



## **Product Guide – Coupon Smarter**

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# 1. Introduction

## 1.1. What is Coupon Smarter & why was it created?

With rapidly growing population in urban cities all over the world, parking of vehicles has been a matter of concern for individuals as well as businesses. The highly expensive parking charges is one of the major reasons keeping back most of the urban motorists from parking at public places. Like every other consumable service industry, parking industry also works on the supply and demand model. For lesser crowded areas having ample parking space, parking is not considered as a limited resource and has little perceived value. However, in case of densely populated urban cities, parking is relatively expensive because of lesser supply than demand.

As a result, a large proportion of people avoid using the paid parking services and switch to alternative options thereby affecting the businesses which generate direct or indirect profits through parking. **Parking Coupons** are one such important tool that can be used by parking companies as well as public targeted businesses like shopping malls, movie theatres, fitness centers, stadiums etc. to bring in new customers by offering lucrative deals on parking facility. However, this tool can prove to be highly effective only when it is implemented in a hassle-free and cost-efficient manner. It wouldn't be meaningful to issue and distribute parking coupon booklets in this world of technology and digitalization. Why use that 'obsolete and unorganized' booklet technique when everything can be efficiently handled by an application on your device by just a few clicks!

IPS, which is known for manufacturing state-of-the-art parking meters has come up with one such application known as **Coupon Smarter**, which provides the configuration required to implement the discounting feature on the parking meters.

Coupon Smarter is based on the DPC (Dynamic Pole Configuration) architecture. DPC is an XML based application that fetches the meter data for already installed VM Meters across the country. Currently this application will be installed only on VM meters due to their similar base platform i.e. XML. This application seeks two key data inputs from the parking meters: **Meter Schedule & Parking Rates**. A Meter Schedule is needed to understand the availability of a parking meter at a given time and the parking rates play an important role in assigning a discount value with a coupon.

Once installed on a user device, it generates the data dynamically based upon actions taken by a user at the User Interface level and then stores that data in configuration files. These files are later converted into a suitable format and sent to the parking meters.

## 1.2. Benefits of Coupon Smarter

- **Easy Installation** – Coupon Smarter is an application that doesn't require a separate hardware or software setup for installation on meters as well as user devices. It is built in a way that it's compatible with existing devices.
- **All-In-One Solution** – Coupon Smarter offers a wide range of features such as Discounting, Coupon Generation, Coupon Distribution, Meter Assignment, Report Generation etc.
- **User Friendliness** – All features of Coupon Smarter are easy to understand and does not require an IT personnel or in-depth knowledge of IT for successful execution.
- **Cost Effectiveness**– Because there is no need to replace the existing parking meters or poles, the Coupon Smarter application is not heavy on the pockets.

### 1.3. How does it work?

To be able to use all the features offered by the Coupon Smarter application, each user will be given unique credentials for logging into the application.

After successfully logging into the application, a user has to follow a series of simple steps to complete a desired task. The first step is to create a **Coupon Profile**. A 'Coupon Profile' is a feature that allows the user to set the attributes of coupons which are sent to the end customers. It is the stage when a user defines the discounting type and value that is assigned to a coupon. The discounting type can be of three types: **Percentage Off, Fixed Discount & Fixed Rate Parking**. Moreover, a user can also set specific limitations and restrictions on the coupon usage which will be implemented on all coupons generated through that profile. Coupon Smarter also offers user-friendly ways to assign meters to the coupons by using real-time maps or by directly locating a meter by its Pole ID.

Once the Profile Setup is complete, a user can then generate & distribute coupons by using the **Quick Coupon & Generate Bulk Coupons** features of this application. The users can simply set the redemption life of coupons and enter details of customers before sending out coupons directly to an individual as well as groups of customers. All the coupons can also be managed by users while using the **Manage Coupons** feature which allows a user to add, delete or modify coupons based upon the need of the hour. <sup>®</sup>

Besides simplifying the process of generating and distributing parking coupons to customers, Coupon Smarter also enables a user to keep track of all the types of coupons such as active, consumed, exceeding use limits and invalid attempts with the help of the **Reports** feature.

All these features of Coupon Smarter will ensure a smooth flow of several inter-related operations like Coupon Generation, Discounted Parking and Record Tracking. This Product Guide will help you understand how each feature of this application works step by step.

The process starts with a login ID that will be created for all authorized users. Once you are logged in, the landing screen as shown below appears.

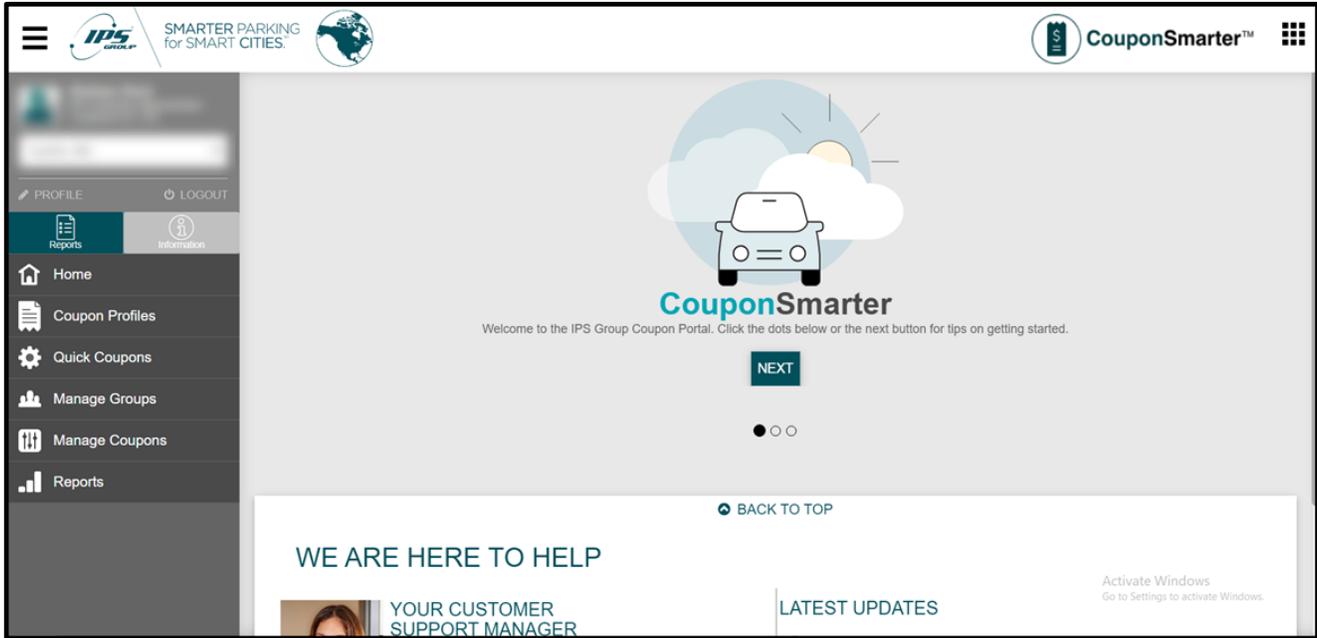


Figure 1.2.

## 2. Coupon Profile

### 2.1. Coupon Profile Setup

For setting up a profile, click on the **Coupon Profile** button present in the menu bar on the left-hand side as shown below.

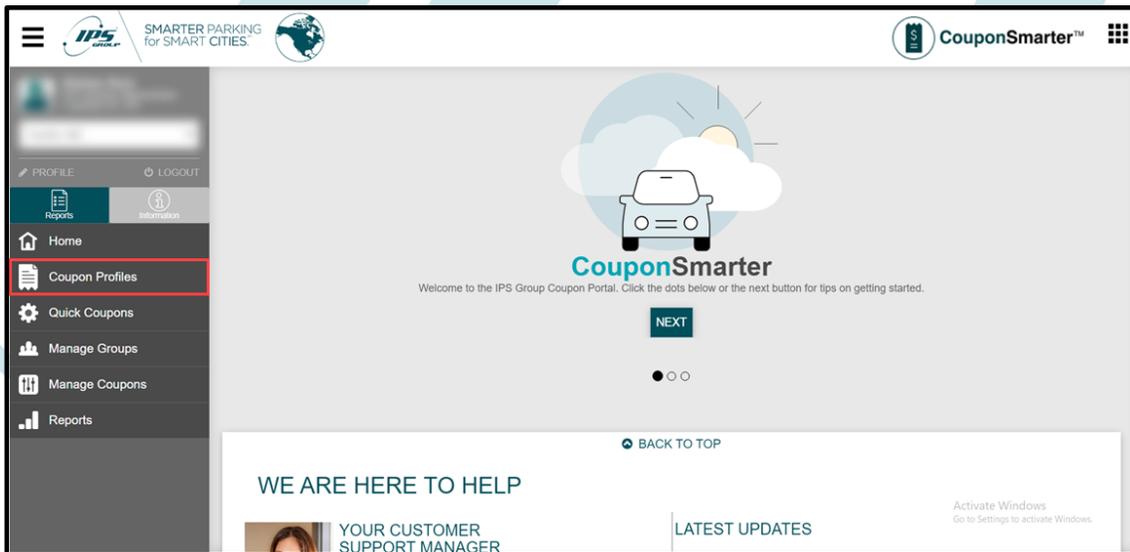


Figure 2.1.

## 2.1.1. Selecting a Profile: New or Existing

A customer can either update an existing profile or create a new profile from the beginning. To update an existing profile, select that particular profile from the list of existing profiles. However, in order to create a new profile, select **New Profile** from the drop-down menu as shown below.

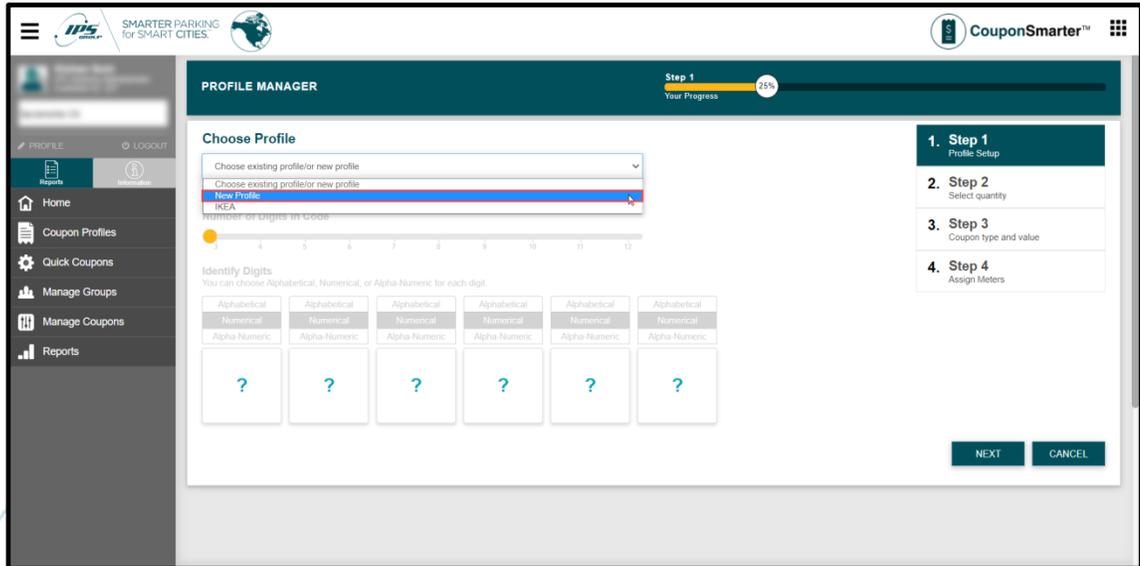


Figure 2.1.1. (a)

Next, you will be required to create a profile name. Once you have entered a suitable name in the given field, click on the **Enter** button as shown below.

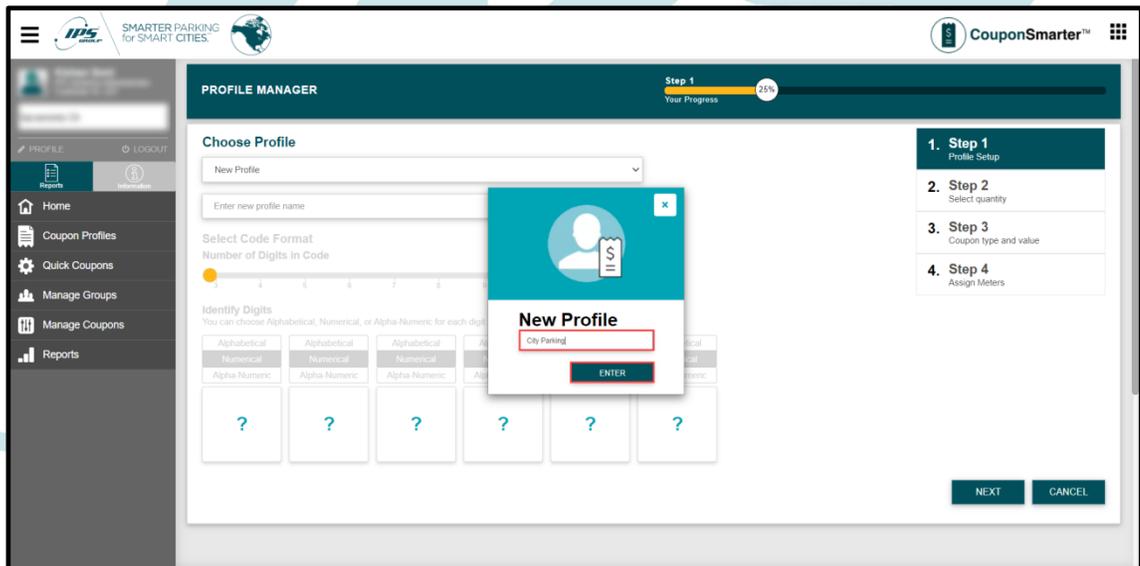


Figure 2.1.1. (b)

## 2.1.2. Selecting Coupon Code Format

There are two steps involved in setting up the format of a Coupon Code:

- (i) First, select the length of the code by selecting the number of digits in the scale shown below.

The screenshot shows the 'PROFILE SETUP' page for 'City Parking'. The progress bar indicates 'Step 1' is 25% complete. The 'Choose Profile' section has 'New Profile' selected. The 'Select Code Format' section shows 'Number of Digits in Code' set to 5. The 'Identify Digits' section has five columns, each with 'Numerical' selected. A 'NEXT' button is visible at the bottom right.

Figure 2.1.2. (i)

- (ii) Then select the type of characters for each code digit from the three options available i.e. Alphabetical, Numerical or Alpha Numerical.

The screenshot shows the 'PROFILE SETUP' page with 'Number of Digits in Code' set to 5. The 'Identify Digits' section has five columns. The first column is 'Alphabetical' with 'Z' entered. The second column is 'Numerical' with '7' entered. A red box highlights the first two columns. A note says: 'Note: To freeze the value of a digit, enter a character in that particular field.' A red arrow points from the note to the 'Z' and '7' fields. A red box highlights the 'Step 2' button in the progress bar, with a note: 'Click on the Step 2 button or the NEXT button to go to the next step.' The 'NEXT' button is at the bottom right.

Figure 2.1.2. (ii)

Note: You can also enter a range of characters (alphabetical/numerical) to freeze a particular digit by entering the upper & lower limits in the **Coupon Code Character** field as shown above (for example: 0-7 or J-Z).

## 2.2. Coupon Usage

### 2.2.1. Selecting Coupon Usage: Limited or Unlimited

To begin, select the type of usage for the coupon. For allowing limited usage, select the **NO** option in the slider button as shown below.

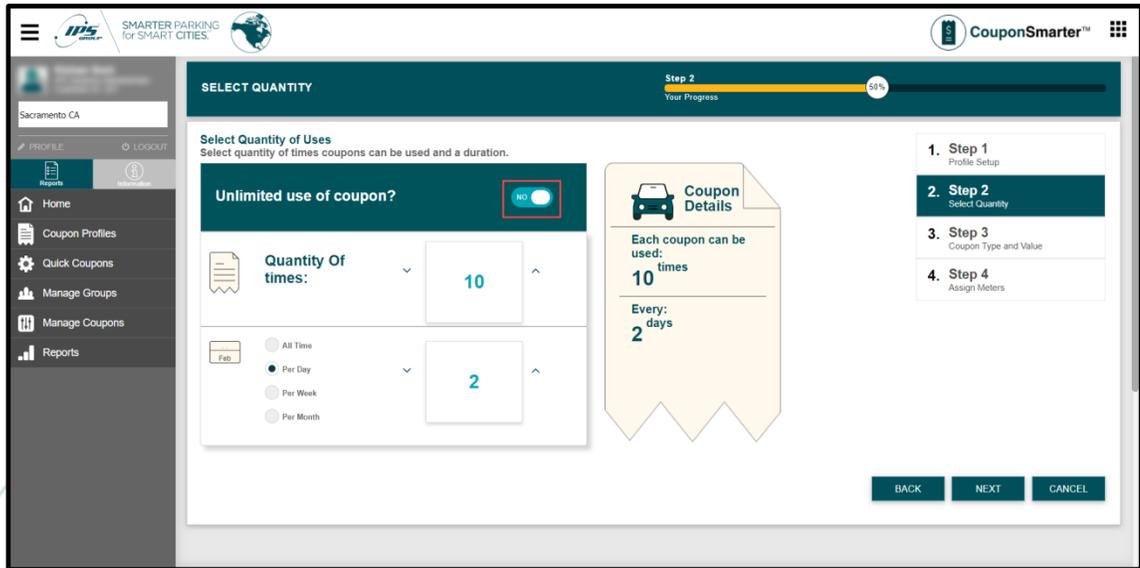


Figure 2.2.1. (i)

Otherwise, switch the slider button to **YES** option for allowing unlimited usage of the coupon as shown below.

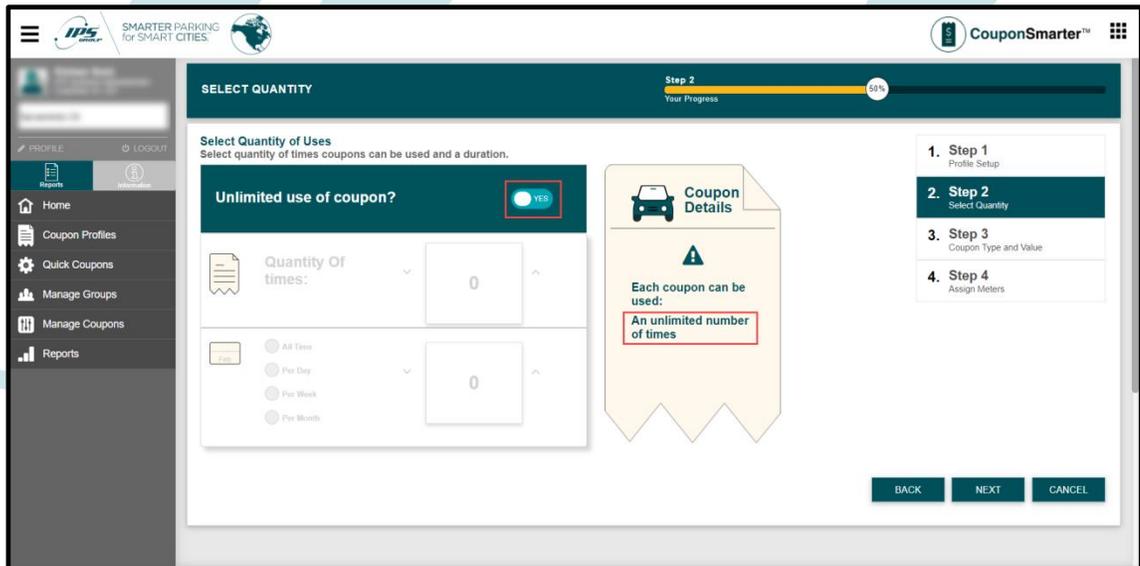


Figure 2.2.1. (ii)

## 2.2.2. Setting up Coupon Usage Quantity

In case of limited usage of coupon, set the number of times a coupon can be used for a particular duration by increasing or decreasing the number on the meter.

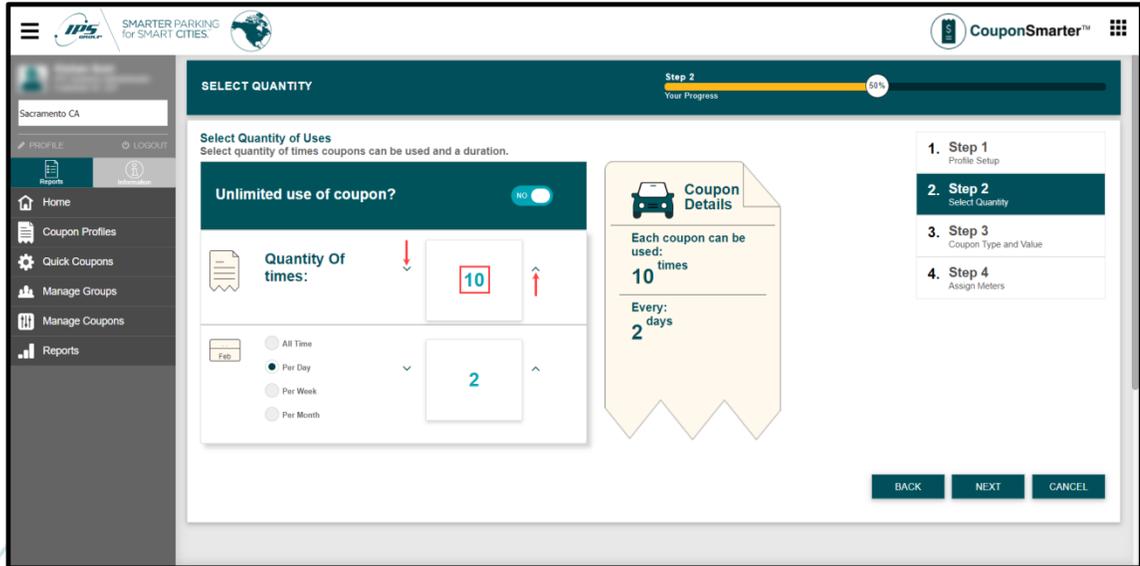


Figure 2.2.2.

## 2.2.3. Setting up Coupon Usage Duration

Next, set the usage duration by selecting the time period from the four given options and selecting the occurrences by increasing or decreasing the number on the meter.

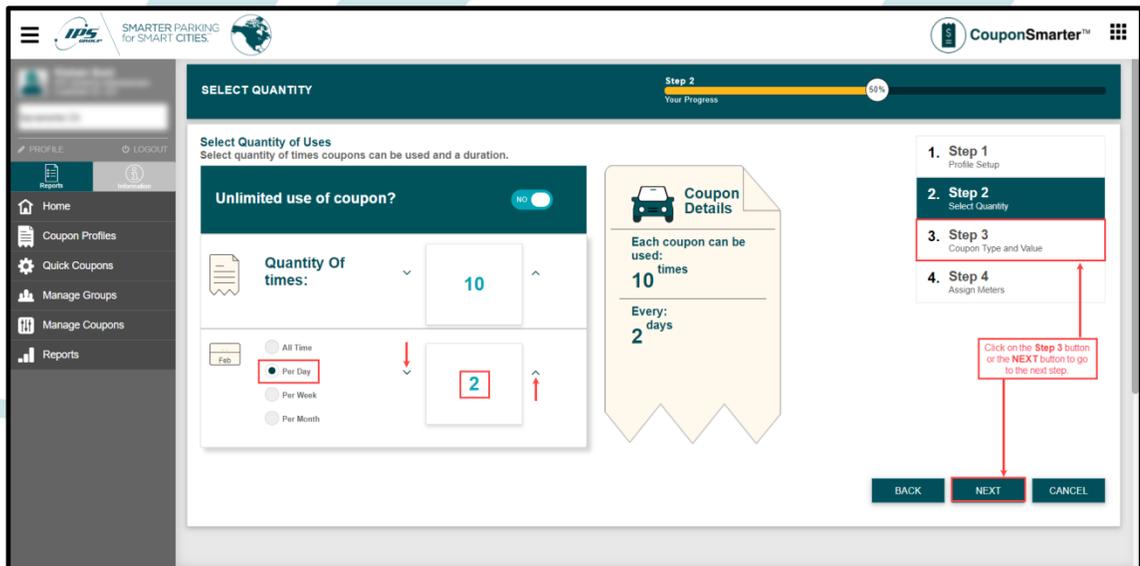


Figure 2.2.3.

## 2.3. Coupon Type and Value

### 2.3.1. Selecting Coupon Type

Select the type of coupon based upon the form of discount being offered to the end customer as shown below.

The screenshot displays the 'COUPON TYPE AND VALUE' configuration page in the CouponSmarter system. The page is titled 'Step 3' and shows a progress bar at 75%. The 'Select Coupon Type and Value' section has three radio button options: 'Percentage Off Coupon' (selected and highlighted with a red box), 'Fixed Discount Coupon', and 'Flat rate parking'. Below this, there are 'Coupon Limitations' with three toggle switches, all currently set to 'OFF'. The 'Enter Percentage OFF' field is populated with '5'. There are also fields for 'Fixed Discount OFF' and 'Flat rate', both currently empty. A 'Duration' field is set to '0' minutes, and a 'Value' field is empty. A dropdown menu for 'Coupon Affiliation Validity' is set to 'Standard'. A sidebar menu on the left contains options like Home, Coupon Profiles, Quick Coupons, Manage Groups, Manage Coupons, and Reports. A step indicator on the right shows four steps: 1. Step 1 Profile Setup, 2. Step 2 Select Quantity, 3. Step 3 Coupon Type and Value (highlighted), and 4. Step 4 Assign Meters. At the bottom right, there are 'BACK', 'CANCEL', and 'SAVE + NEXT' buttons.

Figure 2.3.1.

### 2.3.2. Entering Value-based on Coupon Type

Based on the coupon parking type selected, enter the appropriate value in the respective fields as shown below.

This screenshot is identical to Figure 2.3.1, but with red dashed arrows pointing from the 'Percentage Off Coupon' radio button to the 'Enter Percentage OFF' field, which contains the value '5'. The other elements of the interface, including the sidebar, step indicator, and other form fields, remain the same.

Figure 2.3.2.

### 2.3.3. Selecting Coupon Limitations

For setting limitations on the usage of coupon, select the **ON** option in the slider button and then set either the duration or the price value by which a coupon needs to be limited in the respective fields (as shown below).

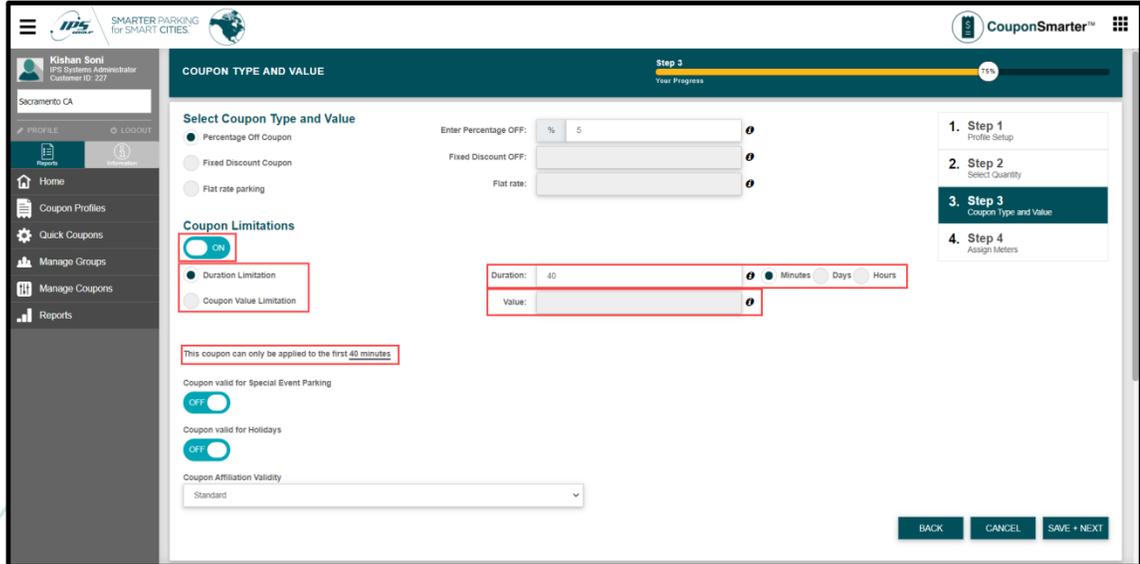


Figure 2.3.3.

### 2.3.4. Selecting Coupon Restrictions and Affiliations

In case of any specific restrictions (For eg.: special events or holidays) and affiliations (For eg.: senior citizen parking, staff parking etc.), select the desired options as shown below.

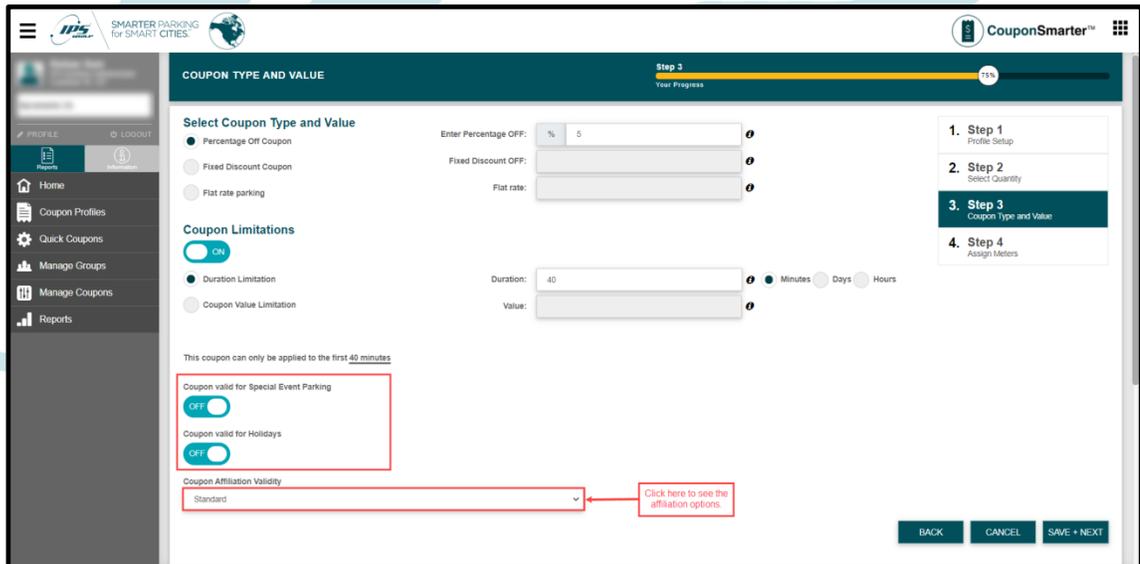


Figure 2.3.4.

