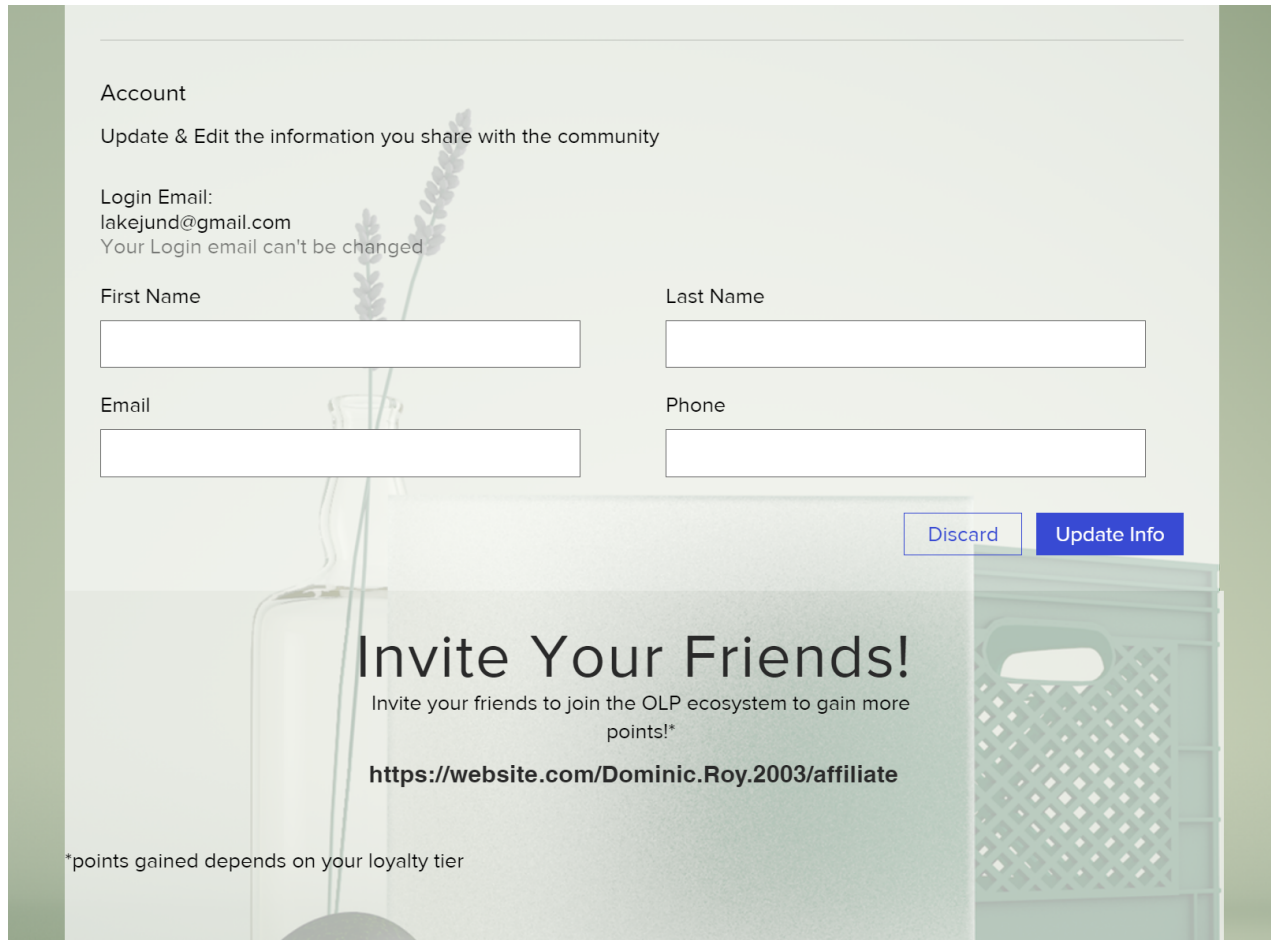


Fig. 2.0.6

Key features of the site include: the *Tier Upgrade* program; which will allow users to upgrade their *OLP* loyalty account at an additional cost to gain access to more rewards, as well as a better conversion rate from when converting other points into *OLP* points, the affiliate link; which encourages users to share *OLP* with people they know by giving them a points incentive, and the *Points Conversion System*; which we created using *Airtable*. The conversion system does all the heavy lifting of our program and is the basis for our idea.

OLP is a web-based product that was created using *Wix* as the basis for the system's architecture and *Airtable* for the actual conversion system.

2.1 Conventions

There are no special conventions for our website.

2.2 Cautions & Warnings

Photosensitive users may have difficulty using the program since a computer is required for operation.

