User Manual PerkPlus (V1.0)
Last Update: 16 January 2025

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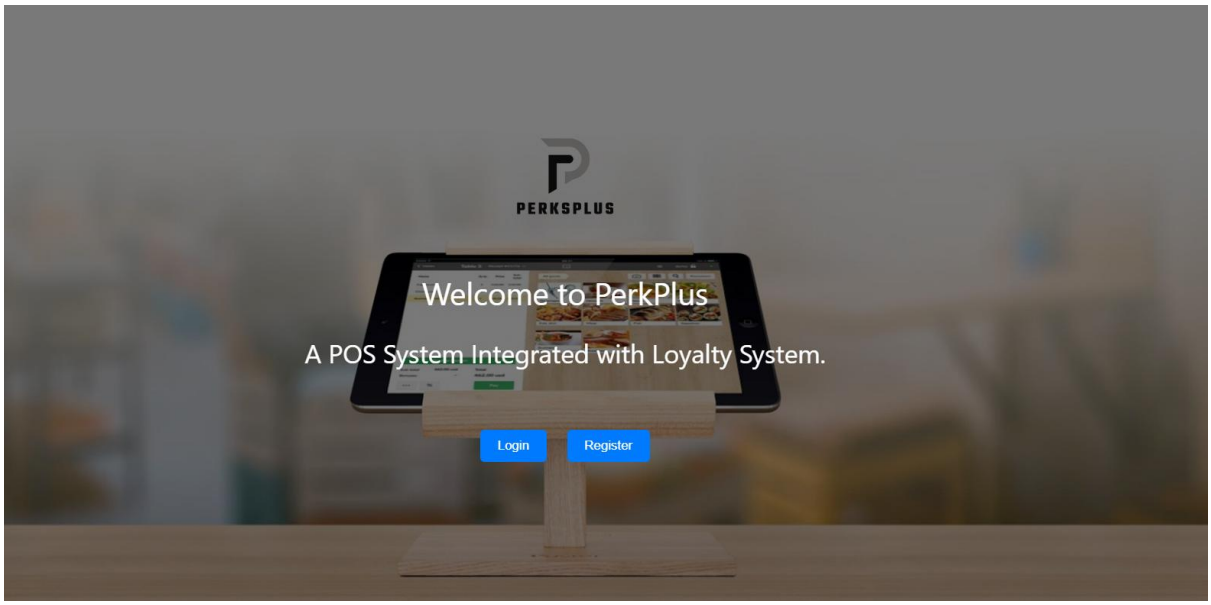
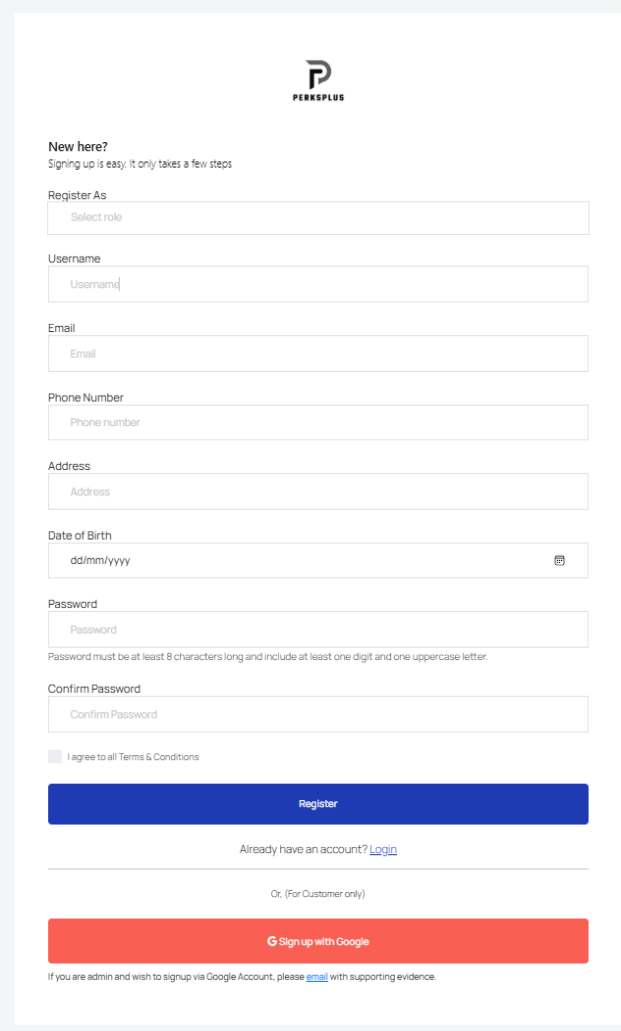
Chapter 1: Home Page



1. Go to www.perkplus.adiwidget.com
2. Select “Login” if you have an account or “Register” if you do not have an account.

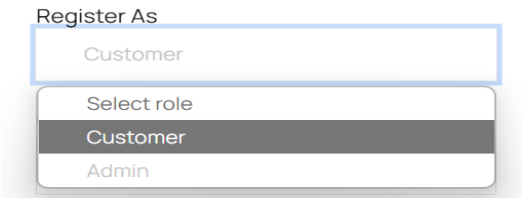
Chapter 2: Register, Login and Forget Password

2.1 Register



For the new users, users can opt for manual register by keyin the required field, or users can register via their google account.

Option 1: Manual Register

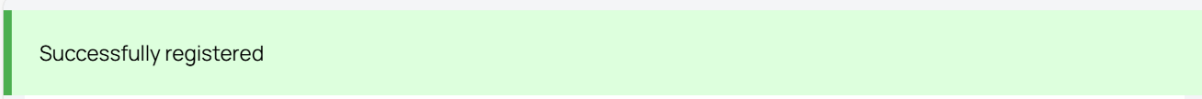


Information required to login:

- Register as [User Type] – Customer or Retailer
- Username
- Email (Email previously register via google account does not work)
- Phone number
- Address

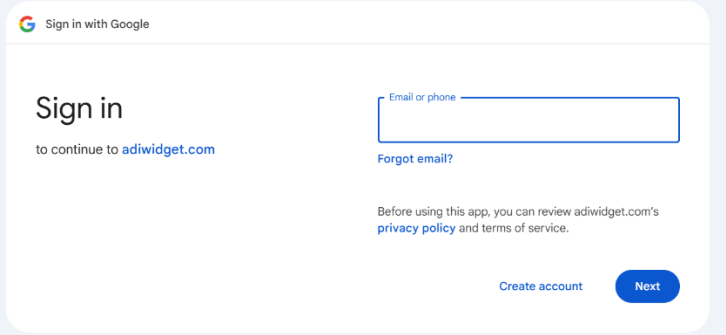
- Date of birth (must be at least 13 years old and above)
- Password (at least 8 characters long and include at least one digit and one uppercase letter.)
- Consent to Terms and Conditions

If everything is done, click “Register”. A successful message will be shown. Click login to proceed with Login

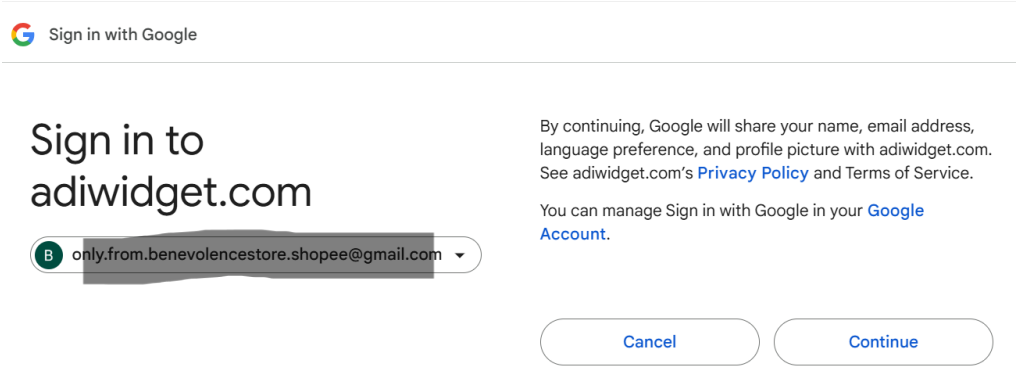


Option 2: Google Login
Note: By default, user who use this method will be assigned as “Customer”. If user wants to login as Admin/Super Admin via Google Account, please email snoopyjian0130@gmail.com with supporting evidence.

1. Click “Sign up with Google” (Note: If the google email is used to register using manual method previously, this method is not suitable)
2. Sign in your Google Account

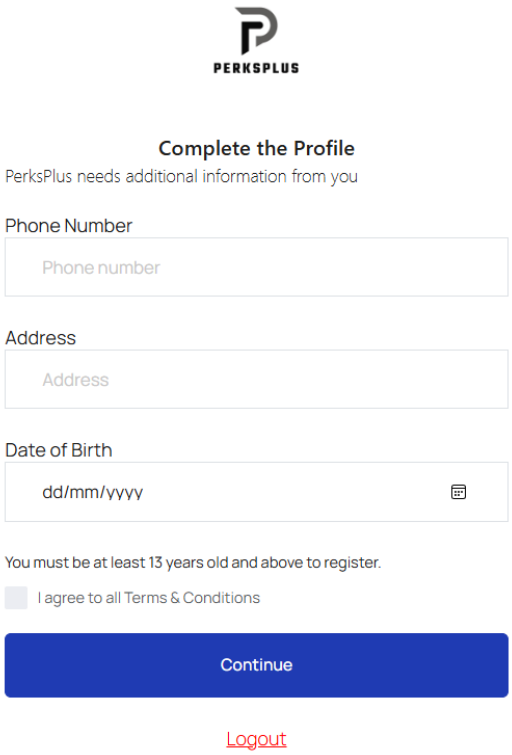


3. Click “Continue”



4. Complete the profile by providing:
    - Phone number
    - Address
    - Date of birth (must be at least 13 years old and above)

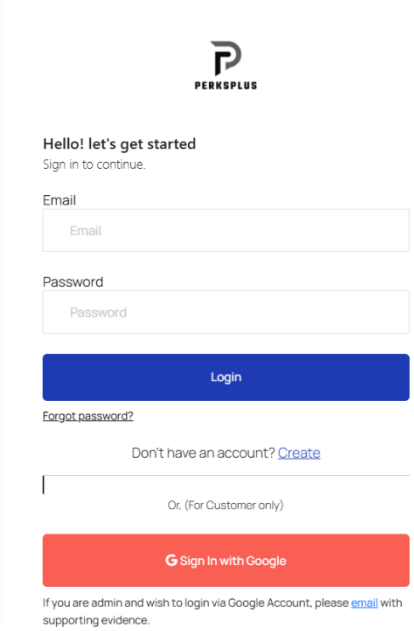
- Consent to Terms & Conditions



5. Click Continue.

2.2 Login

Method 1: Manual Login
Note: This method is only suitable for manual login user.

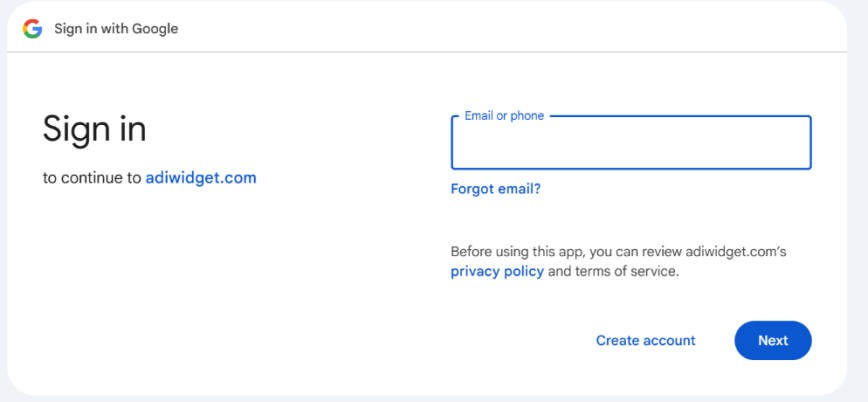


1. Fill in the required field:
   - Email
   - Password
2. Click “Login”

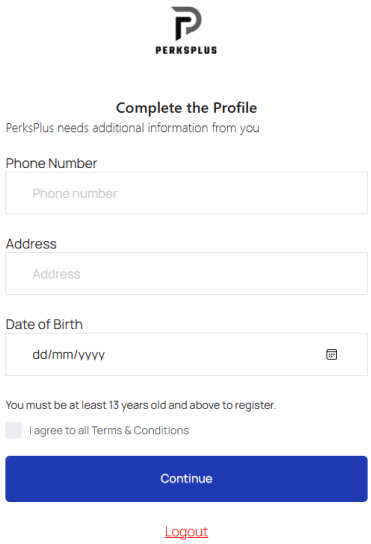
Method 2: Google Login

Note: By default, user who use this method will be assigned as “Customer”. If user wants to login as Admin/Super Admin via Google Account, please email snoopyjian0130@gmail.com with supporting evidence and justifications.

1. Click “Sign up with Google” (Note: If the google email is used to register using manual method previously, this method is not suitable)
2. Sign in your Google Account



3. If you do not complete the profile before, complete the profile by providing:
   - Phone number
   - Address
   - Date of birth (must be at least 13 years old and above)
   - Consent to Terms & Conditions

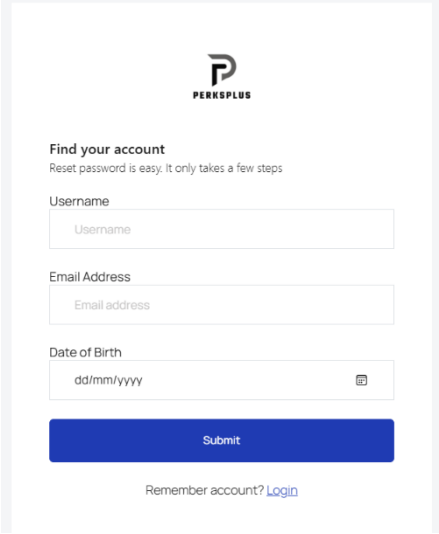


4. Click Continue.

2.3 Forget Password

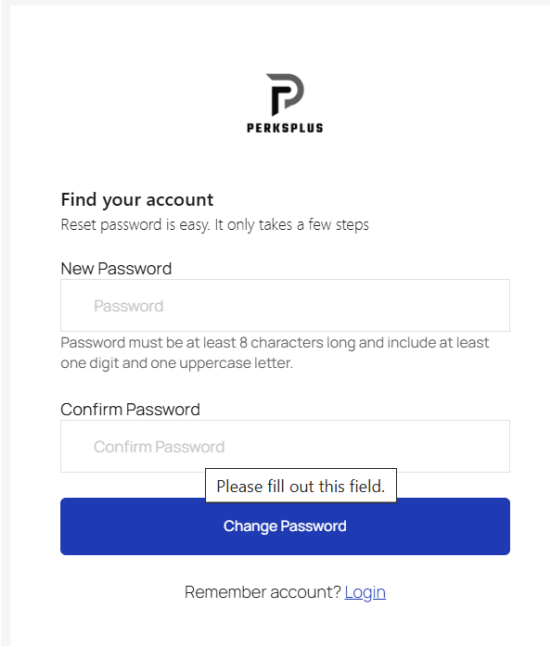
Note: This method is only suitable for manual login user.