Once the Coupon Profile is complete, make sure to click on the **SAVE + NEXT** button to successfully create the profile.

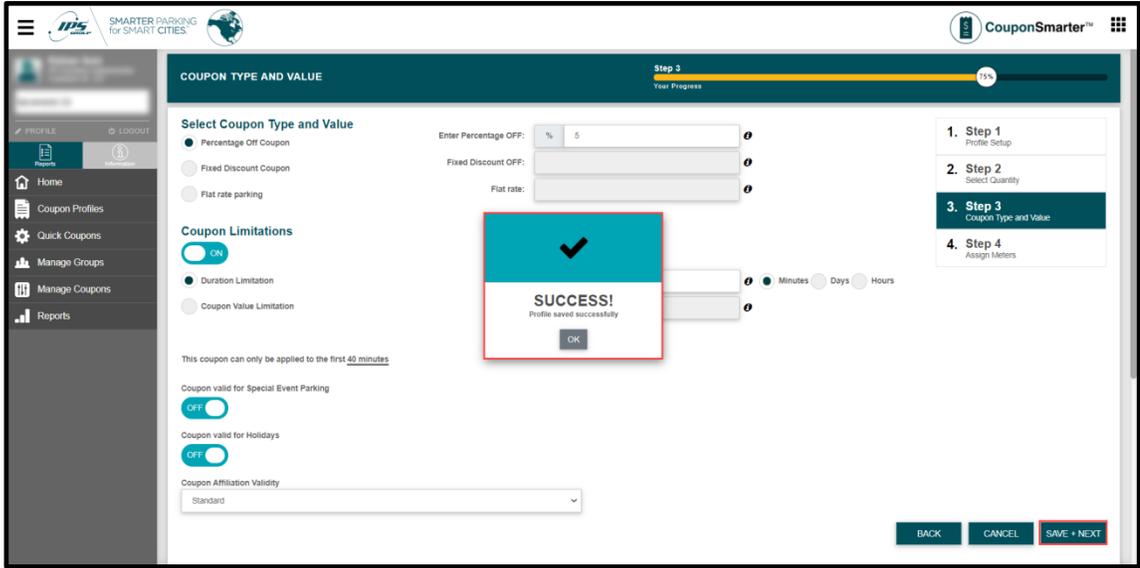


Figure 2.3.5.

## 2.4. Assigning Meters

There are two methods of assigning meters to a coupon – Map View & List View. Below shown is the **MAP** view which is the currently selected option. Each meter is associated with a specific Pole ID, Zone, Sub Zone and Area. To find a meter on the map, select the desired options in the fields highlighted below and click on the **SEARCH** button.

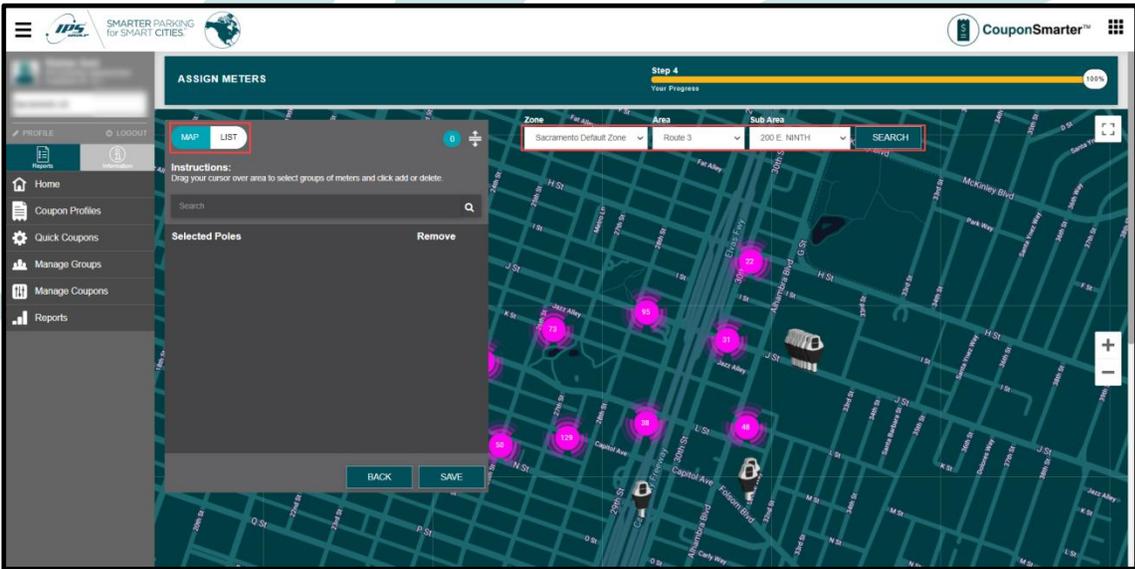


Figure 2.4. (i)

Once the meter is located on the map, select it and click on the **ADD** button to assign that particular meter. However, an already selected meter can be removed by selecting it and clicking on the **REMOVE** button. In case you want to take a collective action on all the visible meters, click on the **SELECT ALL** button. Once all changes are made, click on the **SAVE** button to continue (as shown below).

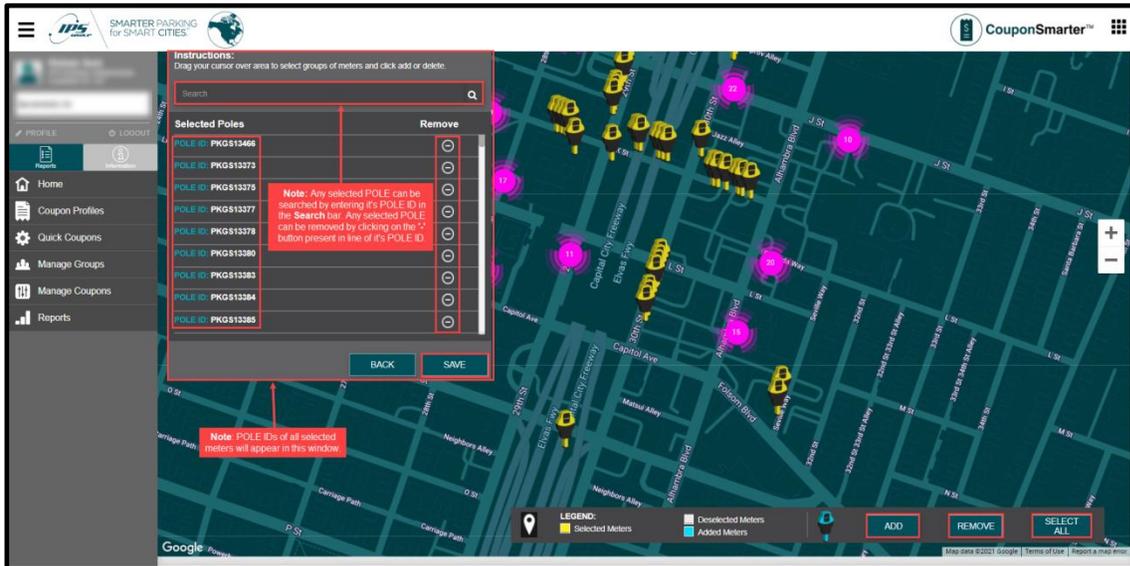
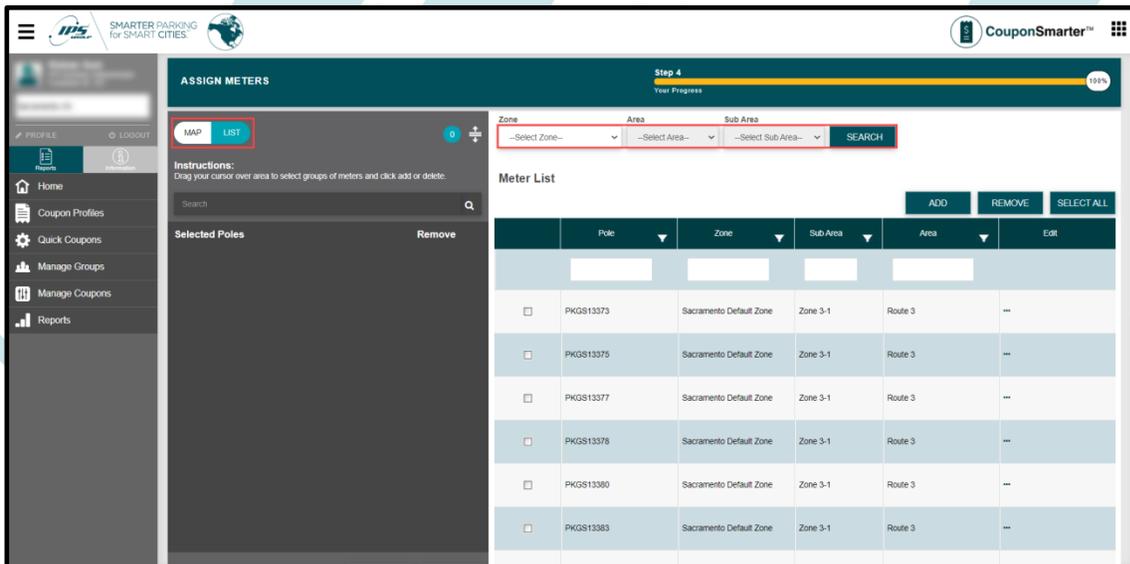
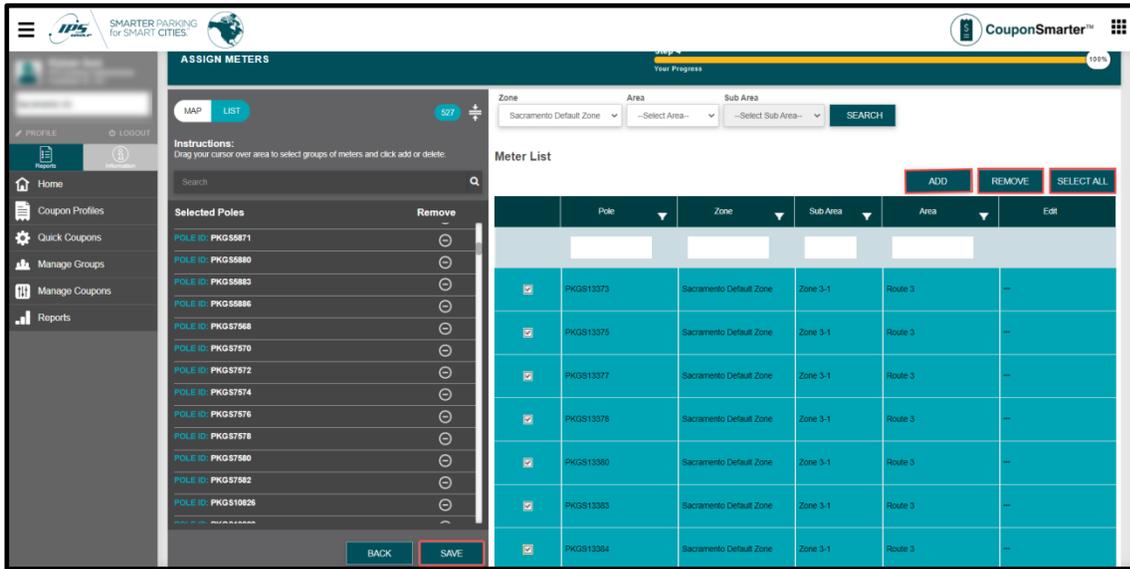


Figure 2.4. (ii)

However, all the meters can be viewed and accessed in form of a list by switching to the **LIST** mode as shown below. Each meter is associated with a specific Pole ID, Zone, Sub Zone and Area. To find a meter in the list, select the desired options in the fields highlighted below and click on the **SEARCH** button.



Once the meter is located in the list, select it and click on the **ADD** button to assign that particular meter. However, an already selected meter can be removed by selecting it and clicking on the **REMOVE** button. In case you want to take a collective action on all the visible meters, click on the **SELECT ALL** button. Once all changes are made, click on the **SAVE** button to continue (as shown below).



Once all the profile settings are successfully saved, you will be redirected to the home screen where the following message will appear.

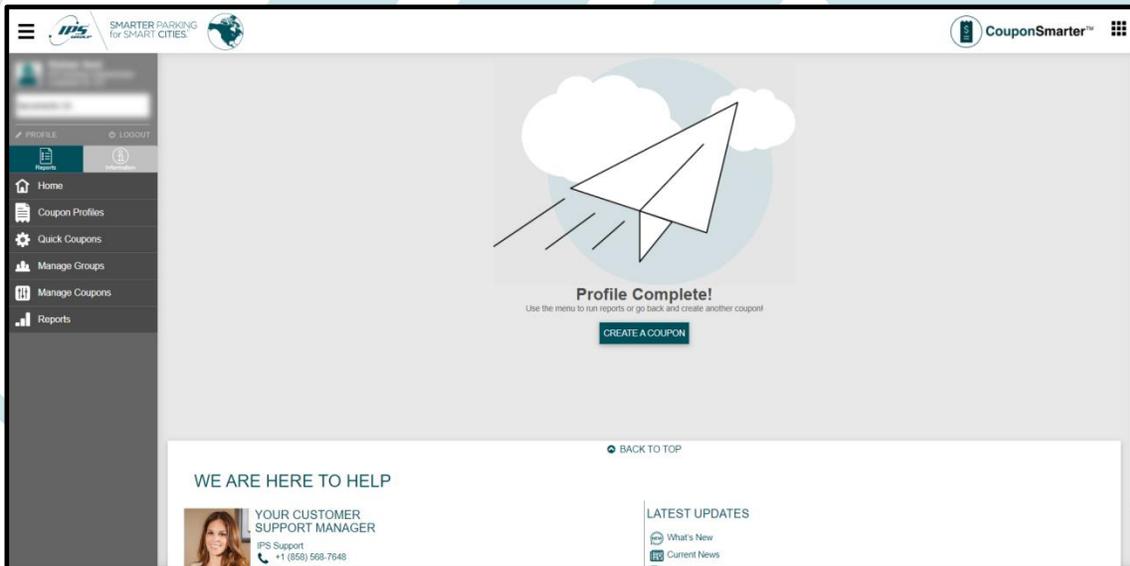


Figure 2.4. (iv)

## 3. Coupon Creation

### 3.1. Single Coupon

This is the case when only a single coupon needs to be issued for a particular customer. To begin, click on the **Quick Coupons** button from the left-hand side bar of the Homescreen as shown below.

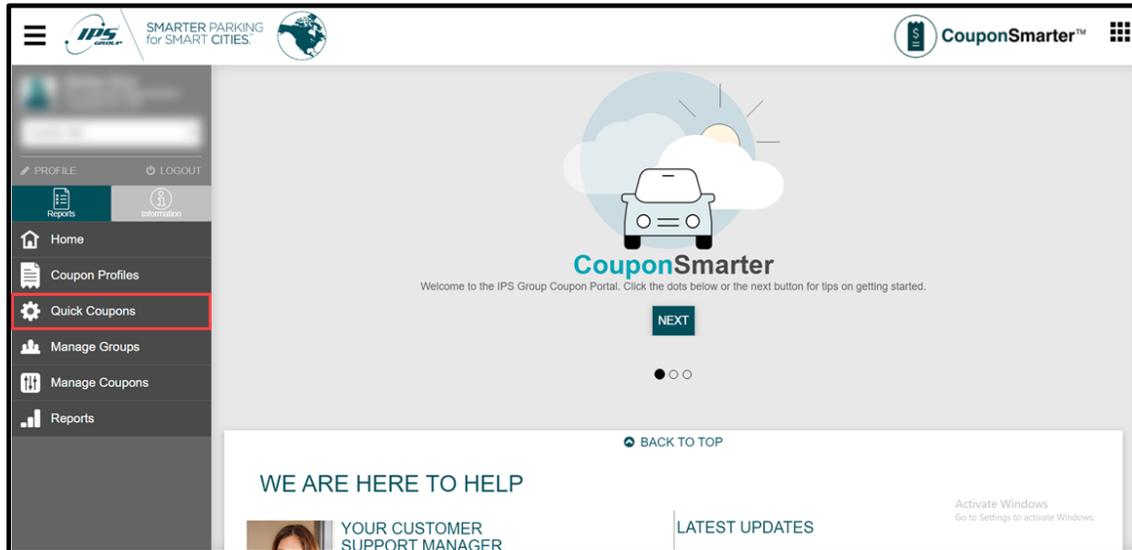


Figure 3.1 (i)

#### 3.1.1. Selecting Coupon Profile

Once you are on the **Quick Coupons** page, you will first have to choose a particular coupon profile from a list of available options in the drop-down menu as shown below.

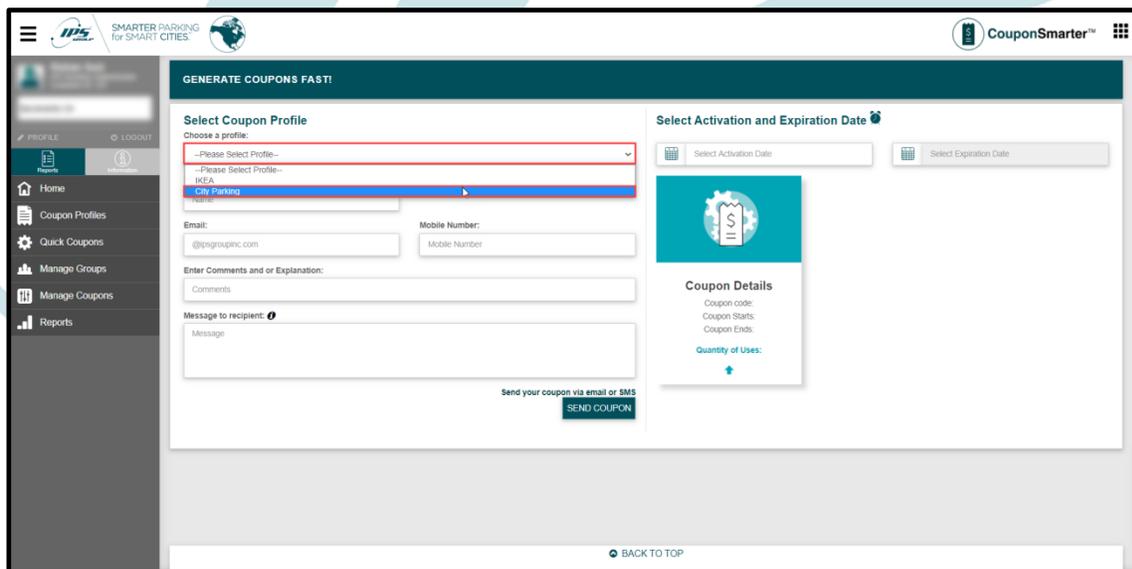


Figure 3.1.1.

### 3.1.2. Selecting Coupon Activation Date

In order to set the activation date of the coupon, click on the **Select Activation Date** field present under the **Select Activation and Expiration Date** section as shown below.

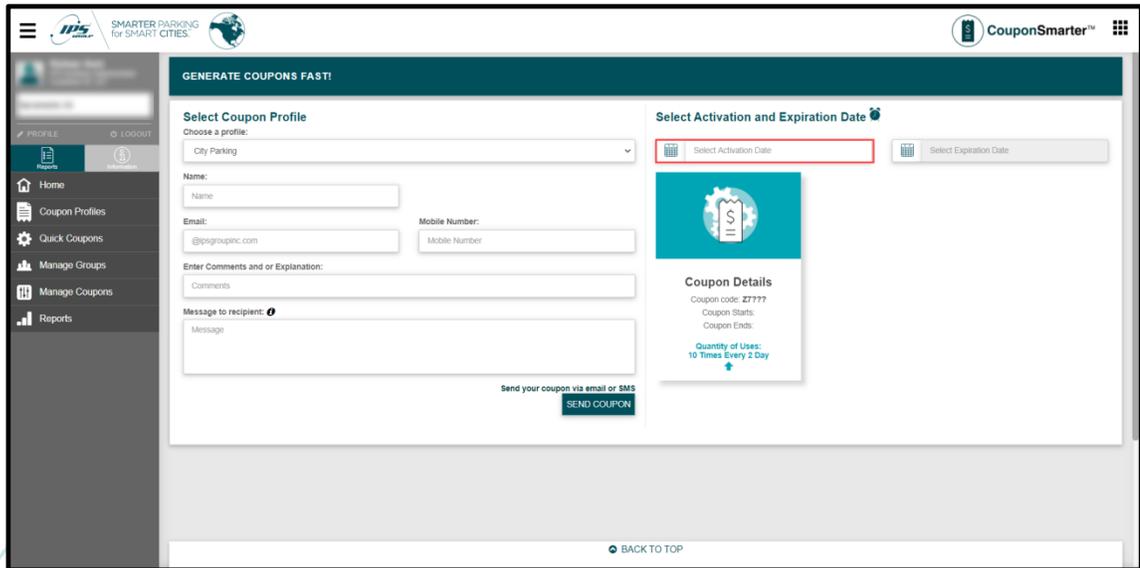


Figure 3.1.2.

There are two ways to select an **Activation Date**:

- (i) By selecting the exact month and date from the calendar as shown below.

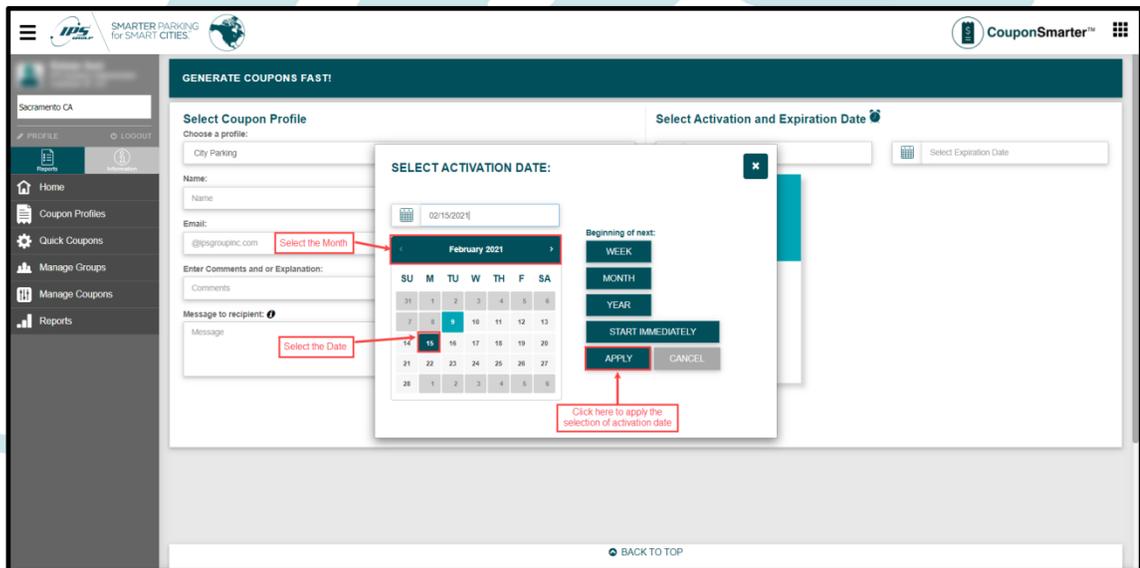


Figure 3.1.2 (i)

(ii) By selecting the start time criterion as shown below.

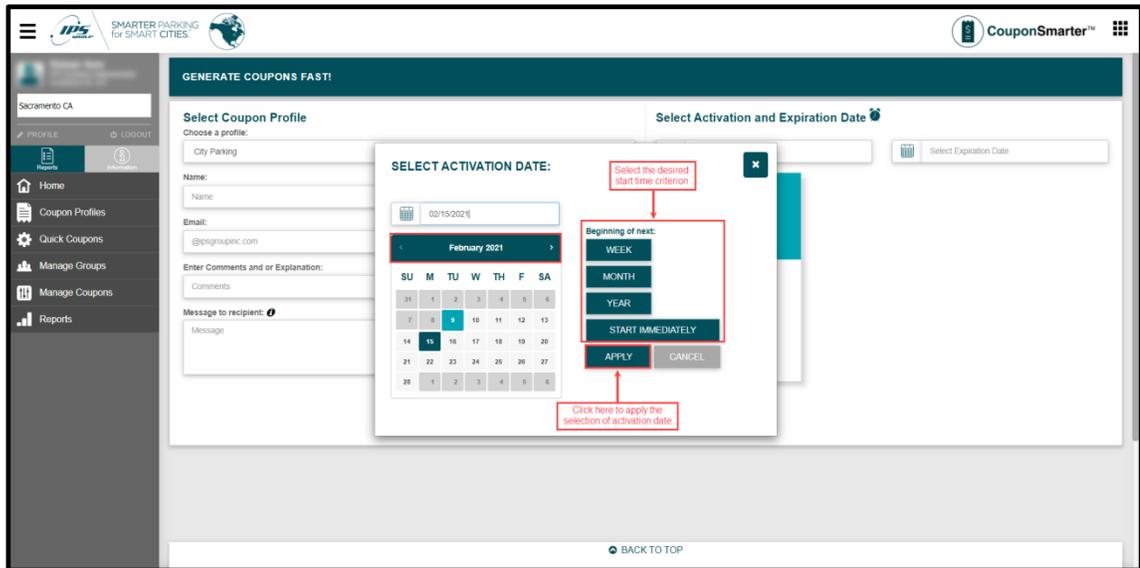


Figure 3.1.2 (ii)

### 3.1.3. Selecting Coupon Expiration Date

In order to set the expiration date of the coupon, click on the **Select Expiration Date** field present under the **Select Activation and Expiration Date** section as shown below.

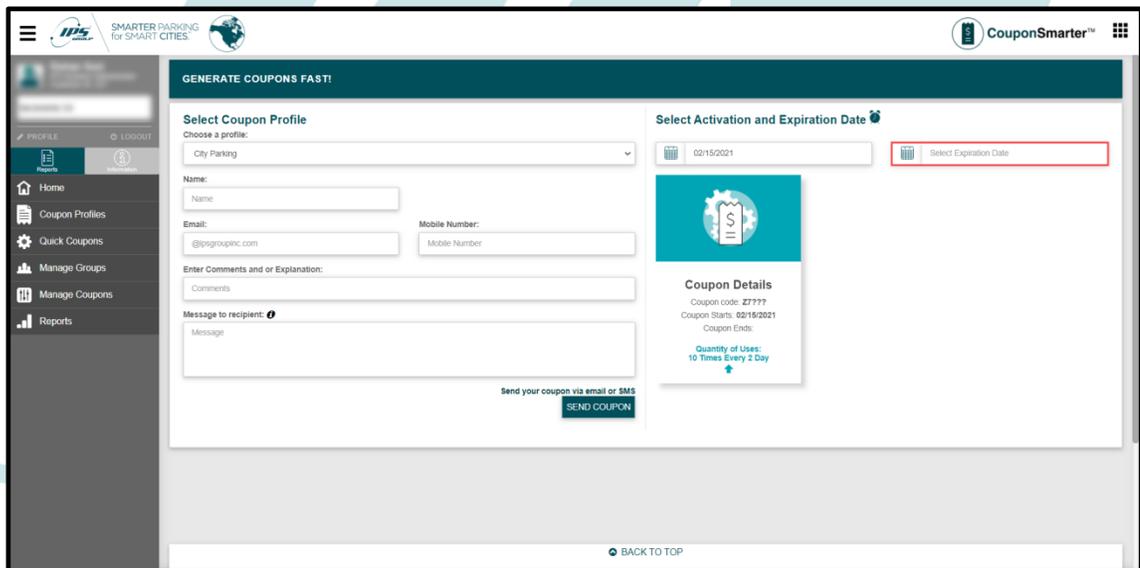


Figure 3.1.3.

There are two ways to select an **Expiration Date** –

(i) By selecting the exact month and date from the **Calendar** as shown below.

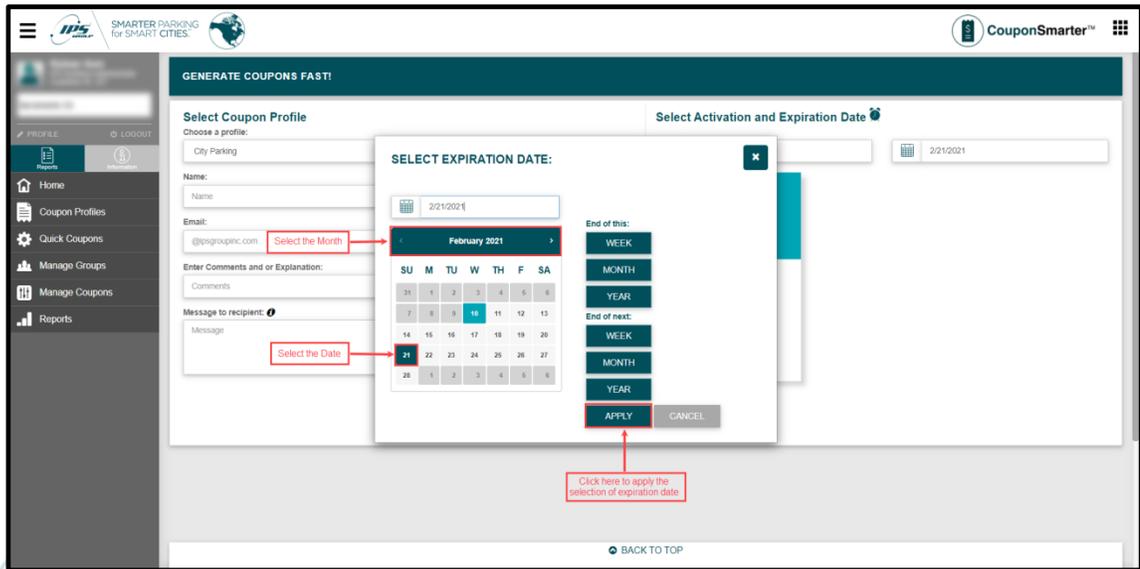


Figure 3.1.3 (i)

(ii) By selecting the **End Time** criterion as shown below.