3 Getting started

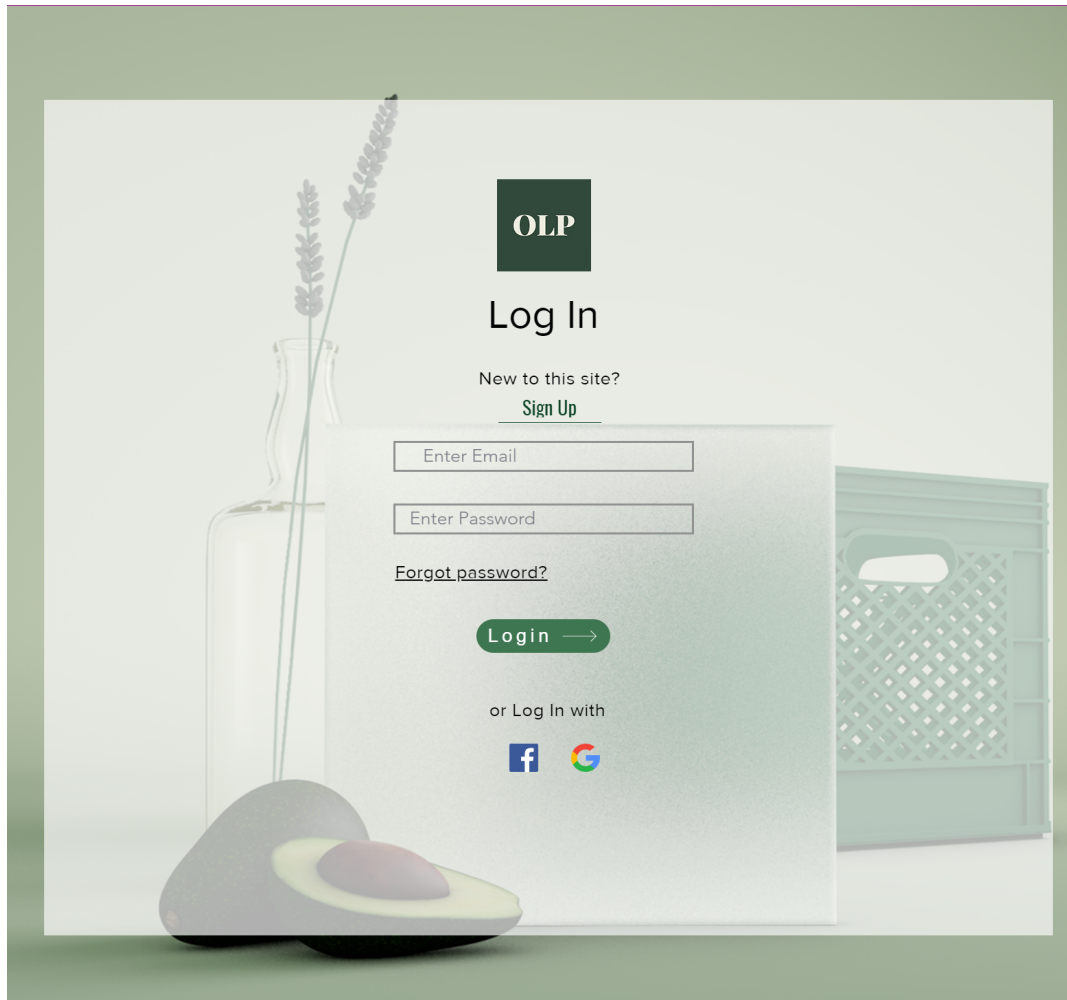


Fig. 3.0.1

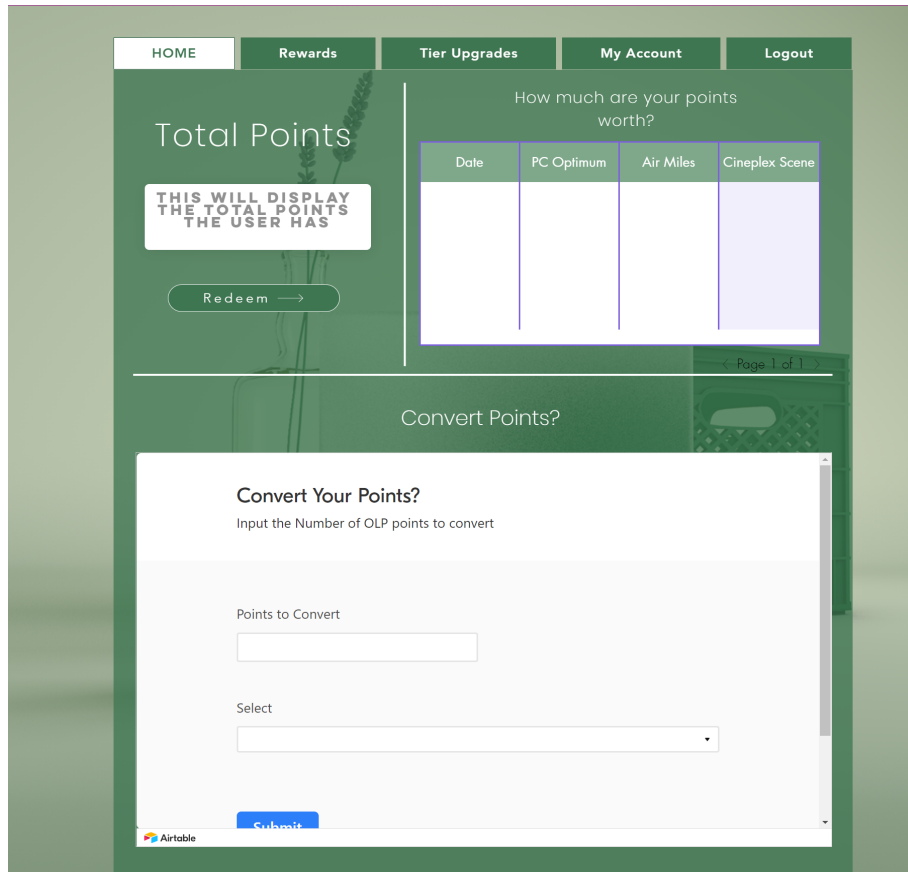


Fig. 3.0.2

To get started using *OLP*, the user must visit the website and click the sign up button to create a new account. Existing users can sign in with their existing *OLP* profile.

After successfully logging into the website, the user will be confronted with this home page, which can be seen in three sections: a '*Total Points*' field; which shows the total number of points accumulated by the user, the *Airtable* section; that includes a table that simply shows how much other brands loyalty points are worth on that day (this is set to change daily and be regularly updated based on supply and demand, so make sure to keep an eye on the changes), and a *Conversion* section; which shows a form where the user can carry out the conversion of his units from and to other loyalty program points.

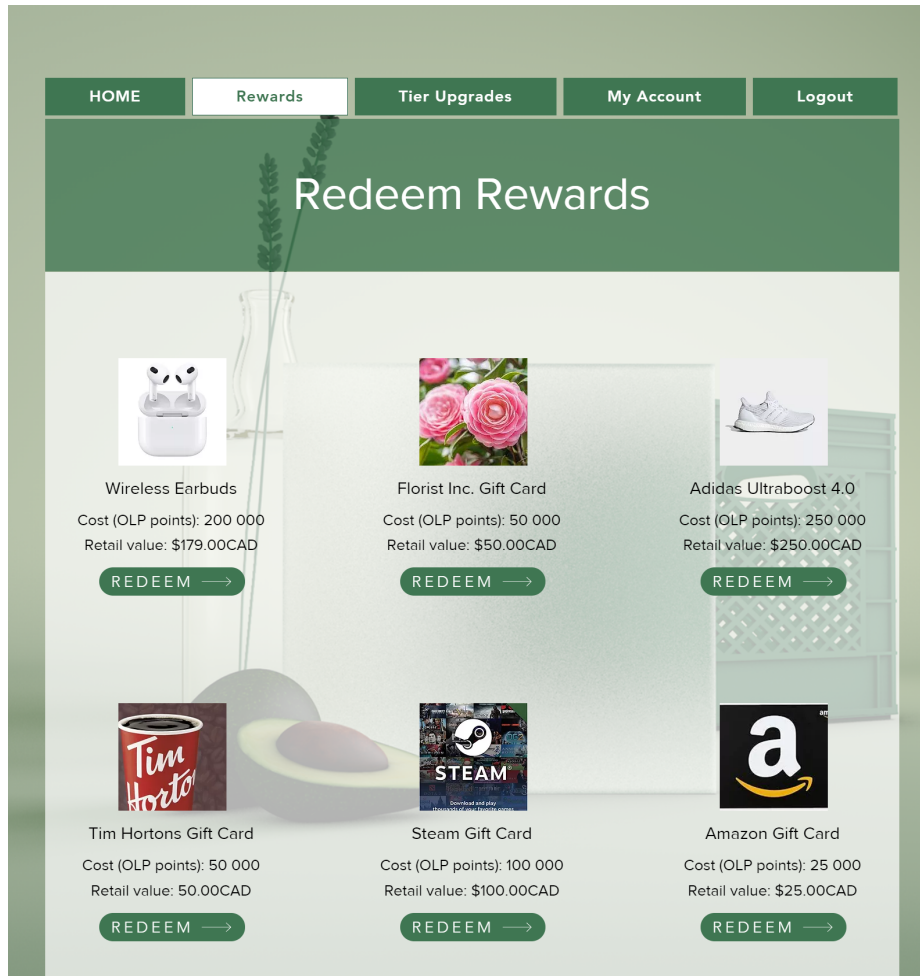


Fig. 3.0.3

The third page is the 'Rewards' page. This page is where the user may spend their accumulated points to redeem rewards. To use their points, the user must click the 'Redeem' button under the reward they want to redeem. This will spend the specified amount of points required for that particular reward item.