1. At login page, click “Forget Password” below Login button



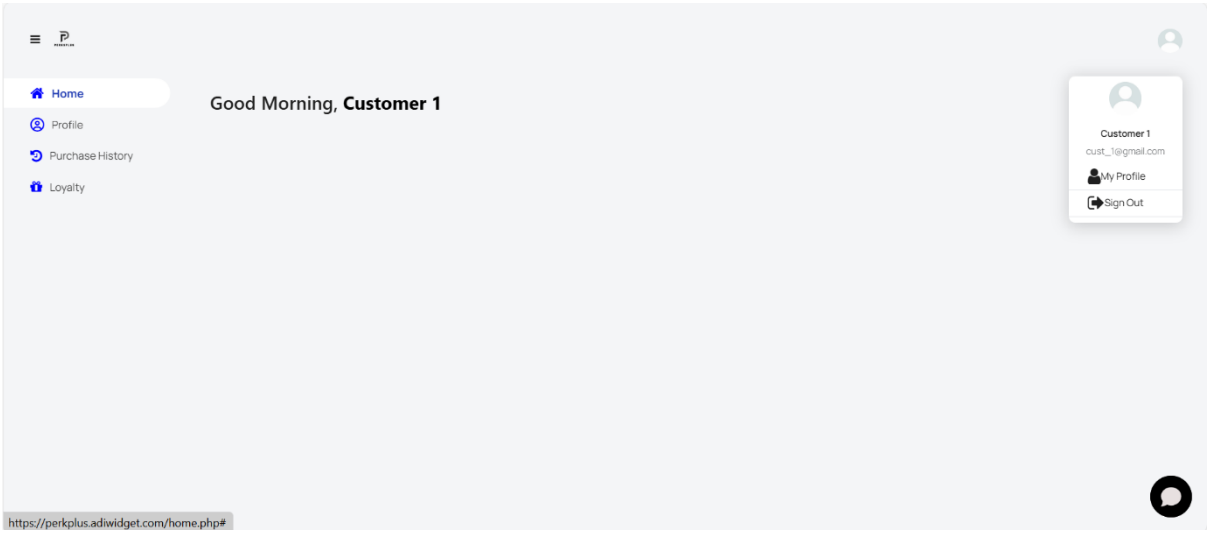
2. Fill in the required field based on information keyin during registration:
    - Username
    - Email address
    - Date of birth

3. Click “Submit”



4. Fill in the new password (at least 8 characters long and include at least one digit and one uppercase letter.)
5. Click “Change Password”.

Chapter 3: Customer

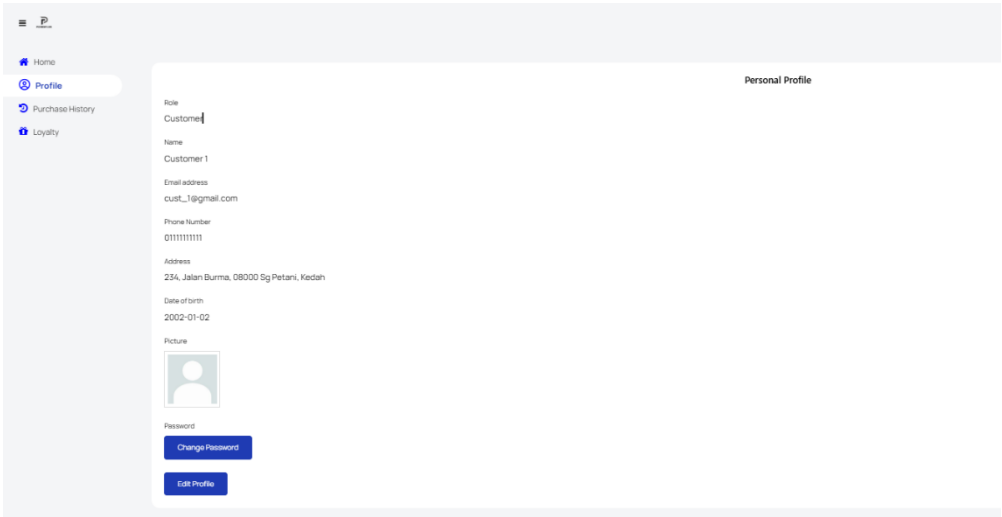


Function available for Customer:

- Profile
- Purchase History
- Loyalty
- Chatbot

To sign out, click on the picture on the right top corner and click “Sign out”.

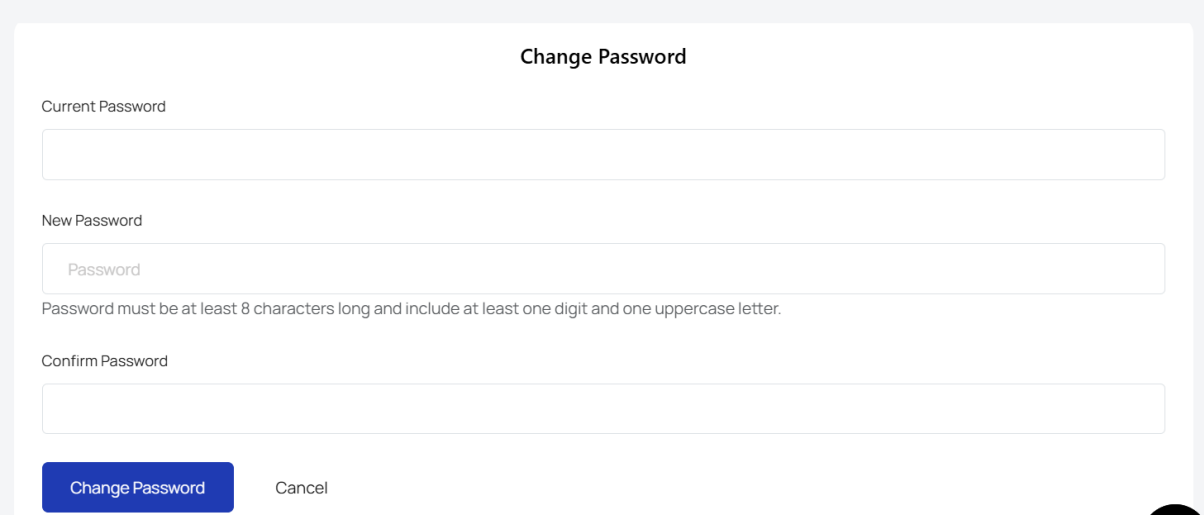
3.1 Profile



From profile page, user can view their profile that is registered in PerkPlus.
User can choose to change password or edit profile.

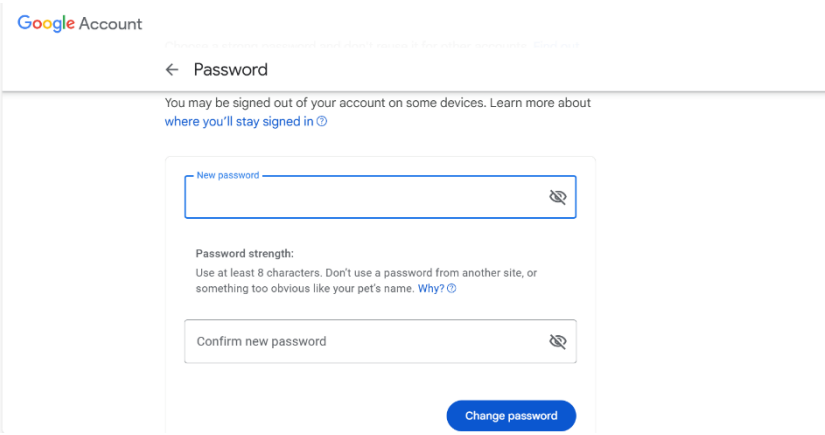
3.1.1 Change Password

For manual register user:



1. Fill in the required field
    - Current Password
    - New Password & Confirm password (at least 8 characters long and include at least one digit and one uppercase letter.)
2. Click “Change Password”

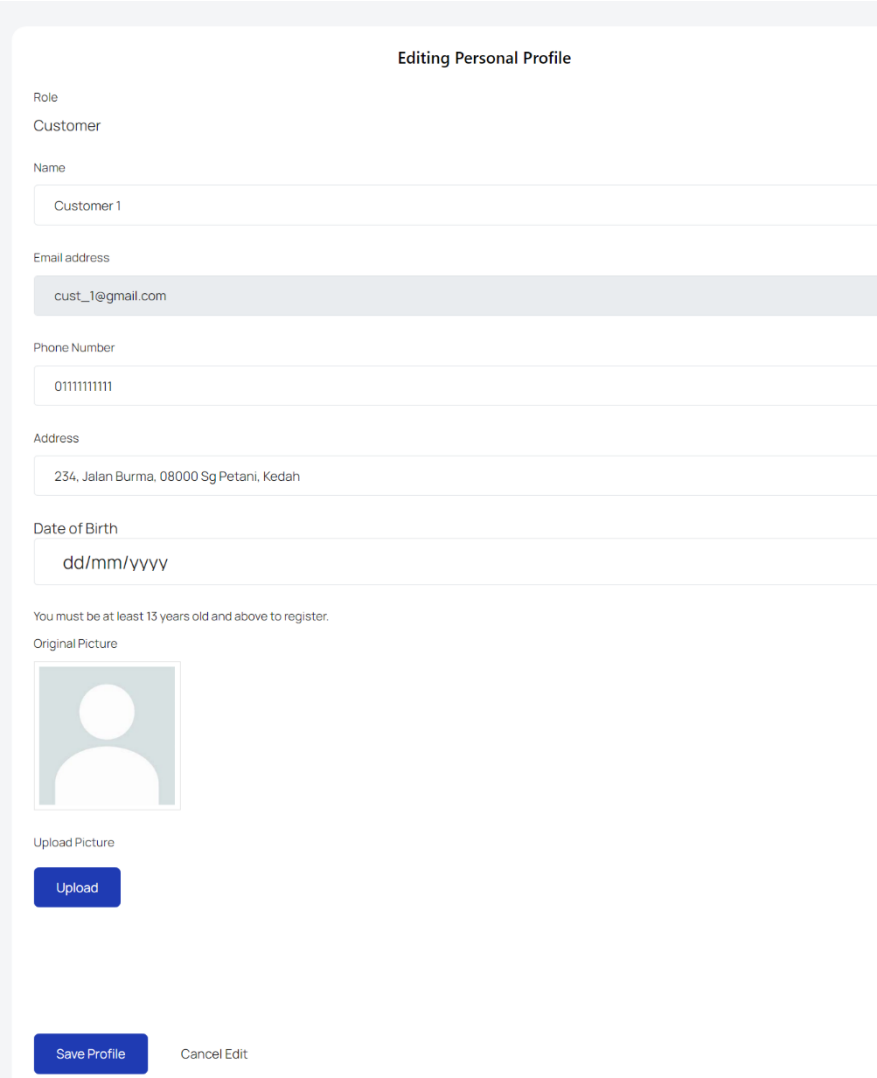
For Google Account User:



Change password will redirect you to the Google change password page. Follow the on-screen instructions

Warning: Password lost for Google Account is beyond the control of PerkPlus. PerkPlus is not responsible for the password lost for your Google Account.

3.1.2 Edit Profile

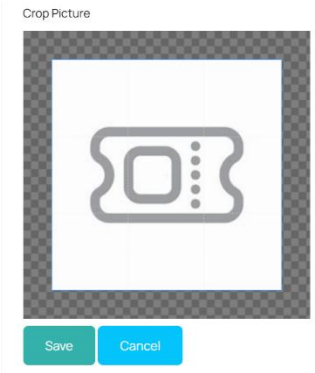


User can edit their profile in this page. Among the particular that can be edited are:

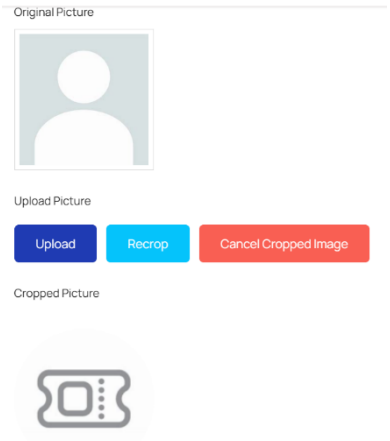
- Name
- Phone number
- Address
- Date of birth (must be at least 13 years old and above)
- Profile picture*

*Instruction for profile picture:

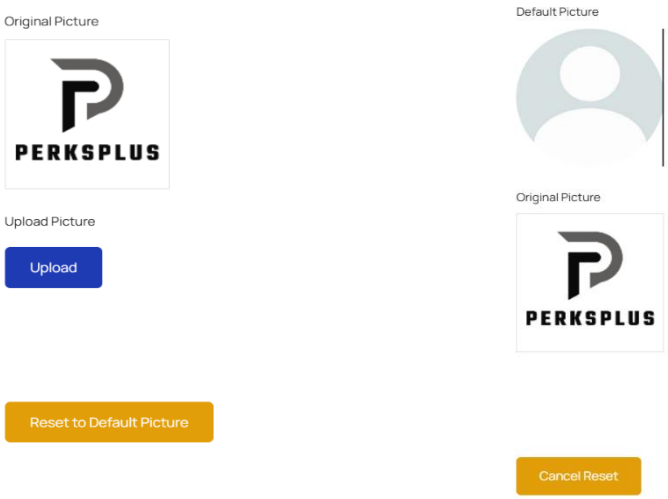
1. Click on “Upload” and select picture from your device.
2. Select the range to be used in your profile picture and click “Save”



3. After the picture is cropped, user can choose to upload a new photo by clicking “Upload”, recrop the picture by clicking “Recrop” (Back to Step 2) and reset to original picture by clicking “Cancel Cropped Image”.