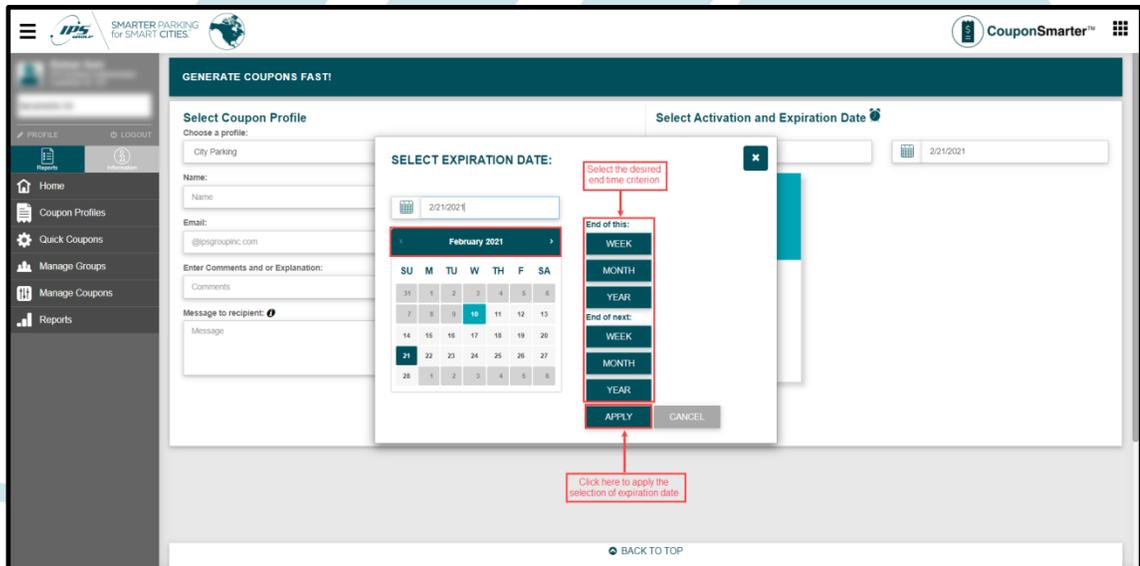


Figure 3.1.3 (ii)

### 3.1.4. Coupon Recipient Details

Next step is to enter details of the recipient to whom the coupon will be sent through email and SMS. Enter values in the **Name**, **Email** and **Mobile Number** fields as shown below.

The screenshot shows the 'GENERATE COUPONS FAST!' interface. On the left is a navigation menu with options like Home, Coupon Profiles, Quick Coupons, Manage Groups, Manage Coupons, and Reports. The main form area is divided into several sections: 'Select Coupon Profile' with a dropdown menu set to 'City Parking'; 'Name' field containing 'Zubin Sethi'; 'Email' field containing 'zubin.sethi@xanthus.in'; 'Mobile Number' field containing '989-911-0222'; 'Enter Comments and or Explanation:' with a text area; and 'Message to recipient:' with a text area. To the right, 'Select Activation and Expiration Date' shows dates '02/15/2021' and '2/21/2021'. Below this is a 'Coupon Details' box with a coupon icon, code 'Z7777', start/end dates, and 'Quantity of Uses: 10 Times Every 2 Day'. A 'SEND COUPON' button is at the bottom right, with a note 'Send your coupon via email or SMS' above it.

Figure 3.1.4.

### 3.1.5. Reviewing & Sending Coupons

Finally, in the **Message to Recipient** field, write a message that you would want the user to receive along with the coupon and then click on the **Send Coupon** button as shown below.

This screenshot is identical to Figure 3.1.4, but with additional annotations. A red box highlights the 'Message to recipient:' field, which contains the text: 'Dear Customer, We are pleased to issue a Parking Coupon for you. Kindly go through the coupon details carefully for being able to redeem it without any hassle. Have a nice day! Greetings.' Another red box highlights the 'Coupon Details' section, with a red arrow pointing to it and the text 'Review the Coupon Details carefully before sending the coupon'. The 'SEND COUPON' button and 'Send your coupon via email or SMS' note are also present.

Figure 3.1.5.

Once the coupon is sent successfully, the following message will appear on the screen:

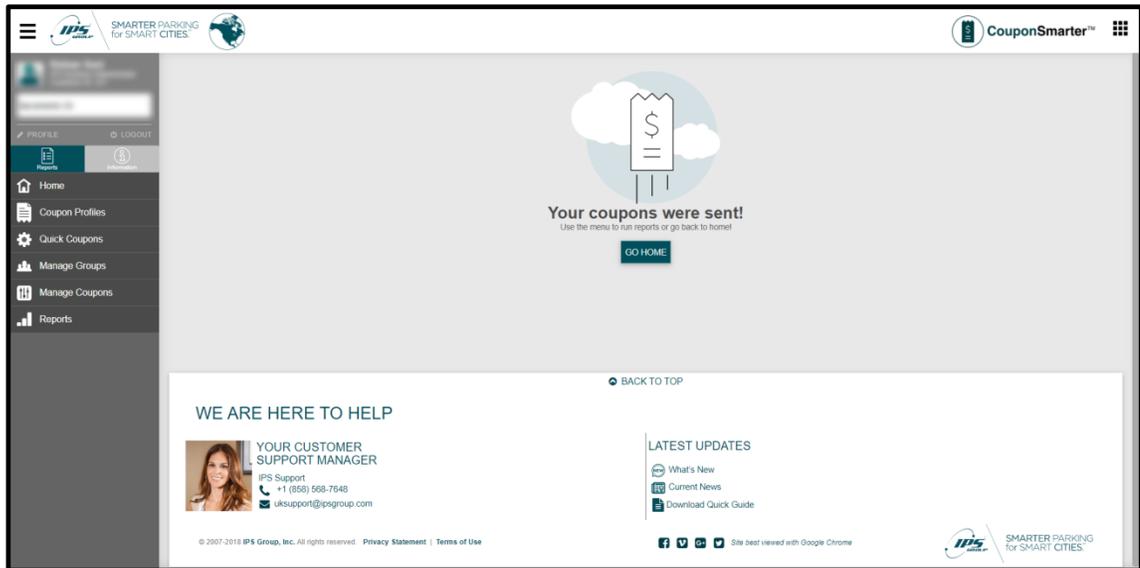


Figure 3.1.5. (i)

## 3.2. Bulk Coupons

This is the case when a batch of coupons needs to be issued for a group of customers. To begin, click on the **Manage Groups** button from the left-hand side bar of the Home Screen as shown below.

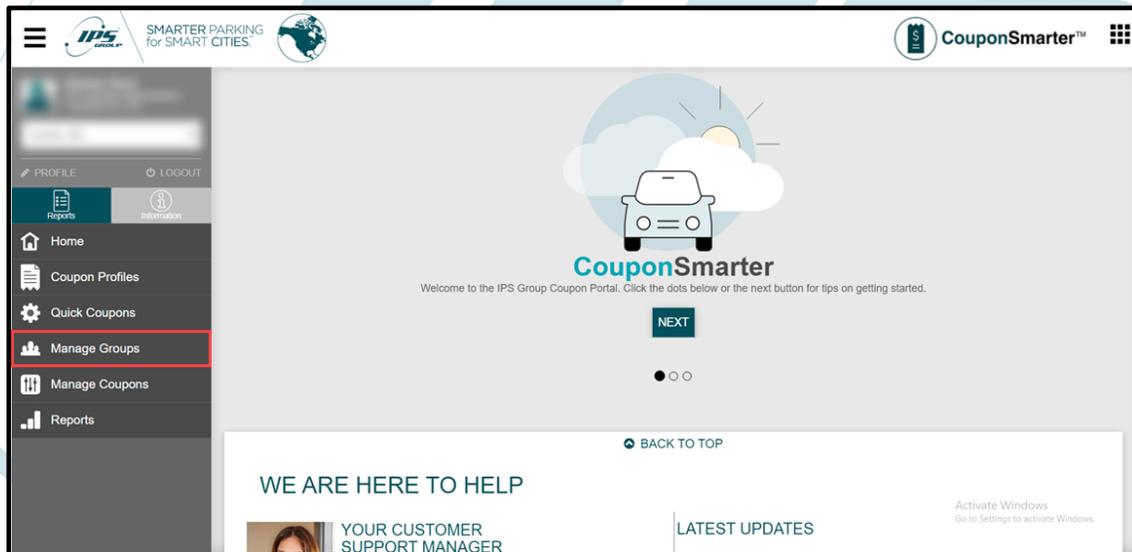


Figure 3.2. (i)

Once you go to the **Manage Groups** section, locate the group for which you are creating coupons under the 'Group Manager List' and then click on the 'Generate Bulk Coupons' icon as shown below.

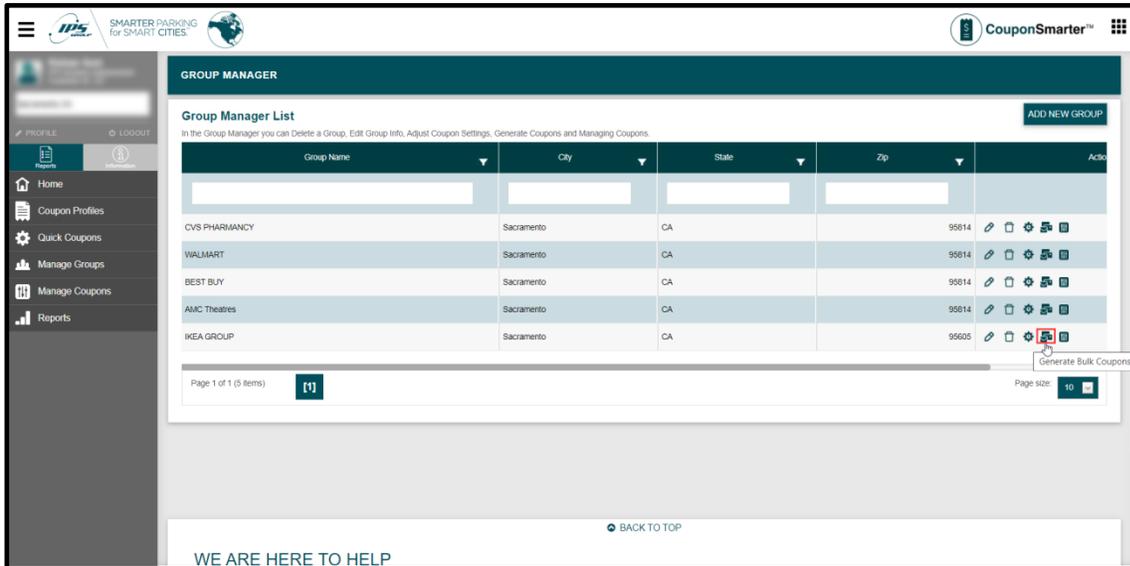


Figure 3.2. (ii)

### 3.2.1. Selecting Coupon Profile

Once you are on the **Generate Bulk Coupons** page, you will first have to choose a particular coupon profile from a list of available options in the drop-down menu as shown below.

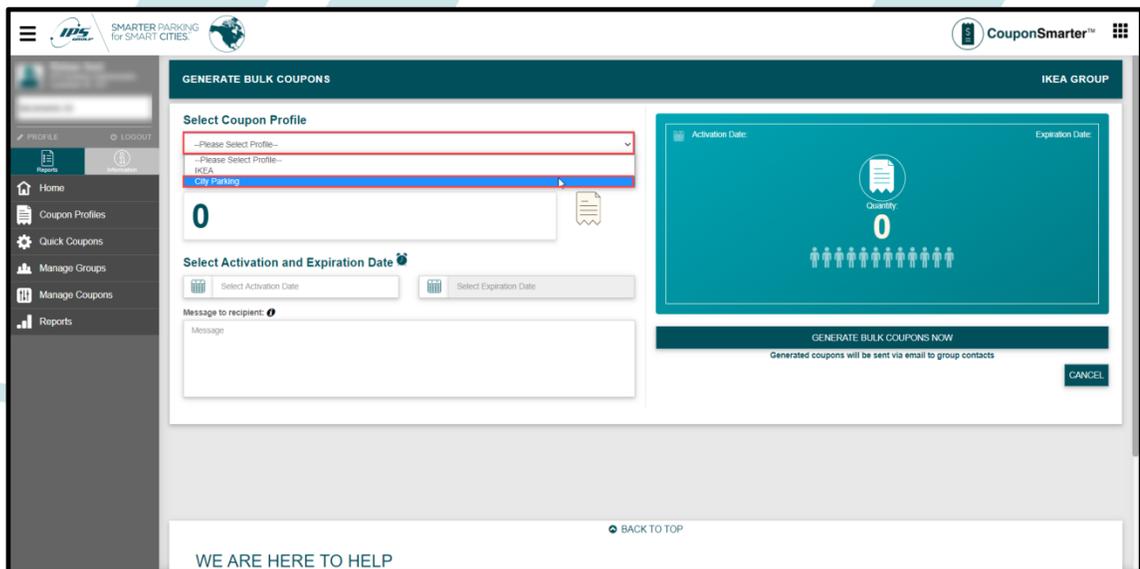


Figure 3.2.1.

### 3.2.2. Selecting Coupon Quantity

The next step is to set the quantity of the coupons to be sent. Enter the number of coupons you want to send to this group in the **Select Coupon Quantity** field as shown below.

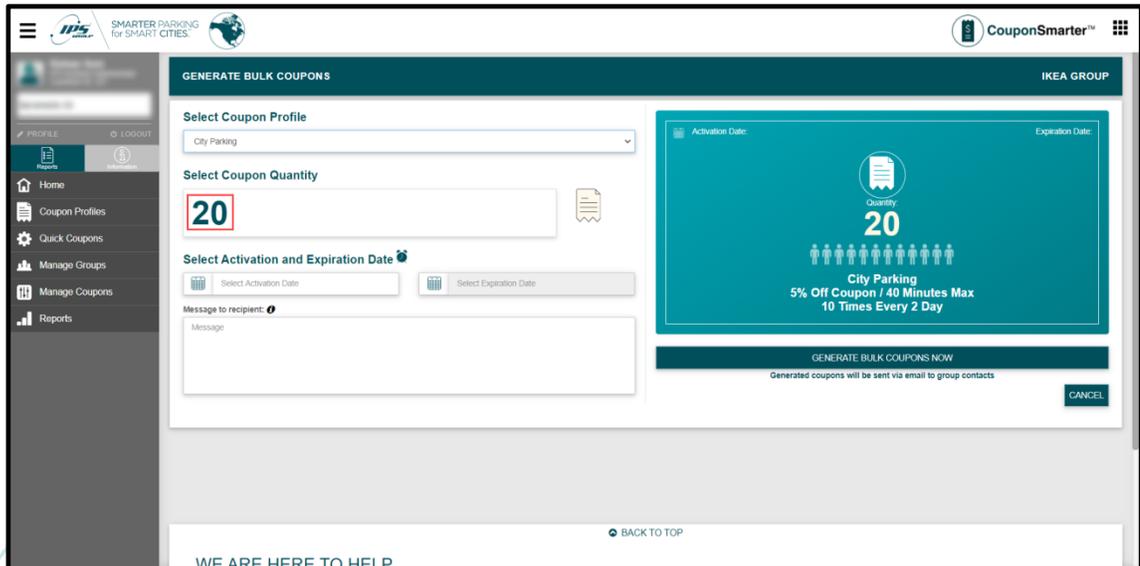


Figure 3.2.2.

### 3.2.3. Selecting Coupon Activation Date

In order to set the activation date of the coupons, click on the **Select Activation Date** field present under the **Select Activation and Expiration Date** section as shown below.

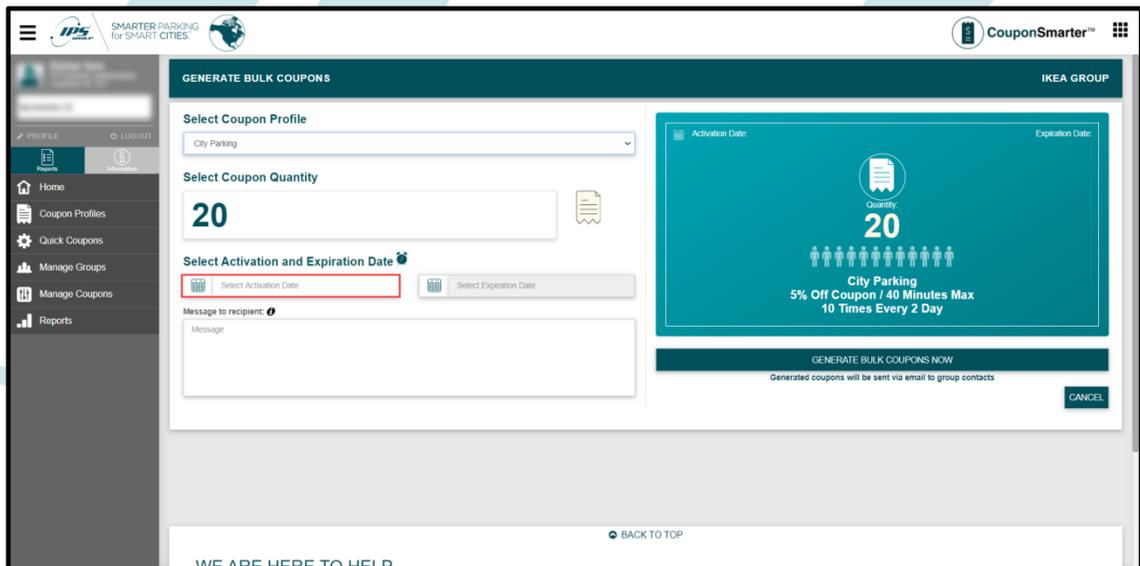


Figure 3.2.3.

There are two ways to select an **Activation Date**:

(i) By selecting the exact month and date from the calendar as shown below.

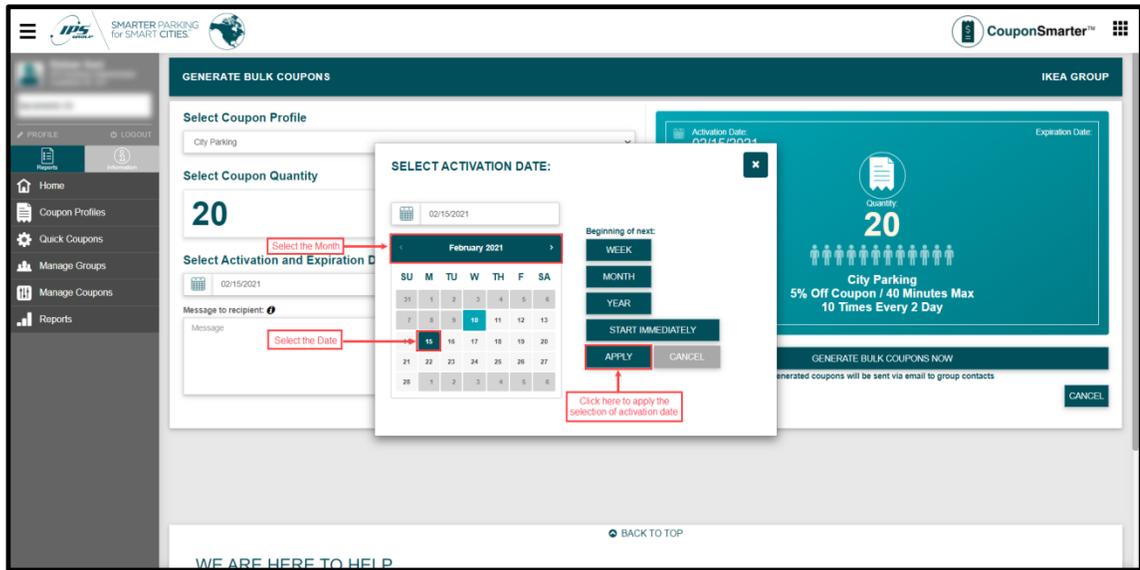


Figure 3.2.3 (i)

(ii) By selecting the **Start Time** criterion as shown below.

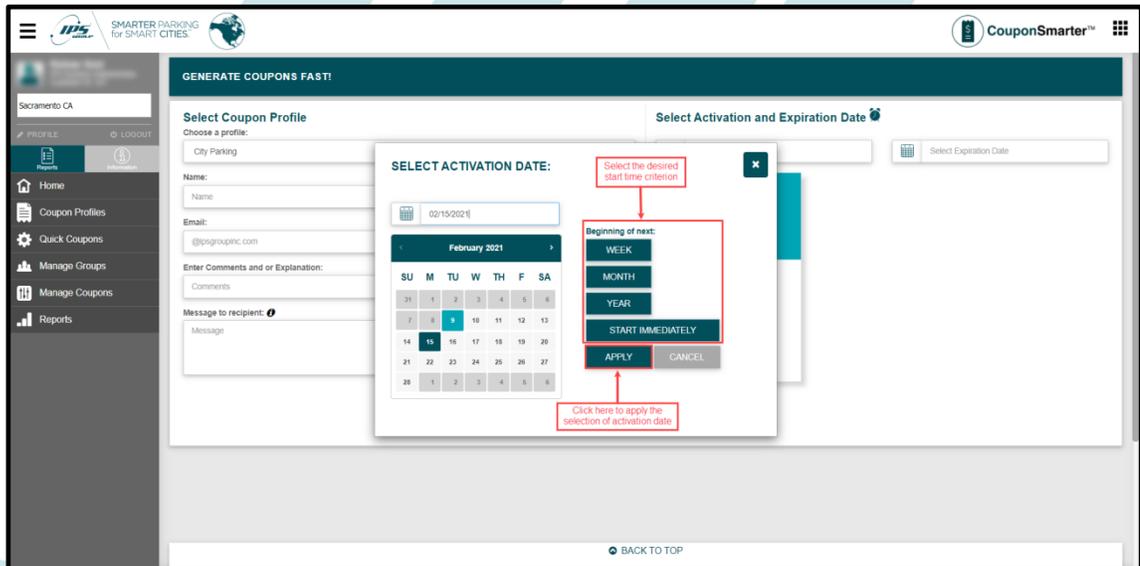


Figure 3.2.3 (ii)

### 3.2.4. Selecting Coupon Expiration Date

To set the expiration date of the coupons, click on the **Select Expiration Date** field present under the **Select Activation and Expiration Date** section as shown below.

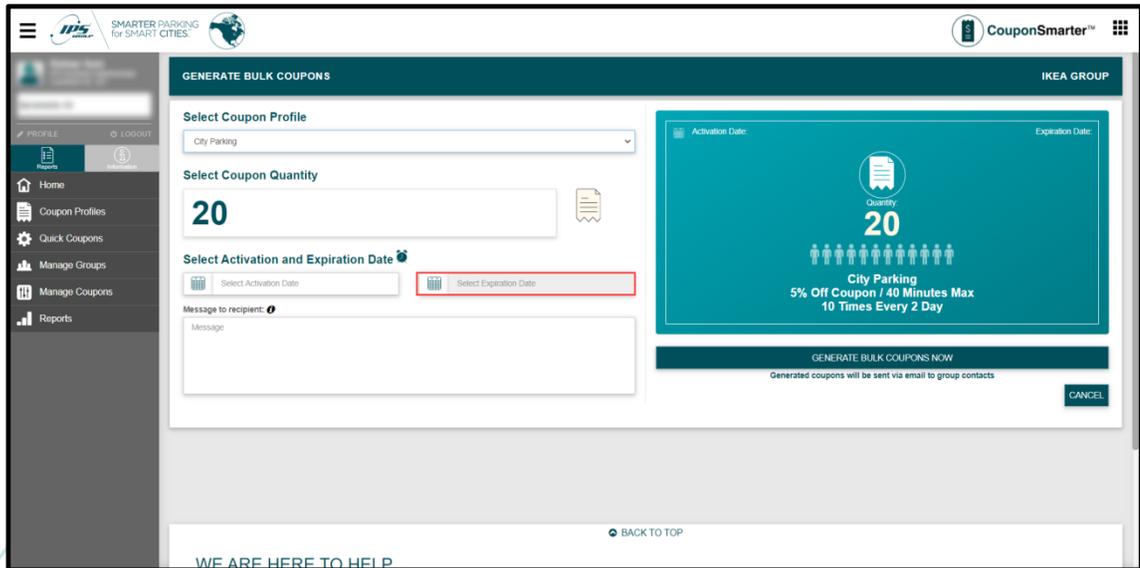


Figure 3.2.4.

There are two ways to select an **Expiration Date**:

- (i) By selecting the exact month and date from the **Calendar** as shown below.

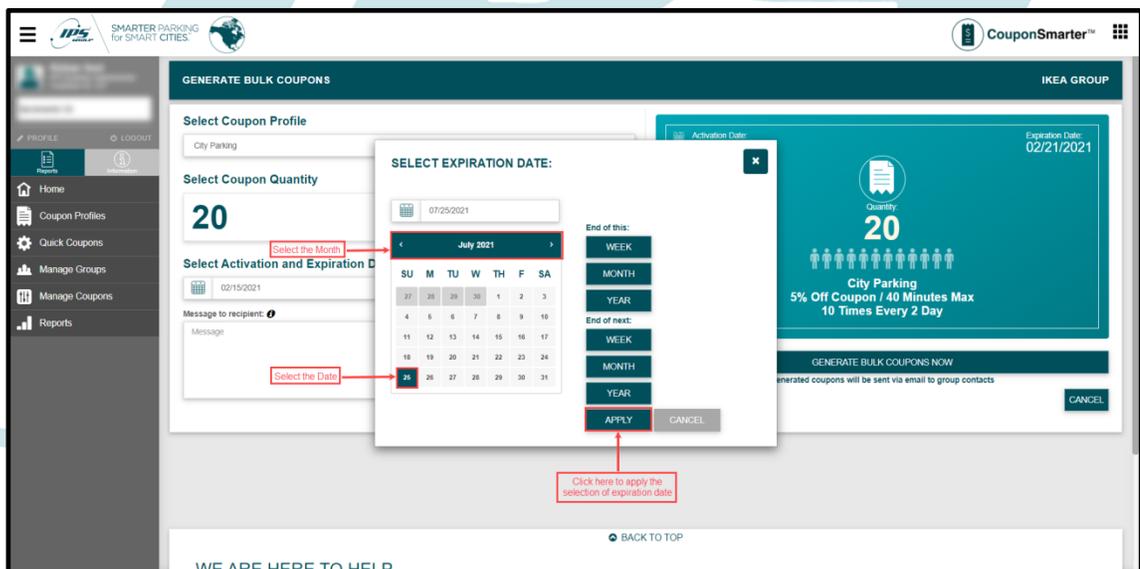


Figure 3.2.4 (i)

(ii) By selecting the **End Time** criterion as shown below, you can select an 'Expiration Date'.

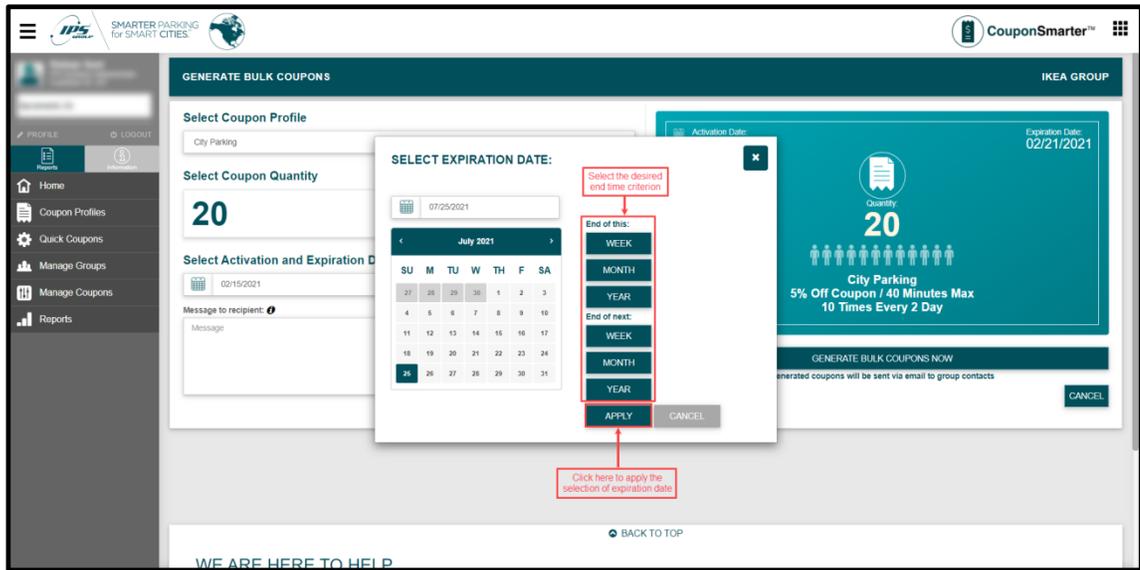


Figure 3.2.4 (ii)

### 3.2.5. Reviewing & Sending Coupons

In the **Message to Recipient** field, write a message that you would want the user to receive along with the coupon and then click on the **Generate Bulk Coupons Now** button as shown below.

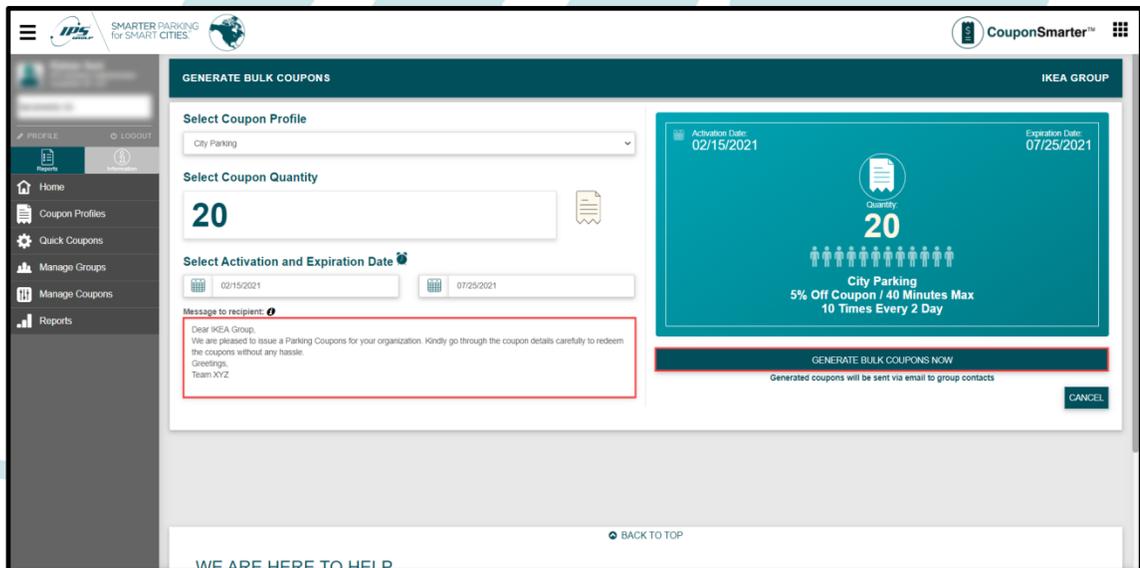


Figure 3.2.5. (i)

Once the coupons are sent successfully, the following message will appear on the screen.