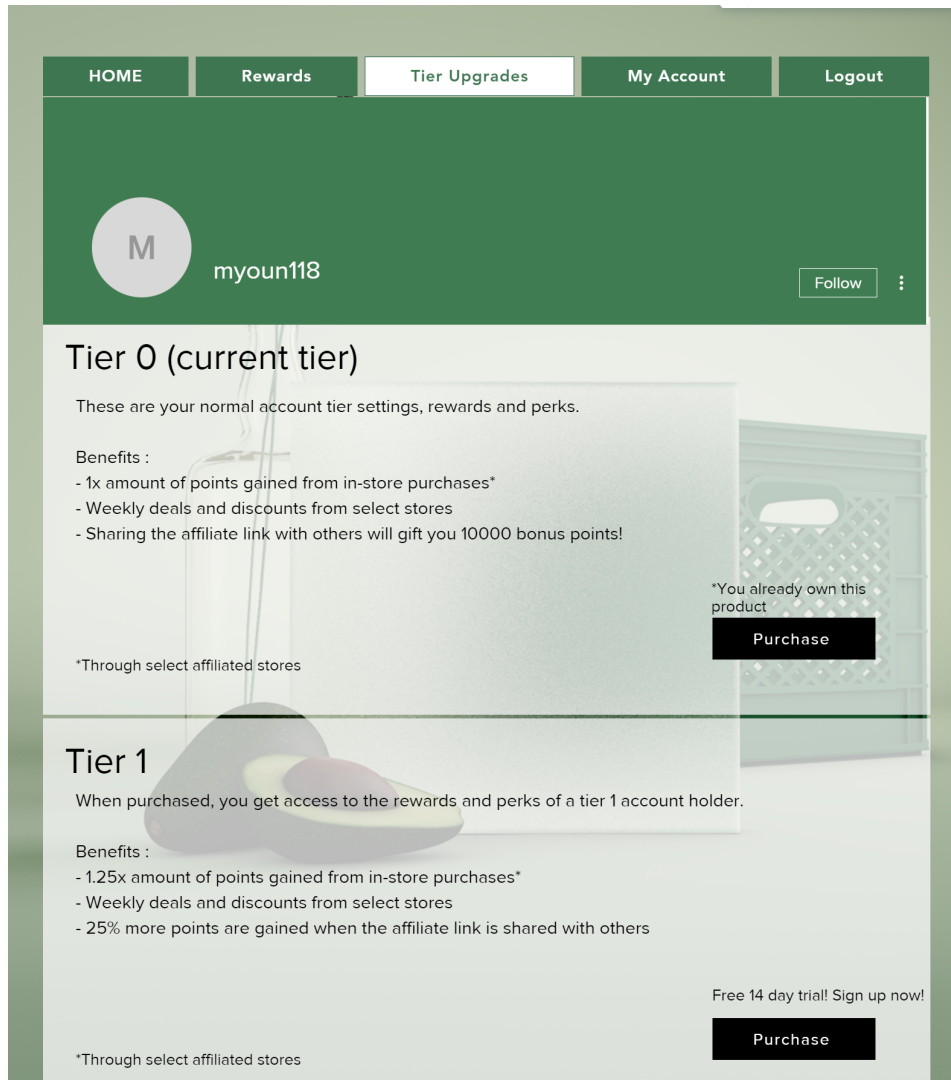


Fig. 3.0.4

This page grants the user access to the *'Tier Upgrades'* section. This section allows users to upgrade or downgrade their account to greater or lesser tiers, respectively. These tier upgrades grant the users access to greater bonus rewards and improve their point collection process by offering them improved point conversion rates.