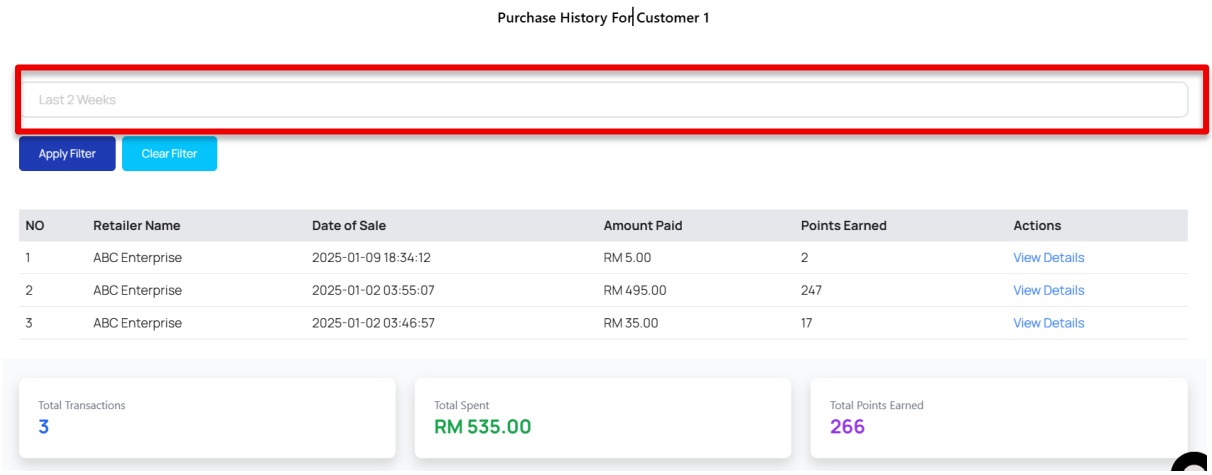


4. If previously the new photo is saved, user can either upload a new photo (Step 2) or reset to default picture. Default picture for the manual register user is as defined by PerkPlus, while default picture for Google register user is Google Profile picture when registered. User can cancel reset to default picture by clicking “Cancel Reset”



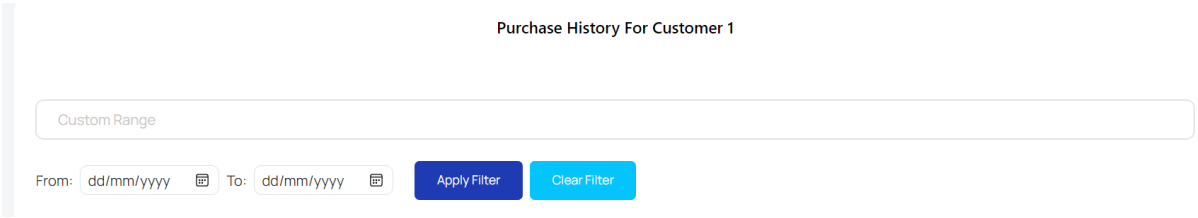
After complete editing the particulars, click “Save” button.

3.2 Purchase History



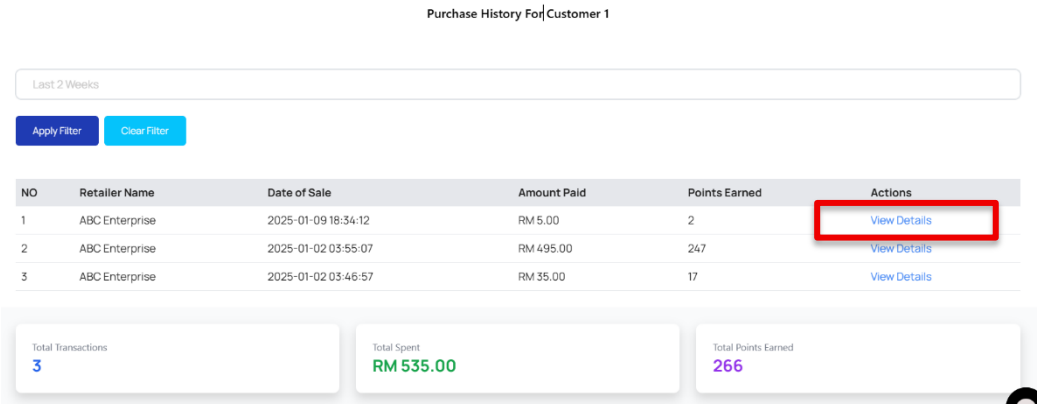
From the Purchase History page, customer can view a list of transaction history and the summary of the purchase history such as total transactions, total spent and total points earned during the defined range of time. By default, the page shows all the transactions and its summaries in last 2 weeks. To change the range of the transaction period, click on the dropdown circled by red and click on “Apply Filter”. The range that can be chosen are:

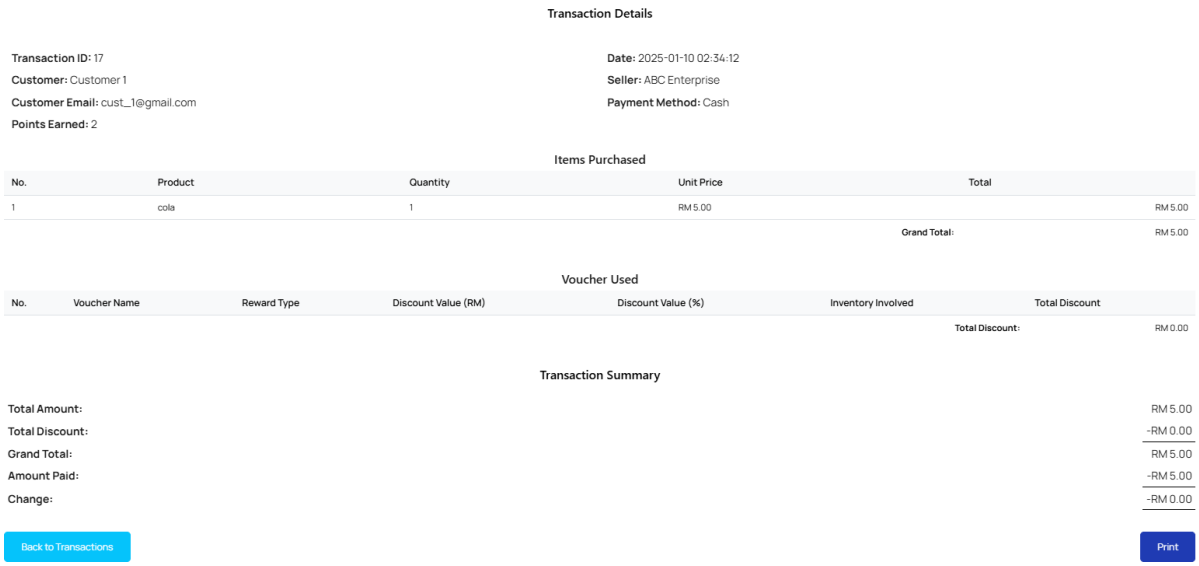
- Last 1 week
- Last 2 weeks
- Last 1 month
- Last 3 months
- Custom range



For the custom range, the customer can choose the range of date of transactions they wish to view and click “Apply filter” to apply the range.

To view the details of a certain transaction, click “View Details” for that particular transaction.



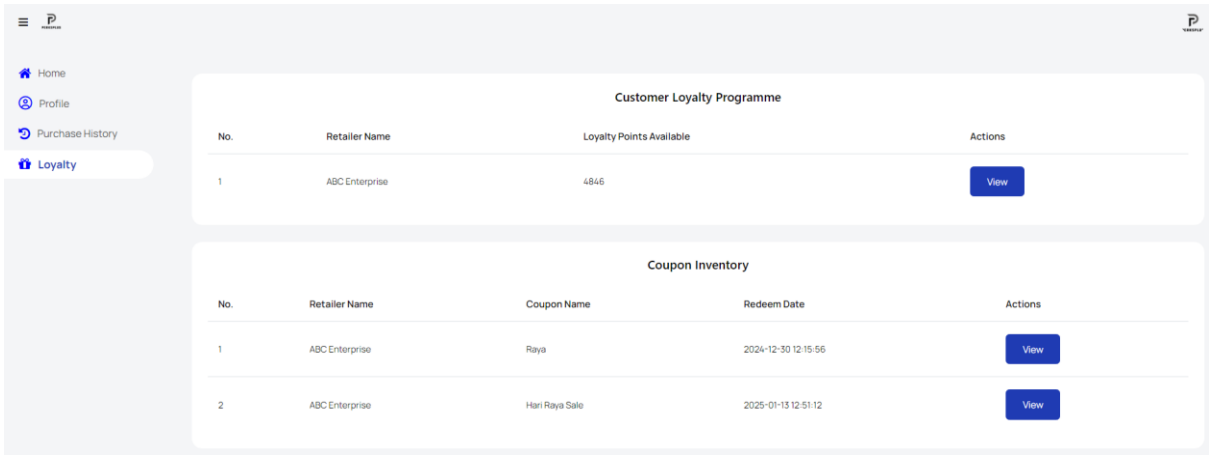


The customer can view the details of their transactions which includes:

- Transaction ID
- Customer (name)
- Customer Email
- Points Earned (based on conversion ratio)
- Date (date and time)
- Seller (name)
- Payment Method
- Item purchased
- Voucher used
- Transaction summary

Click “Back to Transactions” to back to purchase history page.
Click ‘Print’ to automatically generate a PDF receipt.

3.3 Loyalty



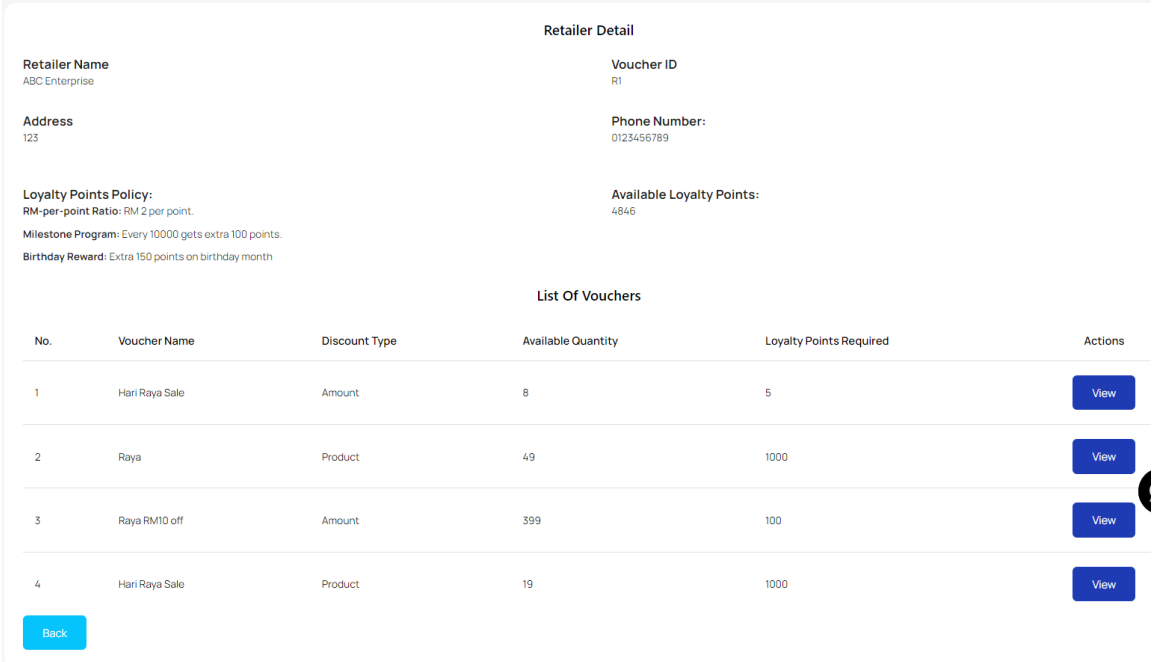
In the loyalty page, it consists of 2 parts:

- Customer Loyalty Programme
- Coupon Inventory

3.3.1 Coupon Loyalty Programme

In the upper part of loyalty page, customer can view a list of loyalty programme they have participated, which are also the retailers that he/she has transactions with. The customer can view on their loyalty points associated with the retailer*. To view details of the retailer, click "View" on its correspondence row.

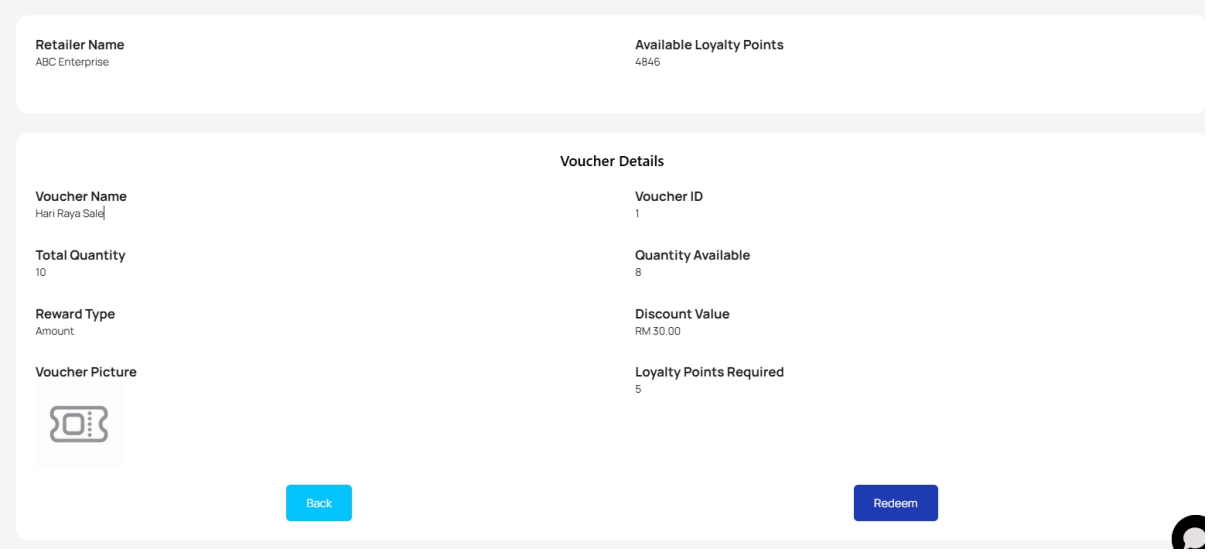
***Note:** 1 loyalty points is associated with a single customer and a single retailer.



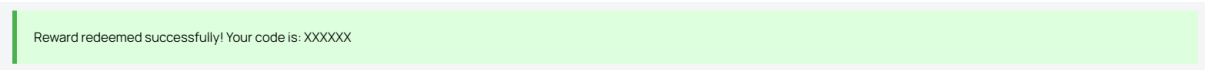
When the "View" button is clicked, the particular of the retailer details are shown which includes:

- Retailer name
- Retailer ID
- Address
- Phone number
- Loyalty points policy
- Available loyalty points
- List of vouchers available (Where availability quantity >0)

To view and claim the voucher, click "View". To back to previous page, click "Back".



When the view button is clicked, it will direct user to view the voucher details page, where user may use their loyalty points to redeem the coupon by clicking "Redeem" button. Once successfully claimed, a successful claim voucher message will be shown together with a 8-character long code, which will also be visible later in coupon inventory.