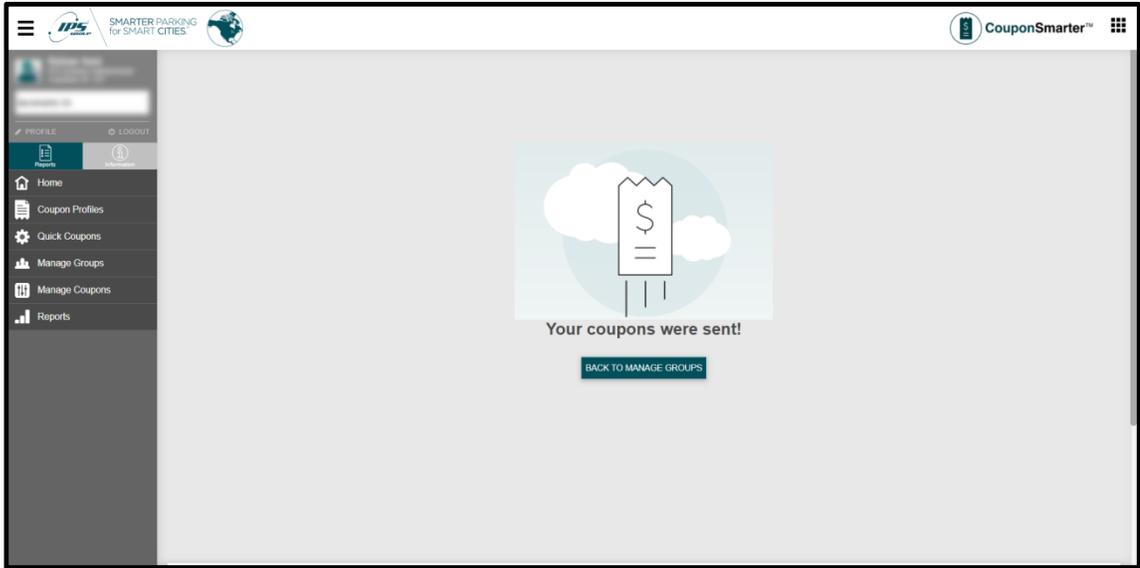


Figure 3.2.5. (ii)



## 4. Managing Groups

All the desired actions that are specific to a group of customers such as creating a new group, deleting/editing an existing group, sending bulk coupons and managing coupons can be performed by going to **Manage Groups** section present on the left-hand side bar of the Home Screen as shown below.

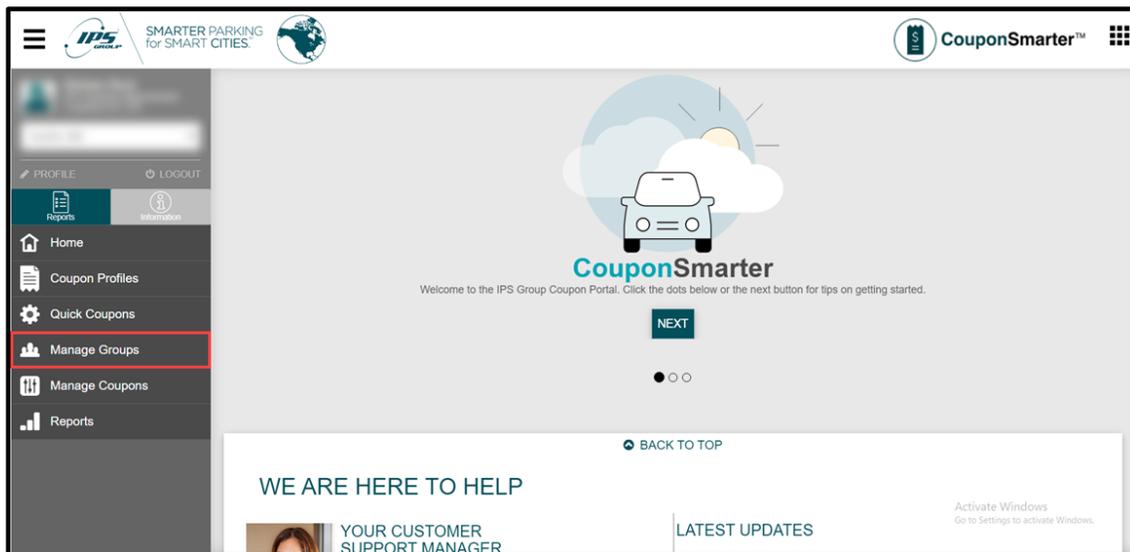


Figure 4.0.

## 4.1. Creating a New Group

Once you are on the **Manage Groups** page, click on the 'Add New Group' button as shown below.

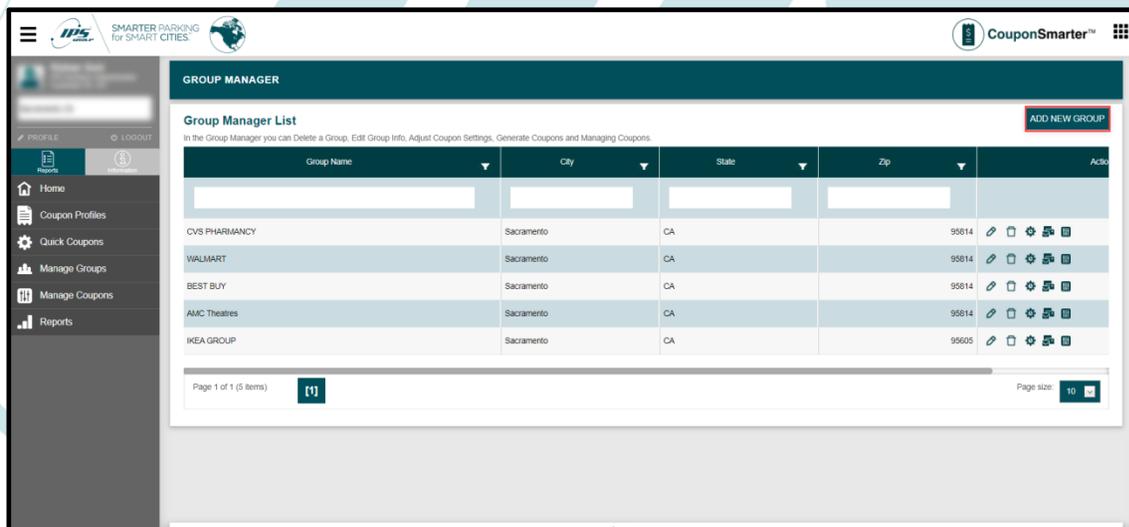


Figure 4.1.

### 4.1.1. Adding Group Information

To begin, add the group information in the **New Group Form** by entering values in all the fields present under **Organization Info** i.e. Organization Group Name, Mailing Address, City, State, Zip, Phone Number and Comments. Enter values in the highlighted fields as shown below.

The screenshot shows the 'NEW GROUP FORM' interface. The 'Organization Info' section is highlighted with a red border. It contains the following fields: Organization Group Name (AMC Theatre), Mailing Address (8th Street, Old Sacramento), City (Sacramento), State (CA), Zip (95814), and Phone Number (916-100-1000). A 'Comments' field contains the text 'Parking Coupons for AMC Theatre patrons'. Below this is the 'Add new contacts' section, which includes a table with columns for Name, Email, Phone, Role/Title, and Note. There are 'BACK', 'ADD CONTACT', and 'SAVE' buttons at the bottom right.

Figure 4.1.1.

### 4.1.2. Adding New Contacts

The next step is to add members into the group. Enter the Name, Email, Phone Number, Role and a Note in the respective fields under the **Add New Contacts** heading as shown below.

The screenshot shows the 'Manage Groups' page. The 'New Group Form' is visible, with the 'Add new contacts' section highlighted. It includes a table with columns for Name, Email, Phone, Role/Title, and Note. There are 'Add Contact', 'Save', and 'BACK' buttons at the bottom right.

Figure 4.1.2. (i)

Once all the details of a new contact have been entered, click on the **Add Contact** button or the + sign to add another contact in the group. However, if you wish to delete a contact from this group, click on the **bin** (trash) icon present on the extreme left of that particular contact's information row as shown below.

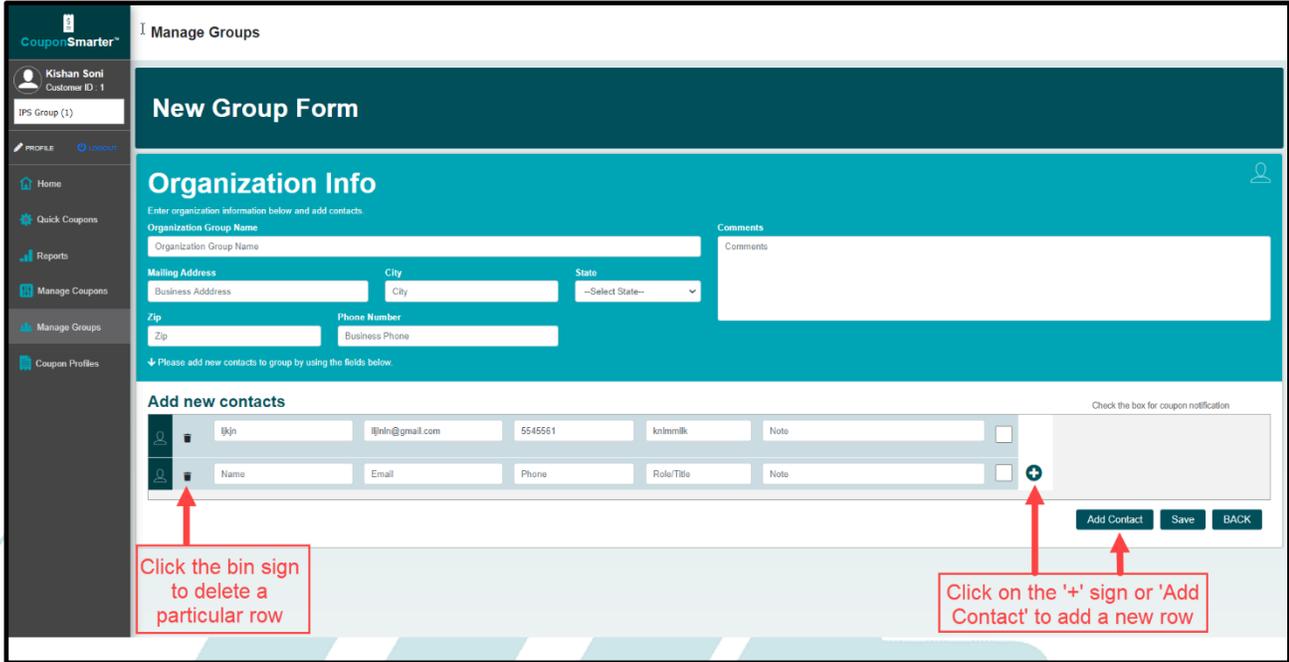


Figure 4.1.2. (ii)

Click on the **Save** button to successfully create a new group as shown below.



**Management Groups**

### New Group Form

**Organization Info**

Enter organization information below and add contacts.

**Organization Group Name**

Organization Group Name

**Mailing Address**

Business Address City State --Select State--

Zip Phone Number Business Phone

Comments

Comments

↓ Please add new contacts to group by using the fields below.

**Add new contacts**

Check the box for coupon notification

Name	Email	Phone	Role/Title	Note	<input type="checkbox"/>
ijjn	ijjnl@gmail.com	5545561	knimilk	Note	<input type="checkbox"/>
Name	Email	Phone	Role/Title	Note	<input type="checkbox"/>

Buttons: Add Contact, Save, BACK

Check this checkbox to send Coupon Notification messages for specific contacts. Leave it unchecked for contacts, you don't wish to send Coupon Notification messages to.

Click on the Save to successfully create the new group

Figure 4.1.2. (iii)

## 4.2. Deleting an Existing Group

Once you are on the **Manage Groups** page, first of all locate the group you would like to delete from the list of existing groups under 'Group Manager List' and then click on the **bin** (trash) icon present in line of that group as shown below.

**Management Groups**

### Group Manager

**Group Manager List**

In the Group Manager you can Delete a Group, Edit Group Info, Adjust Coupon Settings, Generate Coupons and Managing Coupons

Buttons: Add New Group

Group Name	City	State	Zip	Delete	Edit	Automated Coupon Settings	Generate Bulk Coupons	Manage Coupons
Xan test	Sacramento	IA	1234		Edit	Automated Coupon Settings	Generate Bulk Coupons	Manage Coupons
Test two					Edit	Automated Coupon Settings	Generate Bulk Coupons	Manage Coupons
Test one					Edit	Automated Coupon Settings	Generate Bulk Coupons	Manage Coupons
Test One Plus			12345		Edit	Automated Coupon Settings	Generate Bulk Coupons	Manage Coupons
Test_ Organizations	Scranton	CA	12345		Edit	Automated Coupon Settings	Generate Bulk Coupons	Manage Coupons
Tesla Motors_ Group	Sacramneto	PR	12312		Edit	Automated Coupon Settings	Generate Bulk Coupons	Manage Coupons
Extreme Test_ Group sadkjsadkjbsad s...	Scranton asjbsadkjsadjsa	MA	23123		Edit	Automated Coupon Settings	Generate Bulk Coupons	Manage Coupons
Sid Group	Sacramneto		77765		Edit	Automated Coupon Settings	Generate Bulk Coupons	Manage Coupons

Figure 4.2. (i)

By clicking on the **bin** icon, a warning message will appear on your screen. Click on the **Delete** button to confirm group deletion.

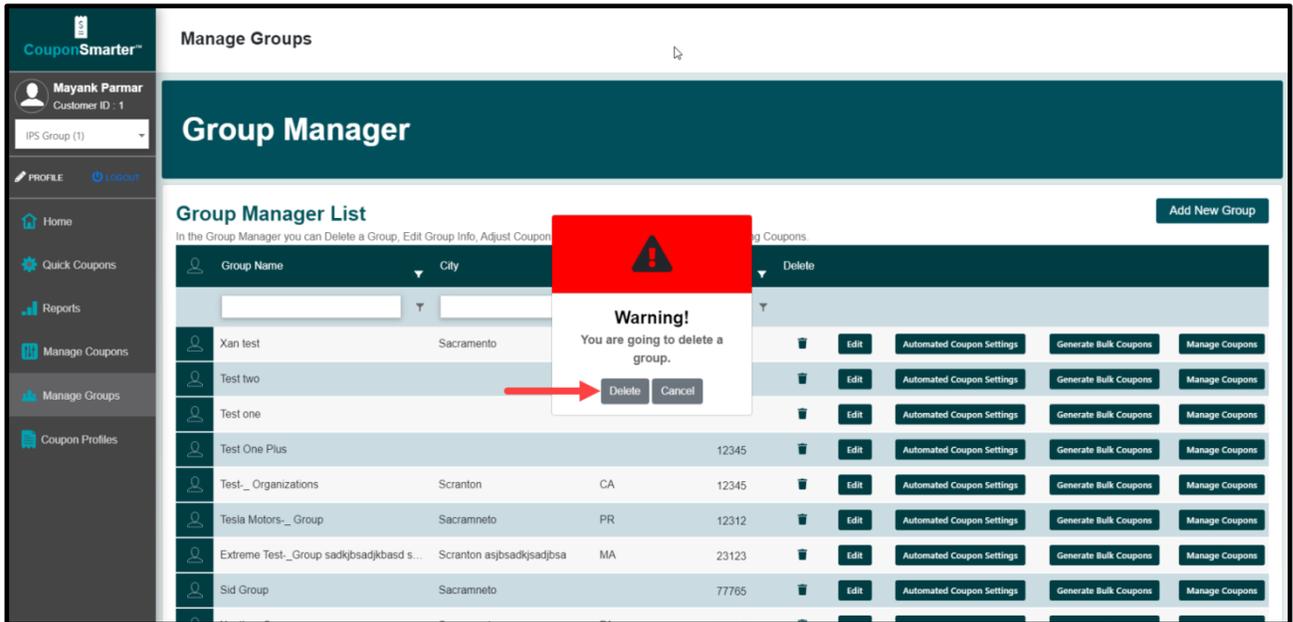


Figure 4.2. (ii)

### 4.3. Editing an Existing Group

Once you are on the **Manage Groups** page, locate the group you would like to edit from the list of existing groups under **Group Manager List** and then click on the **Edit** icon present in line of that group as shown below.

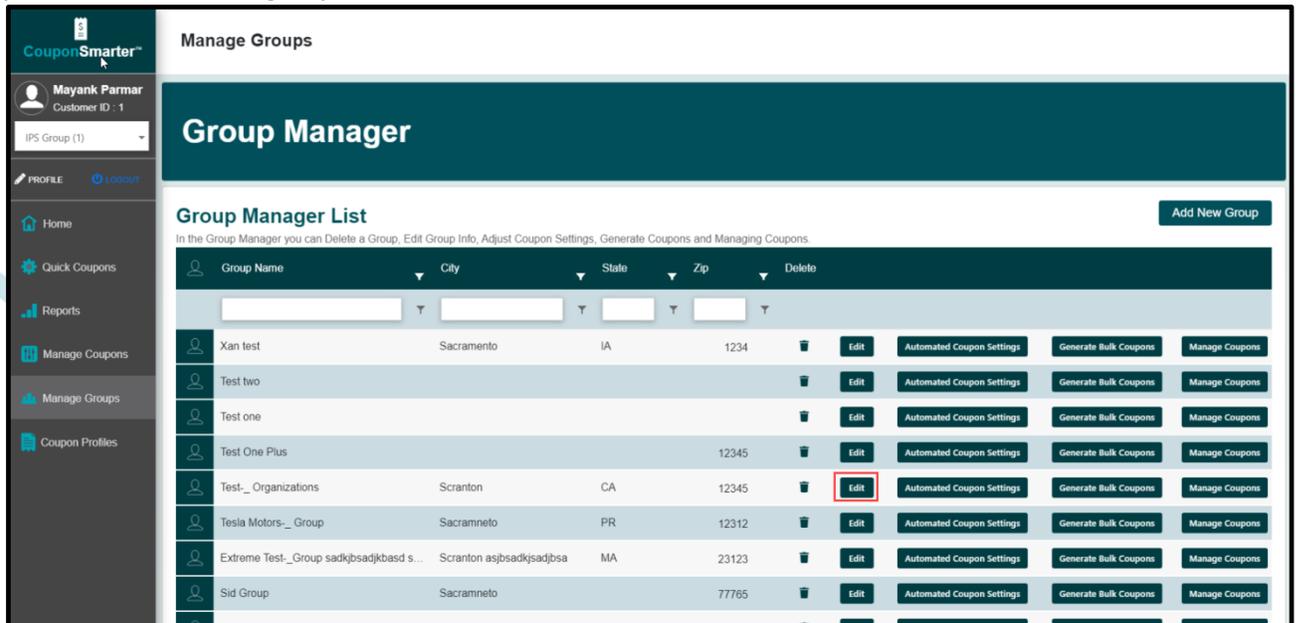


Figure 4.3.

### 4.3.1. Editing Group Information

On the **Edit Group** page you can first edit the group information by updating values in all the fields present under 'Organization Info' i.e. Organization Group Name, Mailing Address, City, State, Zip, Phone Number and Comments. Enter values in the highlighted fields as shown below.

The screenshot displays the 'Edit Group' interface for 'IPS Group'. The 'Organization Info' section includes the following fields:

- Organization Group Name: IPS Group
- Mailing Address: 7737
- City: San Diego
- State: CA
- Zip: 09212
- Phone Number: 650-995-3253
- Comments: (Empty text area)

The 'Edit Groups Contacts' section contains a table with one contact entry:

Name	Email	Phone Number	Check the box for coupon notification	Action
Mayank Parmar	mayank.parmar@ipsgroupinc.o	650995325	<input checked="" type="checkbox"/>	<input type="button" value="+"/>

Buttons at the bottom right include 'Add Contact', 'Save', and 'BACK'.

Figure 4.3.1.



### 4.3.2. Editing Contact Information

You can also edit contact information of the group members by updating the Name, Email, Phone Number, Title and Note in the respective fields under **Edit Group Contacts** heading as shown below.

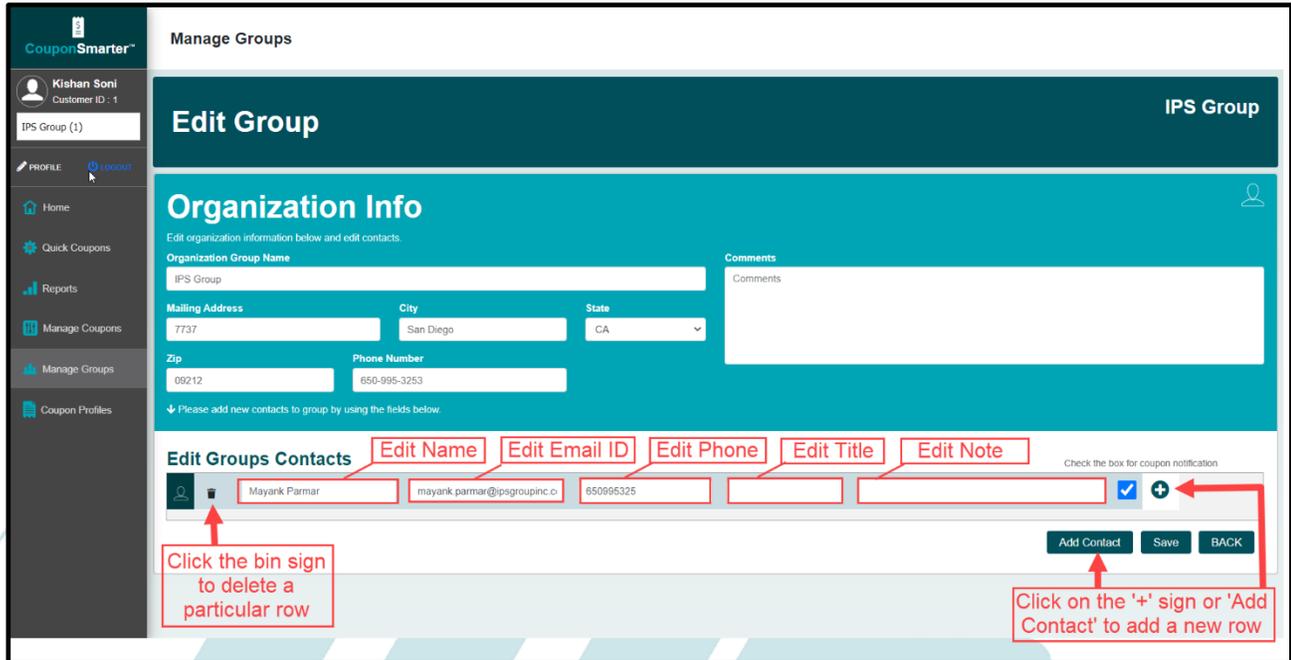


Figure 4.3.2.

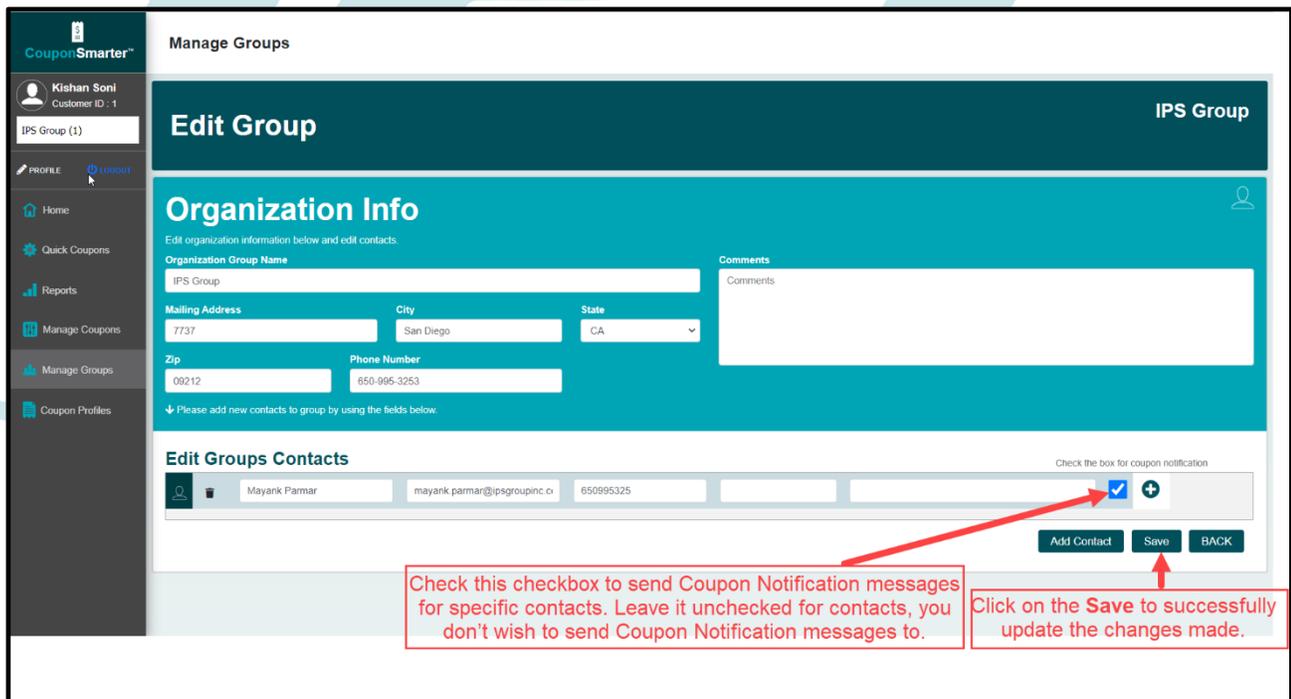


Figure 4.3. (last page)

## 4.4. Automated Coupon Settings

Once you are on the **Manage Groups** page, a 'Group Manager List' will appear. Click on the **Automated Coupon Settings** icon present in line of the group for which you would like to automate the coupon generation process.

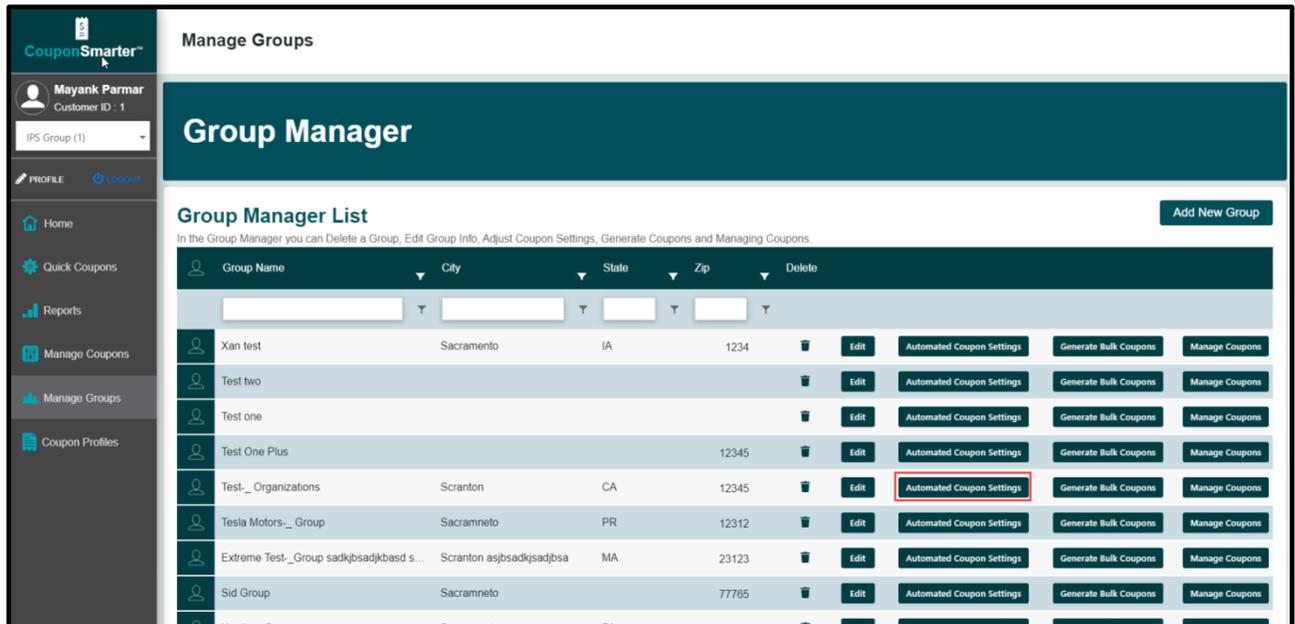


Figure 4.4.

Once the desired page opens up, perform the following steps:

- (i) Select a **Coupon Profile** from the drop-down menu for coupons you wish to consider for Automated Coupon Generation.

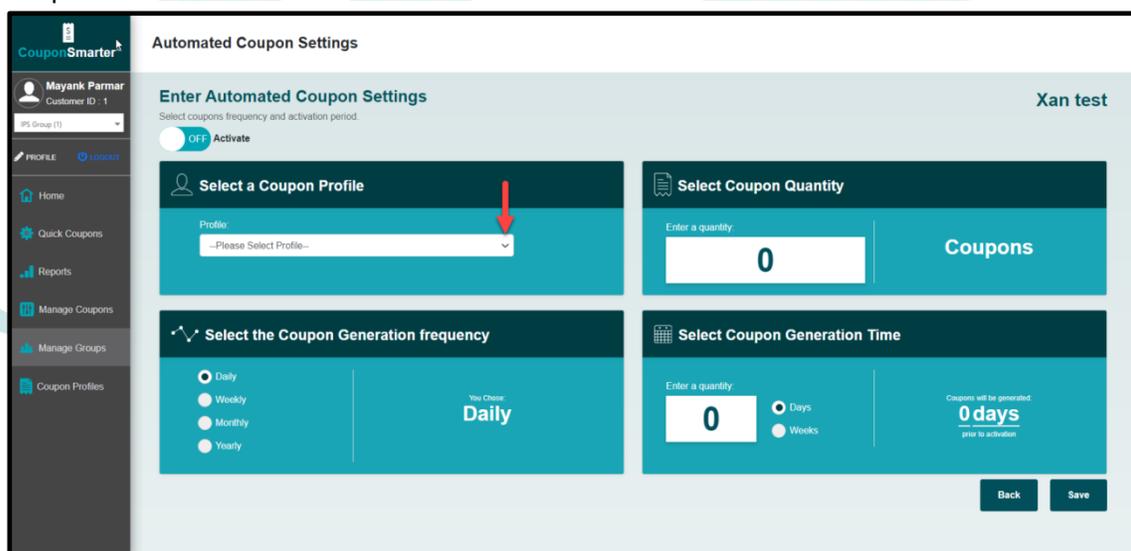


Figure 4.4. (i)

- (ii) Select the **Coupon Generation Frequency** by choosing any one option out of the four options given i.e. Daily, Weekly, Monthly or Yearly.