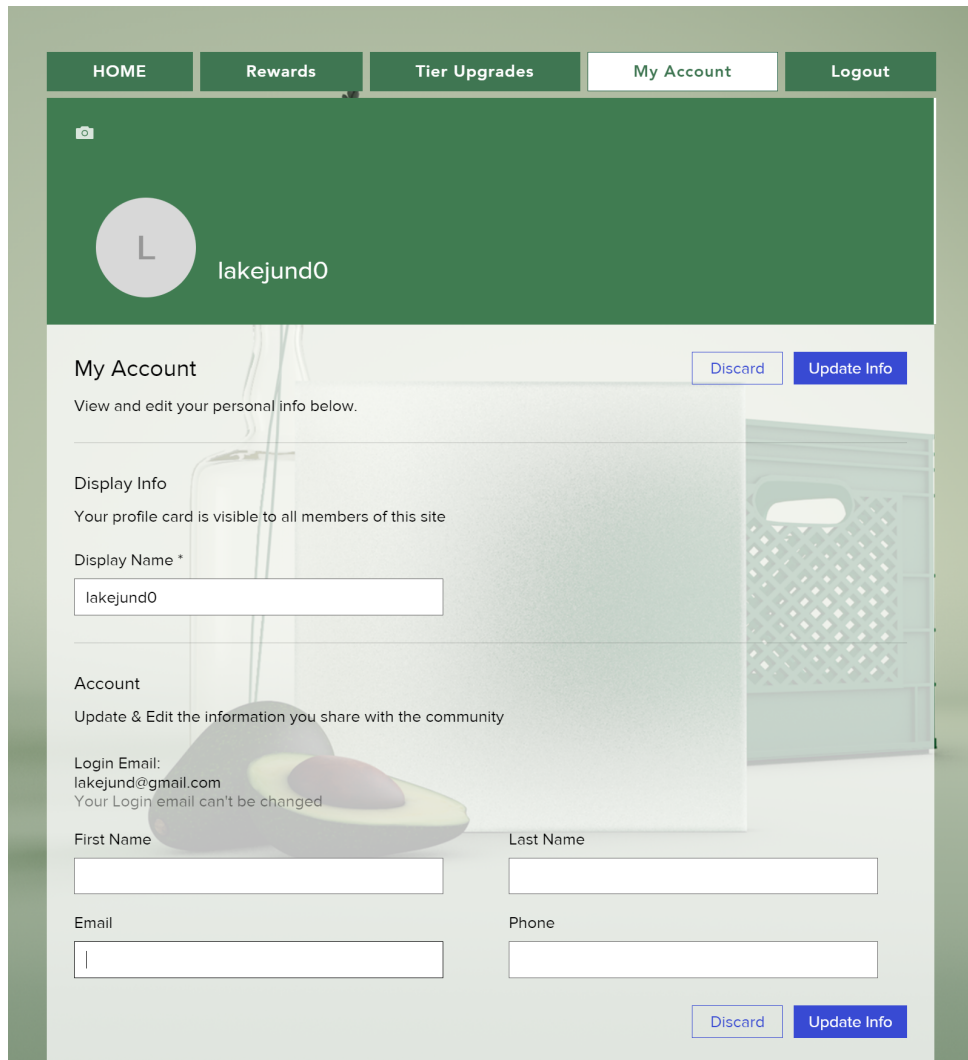


Fig. 3.0.5

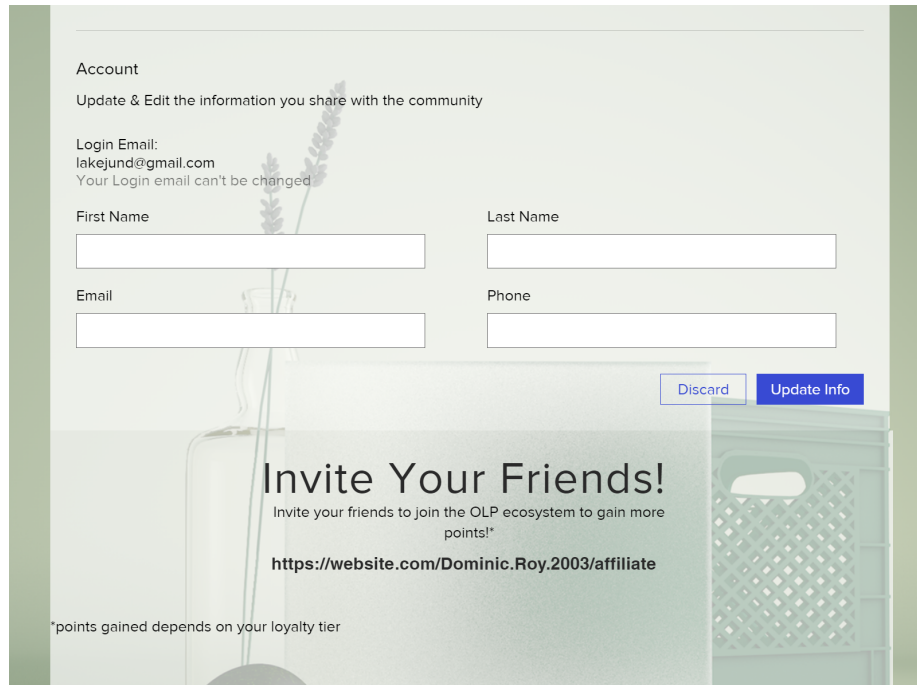


Fig. 3.0.6

The *'My Account'* page allows users to edit certain information such as their username, email address, password, and much more. At the bottom of the *'My Account'* page, the invitation to the *OLP* affiliate link can be found. Users may send this link to other people they know to encourage them to use our program and will receive a points incentive by doing so.

3.1 Set-up Considerations

To set up your account, you will need an electronic device that has access to a web browser, and an internet connection. Additionally, it may be helpful for a user to have a Google or Facebook account so that they can connect it to their *OLP* profile in order to make it easier to sign in, and to have it connected to their primary media accounts so they can receive promotions and coupons.

3.2 User Access Considerations

Each user who would like to use our services must create an account of their own to be able to access our loyalty program.

3.3 Accessing the System

To access the website, the user must create an account. They can do this by clicking ‘*Sign Up*’ on the *Login Page* and inputting their personal information such as their email, their billing address, and their password. After creating an account, the user may login using the email and password they have chosen..

3.4 System Organization & Navigation

At the top of the page on the *OLP* website, there is a horizontal bar which shows all of the available pages on the website. These include, but are not limited to; the *Homepage*, *Rewards*, and *Tiers* pages.

3.5 Exiting the System

To turn off or exit the website, the user must be sure to log out to prevent any other users from accessing your account. After that, they may close the *OLP* webpage.

4 Using the System

The purpose of this section is to go into greater detail regarding the subsystems contained within the *OLP* website.

4.1 Login

The user may login with their *OLP* account, Google account, or Facebook account.

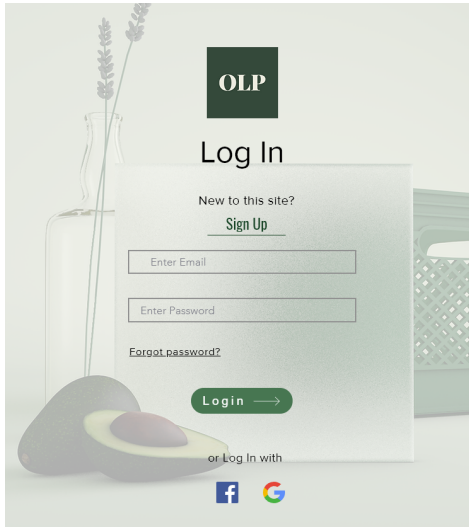


Fig. 4.1.1

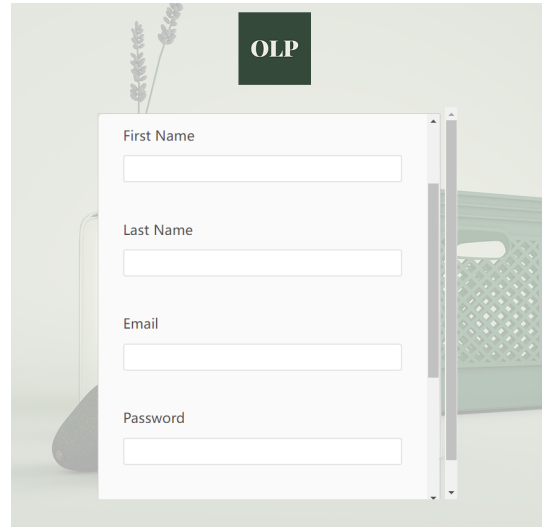


Fig. 4.1.2

4.1.1 Creating your account/Signup

If the user does not have an account, in the *Sign Up* page, the user may enter their data and create their account. If the user forgets their password, there is a '*Forgot password?*' button for them to get their password back with the email they have linked to their account.

4.2 Home

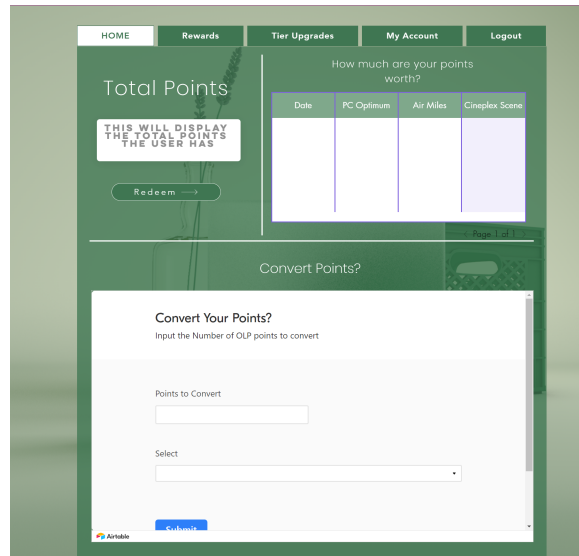


Fig. 4.2.1

4.2.1 Point conversion system

The *OLP* points conversion system uses a points database created in *Airtable*, which allows users to convert your points into other loyalty program's points and vice-versa.