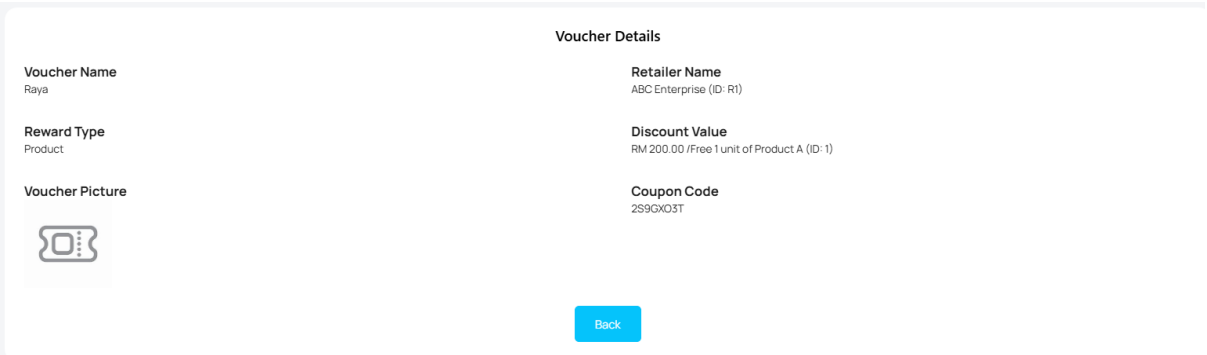


Note: Each coupon can only be claimed once by every customer.

3.3.2 Coupon Inventory

In the lower part of loyalty page, customer can view the coupon inventory where the claimed but unused vouchers are shown in the list. To view details of the coupon, click "View" on its correspondence row.

When the "View" button is clicked, the customer may view the details of the coupon together with the coupon code. This coupon is applied by telling the retailer the email address with the coupon code when making purchase with the retailer.



There are 3 types of coupon reward types that may be offered by retailer and there is

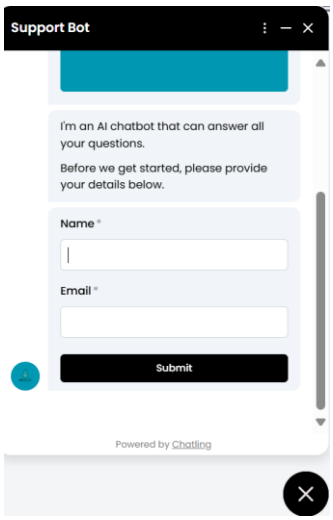
- **Product:** When the coupon is applied, the corresponding product will be free of charge. However, customer must buy the product before the coupon can be applied. It also cannot be applied when the amount discounted is larger than the balance before applying the coupon.

- **Percentage:** When the coupon is applied, customer can get the discount in determined percentage from the total amount (amount before the product coupon is applied). However, the coupon cannot be applied when the amount discounted is larger than the balance before applying the coupon.

- **Amount:** When the coupon is applied, customer can get the fixed amount of discount. However, the coupon cannot be applied when the amount discounted is larger than the balance before applying the coupon.

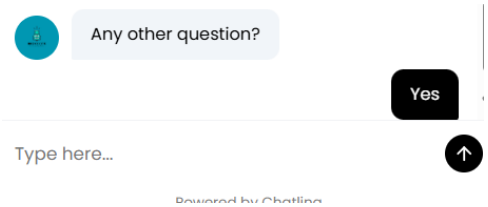
3.4 Chatbot

In every page, users can use the chatbot by clicking the icon located in the right bottom corner.

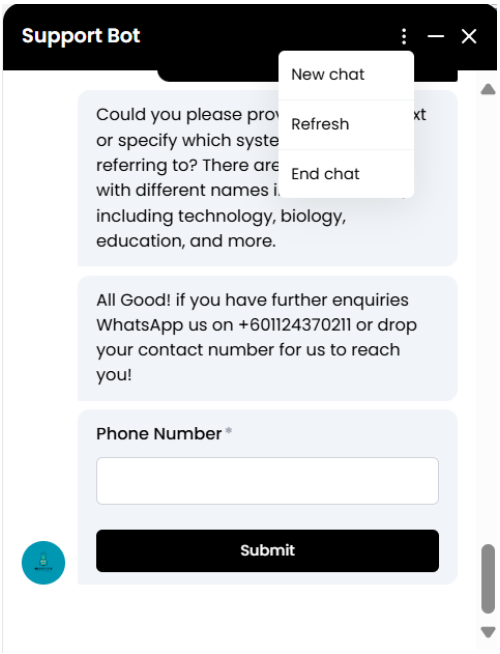


After clicking the button, users are required to keyin the name and email in the chatbox before using the chat.

Then, users can ask the chatbot the inquiry. The chatbot can answer 3 custom questions each time



After the user has used up 3 times of questions users can opt to restart the chatbot by clicking 3 vertical dots on the top right corner of the chatbot and click “New chat” or make enquiries as per the instruction provided by chatbot.



Chapter 4: Retailer

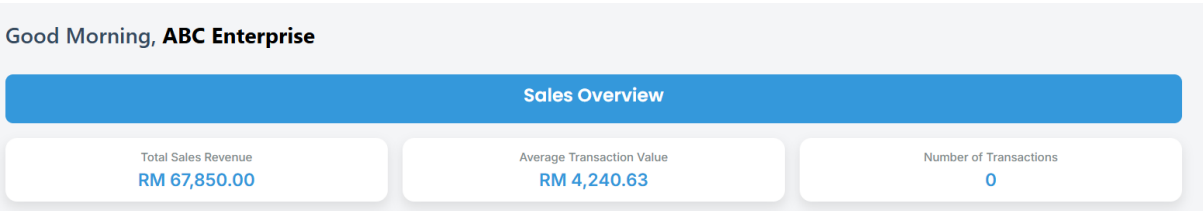
Function available for Retailer:

- Dashboard
- Profile
- Customer Management
- POS Management
- Loyalty
- Reports
- Chatbot

To sign out, click on the picture on the right top corner and click “Sign out”.

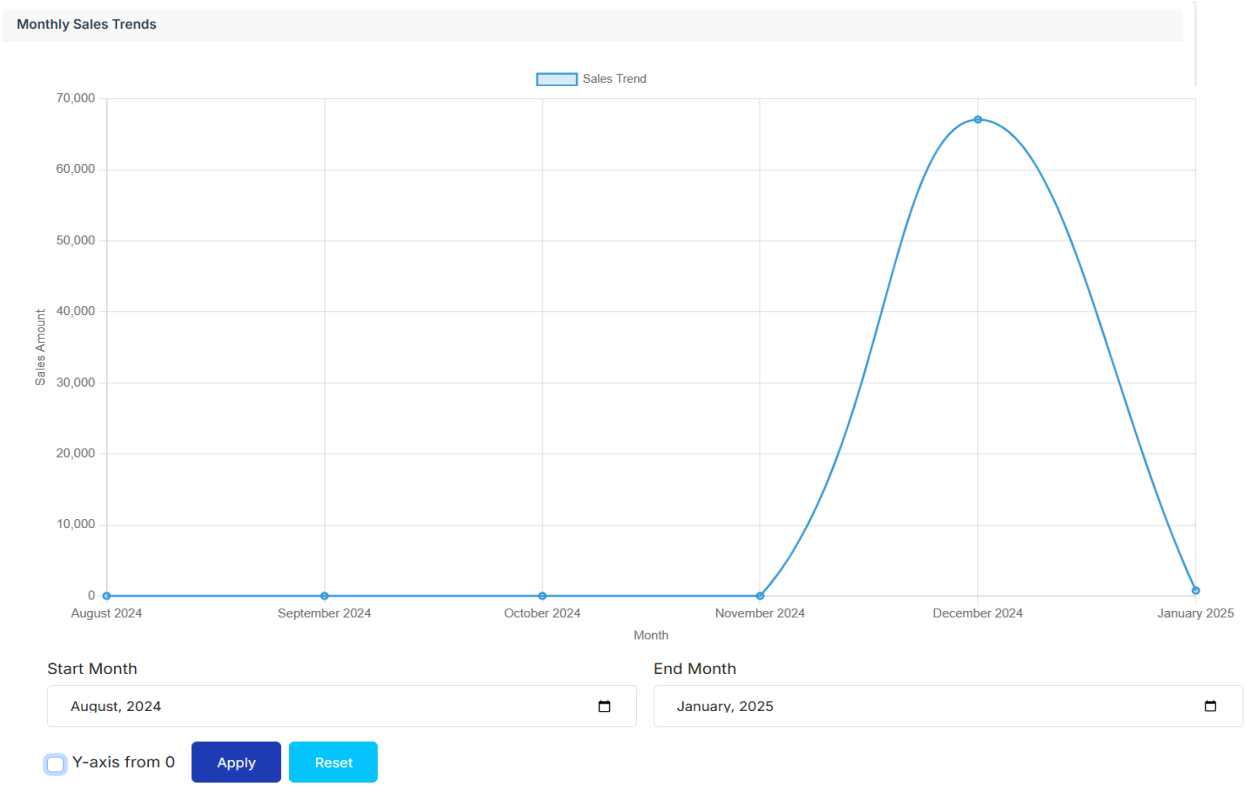
4.1 Dashboard

4.1.1 Sales Overview



“Sales Overview” dashboard shows overall performance metrics for all transactions as follows:

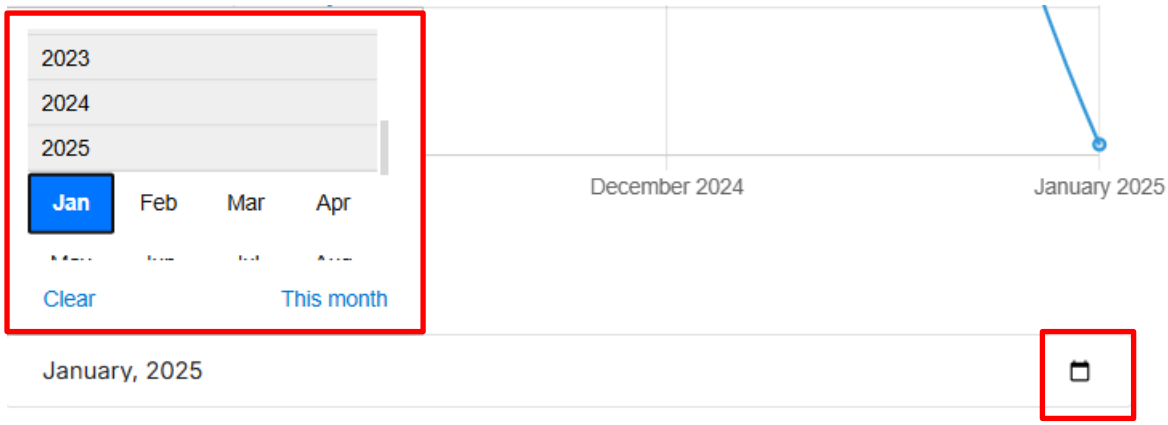
- Total Sales Revenue
- Average Transaction Value
- Number of Transactions



“Monthly Sales Trends” graph shows the sales amount by month. By default, the graph shows sales trends for the last 6 months, including the current month. However, retailer can customize the graph by altering the “Start Month” and “End Month” and hence clicking on “Apply”.

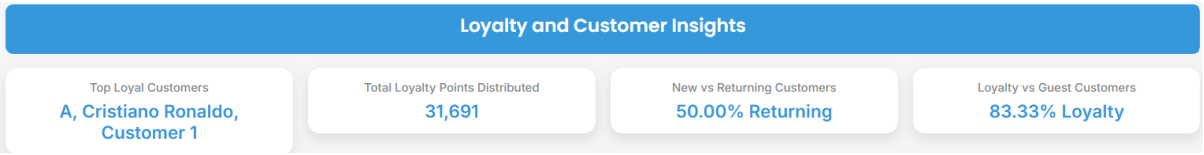
“Y-axis from 0” function allows sales amount always to start from zero.

Clicking on “Reset” will allow the graph to return to default.



Clicking on the calendar icon enables selection of month, which begins with year 1970 and without end. Alternatively, clicking on “This month” will be a shortcut to select month based on current time.

4.1.2 Loyalty and Customer Insights



"Loyalty and Customer Insights" dashboard shows overall performance metrics for all customers as follows:

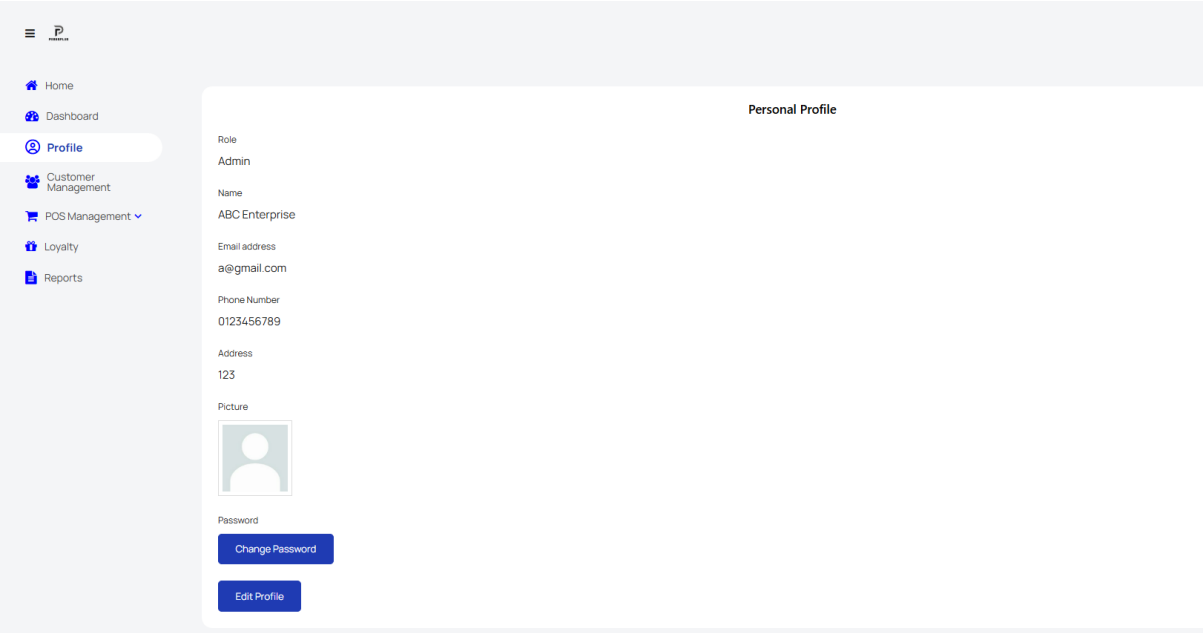
- Top Loyal Customers (Top 3)
- Total Loyalty Points Distributed
- New vs Returning Customers
- Loyalty vs Guest Customers

4.1.3 Inventory and Discount Analysis

"Inventory and Discount Analysis" dashboard shows overall performance metrics for all products as follows:

- Top Selling Products
- Stock Alerts (Low Inventory)
- Discount Summary

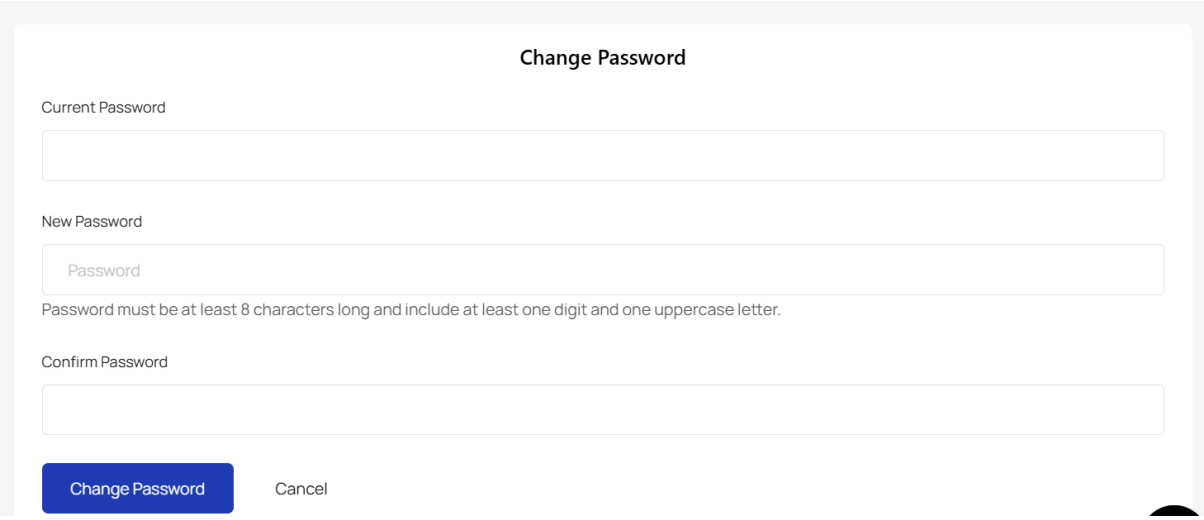
4.2 Profile



From profile page, user can view their profile that is registered in PerkPlus.
User can choose to change password or edit profile.