The screenshot shows the 'Automated Coupon Settings' page in the CouponSmarter application. The page title is 'Automated Coupon Settings' and the user is 'Mayank Parmar' (Customer ID: 1). The page is in 'Xan test' mode. The 'Enter Automated Coupon Settings' section includes an 'Activate' toggle (currently OFF) and four main configuration panels:

- Select a Coupon Profile:** A dropdown menu with the text '--Please Select Profile--'.
- Select Coupon Quantity:** A text input field containing '0' and a 'Coupons' button.
- Select the Coupon Generation frequency:** Four radio button options: Daily (selected), Weekly, Monthly, and Yearly. A red arrow points to the 'Daily' option. Below the options, it says 'You Chose Daily'.
- Select Coupon Generation Time:** A text input field containing '0', radio button options for 'Days' (selected) and 'Weeks', and a 'Coupons will be generated 0 days prior to activation' label.

At the bottom right, there are 'Back' and 'Save' buttons.

Figure 4.4. (ii)

- (iii) Select the **Coupon Quantity** by entering the number of coupons you want to generate.

This screenshot is identical to the previous one, but with a red box highlighting the '0' in the 'Select Coupon Quantity' input field. The 'Daily' frequency option remains selected.

Figure 4.4. (iii)

(iv) Select the **Coupon Generation Time** by entering the number of days or weeks to setup a time when you would like the coupons to be generated prior to the **Activation Period**.

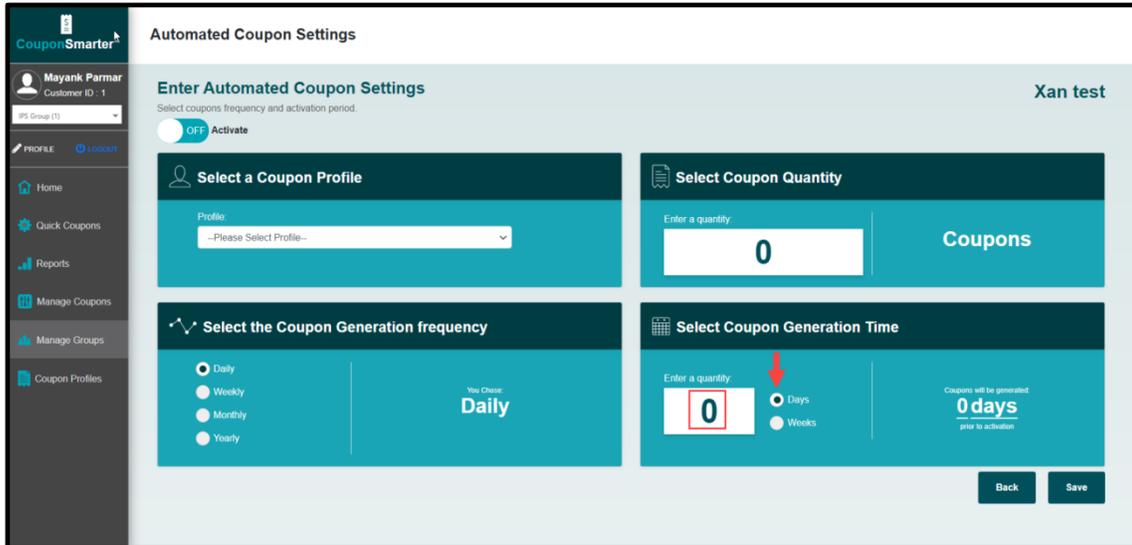


Figure 4.4. (iv)

Finally, make sure the **Activation** slider button is set to the **ON** option in order to activate the automation settings. In case you wish to deactivate these settings, you can switch the slider button to the **OFF** mode.

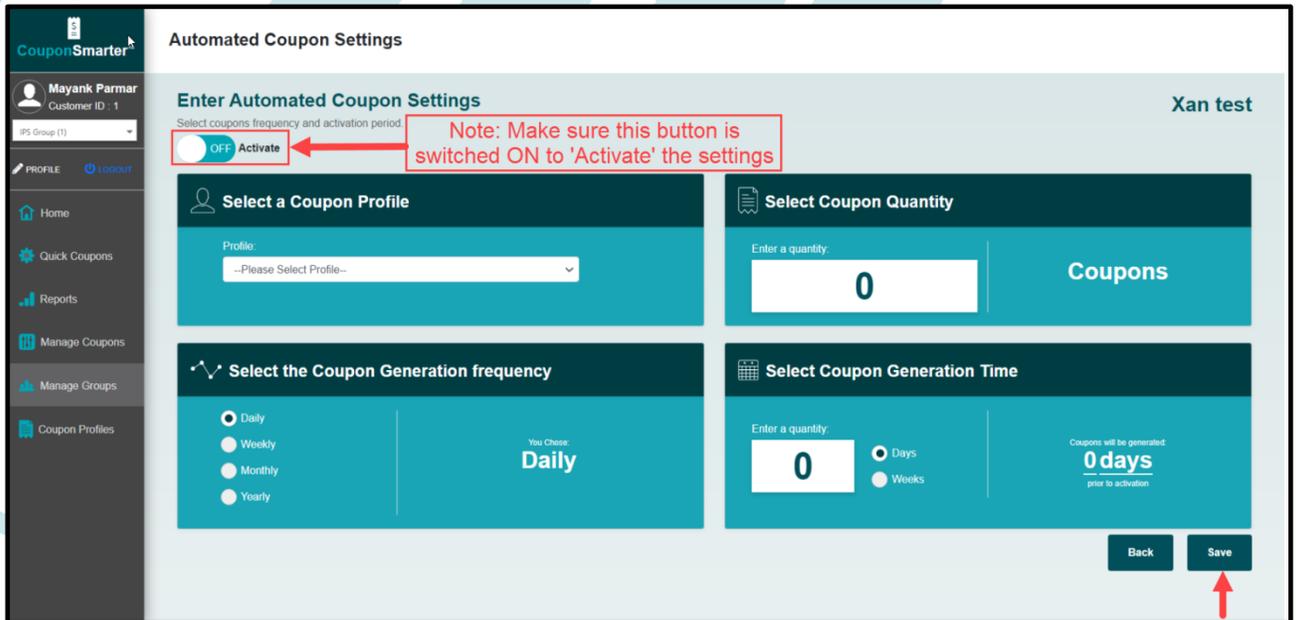


Figure 4.4. (v)

## 4.5. Generating Bulk Coupons

Refer to the [Bulk Coupons](#) section of this document to understand the process of generating bulk coupons step by step.

## 4.6. Managing Coupons

All the group related coupons can be managed from the **Manage Group** section. Once the 'Group Manager List' opens up, locate the group for which you want to manage the coupons and then click on the **Manage Coupons** icon present in line of a particular Group as shown below.

The screenshot displays the 'Manage Groups' section of the CouponSmarter application. The user is logged in as Mayank Parmar (Customer ID: 1). The interface shows a 'Group Manager List' table with the following data:

Group Name	City	State	Zip	Delete	Edit	Automated Coupon Settings	Generate Bulk Coupons	Manage Coupons
Xan test	Sacramento	IA	1234		Edit	Automated Coupon Settings	Generate Bulk Coupons	Manage Coupons
Test two					Edit	Automated Coupon Settings	Generate Bulk Coupons	Manage Coupons
Test one					Edit	Automated Coupon Settings	Generate Bulk Coupons	Manage Coupons
Test One Plus			12345		Edit	Automated Coupon Settings	Generate Bulk Coupons	Manage Coupons
Test_ Organizations	Scranton	CA	12345		Edit	Automated Coupon Settings	Generate Bulk Coupons	Manage Coupons
Tesla Motors_ Group	Sacramneto	PR	12312		Edit	Automated Coupon Settings	Generate Bulk Coupons	Manage Coupons
Extreme Test_ Group sadkjsadkjsad s...	Scranton asjbsadkjsadjsa	MA	23123		Edit	Automated Coupon Settings	Generate Bulk Coupons	Manage Coupons
Sid Group	Sacramneto		77765		Edit	Automated Coupon Settings	Generate Bulk Coupons	Manage Coupons

**Figure 4.6.**

Once you are redirected to the 'Manage Coupons' page, you will see a list of all types of coupons that have been issued for that particular group. Coupons created by any coupon profile can be located under a specific coupon category based on the status of the coupon. This feature can also be used to export the details of any coupon or a list of coupons for reporting purposes. Moreover, coupons can also be suspended under this section as and when required. To understand the functionality of this feature in detail, refer to the [Managing Coupons](#) section of this guide.

## 5. Managing Coupons

The **Manage Coupons** feature allows a user to access the list of all types of coupons that have been issued for individual customers as well as groups. A single coupon or multiple coupons created by any coupon profile can be located under a coupon category based on the status of the coupon. This feature can also be used to export the details of any coupon or a list of coupons for reporting purposes. Moreover, coupons can also be suspended under this section as and when required. To use this feature, click on the **Manage Coupons** button present on the Home screen as shown below.

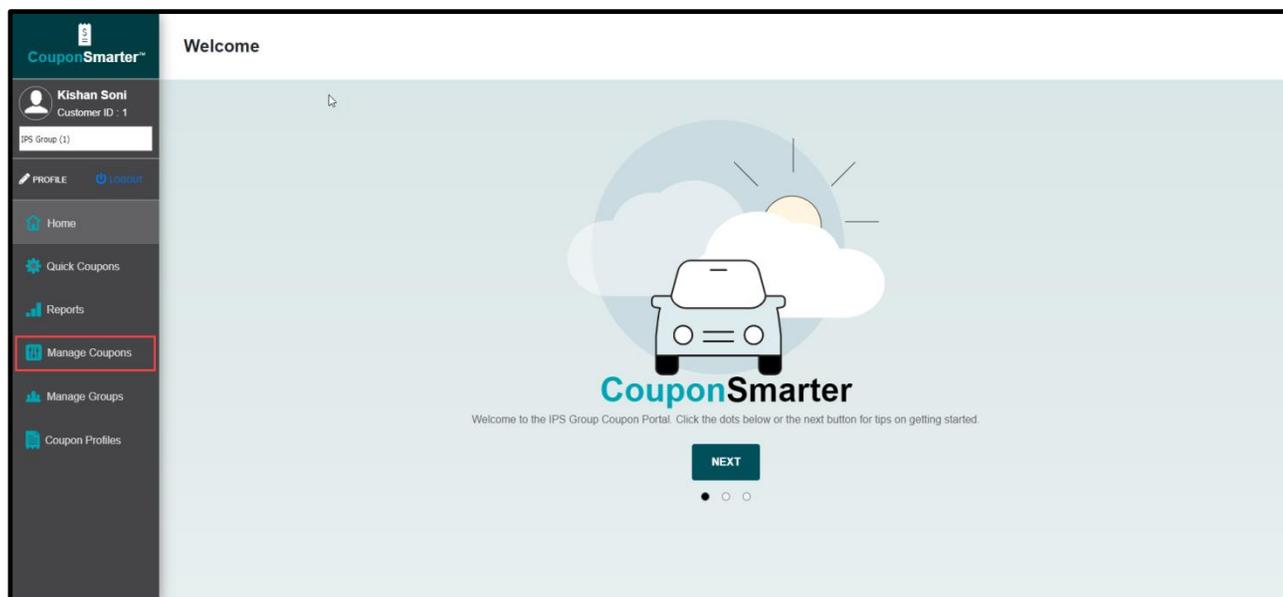


Figure 5.0.

When you are on the 'Manage Coupons' page, you will see tabs for these coupon categories – Active Coupons, Inactive Coupons, Expired Coupons, Exhausted Coupons and Suspended Coupons as shown below.

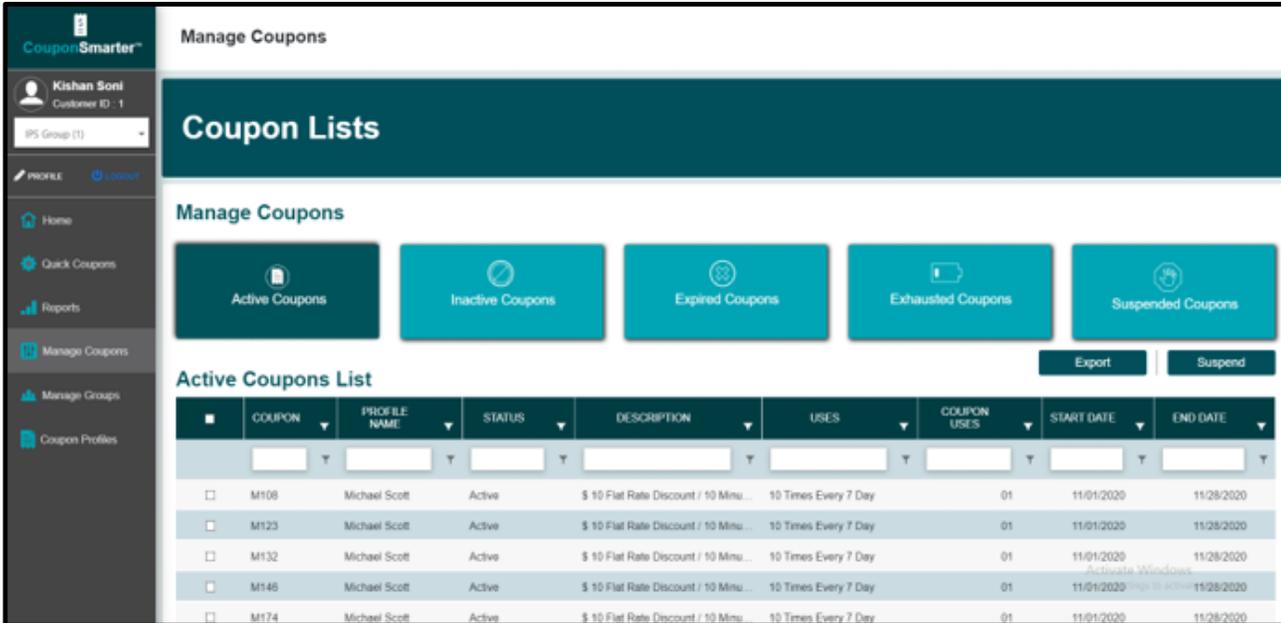


Figure 5.0. (first page)

## 5.1. Active Coupons

To access the list of all the active coupons issued till date, select the **Active Coupons** tab.

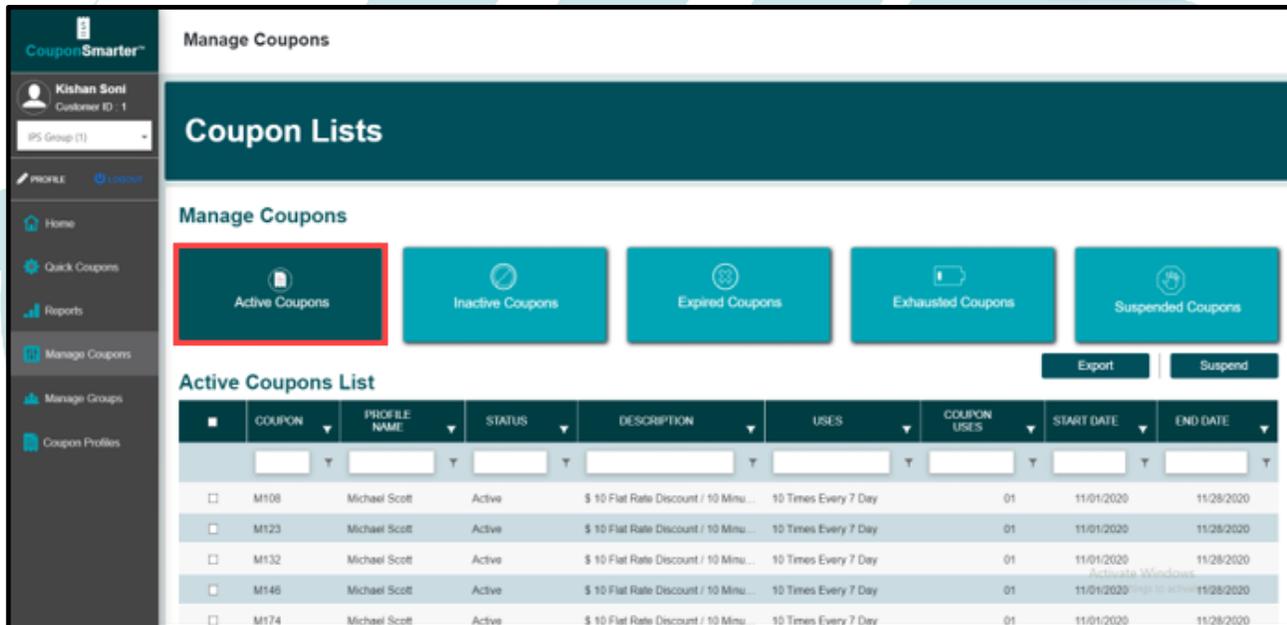


Figure 5.1. (a)

To locate a coupon by using the coupon code, refer to the first column of the table i.e. **COUPON** or directly type the coupon code in the empty field present below the header of the first column.

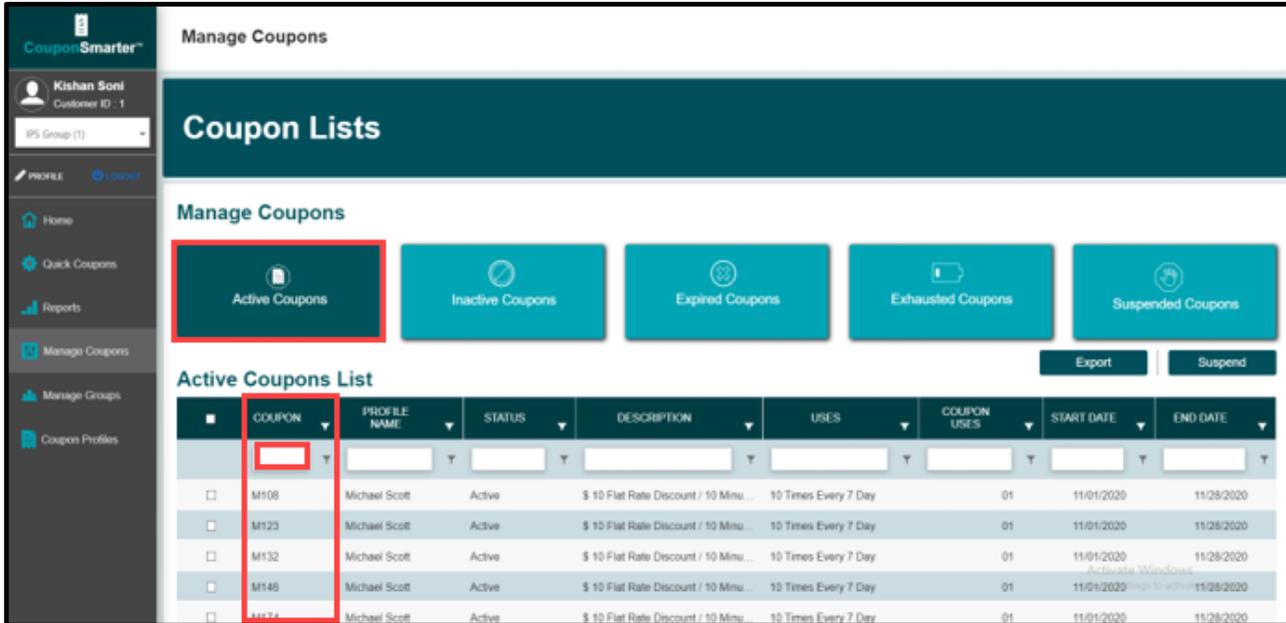


Figure 5.1. (b)

Click on the **Export** button to download the coupon records on your system as shown below.

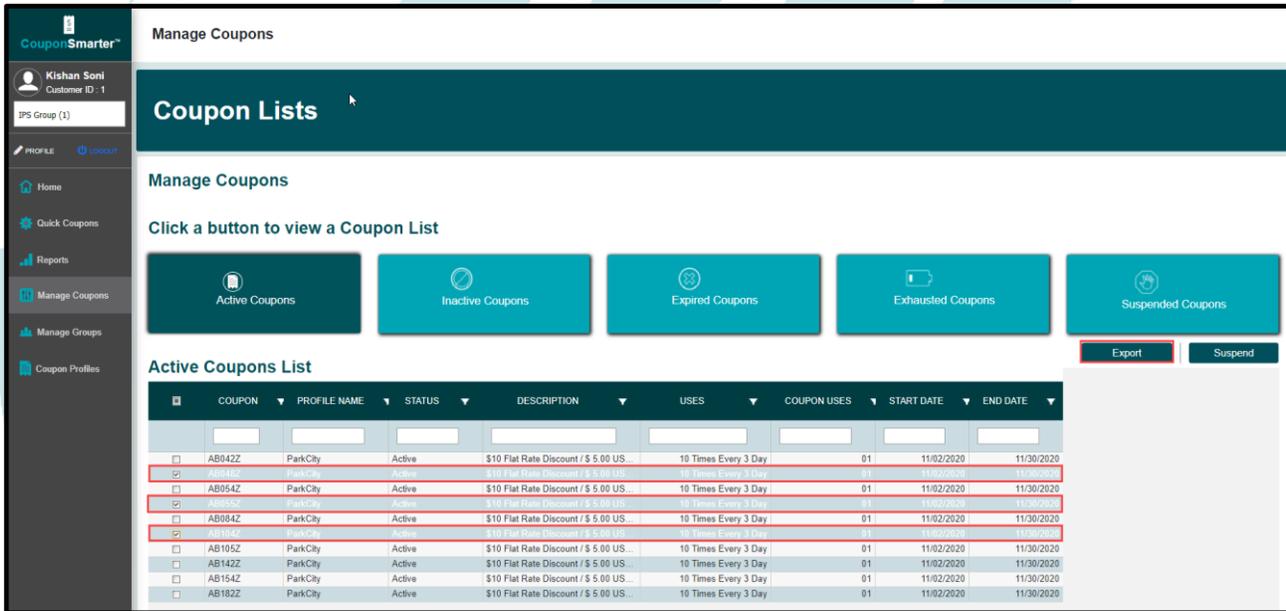


Figure 5.1. (c)

A small window will appear to ask your choice of format for downloading the coupon records on your system. Select the desired format and click on the **Export** button to successfully save the list on your system.

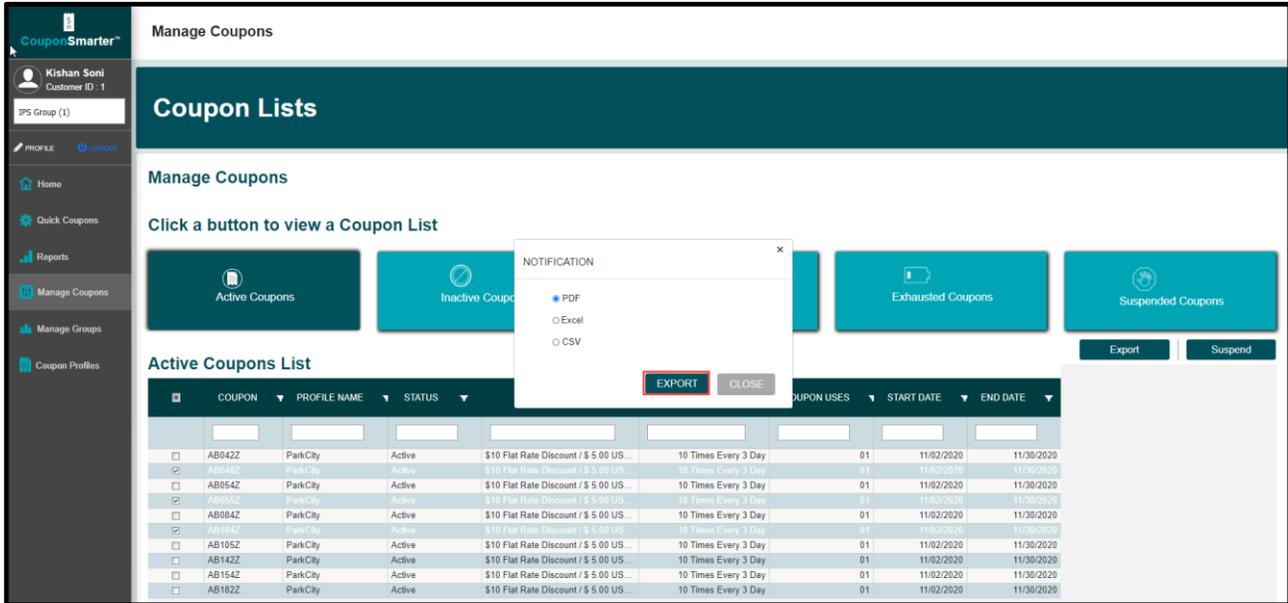


Figure 5.1. (d)

To suspend a single coupon or a batch of coupons, select those coupons and click on the **Suspend** button as shown below.

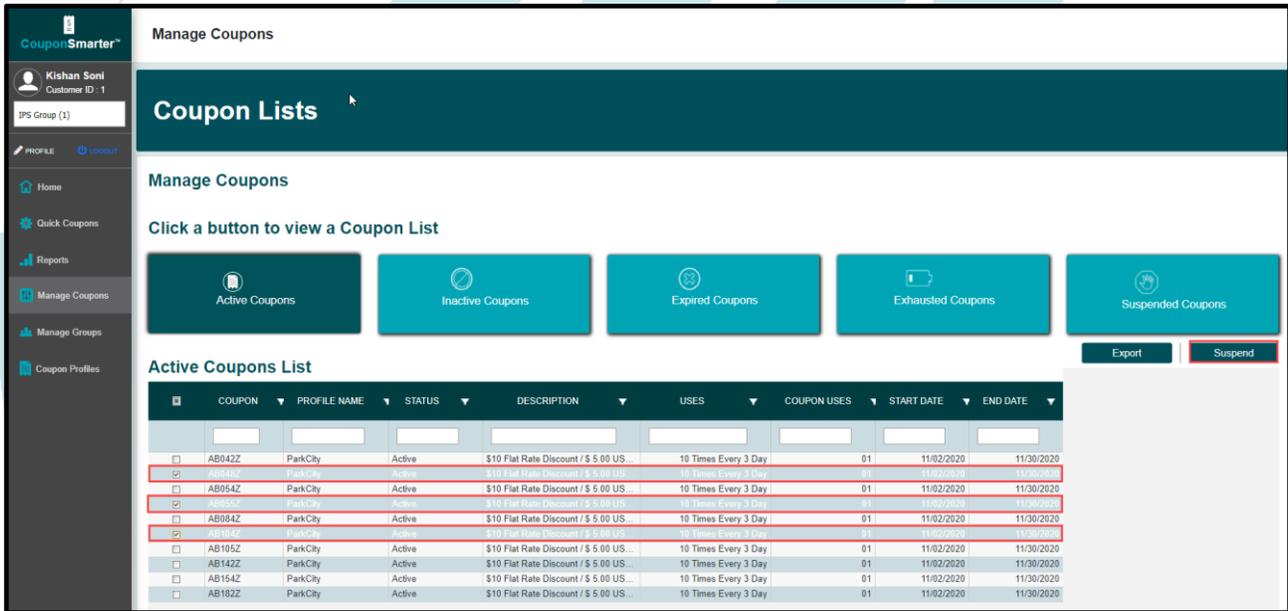


Figure 5.1. (e)

Next, a small window will appear which will ask for your confirmation regarding the suspension of selected coupons. Click on the **Yes** button to successfully suspend the coupons.

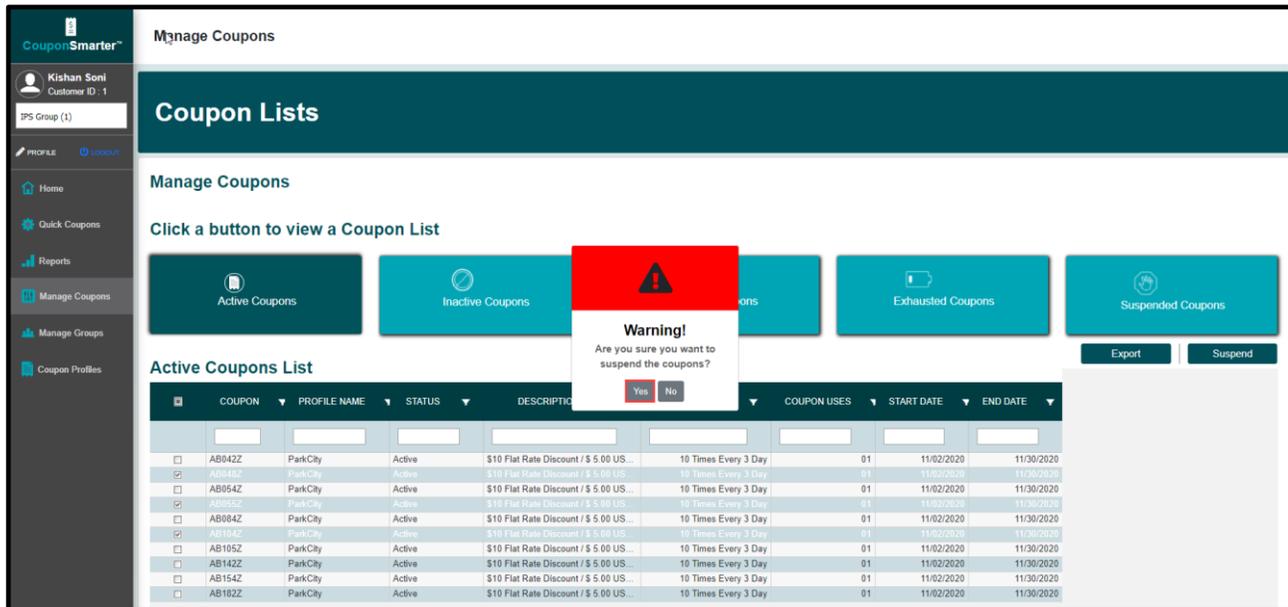


Figure 5.1. (f)

## 5.2. Inactive Coupons

To access the list of all the inactive coupons issued till date, select the **Inactive Coupons** tab.