4.3 Tier upgrade

4.3.1 Tier upgrade purchase screen

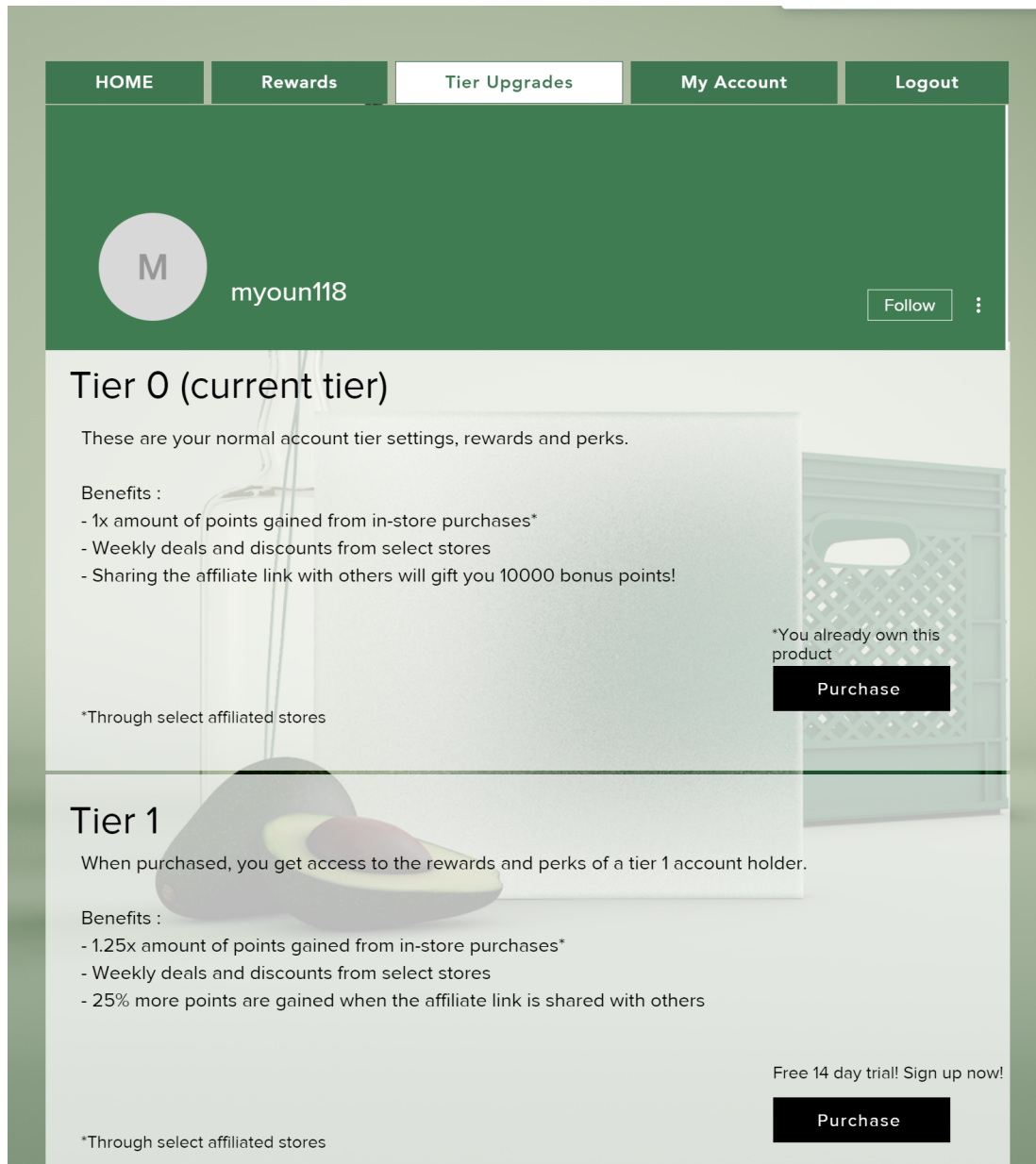


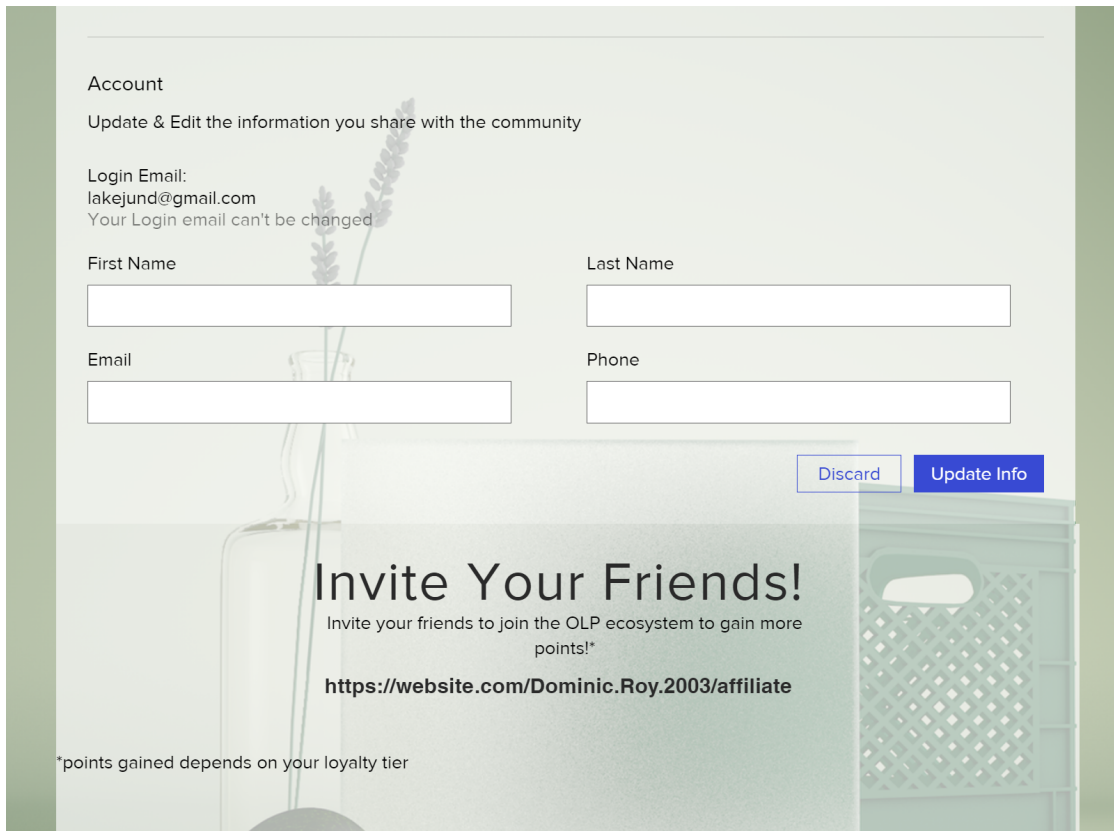
Fig. 4.3.1.1

The *Tier Upgrade* system is also powered by the Airtable database. By clicking the button, the user will be taken to the form where they may fill out the information, and then pay for the *Tier Upgrade* that they wish to purchase for their account.

4.4 Account management

4.4.1 Affiliate Link Program

Like many other affiliate links, the user will have access to a link under their account name that they may share with others who are not yet part of the *OLP* program. Users can share this link with others through email or text message. When the new user signs up and starts using the program, the user who shared the link will receive a reward, in the form of *OLP* points added to their balance.



The image shows a web form for account management. At the top, it says "Account" and "Update & Edit the information you share with the community". Below this, the "Login Email" is listed as "lakejund@gmail.com" with a note that it cannot be changed. There are four input fields: "First Name", "Last Name", "Email", and "Phone". At the bottom right of the form are "Discard" and "Update Info" buttons. An overlay box titled "Invite Your Friends!" is positioned in the lower half of the form, containing the text "Invite your friends to join the OLP ecosystem to gain more points!*" and the affiliate link "https://website.com/Dominic.Roy.2003/affiliate". A small note at the bottom left of the overlay states "*points gained depends on your loyalty tier".

Fig 4.4.1.1

5 Troubleshooting & Support

We have not yet faced significant issues which have required troubleshooting while using the *OLP* website. However, in the case that a user feels there is a problem with their points calculations or with another part of the website, they should first try refreshing the page and ensuring a functioning internet connection. If this problem persists, the user should reach out to our live support team which is available 24 hours a day to help solve any user issues, or send an email to our staff using the contact form at the bottom of the *OLP* webpage.

5.1 Error Messages or Behaviors

If the user receives messages stating that they have no internet connection, then they should first try refreshing the page. If this problem persists, the user should check the internet connection to the computer. Any internet issues must be dealt with by the internet provider of the user.

5.2 Special Considerations

OLP is still in the early stages of our program. We would ask that users who face any issues with our website or conversion system give us critical feedback in order to ensure that the product we are offering meets user expectations.