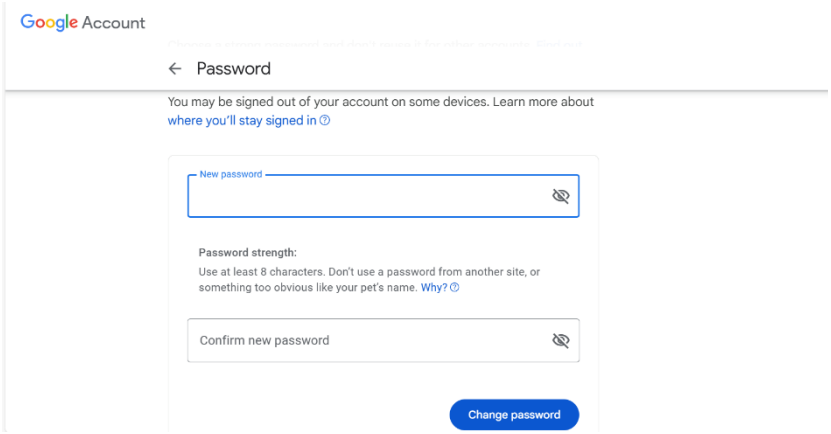
4.2.1 Change Password

For manual register user:



5. Fill in the required field
    - Current Password
    - New Password & Confirm password (at least 8 characters long and include at least one digit and one uppercase letter.)
6. Click “Change Password”

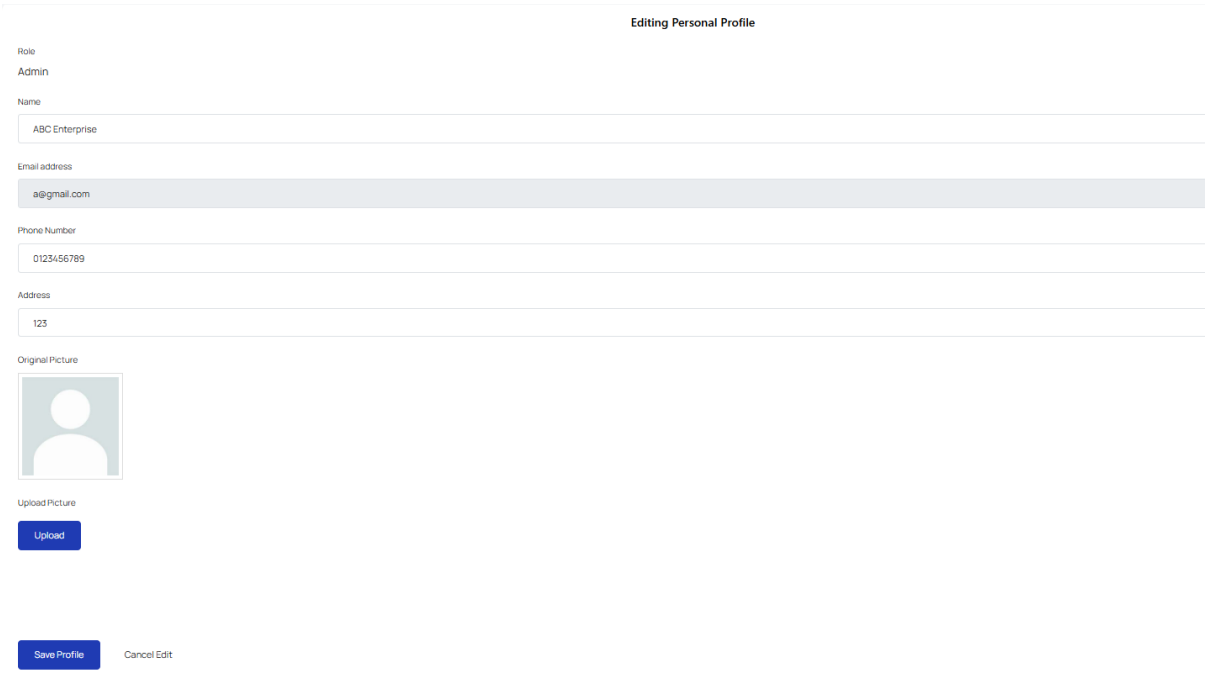
For Google Account User:



Change password will redirect you to the Google change password page. Follow the on-screen instructions

Warning: Password lost for Google Account is beyond the control of PerkPlus. PerkPlus is not responsible for the password lost for your Google Account.

4.2.2 Edit Profile

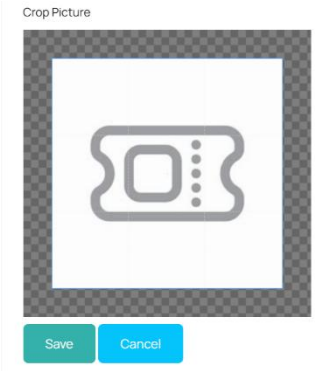


User can edit their profile in this page. Among the particulars that can be edited are:

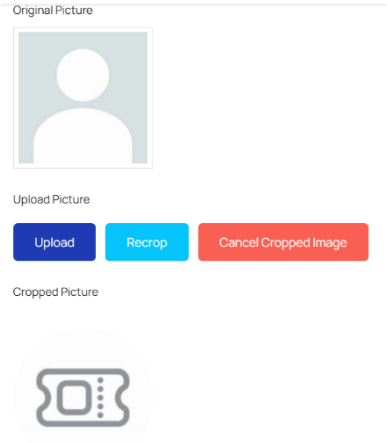
- Name
- Phone number
- Address
- Profile picture*

*Instruction for profile picture:

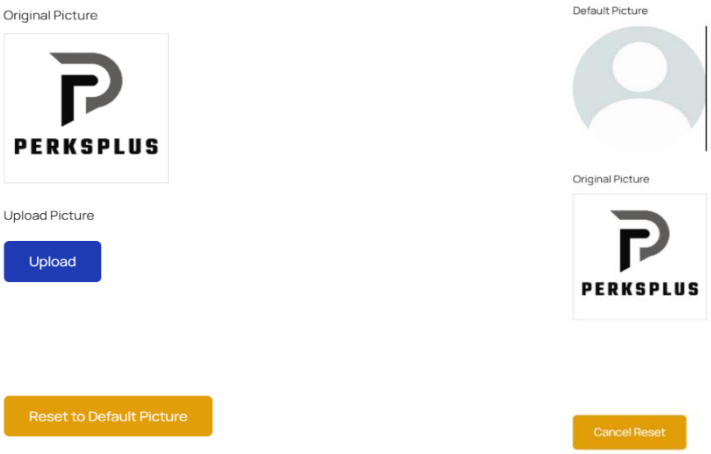
1. Click on “Upload” and select picture from your device.
2. Select the range to be used in your profile picture and click “Save”



3. After the picture is cropped, user can choose to upload a new photo by clicking “Upload”, recrop the picture by clicking “Recrop” (Back to Step 2) and reset to original picture by clicking “Cancel Cropped Image”.



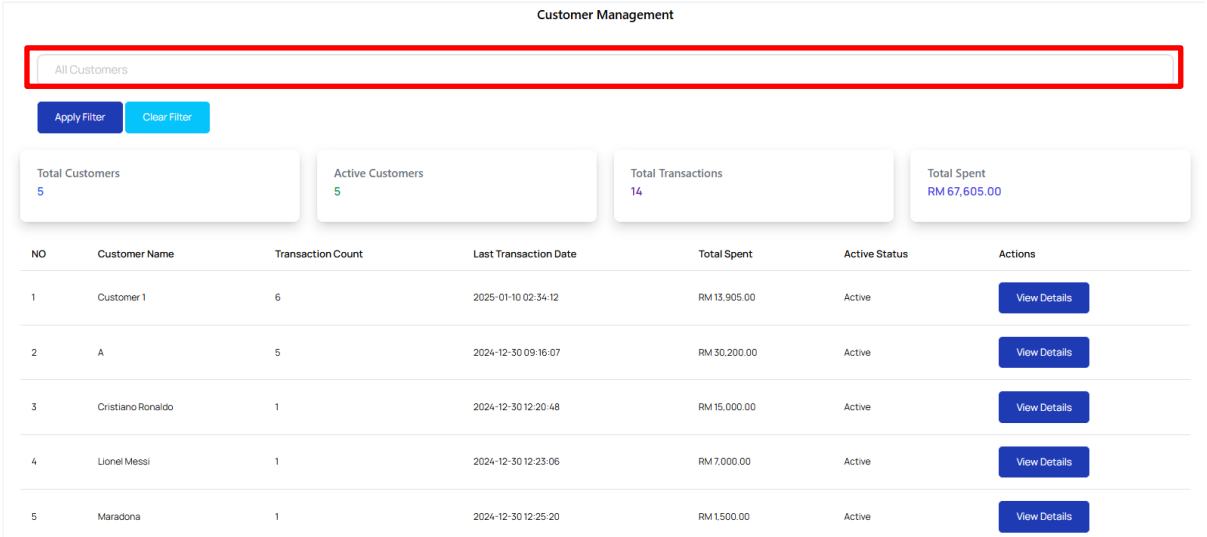
4. If previously the new photo is saved, user can either upload a new photo (Step 2) or reset to default picture. Default picture for the manual register user is as defined by PerkPlus, while default picture for Google register user is Google Profile picture when registered. User can cancel reset to default picture by clicking “Cancel Reset”



After complete editing the particulars, click “Save” button.

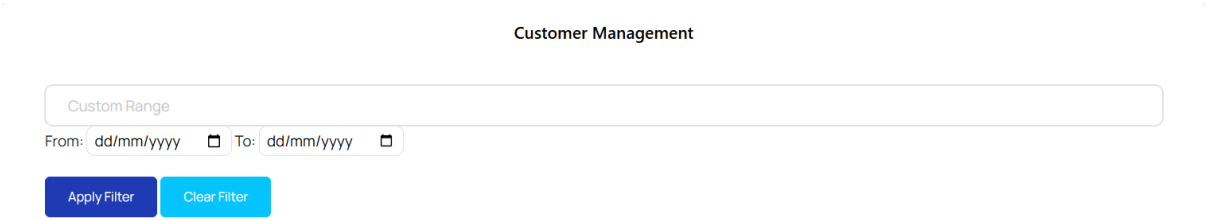
4.3 Customer Management

4.3.1 Filter

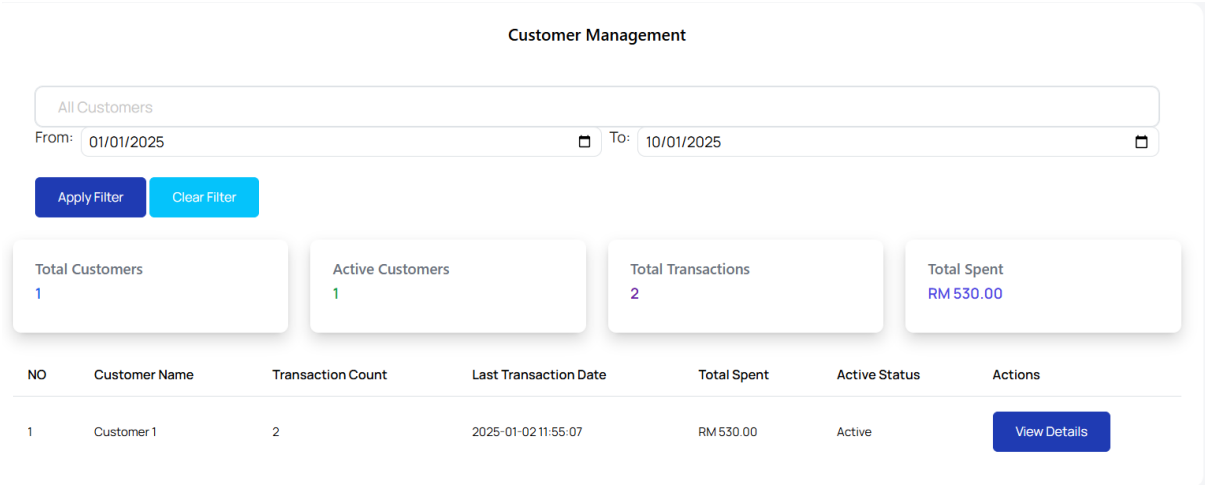


Retailers can view their customers from the Customer Management page. By default, the page shows all the customers that are previously transacted with them in all periods. To change the range of the transaction period, click on the dropdown circled by red and click on “Apply Filter”. The range that can be chosen are:

- Last 1 week
- Last 2 weeks
- Last 1 month
- Last 3 months
- Custom range

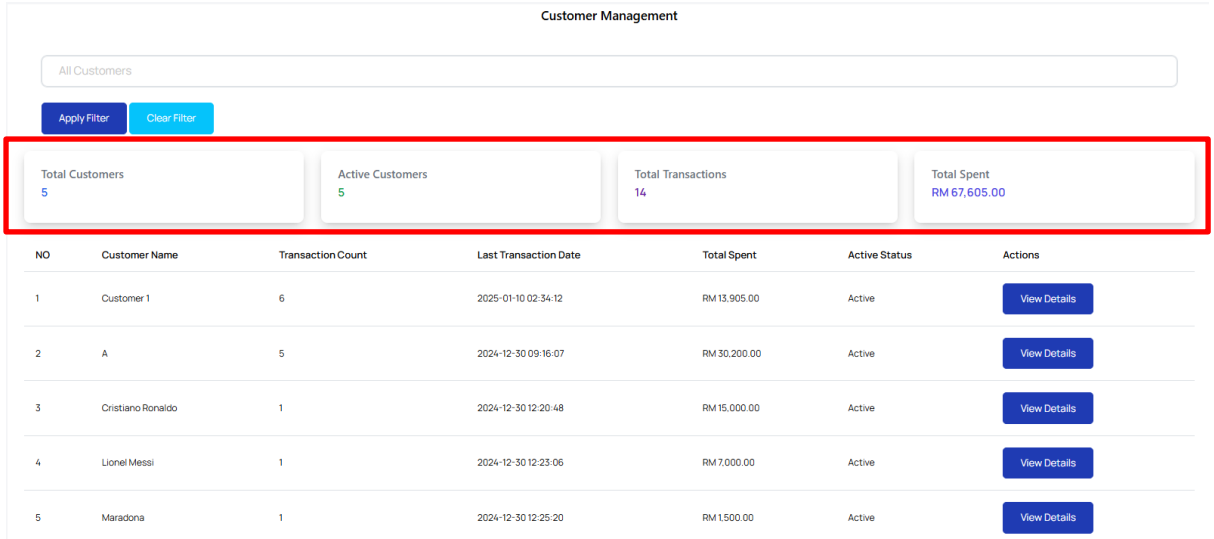


For the custom range, the retailer can select a specific range of transaction period as they think fit. For an instance, by selecting transaction period from 01/01/2025 to 10/01/2025, the page will show transactions occur during the specific period only.