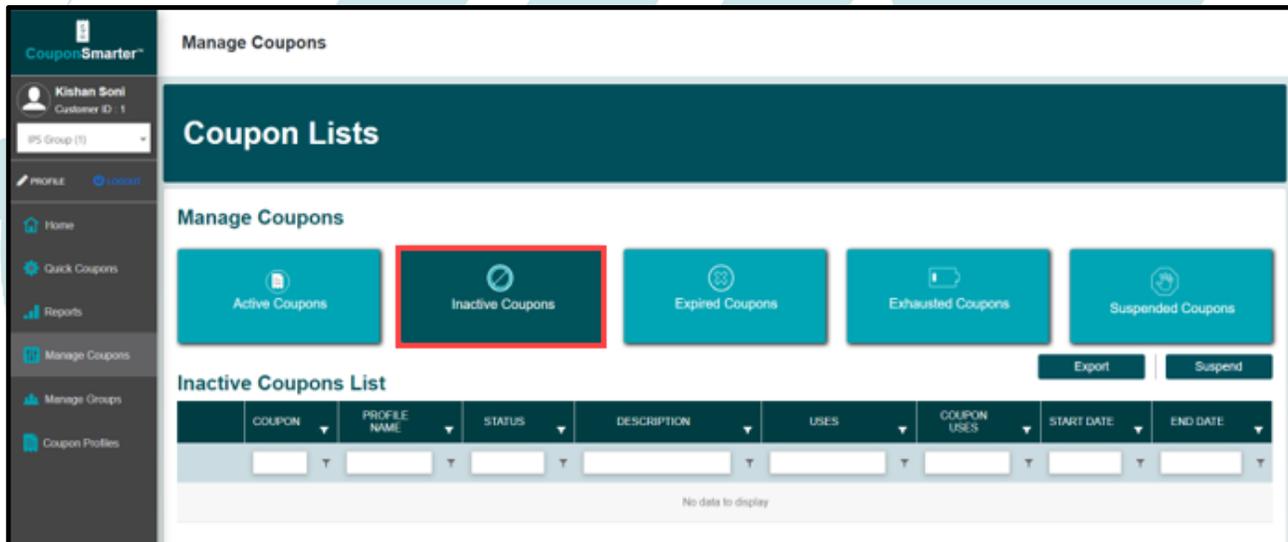


Figure 5.2. (a)

To locate a coupon by using the coupon code, refer to the first column of the table i.e. **COUPON** or directly type the coupon code in the empty field present below the header of the first column.

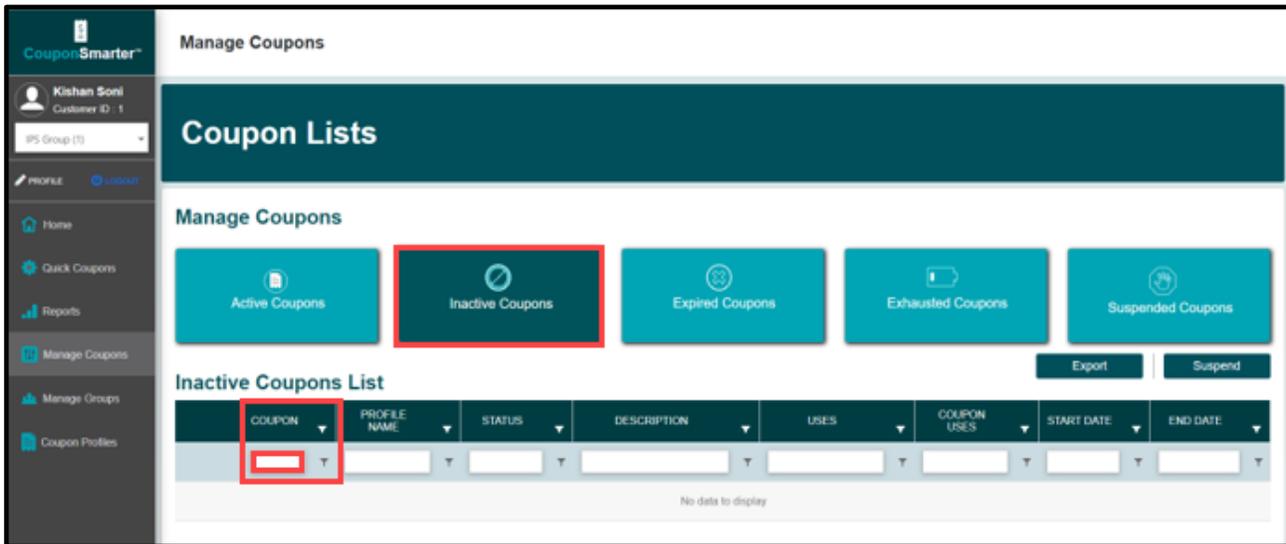


Figure 5.2. (b)

Click on the **Export** button to download the coupon records on your system as shown below.

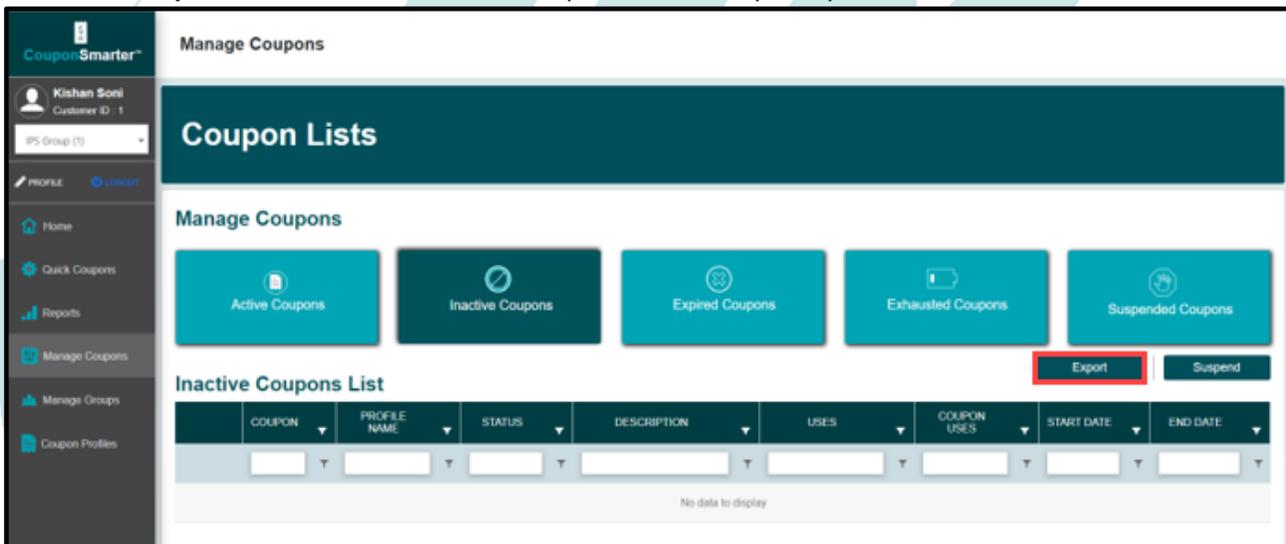


Figure 5.2. (c)

A small window will appear to ask your choice of format for downloading the coupon records on your system. Select the desired format and click on the **Export** button to successfully save the list on your system.

-----SS N/A-----

To suspend a single coupon or a batch of coupons, select those coupons and click on the **Suspend** button as shown below.

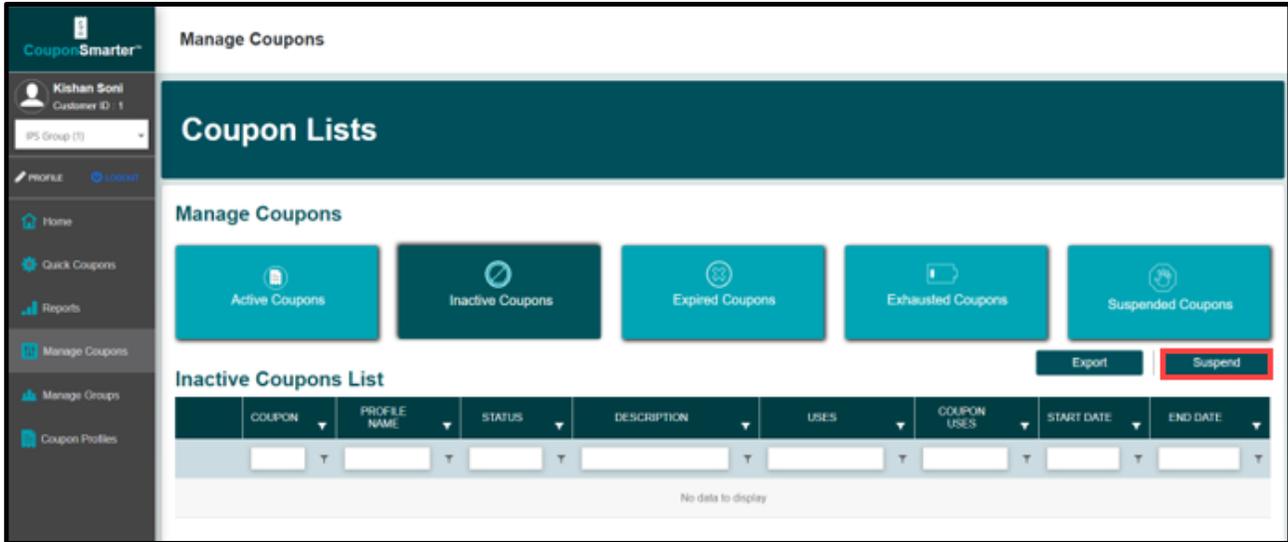


Figure 5.2. (e)

After that, a small window will appear for your confirmation regarding the suspension of selected coupons. Click on the **Yes** button to successfully suspend the coupons.

-----SS N/A-----

### 5.3. Expired Coupons

To access the list of all the expired coupons issued till date, select the **Expired Coupons** tab.

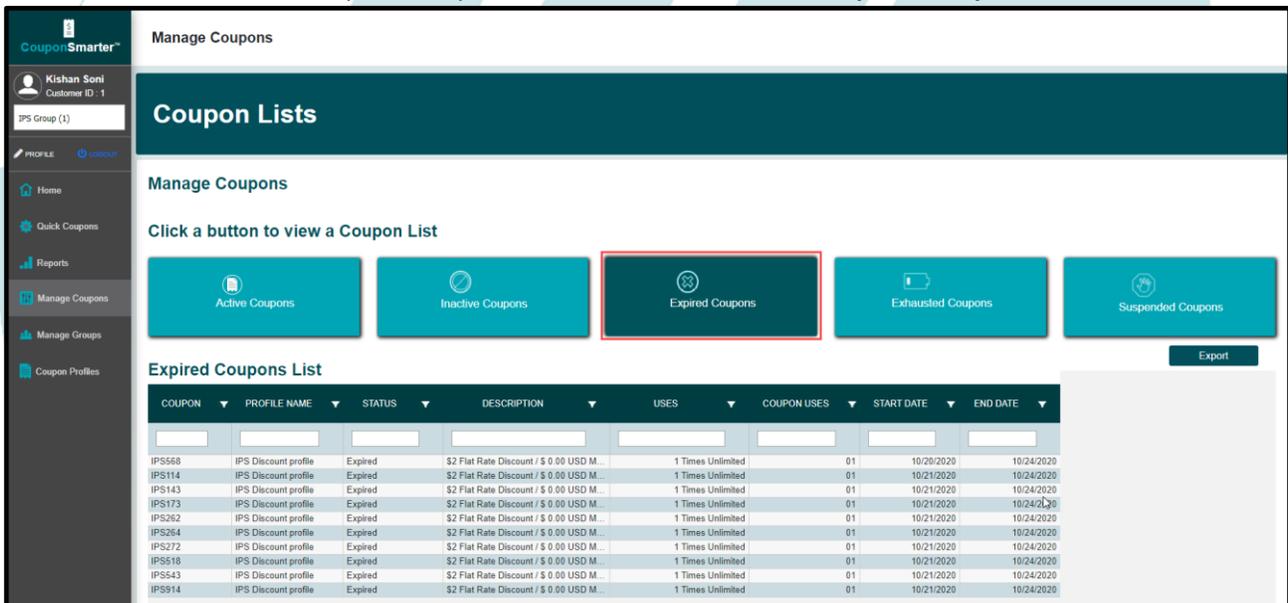


Figure 5.3. (a)

To locate a coupon by using the coupon code, refer to the first column of the table i.e. **COUPON** or directly type the coupon code in the empty field present below the header of the first column.

**Manage Coupons**

### Coupon Lists

Manage Coupons

Click a button to view a Coupon List

Active Coupons | Inactive Coupons | **Expired Coupons** | Exhausted Coupons | Suspended Coupons

Expired Coupons List Export

COUPON	PROFILE NAME	STATUS	DESCRIPTION	USES	COUPON USES	START DATE	END DATE
IPSS68	IPS Discount profile	Expired	\$2 Flat Rate Discount / \$ 0.00 USD M.	1 Times Unlimited	01	10/20/2020	10/24/2020
IPSN14	IPS Discount profile	Expired	\$2 Flat Rate Discount / \$ 0.00 USD M.	1 Times Unlimited	01	10/21/2020	10/24/2020
IPSN143	IPS Discount profile	Expired	\$2 Flat Rate Discount / \$ 0.00 USD M.	1 Times Unlimited	01	10/21/2020	10/24/2020
IPSN173	IPS Discount profile	Expired	\$2 Flat Rate Discount / \$ 0.00 USD M.	1 Times Unlimited	01	10/21/2020	10/24/2020
IPSN262	IPS Discount profile	Expired	\$2 Flat Rate Discount / \$ 0.00 USD M.	1 Times Unlimited	01	10/21/2020	10/24/2020
IPSN264	IPS Discount profile	Expired	\$2 Flat Rate Discount / \$ 0.00 USD M.	1 Times Unlimited	01	10/21/2020	10/24/2020
IPSN272	IPS Discount profile	Expired	\$2 Flat Rate Discount / \$ 0.00 USD M.	1 Times Unlimited	01	10/21/2020	10/24/2020
IPSN518	IPS Discount profile	Expired	\$2 Flat Rate Discount / \$ 0.00 USD M.	1 Times Unlimited	01	10/21/2020	10/24/2020
IPSN543	IPS Discount profile	Expired	\$2 Flat Rate Discount / \$ 0.00 USD M.	1 Times Unlimited	01	10/21/2020	10/24/2020
IPSN914	IPS Discount profile	Expired	\$2 Flat Rate Discount / \$ 0.00 USD M.	1 Times Unlimited	01	10/21/2020	10/24/2020

Figure 5.3. (b)

Click on the **Export** button to download the coupon records on your system as shown below.

**Manage Coupons**

### Coupon Lists

Manage Coupons

Click a button to view a Coupon List

Active Coupons | Inactive Coupons | Expired Coupons | Exhausted Coupons | Suspended Coupons

Expired Coupons List **Export**

COUPON	PROFILE NAME	STATUS	DESCRIPTION	USES	COUPON USES	START DATE	END DATE
IPSS68	IPS Discount profile	Expired	\$2 Flat Rate Discount / \$ 0.00 USD M.	1 Times Unlimited	01	10/20/2020	10/24/2020
IPSN14	IPS Discount profile	Expired	\$2 Flat Rate Discount / \$ 0.00 USD M.	1 Times Unlimited	01	10/21/2020	10/24/2020
IPSN143	IPS Discount profile	Expired	\$2 Flat Rate Discount / \$ 0.00 USD M.	1 Times Unlimited	01	10/21/2020	10/24/2020
IPSN173	IPS Discount profile	Expired	\$2 Flat Rate Discount / \$ 0.00 USD M.	1 Times Unlimited	01	10/21/2020	10/24/2020
IPSN262	IPS Discount profile	Expired	\$2 Flat Rate Discount / \$ 0.00 USD M.	1 Times Unlimited	01	10/21/2020	10/24/2020
IPSN264	IPS Discount profile	Expired	\$2 Flat Rate Discount / \$ 0.00 USD M.	1 Times Unlimited	01	10/21/2020	10/24/2020
IPSN272	IPS Discount profile	Expired	\$2 Flat Rate Discount / \$ 0.00 USD M.	1 Times Unlimited	01	10/21/2020	10/24/2020
IPSN518	IPS Discount profile	Expired	\$2 Flat Rate Discount / \$ 0.00 USD M.	1 Times Unlimited	01	10/21/2020	10/24/2020
IPSN543	IPS Discount profile	Expired	\$2 Flat Rate Discount / \$ 0.00 USD M.	1 Times Unlimited	01	10/21/2020	10/24/2020
IPSN914	IPS Discount profile	Expired	\$2 Flat Rate Discount / \$ 0.00 USD M.	1 Times Unlimited	01	10/21/2020	10/24/2020

Figure 5.3. (c)

A small window will appear to download the coupon records in your chosen format on your system. Select the desired format and click on the **Export** button to successfully save the list on your system.

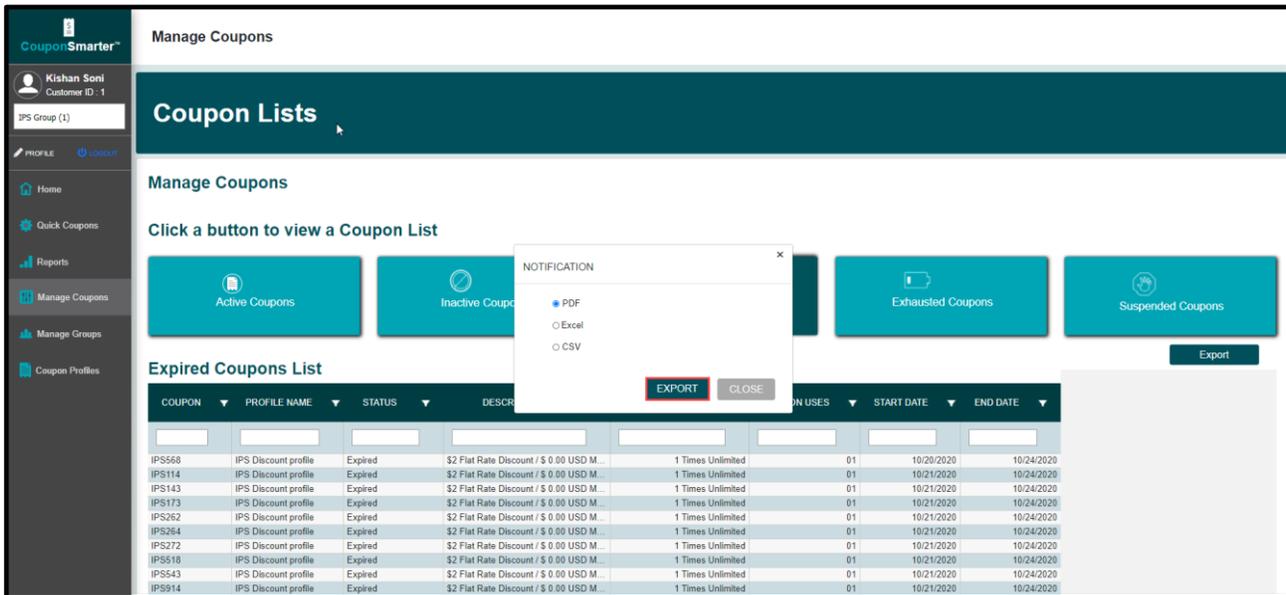


Figure 5.3. (d)

## 5.4. Exhausted Coupons

To access the list of all the exhausted coupons issued till date, make sure that the **Exhausted Coupons** tab has been selected.

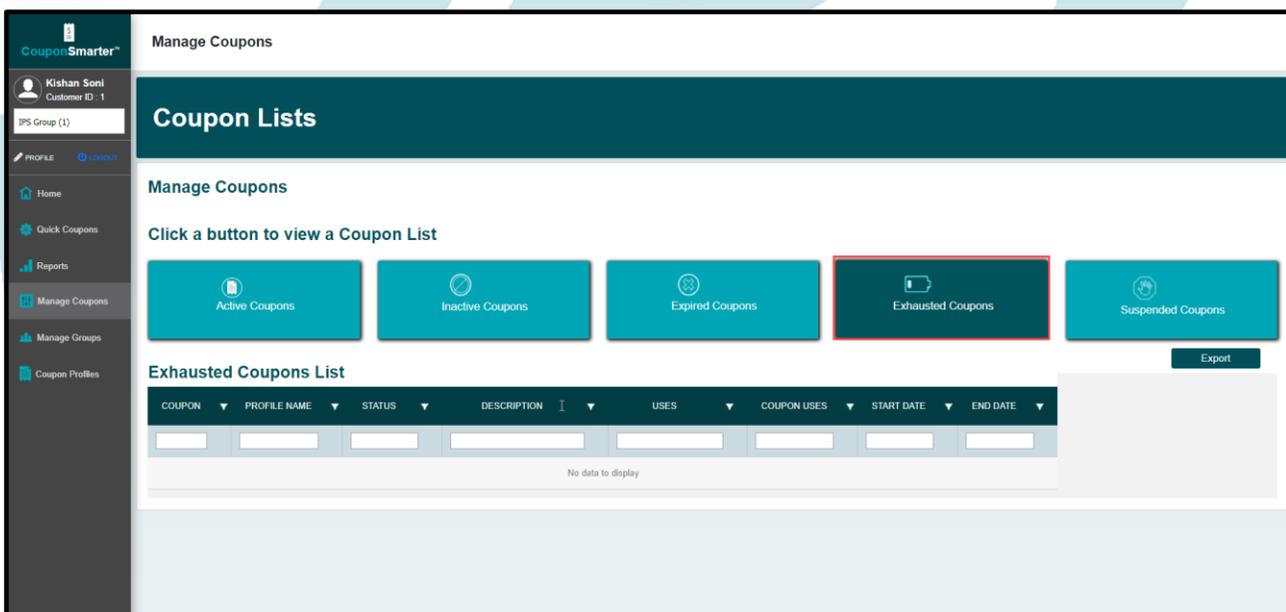


Figure 5.4. (a)

To locate a coupon by using the coupon code, refer to the first column of the table i.e. **COUPON** or directly type the coupon code in the empty field present below the header of the first column.

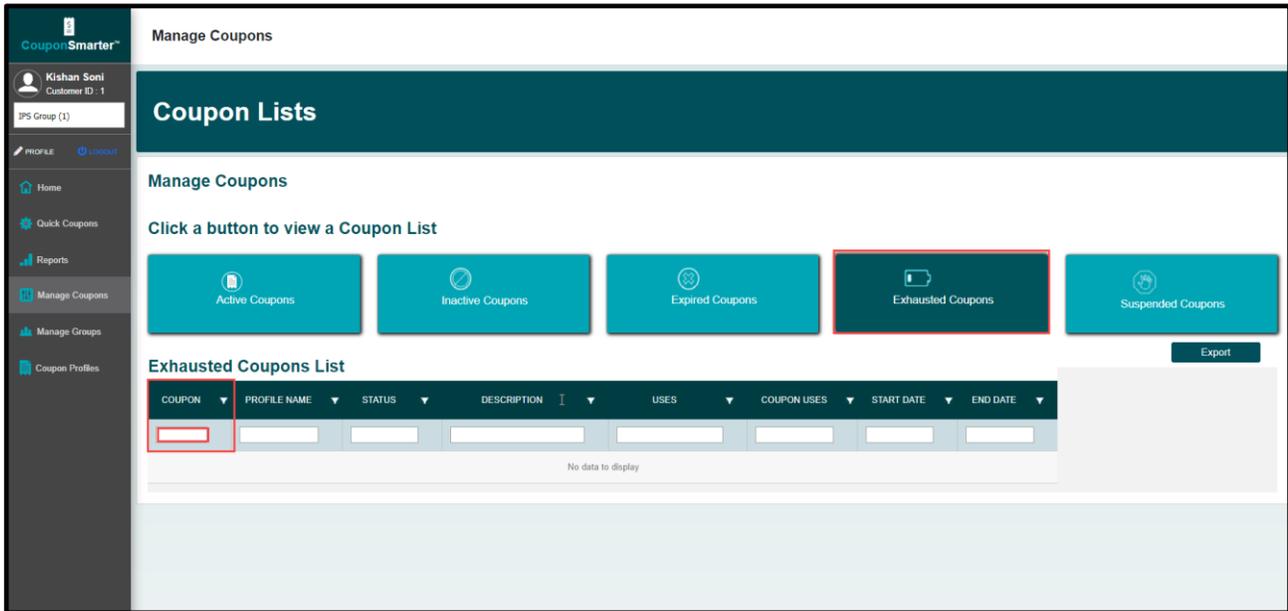


Figure 5.4. (b)

Click on the **Export** button to download the coupon records on your system as shown below.

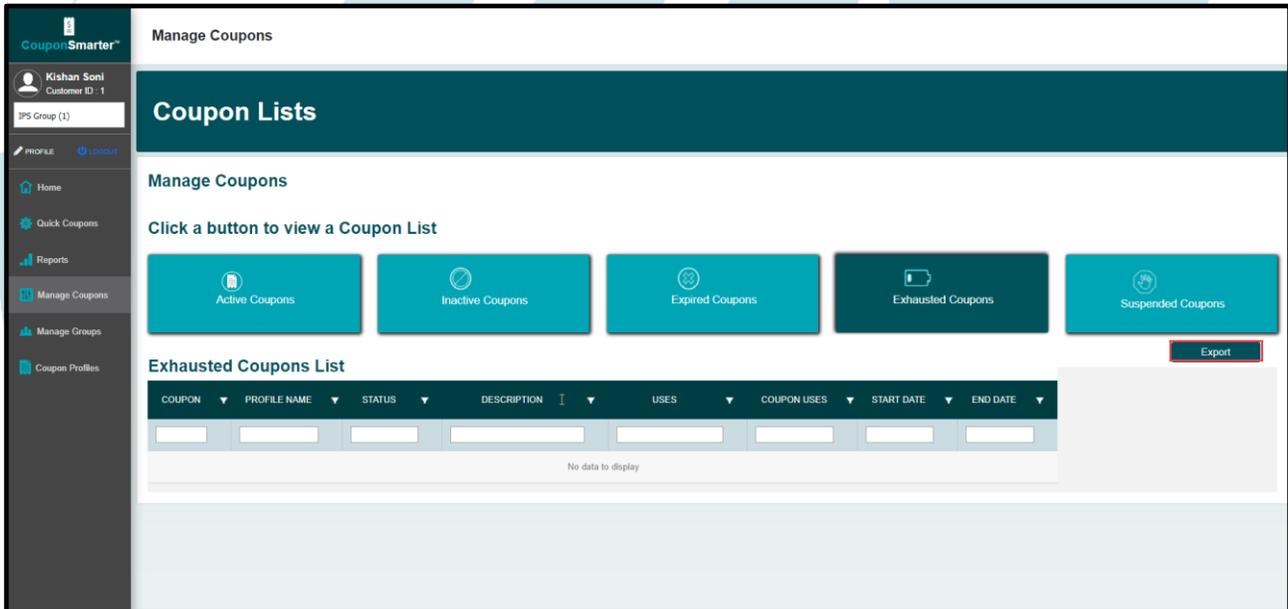


Figure 5.4. (c)

Next, a small window will appear to ask your choice of format for downloading the coupon records on your system. Select the desired format and click on the **Export** button to successfully save the list on your system.

-----SS N/A-----

## 5.5. Suspended Coupons

To access the list of all the suspended coupons issued till date, make sure that the **Suspended Coupons** tab has been selected.

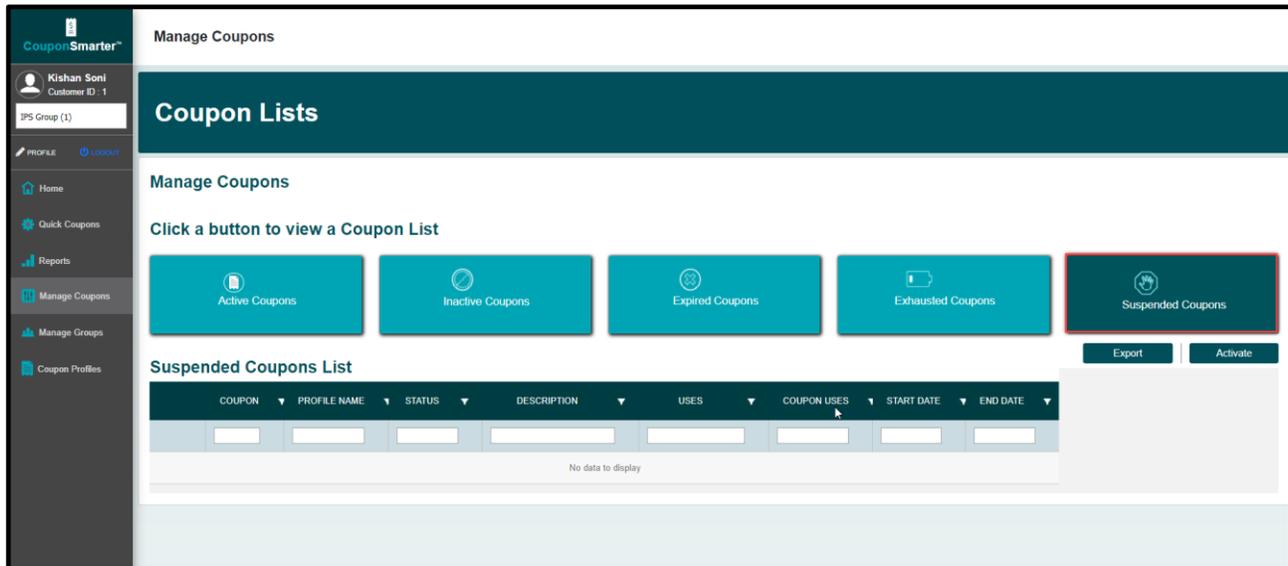


Figure 5.5. (a)

To locate a coupon by using the coupon code, refer to the first column of the table i.e. **COUPON** or directly type the coupon code in the empty field present below the header of the first column.