5.3 Maintenance

There are no specific maintenance requirements on the part of the user. Any changes to the website or conversion system will be made by administrative services and will apply the next time the user signs into their account. In the event that the website is inaccessible due to maintenance, we ask that users be patient as our staff will try and fix any issues as soon as possible.

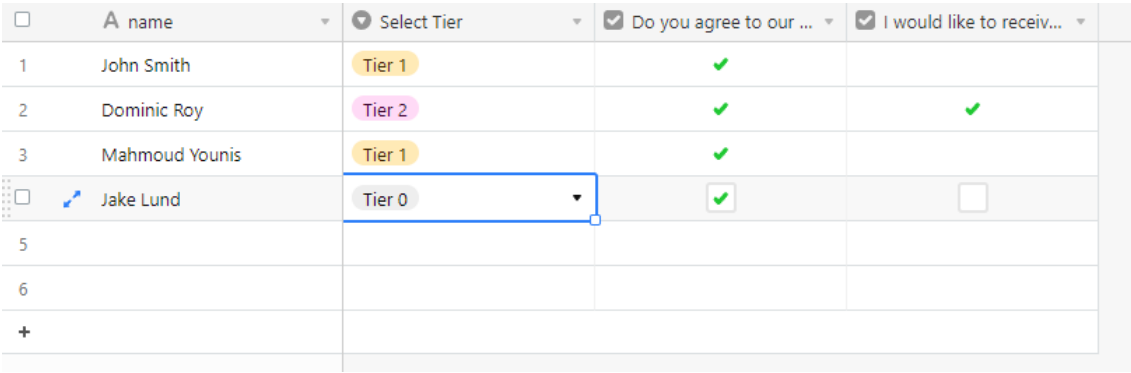
5.4 Support

In the event that the user requires any form of assistance, they may use our 24/7 live chat found in the settings tab of our website. Or, they may send an email through our contact form located on the bottom of each page.

6 Product Documentation

The final prototype is the culmination of various ideas. First was our selection of the basis of our program. We were considering using *Power Apps* initially, but we didn't feel that it would accomplish what we intended to do with our project. The data analysis and the data management of *Power Apps*, as well as the database of *Power Apps* were too inconvenient to use, which we felt would cause difficulties in managing and analysing data.

Wix, which we decided to use as the platform for our program, seemed significantly better at analysing data when compared to *Power Apps*. With the help of our project manager, we were able to create a system which used the input of user data from *Wix* and imported the data into *Airtable*.



<input type="checkbox"/>	A name	Select Tier	<input checked="" type="checkbox"/> Do you agree to our ...	<input checked="" type="checkbox"/> I would like to receiv...
1	John Smith	Tier 1	<input checked="" type="checkbox"/>	
2	Dominic Roy	Tier 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	Mahmoud Younis	Tier 1	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Jake Lund	Tier 0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5				
6				
+				

Fig. 6.0.1

Because our project is a public, online program, it is tailored to the wants and needs of each individual user. When different users sign into the website, the tier of the account and the redeem page will be changed according to how the user has set up their account. Rewards will also be tailored to the user's previous purchases, allowing them to first see the products that they think they will want based on their purchase history.

6.1 Subsystem : Airtable

6.1.1 BOM (Bill of Materials)

Wix - <https://www.wix.com/>

Airtable - <https://www.airtable.com/>

6.1.2 Equipment list

- A Computer and basic peripherals (Keyboard, mouse).

6.1.3 Instructions

1. Create an *Airtable* account and click “Add a Base” to create a new table.

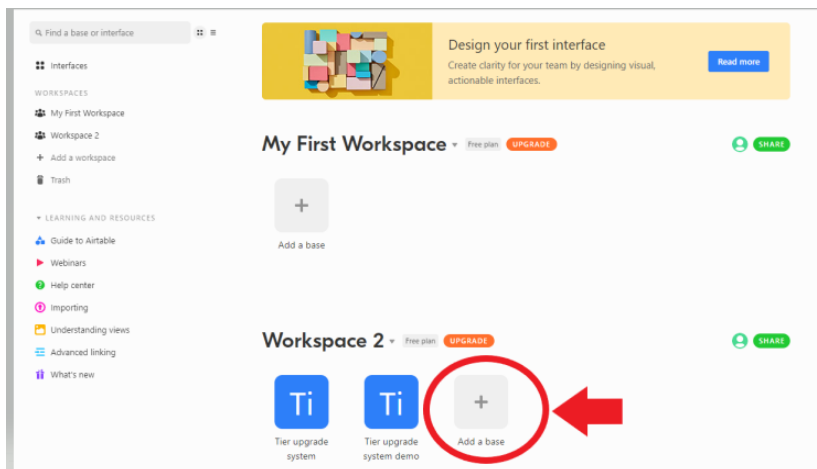


Fig. 6.1.3.1

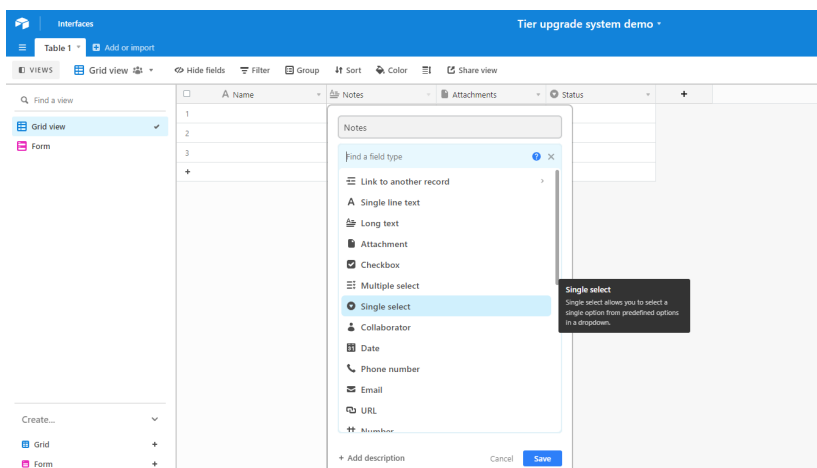


Fig. 6.1.3.2

2. At the top of the second column, click the small arrow on the right side. Select the first option in the drop down menu “Customize field type”. Open the second drop down menu and select “single select”.
3. Repeat step 2 for columns three and four, but choose the option “checkbox” instead.
4. Double click the top of each column to rename them accordingly. They will appear on the Form automatically.
5. Open up the Form menu in the bottom left corner of the screen. You can add a title and subtitle/brief instructions on how to proceed using the form.