Clicking on “Clear Filter” will bring the page to default setting, namely “All Customers”.

4.3.2 Dynamic Dashboard

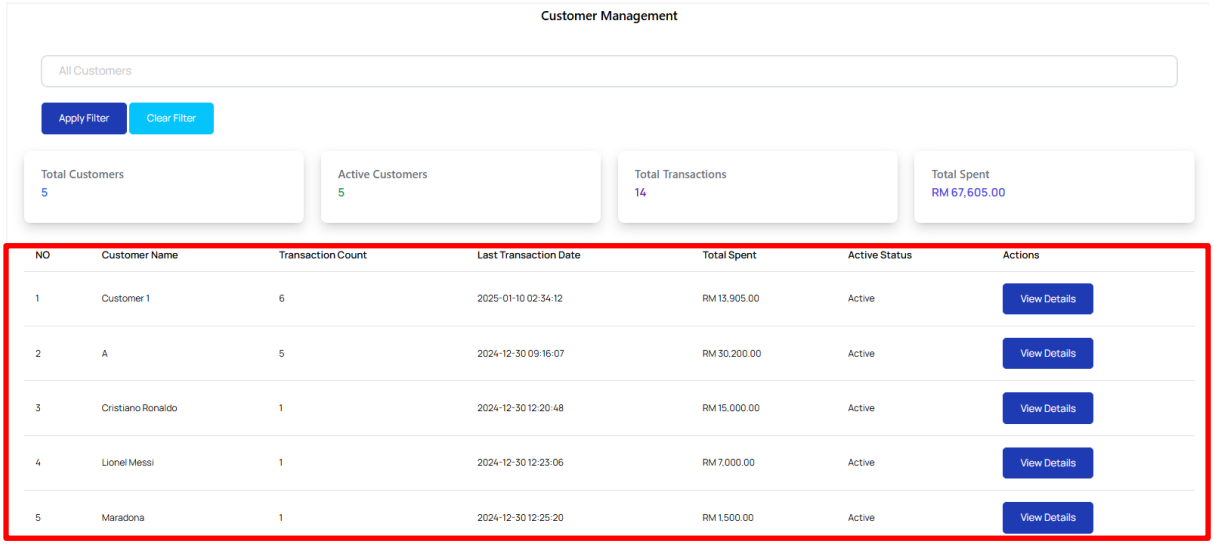


The dynamic dashboard will show several performance metrics of all customers as follows:

- Total Customers
- Active Customers
- Total Transactions
- Total Spent (by customers)

The result of performance metrics will change dynamically according to the type of filters being applied.

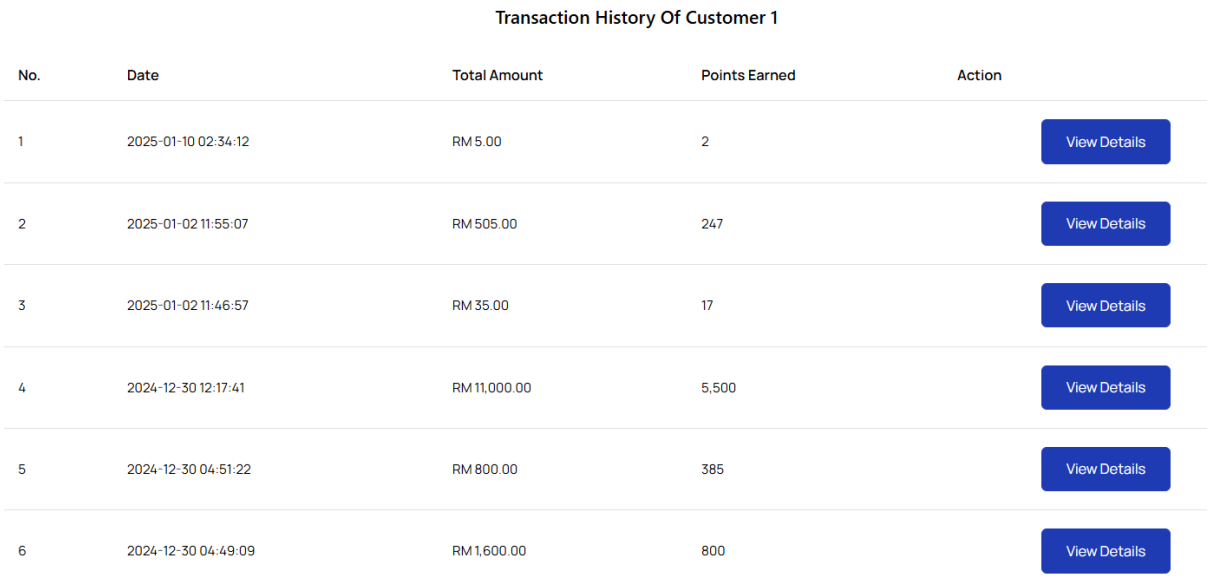
*__Note:__ Guest users are not listed here



The dynamic dashboard will show several detailed performance metrics of each customer as follows:

- No (number)
- Customer Name
- Transaction Count
- Last Transaction Date
- Total Spent
- Active Status
- Actions (View Details)

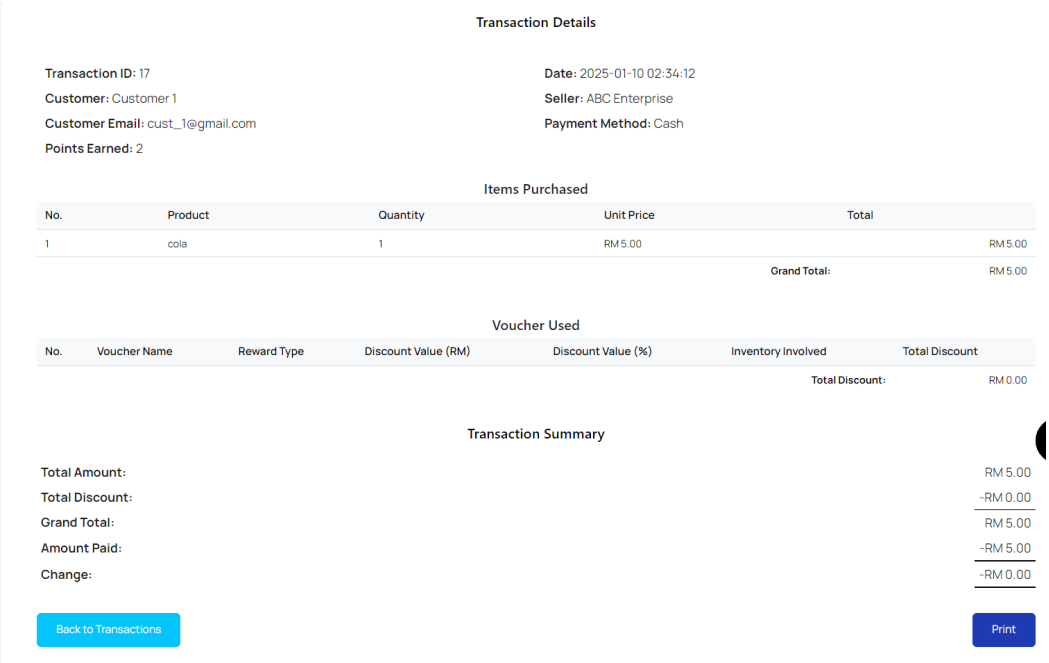
The result of detailed performance metrics will change dynamically according to the type of filters being applied.



By clicking on “View Details”, retailer can view the transaction history of a particular customer, including

- No (number)

- Date (transaction date)
- Total Amount (per transaction)
- Points Earned (per transaction)
- Action (View Details)



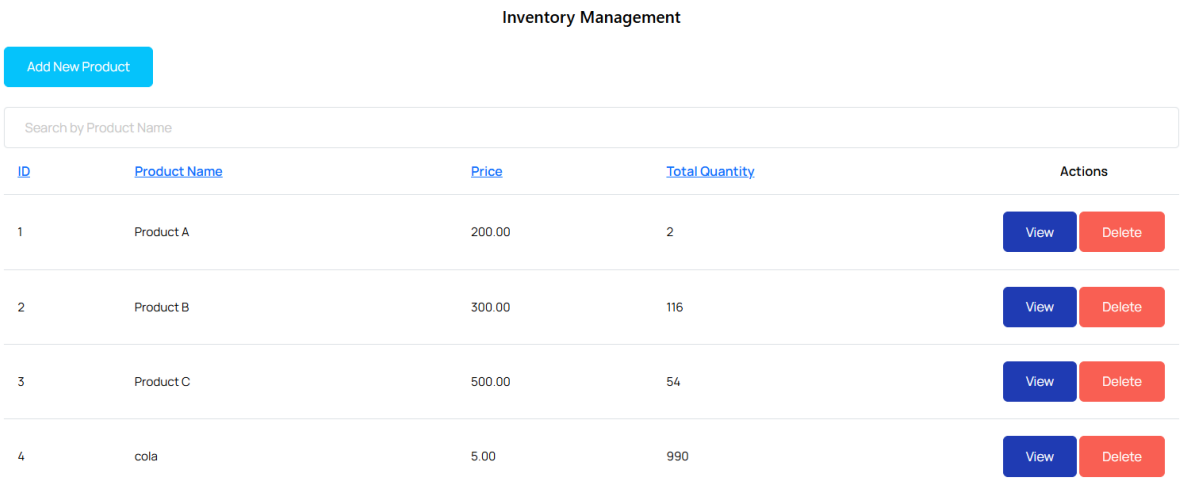
By clicking on “View Details”, retailer can view the transaction details of a particular transaction made, including

- Transaction ID
- Customer (name)
- Customer Email
- Points Earned (based on conversion ratio)
- Date (date and time)
- Seller (name)
- Payment Method
- Items Purchased
- Voucher Used
- Transaction Summary

Click “Back to Transactions” to back to purchase history page.
Click ‘Print’ to automatically generate a PDF receipt.

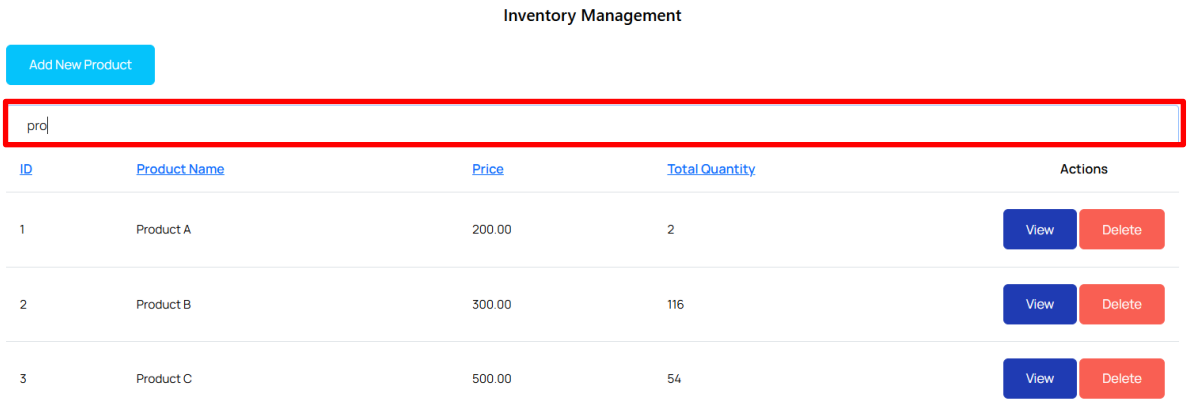
4.4 POS Management

4.4.1 Inventory



Retailer can view and manage inventory with Inventory page. The particulars of inventory are as follows:

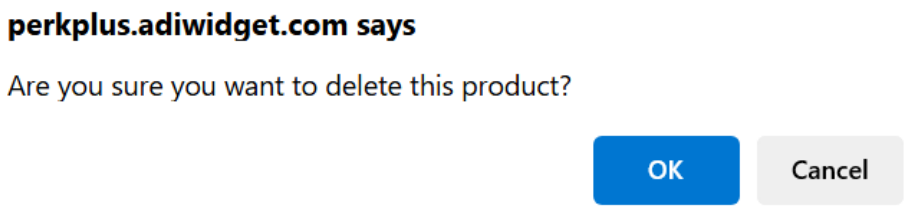
- ID
- Product Name
- Price
- Total Quantity
- Actions (View or Delete)



Retailer can filter the inventory via typing keyword in the red circle. In case of above diagram, keyword “pro”, “pr”, “p”, “t” will return the same result, namely Product A, Product B and Product C. However, keyword “prot” will display nothing.

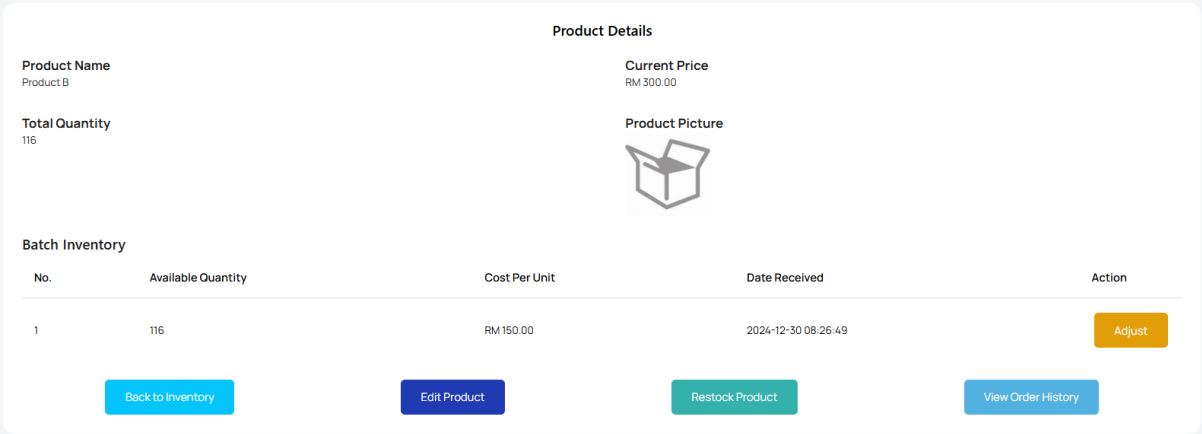
Retailer can better understand the product by clicking on “View” or otherwise “Delete” to delete the product.