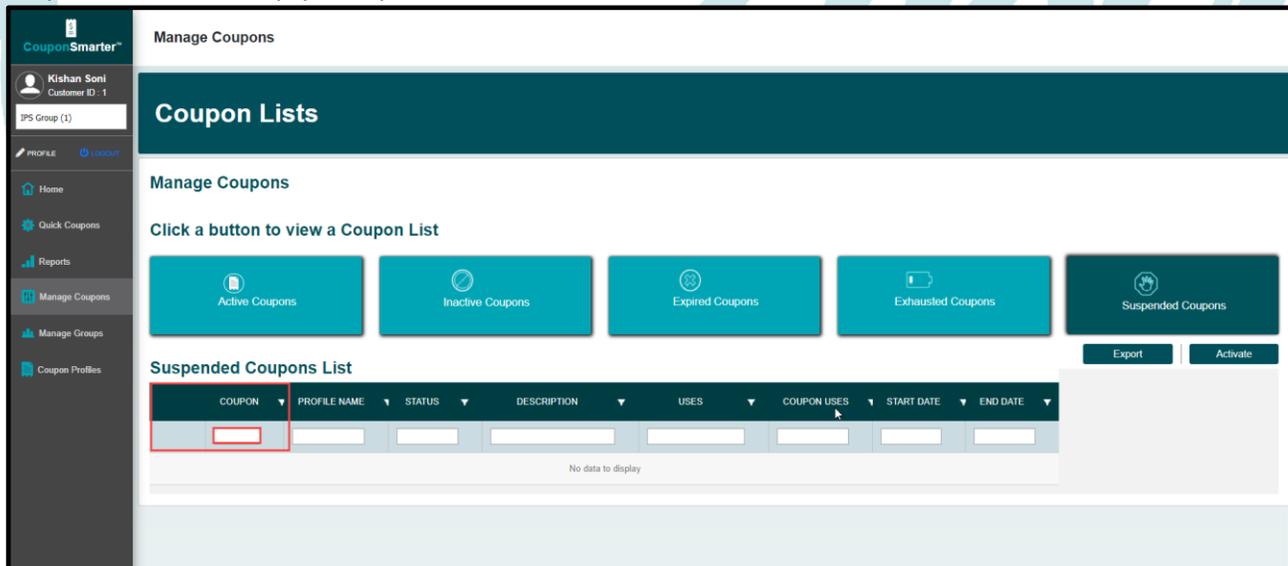


Figure 5.5. (b)

Click on the **Export** button to download the coupon records on your system as shown below.

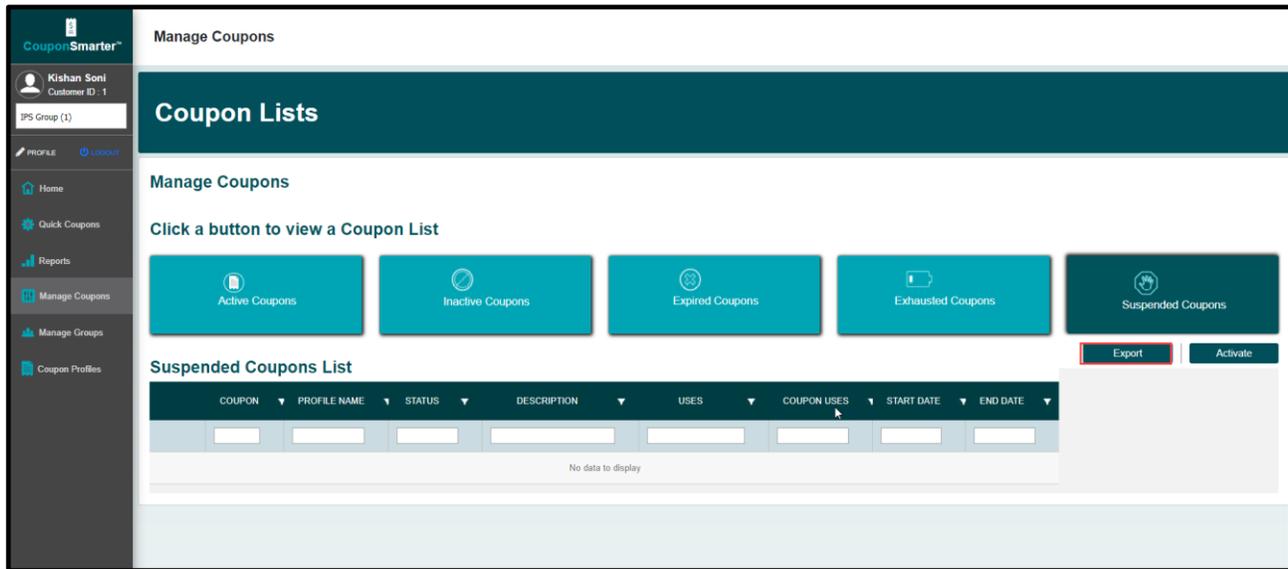


Figure 5.5. (c)

Select a format in which you wish to download the coupon records on your system. Select the desired format and click on the **Export** button. Your list is successfully saved on your system.

-----SS N/A-----

To activate a suspended coupon or a batch of suspended coupons, select those coupons and click on the **Activate** button as shown below.

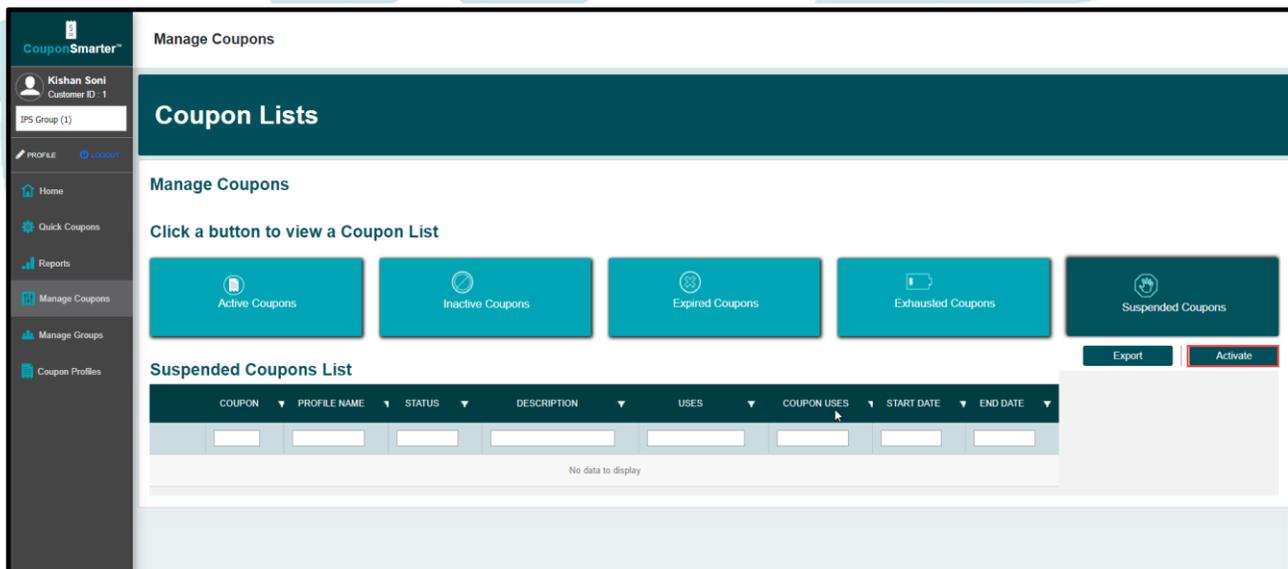


Figure 5.5. (e)

## 6. Reports

Coupon Smarter provides comprehensive and user-friendly reports for coupons of all categories such as Active Coupons, Consumed Coupons, Invalid Attempts and Exceeding Limits. Reports can be viewed in three formats i.e. Chart View, Map View or List View. This section of the Product Guide will explain the process of generating different types of reports in all the possible ways. To begin, click on the **Reports** button present on the Home Screen of the Coupon Smarter application.

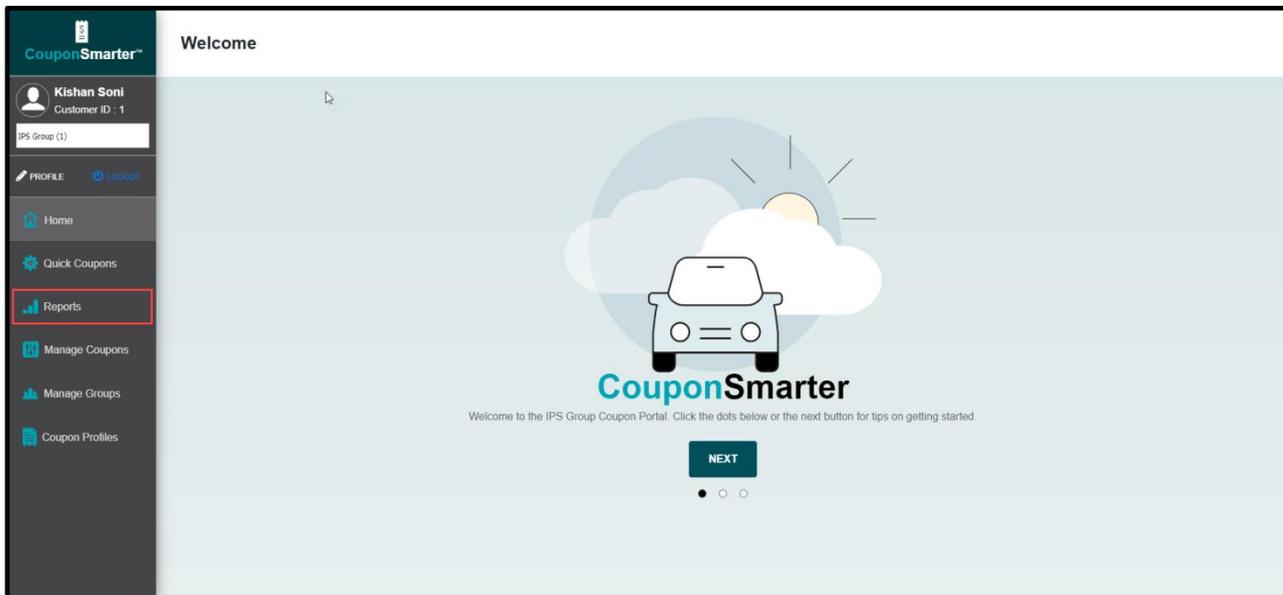


Figure 6.0. (a)

Further, choose the type of coupon and the time period for which you need to generate a report.

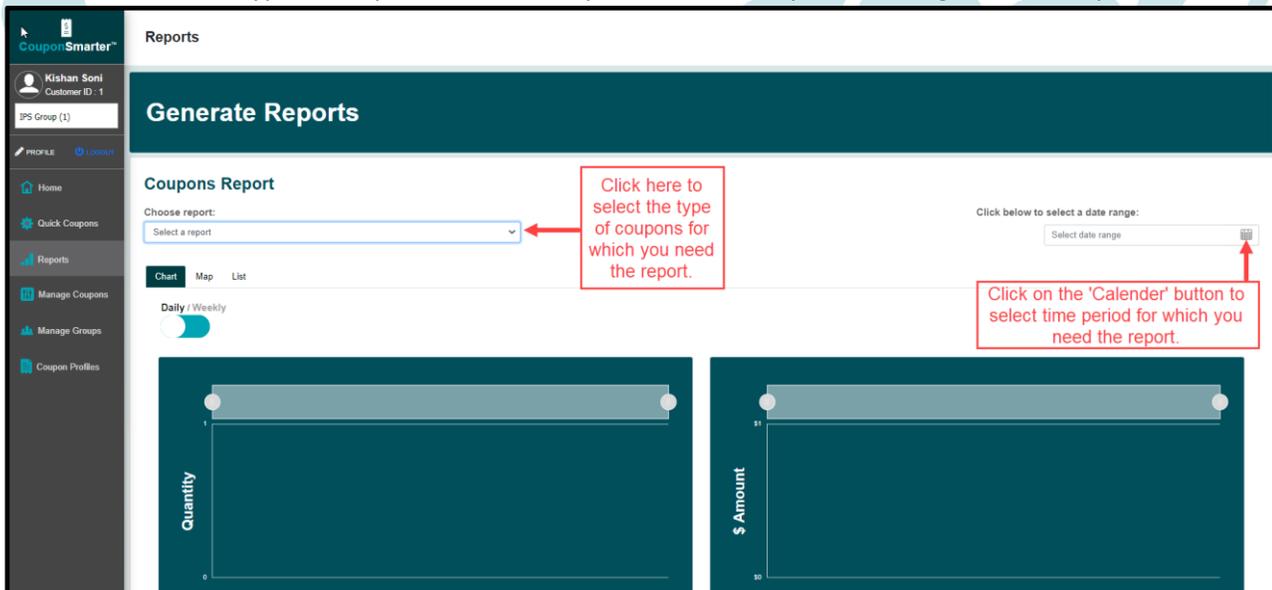


Figure 6.0. (b)

## 6.1. Active Coupons

Select the **Active Coupons** category from the drop-down menu present under the **Choose Report** sub-heading as shown below.

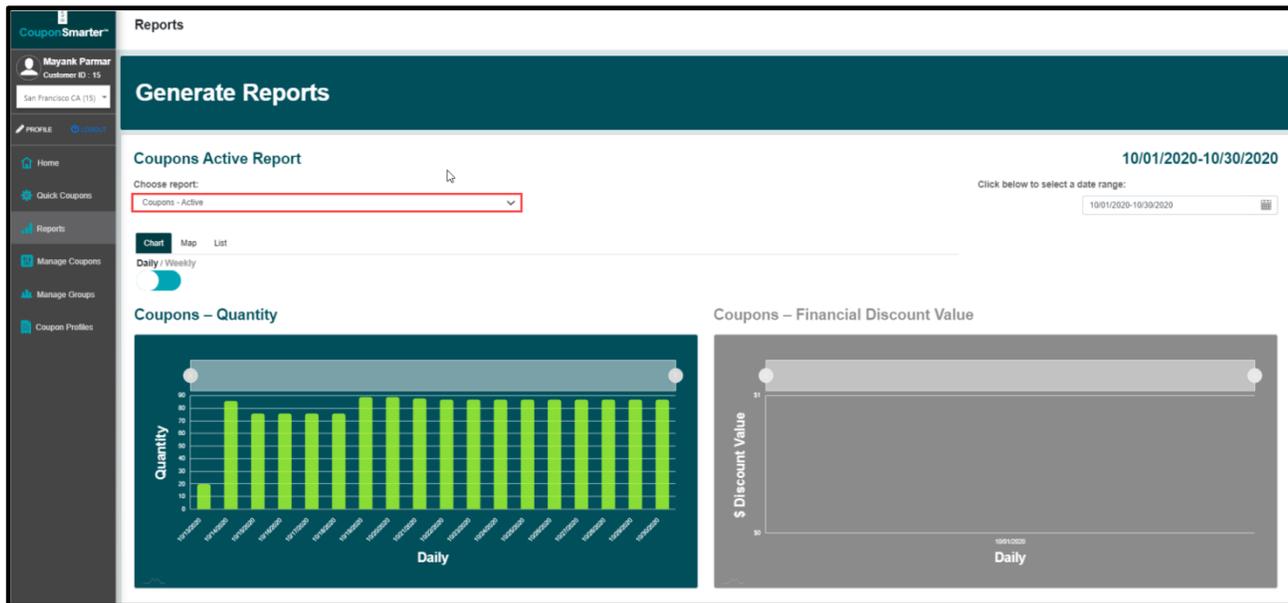


Figure 6.1.

### 6.1.1. Chart View

The **Chart View** allows you to generate reports for **Daily** and **Weekly** records as shown below.

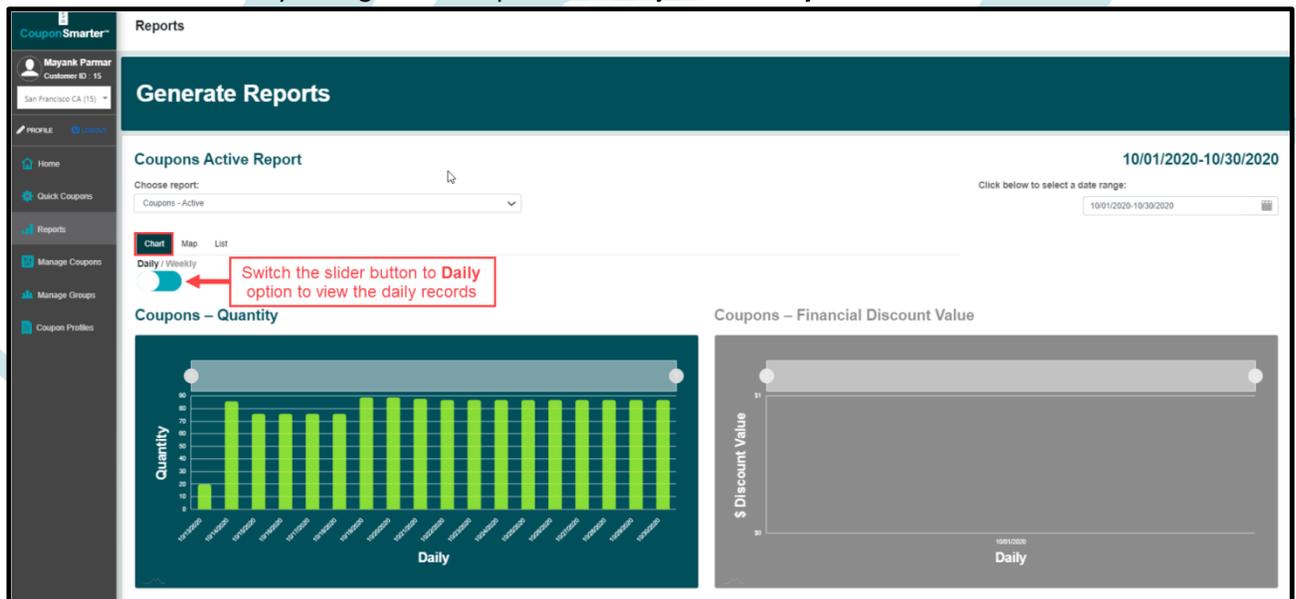


Figure 6.1.1. (Daily Records)

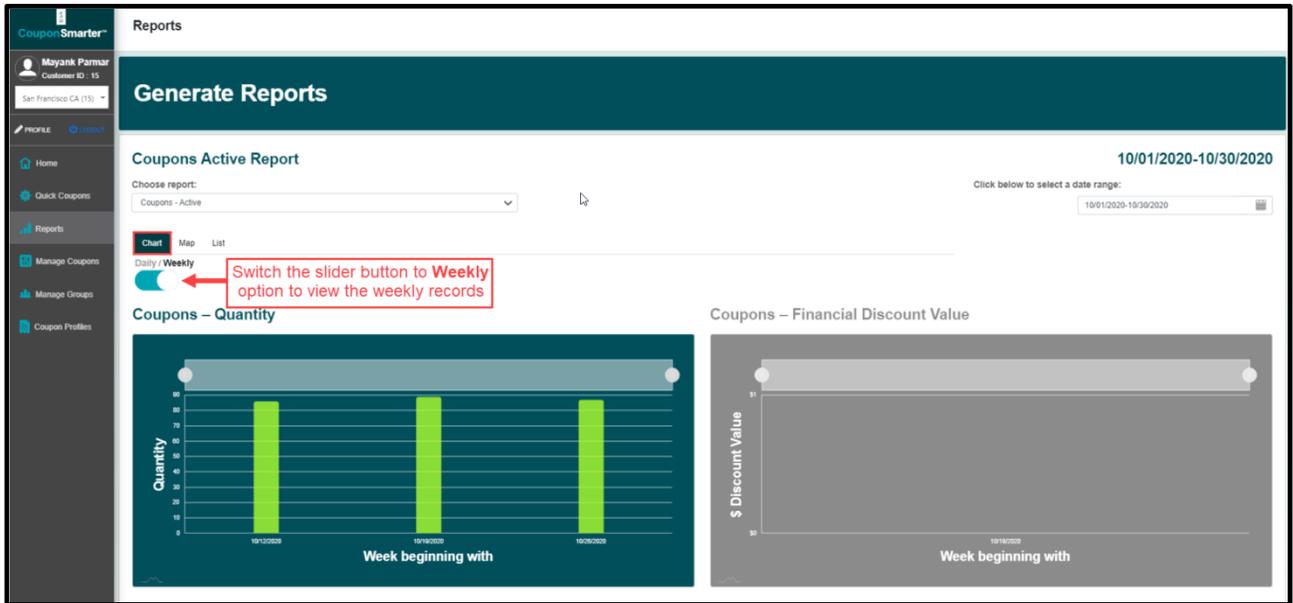


Figure 6.1.1. (Weekly Records)

## 6.1.2. Map View

To view the **Coupon Report** in the form of a map, click on the 'Map' option as shown below. Next, select a particular **Zone**, **Area** and a **Sub Area** by clicking on the respective drop-down menus. Finally, click on the **Search** button to generate the report for the selected location.

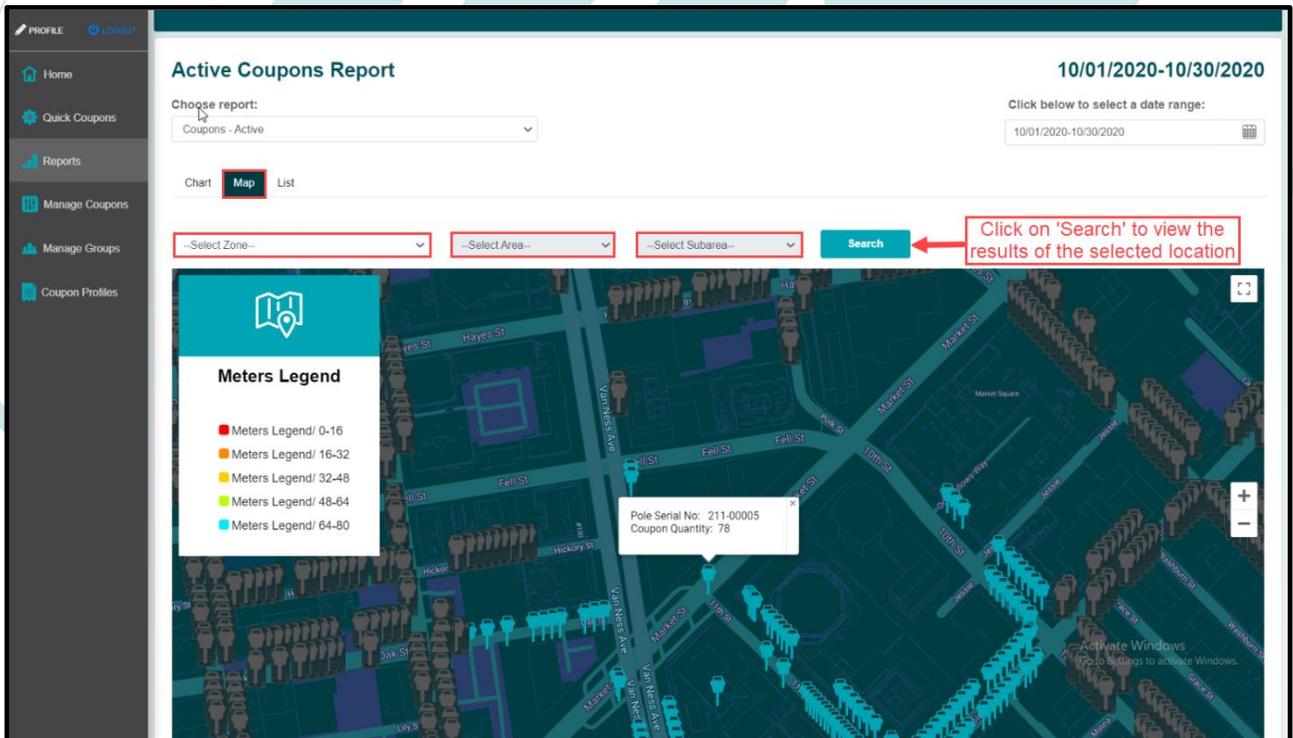


Figure 6.1.2.

### 6.1.3. List View

The **List View** lets you generate reports in two formats i.e. **By Coupon Code** and **By Event**.

(a) **By Coupon Code** –

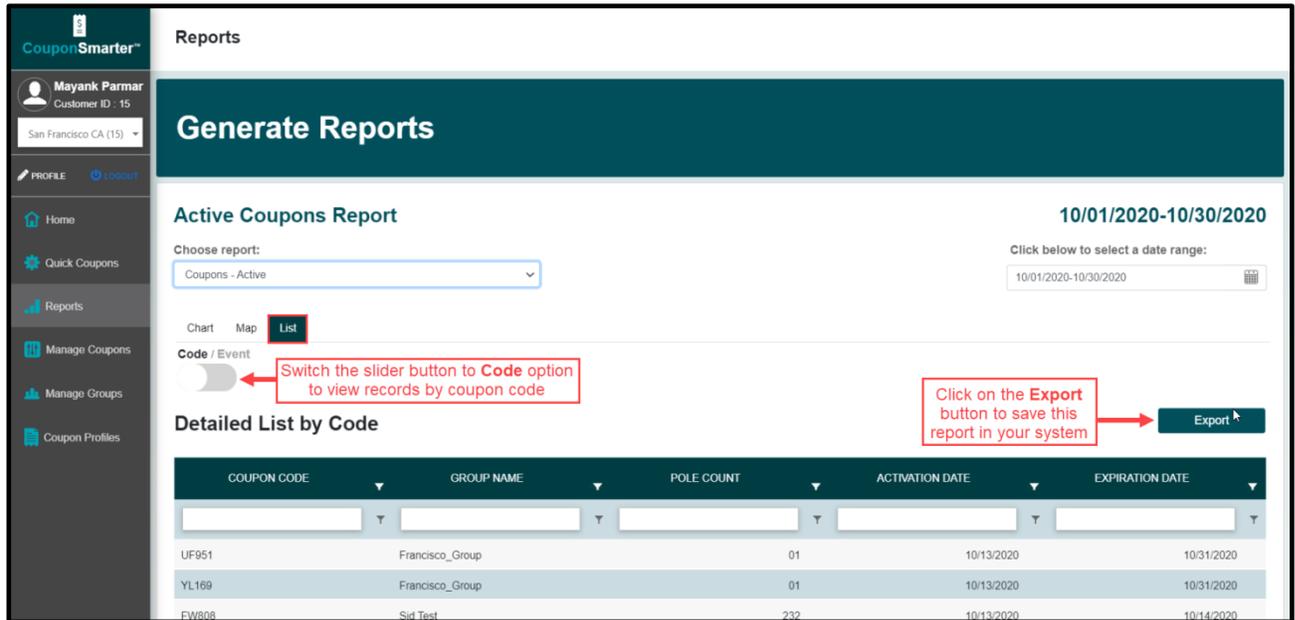


Figure 6.1.3. (By Coupon Code)

(b) **By Event** – N/A

### 6.2. Consumed Coupons

Select the **Consumed Coupons** category from the drop-down menu present under the **Choose Report** sub-heading as shown below.

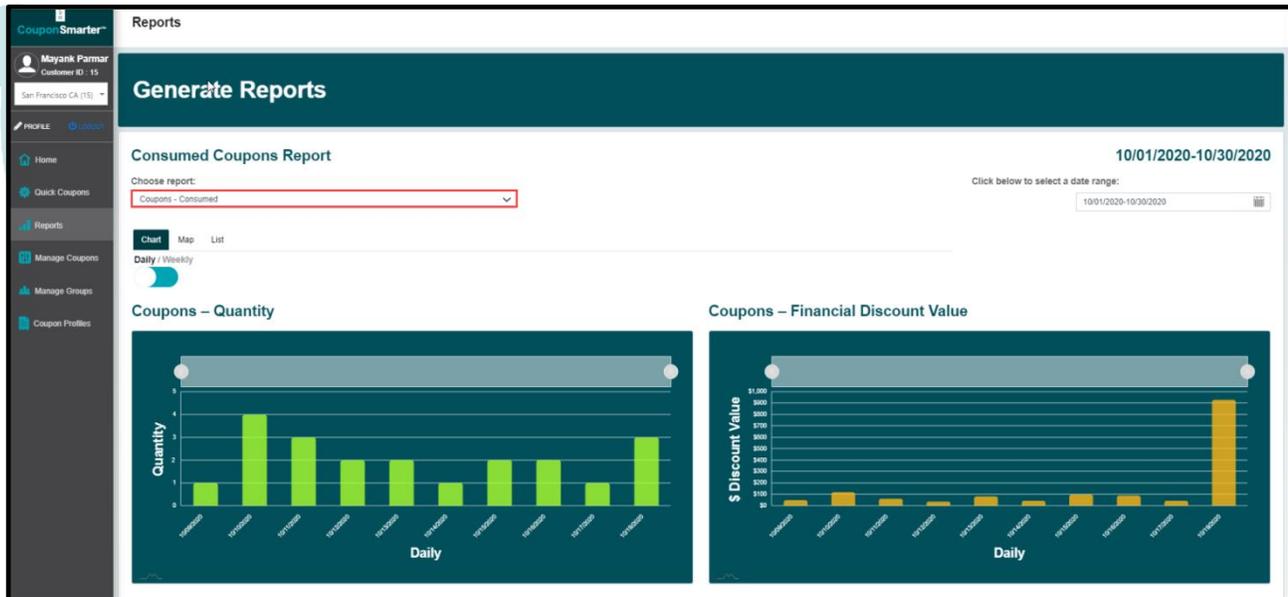


Figure 6.2.

## 6.2.1. Chart View

The **Chart View** allows you to generate reports for 'Daily' and 'Weekly' records as shown below.