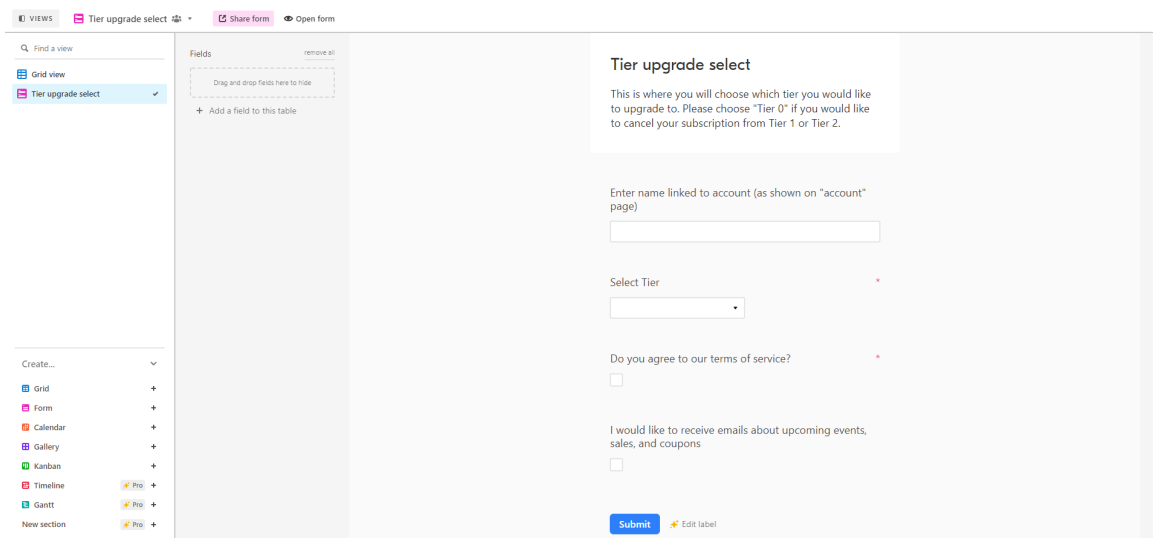


Fig 6.1.3.3

6. In the top right hand corner of the screen, click “Share form,” then select “Embed this form on your site.”



↔ Embed code



```
<iframe class="airtable-embed"
src="https://airtable.com/embed/shr4t3En1YRbOY8pX?
backgroundColor=blue" frameborder="0" onmousewheel="" width="100%"
height="533" style="background: transparent; border: 1px solid
#ccc;"></iframe>
```

Fig 6.1.3.4

This form is shared via a private link

People with the private link can only see the empty form. The title of this page is the view name, "Tier upgrade select".

<https://airtable.com/shr4t3En1YRbOY8pX>  

 Upgrade to restrict by password or email domain 

↔ [Embed this form on your site](#)

✕ [Disable shared view link](#)

Fig. 6.1.3.5

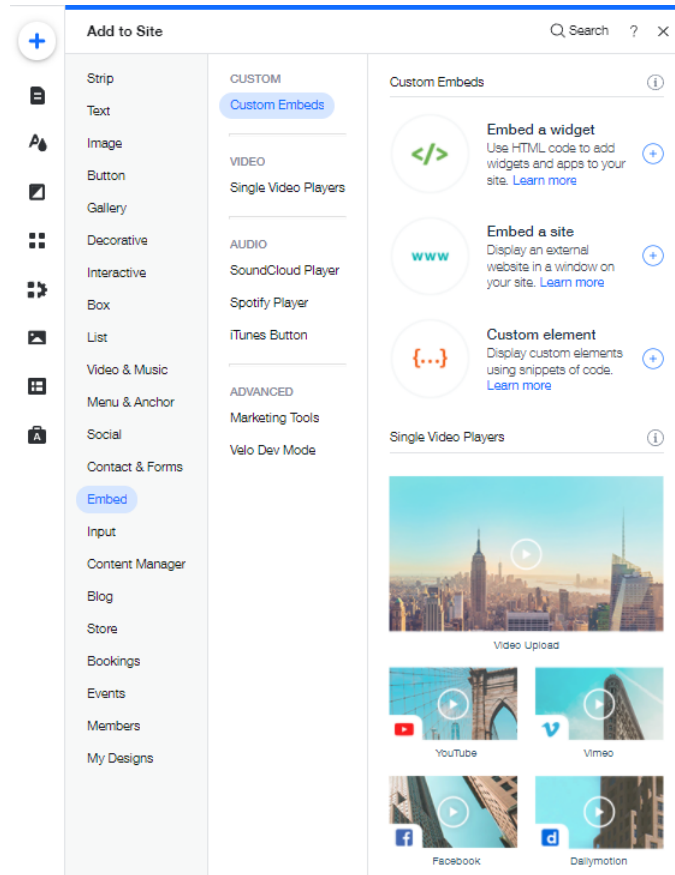


Fig. 6.1.3.6

7. Highlight of the text in the box shown here. Copy by right clicking with the mouse or using 'ctrl+c.'
8. On your website (example here is using *Wix*), Click the plus button on the left side of the screen, then "Embed," then "Embed a widget."
9. Click on "Enter Code" and paste your copied code using 'right-click' or 'ctrl+v' and click "Apply."

6.2 Testing & Validation

The final prototype was tested by our team throughout the design process. There were some initial problems when creating our pages, but eventually it became a functional website, from registration, to the redeem page, to account management.

We were able to successfully link the *OLP* accounts to our *Google* and *Facebook* accounts during the testing phase. This ensures that users will also be able to connect their personal social media accounts to the *OLP* program.