To delete a product, user can click corresponding “Delete” button. A pop up message will be shown, confirming the product deletion



When user confirm to delete the product, click “OK”.

Note: Deletion of product only can be done when the inventory count is 0.



Once retailer clicks on “View”, he can view the product details as follows:

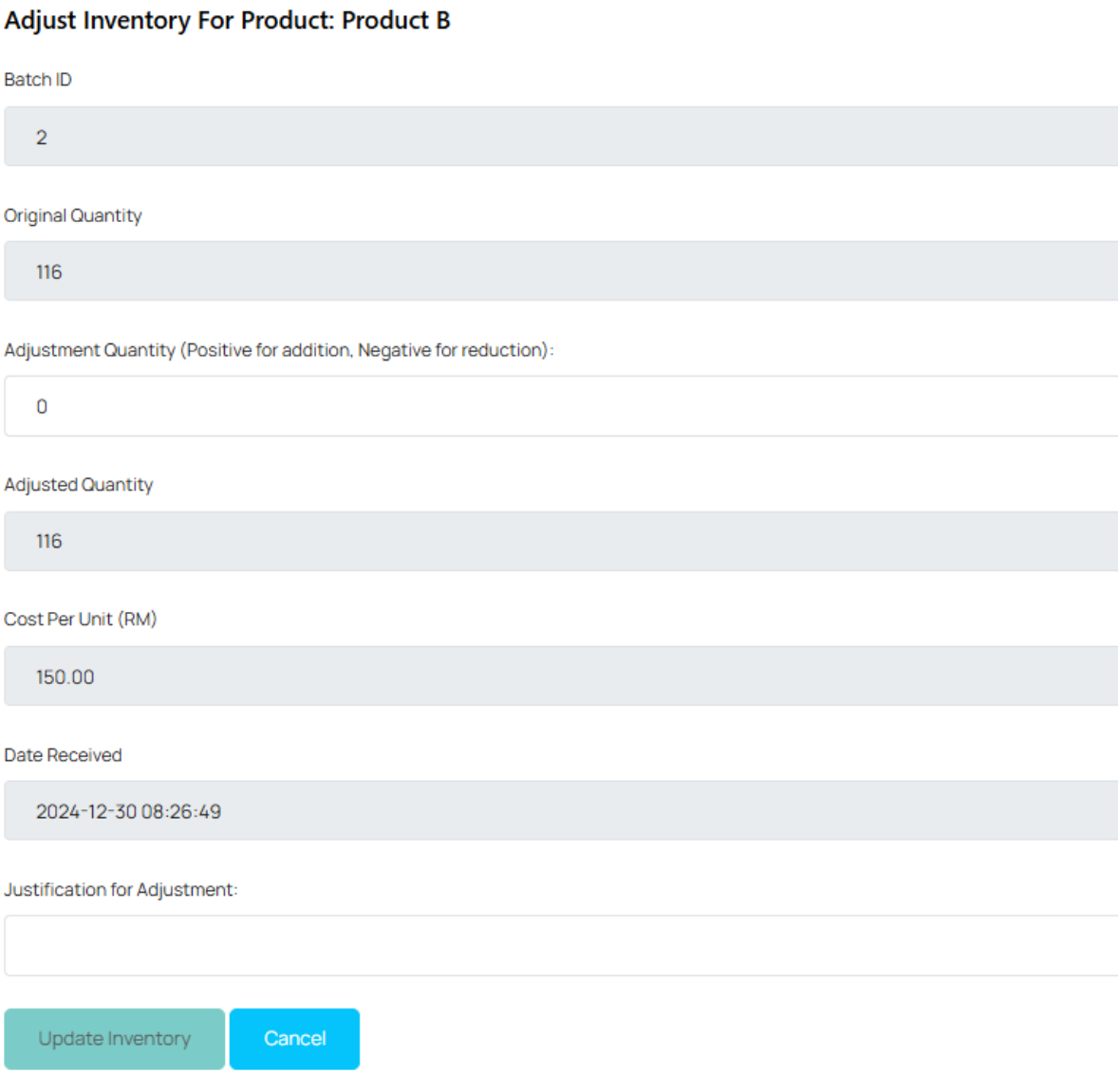
- Product Name
- Total Quantity
- Current Price
- Product Picture

– Batch Inventory (No., Available Quantity, Cost Per Unit, Date Received, Action for Adjust) [Only batch with balance quantity will be display in the list]

Actions that can be done on this page are:

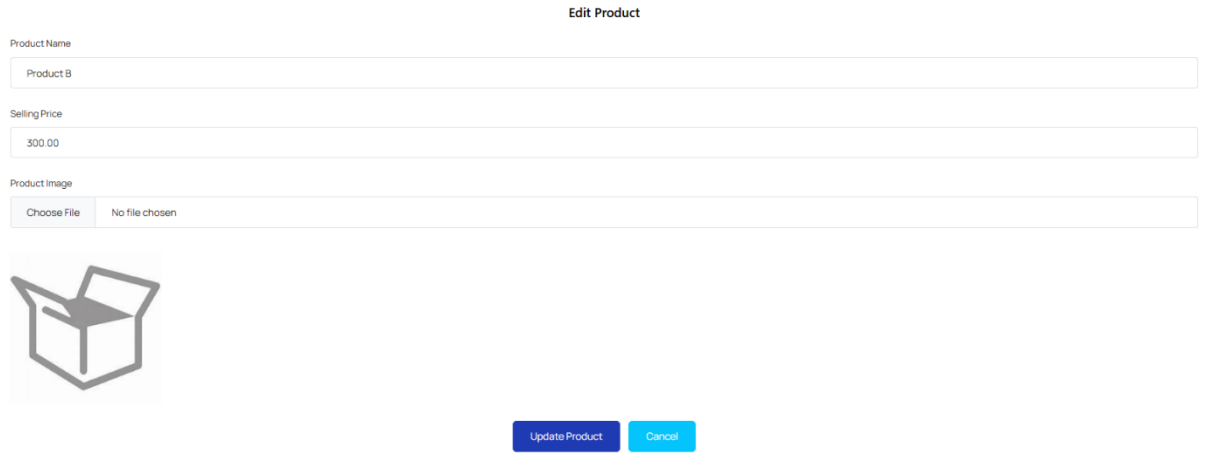
- Edit product
- Restock product
- Adjust batch quantity
- View order history

4.4.1.1 Adjust Quantity



When unexpected events, such as theft and obsolescence, occur, retailer can click on “Adjust” to adjust the quantity of product (positive for addition and negative for reduction) and write justification for adjustment. Other particulars are not allowed to be edited. Once retailer finishes, he can click on “Update Inventory” or otherwise “Cancel” to cancel the process.

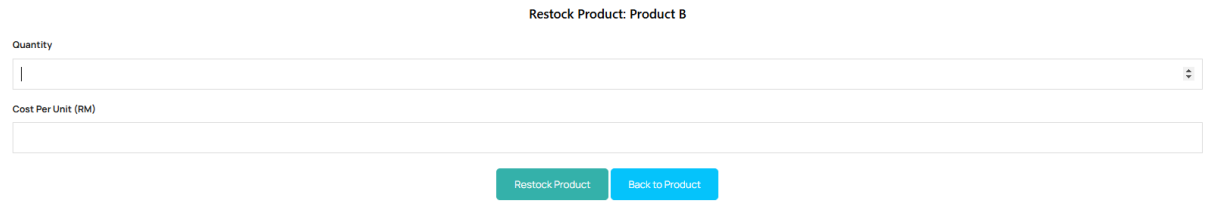
4.4.1.2 Edit Product



Clicking on “Edit Product” allows retailer to alter the particulars as follows:

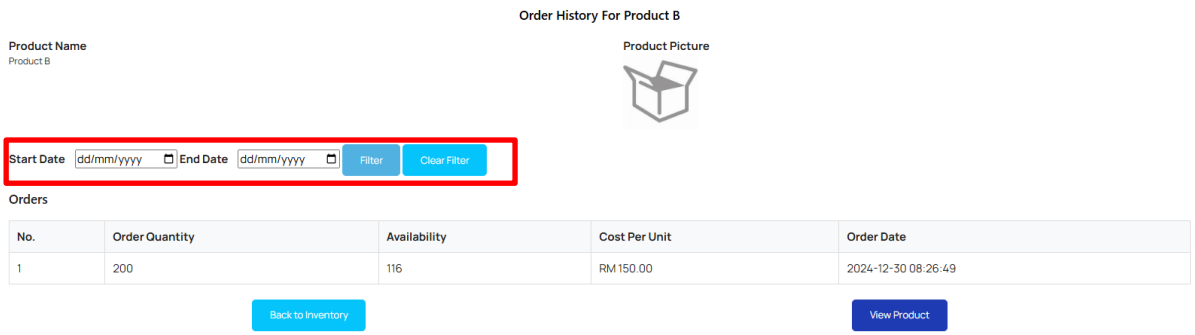
- Product name
- Selling Price
- Product Image

4.4.1.3 Restock Product



Clicking on “Restock Product” allows retailer to restock same kind of product (i.e. Product B) with different cost per unit for certain quantity.

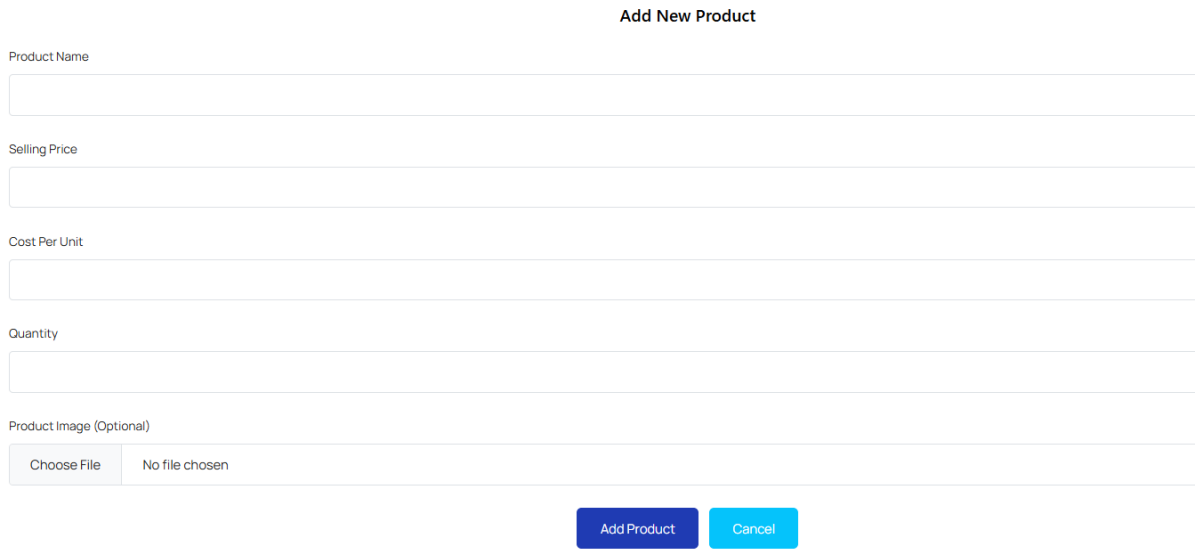
4.4.1.4 Order History



Clicking on “View Order History” allows retailer to better understand the order details such as:

- Order Quantity
- Availability
- Cost Per Unit
- Order Date (date and time)

Also, retailer can customize orders of specific period by filtering “Start Date” and “End Date”. Clicking on “Clear Filter” will return to default, namely orders for all periods of time.

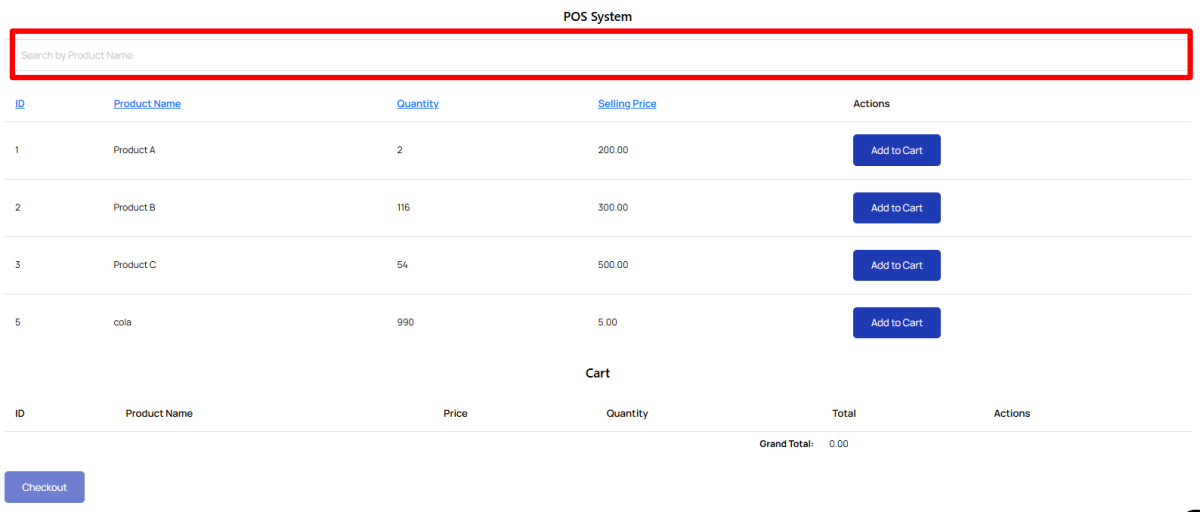


In addition to existing inventory, retailer can click on “Add New Product” to add new product and fill in the particulars as follows:

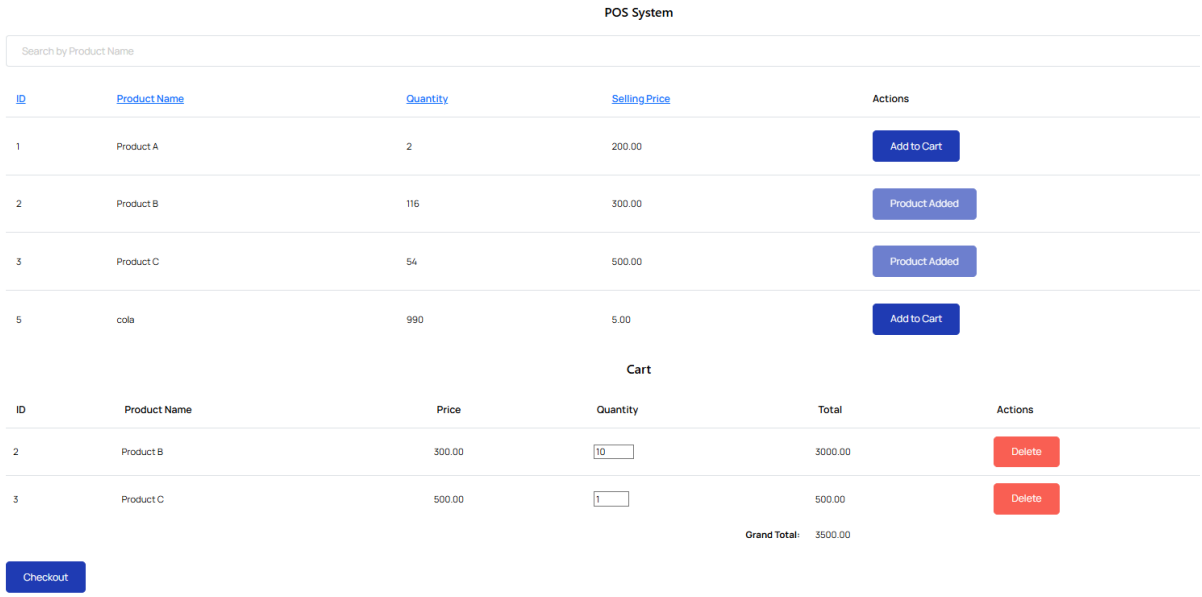
- Product Name
- Selling Price (must be numeric character)
- Cost Per Unit (must be numeric character)
- Quantity (must be numeric character)
- Product Image (Optional)

After filling all particulars, retailer can click on “Add Product” to add product or otherwise “Cancel” the process.