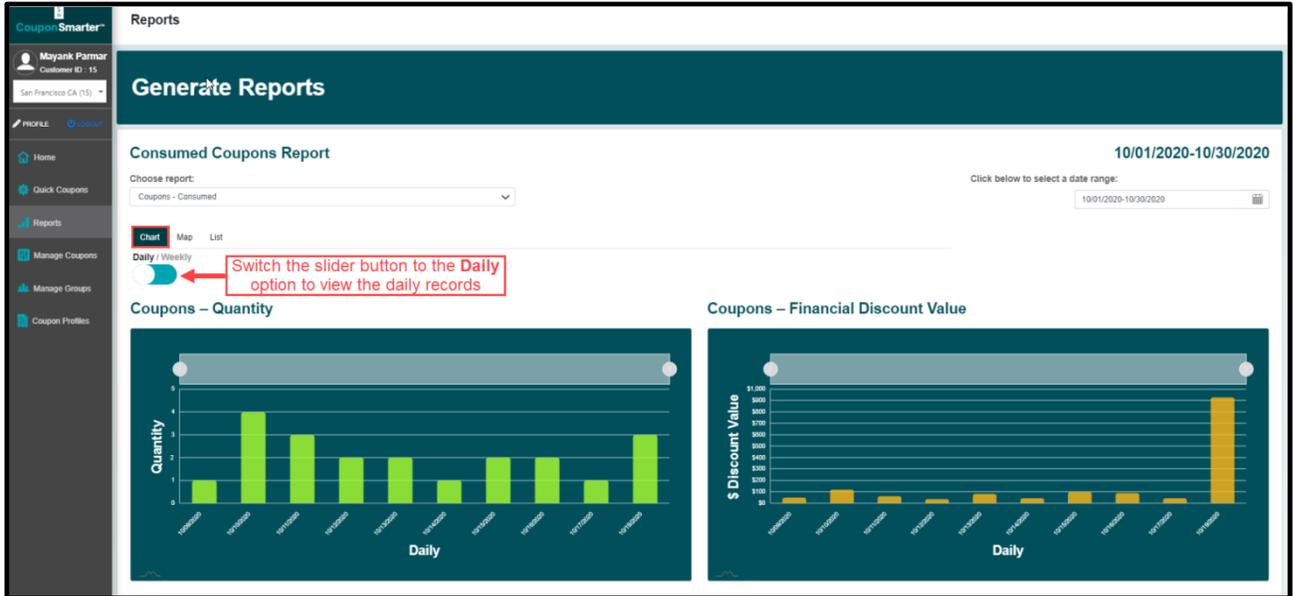


Figure 6.2.1. (Daily Records)

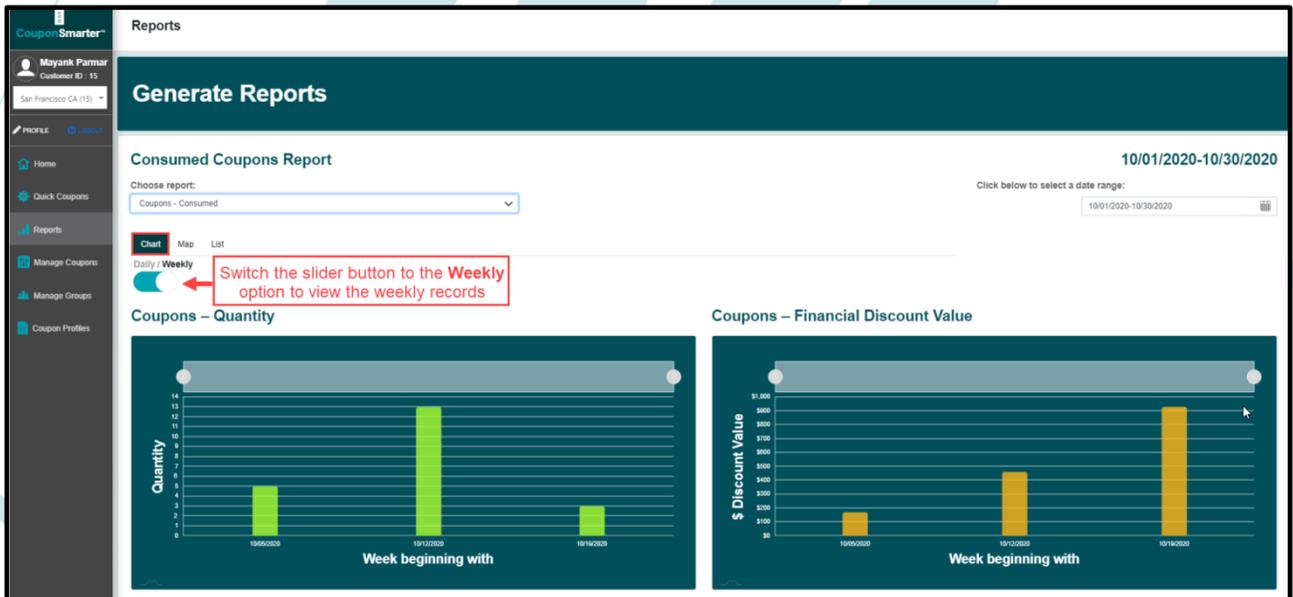


Figure 6.2.1. (Weekly Records)

## 6.2.2. Map View

To view the coupon report in the form of a map, click on the **Map** option as shown below. Next, select a particular **Zone**, **Area** and a **Sub Area** by clicking on the respective drop-down menus. Finally click on the **Search** button to generate the report for the selected location.

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## 6.2.3. List View

The **List View** lets you generate reports in two formats i.e. **By Coupon Code** and **By Event**.

(a) **By Coupon Code** –

The screenshot displays the 'Consumed Coupons Report' interface. At the top right, the date range is '10/09/2020-10/30/202'. Below this, there's a 'Choose report:' dropdown menu set to 'Coupons - Consumed'. To the right, a date range selector shows '10/09/2020-10/30/2020'. Below the dropdown, there are three tabs: 'Chart', 'Map', and 'List', with 'List' being the active tab. A 'Code / Event' toggle switch is present, with a red box and arrow pointing to it containing the text: 'Switch the slider button to the Code option to view records by the coupon code'. To the right of the toggle, another red box and arrow points to an 'Export' button with the text: 'Click on the Export button to save this report on your system'. Below these elements is a table titled 'Detailed List by Code' with the following data:

COUPON CODE	GROUP NAME	TIME USED	START DATE	EXPIRE DATE	VALUE
E0845		4	10/09/2020	12/31/2020	161
ZR075		4	10/21/2020	10/24/2020	165
EE763	Francisco_Group	1	10/09/2020	10/30/2020	20
F4724	Francisco_Group	1	10/09/2020	10/30/2020	16
F7763	Francisco_Group	1	10/09/2020	10/30/2020	21
I9724	Francisco_Group	1	10/09/2020	10/30/2020	19
IG724	Francisco_Group	1	10/09/2020	10/30/2020	18

Figure 6.2.3. (By Coupon Code)

(b) **By Event** –N/A

## 6.3. Invalid Attempts

Select the **Invalid Attempts** category from the drop-down menu present under the **Choose Report** sub-heading as shown below.

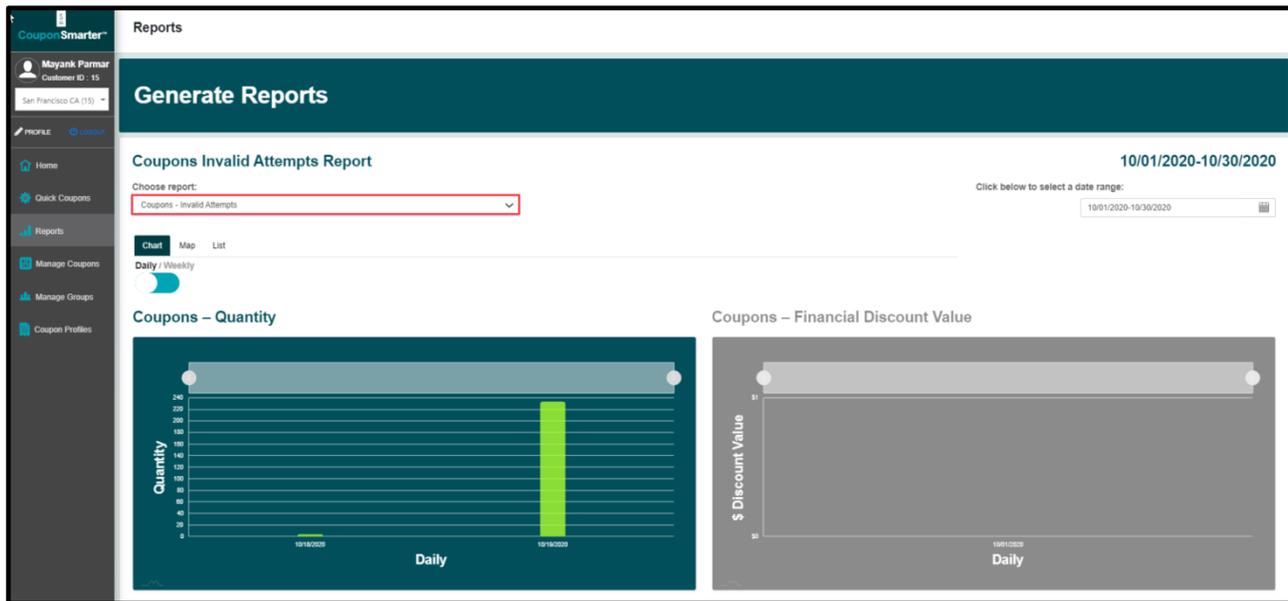


Figure 6.3.

### 6.3.1. Chart View

The **Chart View** allows you to generate reports for **Daily** and **Weekly** records as shown below.

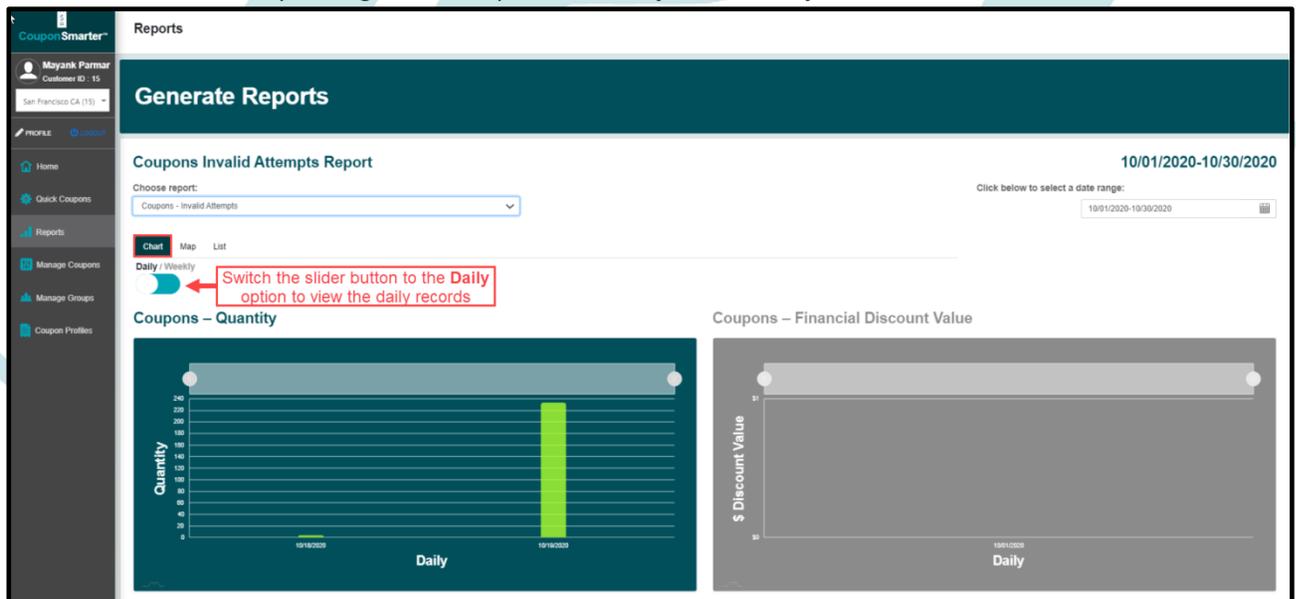


Figure 6.3.1. (Daily Records)

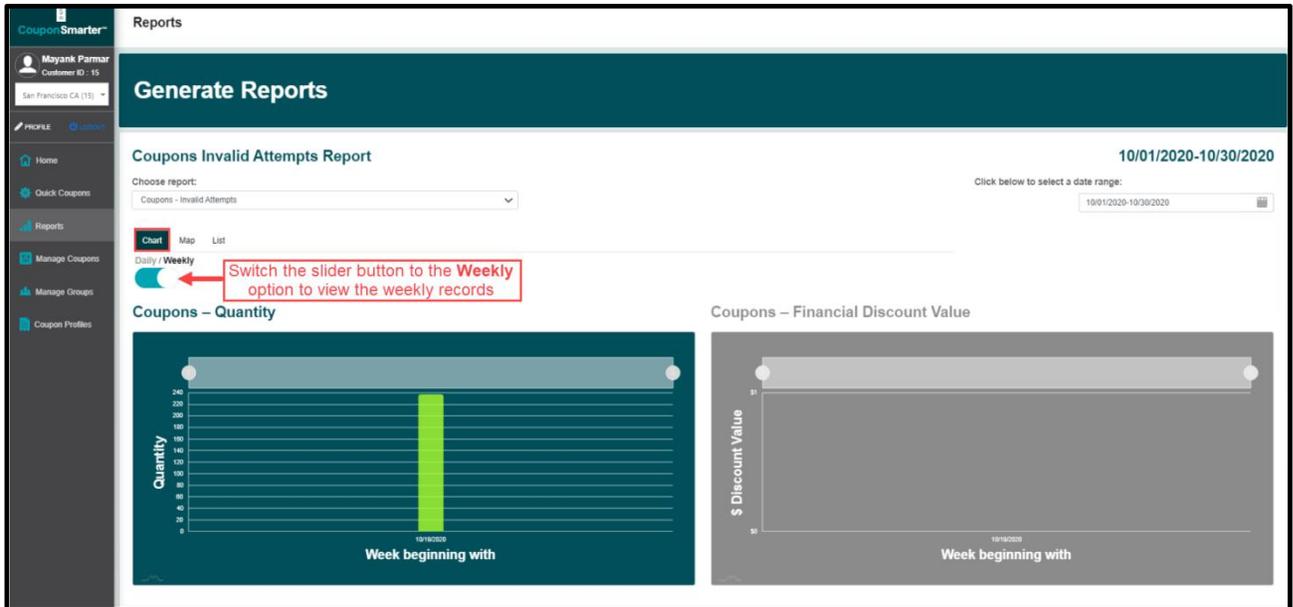


Figure 6.3.1. (Weekly Records)

### 6.3.2. Map View

To view the Coupon Report in the form of a map, click on the **Map** option as shown below. Next, select a particular **Zone**, **Area** and a **Sub Area** by clicking on the respective drop-down menus. Finally click on the **Search** button to generate the report for the selected location.

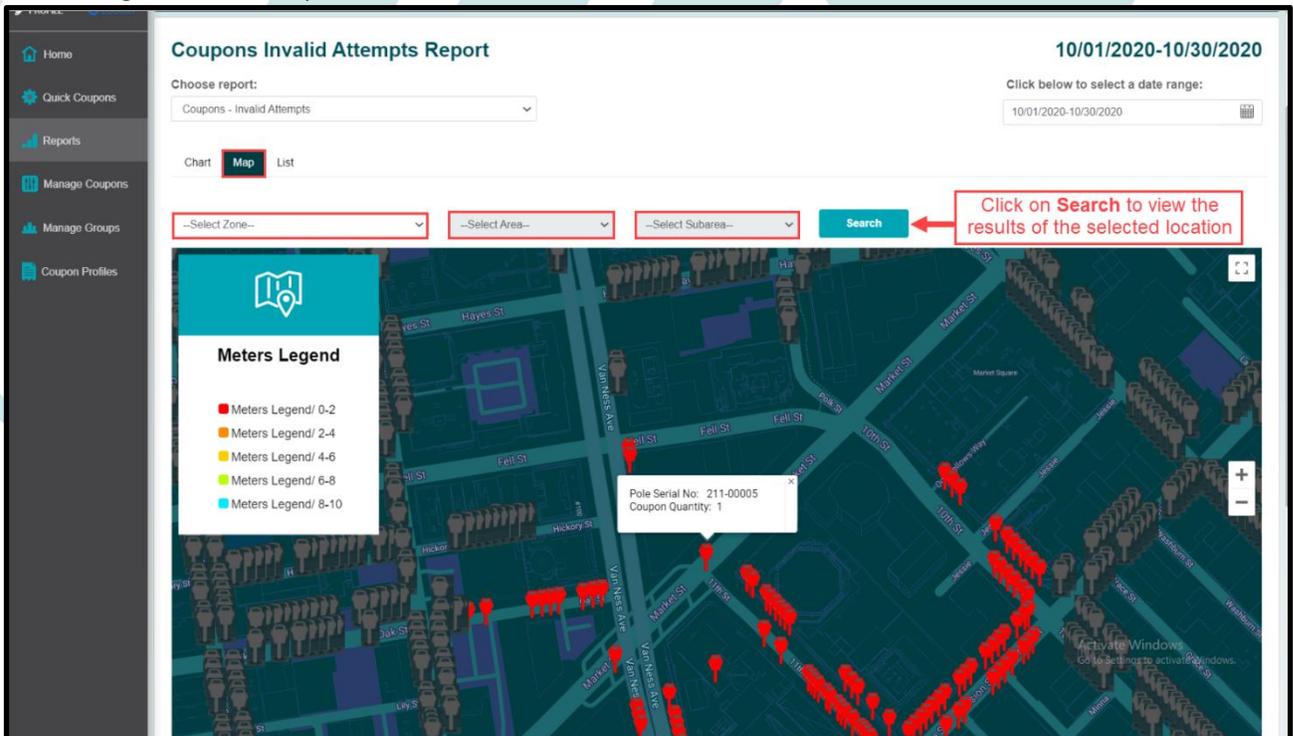


Figure 6.3.2.

### 6.3.3. List View

The **List View** lets you generate reports in two formats i.e. **By Coupon Code** and **By Event**.

#### (a) By Coupon Code –

**Invalid Attempts Coupons Report** 10/09/2020-10/30/2020

Choose report: Coupons - Invalid Attempts

Click below to select a date range: 10/09/2020-10/30/2020

Chart Map **List**

Code / Event  Code  Event

Switch the slider button to the **Code** option to view records by the coupon code

Click on the **Export** button to save this report on your system

**Detailed List by Code**

COUPON CODE	GROUP NAME	INVALID ATTEMPTS	START DATE	EXPIRE DATE
E0845		3	10/09/2020	12/31/2020
ZR075		3	10/21/2020	10/24/2020

Page 1 of 1 (2 items) < 1 > Page size: 10

Figure 6.3.3. (By Coupon Code)

#### (b) By Event –

**Invalid Attempts Coupons Report** 10/09/2020-10/30/2020

Choose report: Coupons - Invalid Attempts

Click below to select a date range: 10/09/2020-10/30/2020

Chart Map **List**

Code / Event  Code  Event

Switch the slider button to the **Event** option to view records by the event

Click on the **Export** button to save this report on your system

**Detailed List by Event**

COUPON CODE	GROUP NAME	POLE SERIAL NO	DATE / TIME EXERCISED	START DATE	EXPIRE DATE	ACTION
E0845		419-070	10/18/2020 1:29 0...	10/09/2...	12/31/2...	ONLINE REDEMPTION
ZR075		419-070	10/18/2020 1:47 0...	10/21/2...	10/24/2...	ONLINE REDEMPTION
E0845		419-070	10/18/2020 1:29 0...	10/09/2...	12/31/2...	ONLINE REDEMPTION
ZR075		419-070	10/18/2020 1:47 0...	10/21/2...	10/24/2...	ONLINE REDEMPTION
E0845		419-070	10/19/2020 1:29 0...	10/09/2...	12/31/2...	ONLINE REDEMPTION
ZR075		419-070	10/19/2020 1:47 0...	10/21/2...	10/24/2...	ONLINE REDEMPTION

Page 1 of 1 (6 items) < 1 > Page size: 10

Figure 6.3.3. (By Event)

## 6.4. Exceeding Use Limits

Select the **Exceeding Use Limits** category from the drop-down menu below the **Choose Report** sub-heading as shown below.

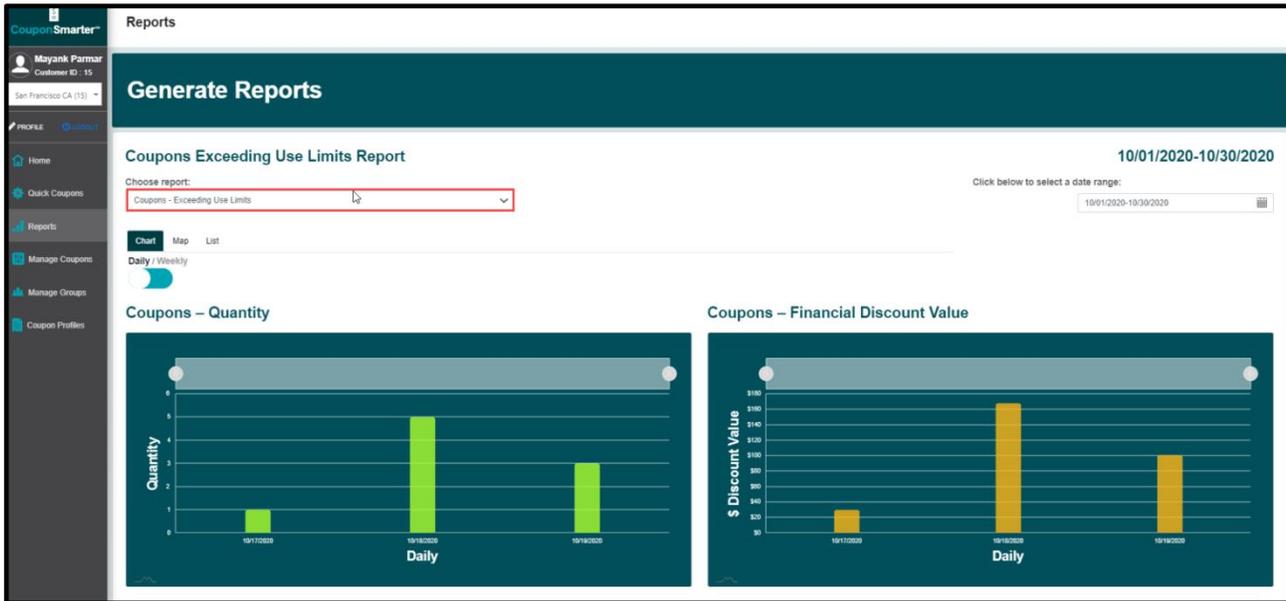


Figure 6.4.

### 6.4.1. Chart View

The **Chart View** allows you to generate reports for **Daily** and **Weekly** records as shown below.

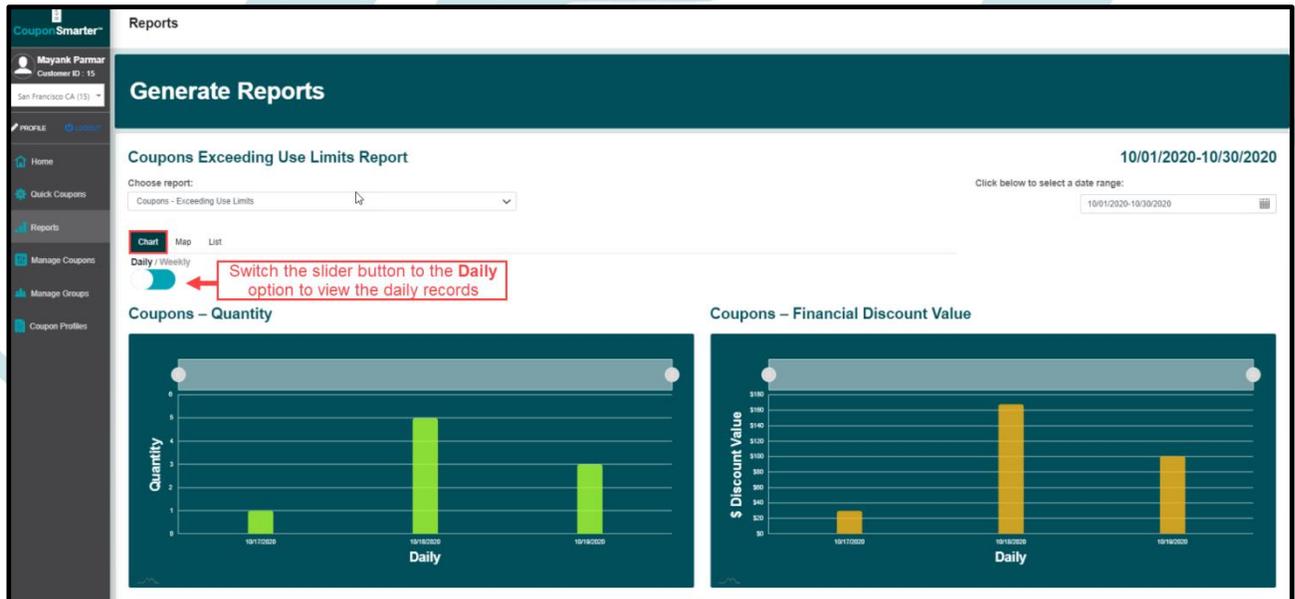


Figure 6.4.1. (Daily Records)

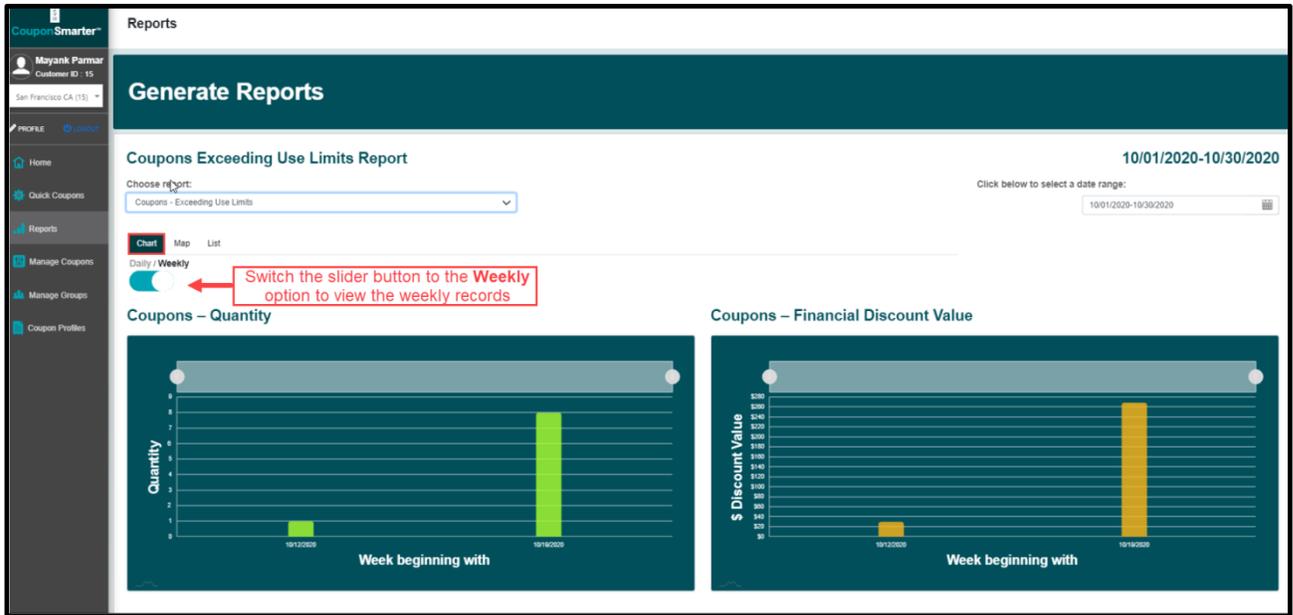
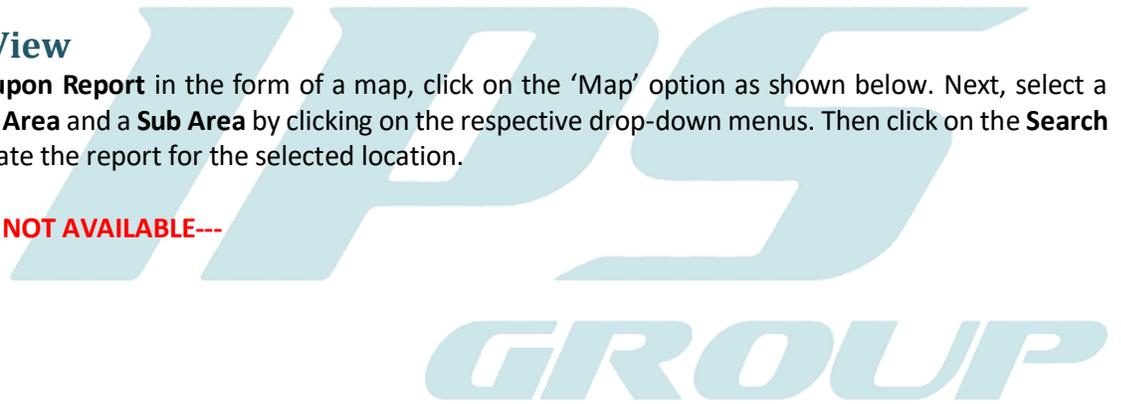


Figure 6.4.1. (Weekly Records)

## 6.4.2. Map View

To view the **Coupon Report** in the form of a map, click on the 'Map' option as shown below. Next, select a particular **Zone**, **Area** and a **Sub Area** by clicking on the respective drop-down menus. Then click on the **Search** button to generate the report for the selected location.

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### 6.4.3. List View

The **List View** lets you generate reports in two formats i.e. **By Coupon Code** and **By Event**.

#### (a) By Coupon Code –

**Exceeding Use Limits Report** 10/09/2020-10/30/2020

Choose report: Coupons - Exceeding Use Limits

Click below to select a date range: 10/09/2020-10/30/2020

Chart Map **List**

Code / Event  Code  Event  
Switch the slider button to the Code option to view records by the coupon code

Detailed List by Code

Click on the Export button to save this report on your system

COUPON CODE	GROUP NAME	TIME USED	START DATE	EXPIRE DATE	VALUE
E0845		4	10/09/2020	12/31/2020	154
ZR075		4	10/21/2020	10/24/2020	145

Page 1 of 1 (2 items) < 1 > Page size: 10

Figure 6.4.3. (By Coupon Code)

#### (b) By Event –

**Exceeding Use Limits Report** 10/09/2020-10/30/2020

Choose report: Coupons - Exceeding Use Limits

Click below to select a date range: 10/09/2020-10/30/2020

Chart Map **List**

Code / Event  Code  Event  
Switch the slider button to the Event option to view records by the event

Detailed List by Event

Click on the Export button to save this report on your system

COUPON CODE	GROUP NAME	POLE SERIAL NO	DATE/ TIME EXERCISED	START DATE	EXPIRE DATE	ACTION
E0845		419-07...	10/17/2020 1:29:0...	10/09/2...	12/31/2...	ONLINE REDEMPTION
ZR075		419-07...	10/18/2020 1:47:0...	10/21/2...	10/24/2...	ONLINE REDEMPTION
E0845		419-07...	10/18/2020 1:29:0...	10/09/2...	12/31/2...	ONLINE REDEMPTION
ZR075		419-07...	10/18/2020 1:47:0...	10/21/2...	10/24/2...	ONLINE REDEMPTION
E0845		419-07...	10/18/2020 1:29:0...	10/09/2...	12/31/2...	ONLINE REDEMPTION
ZR075		419-07...	10/18/2020 1:47:0...	10/21/2...	10/24/2...	ONLINE REDEMPTION
E0845		419-07...	10/19/2020 1:29:0...	10/09/2...	12/31/2...	ONLINE REDEMPTION
ZR075		419-07...	10/19/2020 1:47:0...	10/21/2...	10/24/2...	ONLINE REDEMPTION

Figure 6.4.3. (By Event)