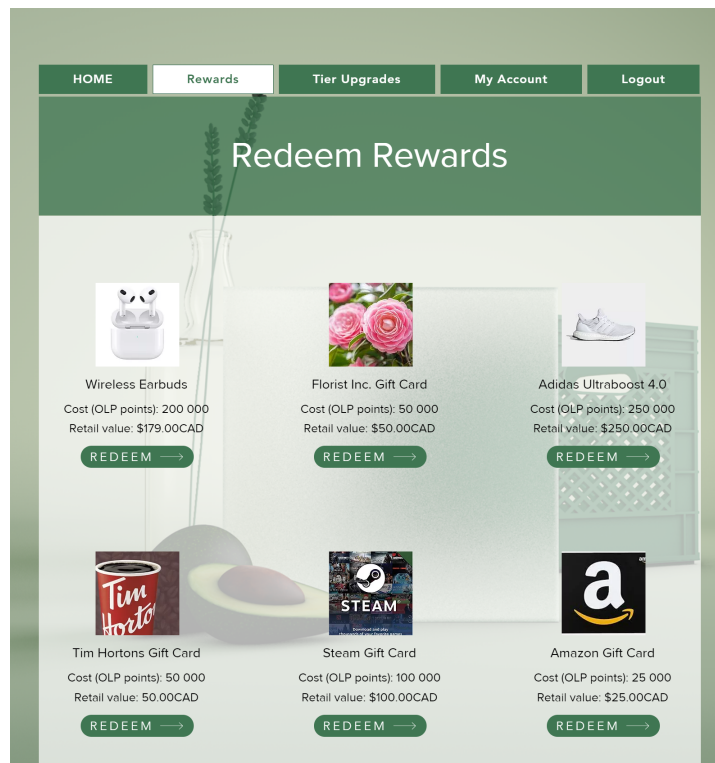


Fig 6.2.1

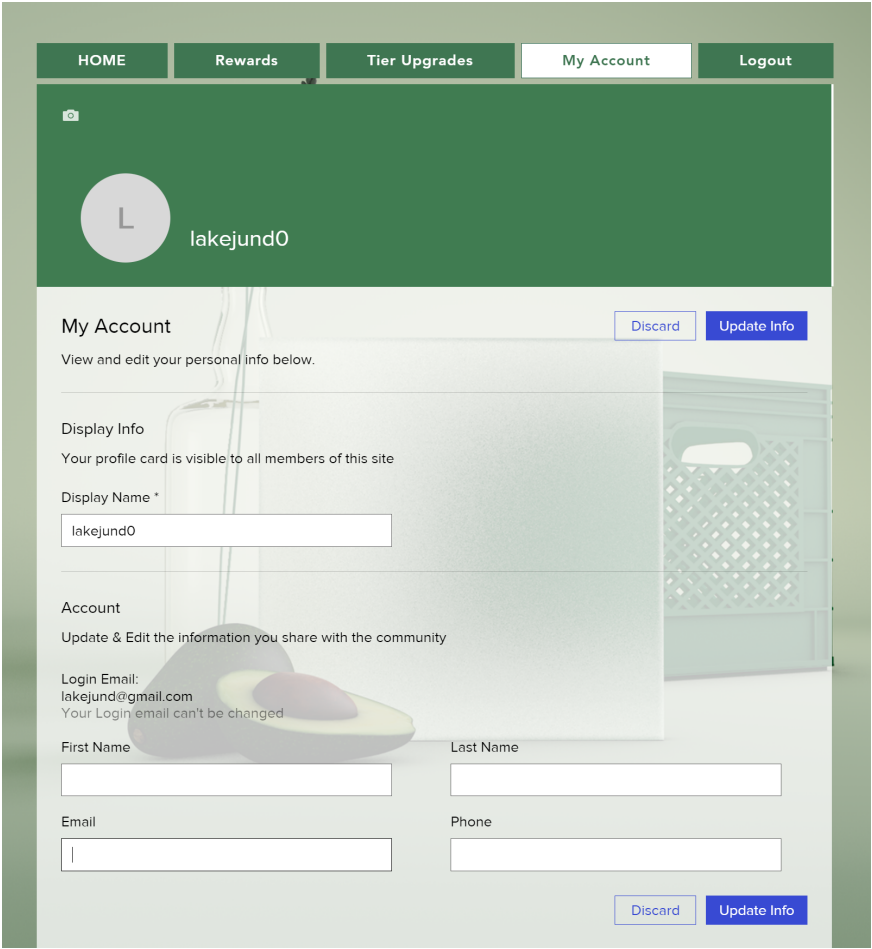


Fig. 6.2.2

Account
Update & Edit the information you share with the community

Login Email:
lakejund@gmail.com
Your Login email can't be changed

First Name

Last Name

Email

Phone

Invite Your Friends!
Invite your friends to join the OLP ecosystem to gain more points!
<https://website.com/Dominic.Roy.2003/affiliate>

*points gained depends on your loyalty tier

Fig. 6.2.3

7 Conclusions and Recommendations for Future Work

In conclusion, we realized that creating a project that would satisfy the client's needs, in only a few months, wasn't going to be an easy task. Especially given that all team members were strangers to one another at the beginning of the project. Some of the key takeaways from this project are as follows:

Firstly, time management is very important for the entire team. It taught us how to all work together through our busy schedules and also meet important deadlines.

Secondly, we realized that feedback from others is very valuable, especially when one's team is at a stand-still. There are very critical things that one can pick up when receiving feedback from others, such as the client they are making the product for. The clients are the ones that know the most about the project's crucial design criteria, and getting guidance from what the team has made for them at a given stage always seems to "reignite the spark" in the project.

Finally, our team learned that the design process helps significantly with the overall organization of the project. The organization of the project itself and of every member in the group is a crucial factor in meeting deadlines and expectations. When you have a five-step process for designing a project from start to finish that is relatively easy to follow, the quality of the product will be much better when compared to starting a project with no vision or process to follow..

If our team were to restart this project, we would have tried not to limit ourselves as much with the foci of our project.. Our original concept was a mobile app built in *Power Apps*. But, when we created our design priorities, we decided that a web-based platform would benefit the vision we had for our user interface. This was the start of our first stand-still. We would have also done a lot more research on other platforms that could potentially compete with our program. There are many options that can yield end-products that have greater emphasis on specific parts of the system. One could explore coding the website along with their team using languages such as *html* or *Java*, *Power Apps* as mentioned before, or by using website builders such as *Wix* or *Firebase*.

If we had more time to work on our system, the first thing we would have done was expand the back-end of the website. Currently, Our *Airtable* database is somewhat limiting in its linking of all unique aspects of the website together. We would like to explore how we can link all individual databases together under one database that controls all others. We feel as though we did

not completely abandon anything due to lack of time. But we believe that we could have made more progress on our database with the time given had we spent less time focusing on the visual aspect of our site.

8 Bibliography

Wix:<https://www.wix.com/>

Airtable:<https://www.airtable.com/>

APPENDICES

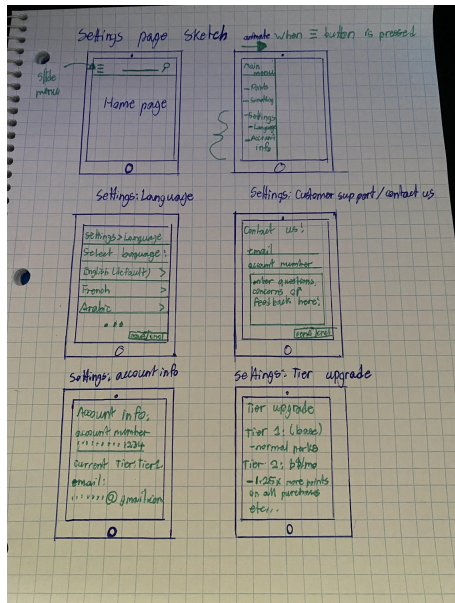
9 APPENDIX I: Design Files

- Deliverable_A_Proj_16
 - Team contract
- Deliverable_B_Proj_16
 - Identify clients need
- Deliverable_C_Proj_16
 - Design criteria
- Deliverable_D_Proj_16
 - Develop the design concept
- Deliverable_E_Proj_16
 - Make schedule
 - Test for prototype 1
- Deliverable_F_Proj_16
 - Complete the first prototype
 - Plan for the second prototype
- Deliverable_G_Proj_16
 - Complete the second prototype
 - Plan for the third prototype
- Deliverable_H_Proj_16
 - Complete the third prototype
 - Collect customer feedback
- Deliverable_I_Proj_16
 - Present the pitch presentation
- Deliverable_J_Proj_16
 - Learn from the advice given during the pitch presentation
 - Do the final presentation to show the completed project
- GNG1103 Project Presentation
- Design Day Presentation Proj16

Table 3. Referenced Documents

Document Name	Document Location and/or URL	Issuance Date
MakerRepo Page	https://makerepo.com/DominicRoy18/1023.proj-16-olp-loyalty-rewards-program-	Nov 18, 2021

10 APPENDIX II: Other Appendices



- First sketches/Ideation of the original loyalty program concept. First conceptualized as a mobile app.



- After doing the original sketches on paper, we then moved the sketches digitally.

HTML code for the Tier upgrade form

```
<iframe class="airtable-embed"  
src="https://airtable.com/embed/shr4t3En1YRbOY8pX?backgroundColor=blue"  
frameborder="0" onmousewheel="" width="100%" height="533" style="background:  
transparent; border: 1px solid #ccc;"></iframe>
```

HTML code for the Sign up form

```
<iframe class="airtable-embed"  
src="https://airtable.com/embed/shriVB4XtiFhKWBWu?backgroundColor=orange"  
frameborder="0" onmousewheel="" width="100%" height="533" style="background:  
transparent; border: 1px solid #ccc;"></iframe>
```

HTML code for the points conversion system

```
<iframe class="airtable-embed"  
src="https://airtable.com/embed/shrTyqM5Y7MfEnU6L?backgroundColor=orange"  
frameborder="0" onmousewheel="" width="100%" height="533" style="background:  
transparent; border: 1px solid #ccc;"></iframe>
```