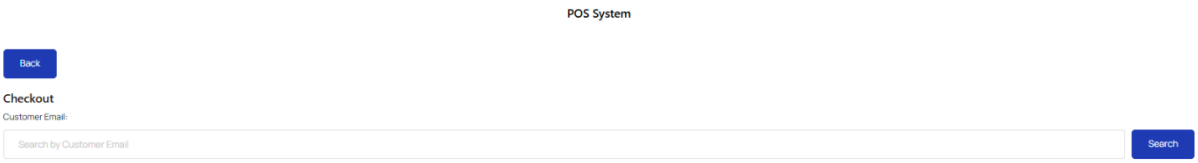
4.4.2 Sales



Retailer can make sales and record transaction via “Sales” page. Retailer can filter and search product by filling keyword into the red circle. Filter function will work automatically once keywords are filled in. The result shows such particulars as ID, Product Name, Quantity, Selling Price, and Action to add to cart.



Retailer can click on “Add to Cart” to select the products that are pending payment, then enter the quantity. The cart will display total amount for each product and a grand total. If the product is mistakenly added, retailer may click on “Delete” to remove it from cart. Once all particulars are confirmed, retailer can click on “Checkout” to move to payment.



Retailer needs to enter customer email to identify whether the customer is existing customer or new customer or a guest customer

Note:

There are 3 types of customers defined in PerkPlus:

- **Existing customer**: User who have registered an account in PerkPlus and had at least 1 transaction with the retailer. They are eligible to use the coupon code, earn loyalty points and view the transaction history
- **New customer**: User who have registered an account in PerkPlus but has no transactions with the retailer. They are eligible to earn loyalty points and view the transaction history but are not eligible to use the coupon code.
- Guest customer: User who have registered an account in PerkPlus. They are not eligible to earn loyalty points, view the transaction history and use the coupon code. However, a hard copy of receipt will be provided.

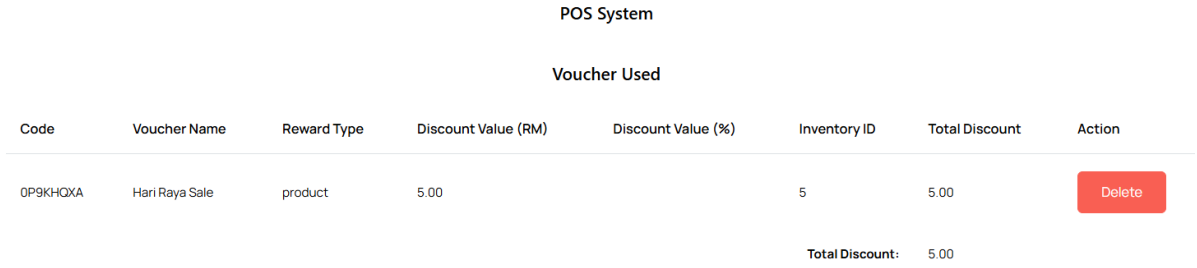
New Customer/Guest customer:

As a new customer/guest, he will not have discount. Retailer also can click on “Edit” to edit the customer email.

Retailer can select payment method (cash, card, online banking, or e-wallet) and enter paid amount based on “Total After Discount”. Retailer can only click on “Submit Payment” when the “Balance” is nil (0.00).

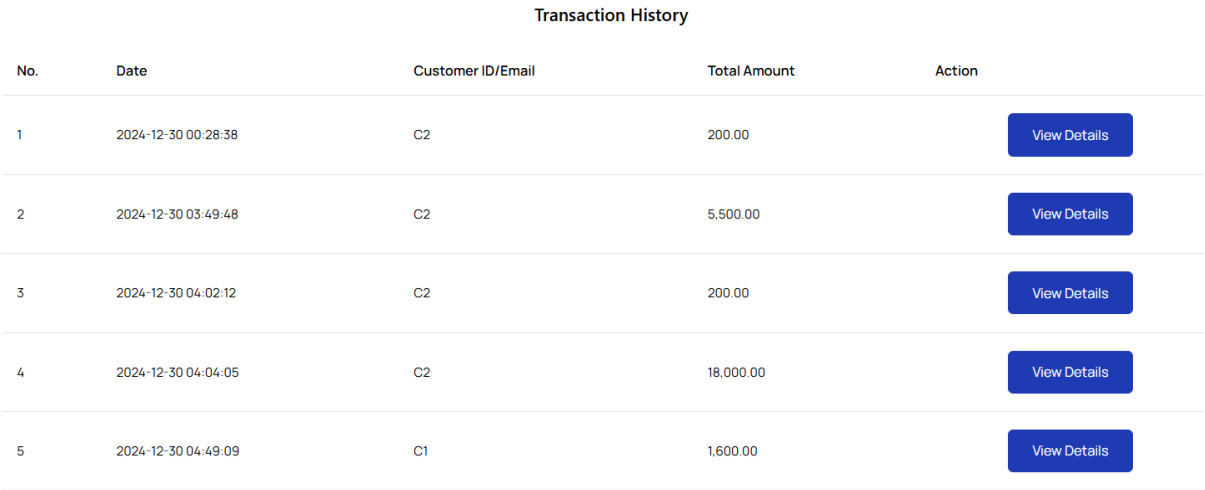
Existing Customer:

In addition to new customer/guest customer, retailer can view the customer's available loyalty points. As an existing customer who is involved in the loyalty program, he may claim a discount via voucher redeemed. Retailer needs to ask customer for coupon code to verify the discount, enter the coupon code, and click on "Apply Coupon".



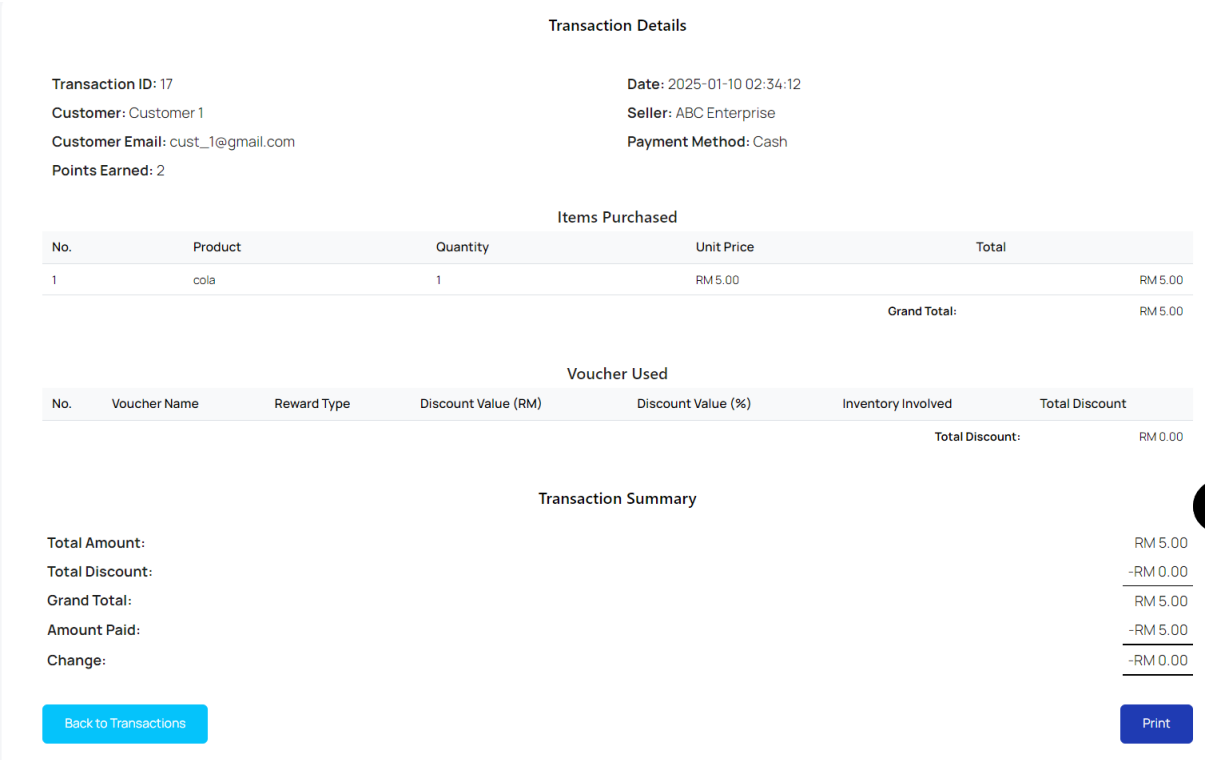
The particulars of voucher used will be displayed, including code, voucher name, reward type, and discount value. The voucher used is cancellable via clicking on "Delete".

4.4.3 Transaction



Retailer can view its transaction history via "Transaction" page with particulars as follows:

- Date
- Customer ID/Email
- Total Amount
- Action (View Details)

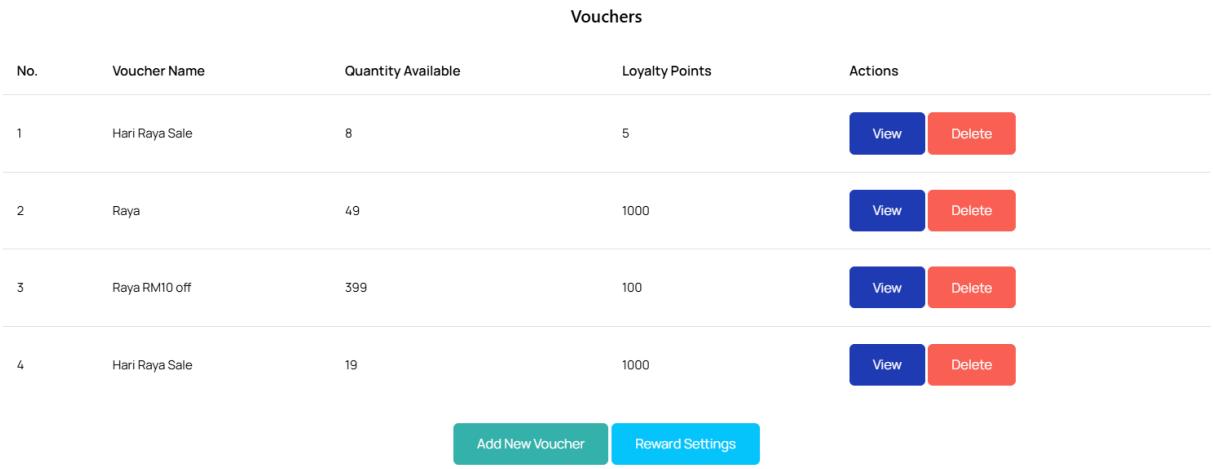


By clicking on “View Details”, retailer can view the transaction details of a particular transaction made, including

- Transaction ID
- Customer (name)
- Customer Email
- Points Earned (based on conversion ratio)
- Date (date and time)
- Seller (name)
- Payment Method
- Items Purchased
- Voucher Used
- Transaction Summary

Click “Back to Transactions” to back to purchase history page.
Click ‘Print’ to automatically generate a PDF receipt.

4.5 Loyalty



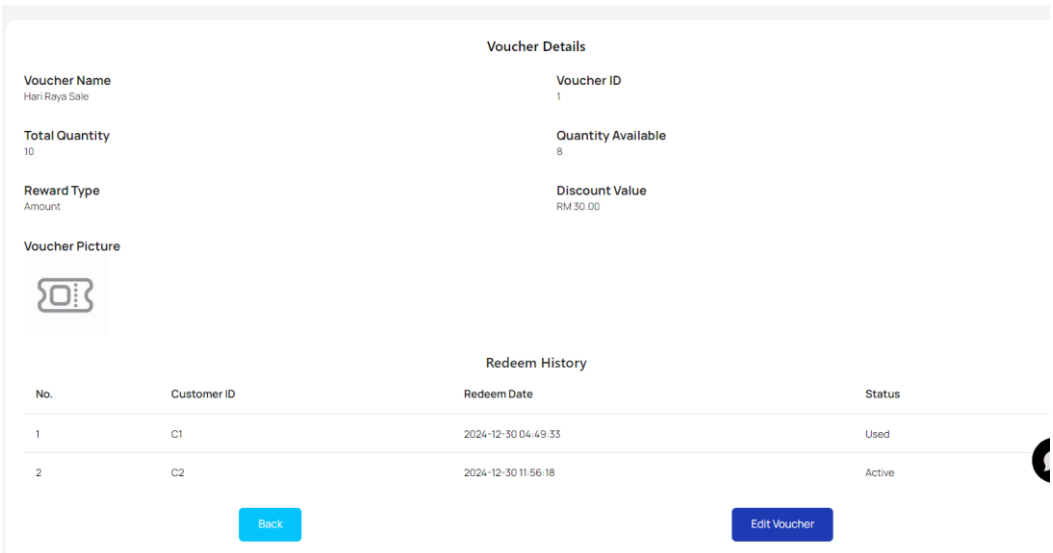
The Retailer's Loyalty Page allows you to manage and review all the vouchers you have created for your customers.

Actions that can be done by the user in this page are:

- View voucher
- Delete voucher
- Add New voucher
- View reward setting

4.5.1 View Voucher

To view a voucher that is created, click the corresponding “View” button.

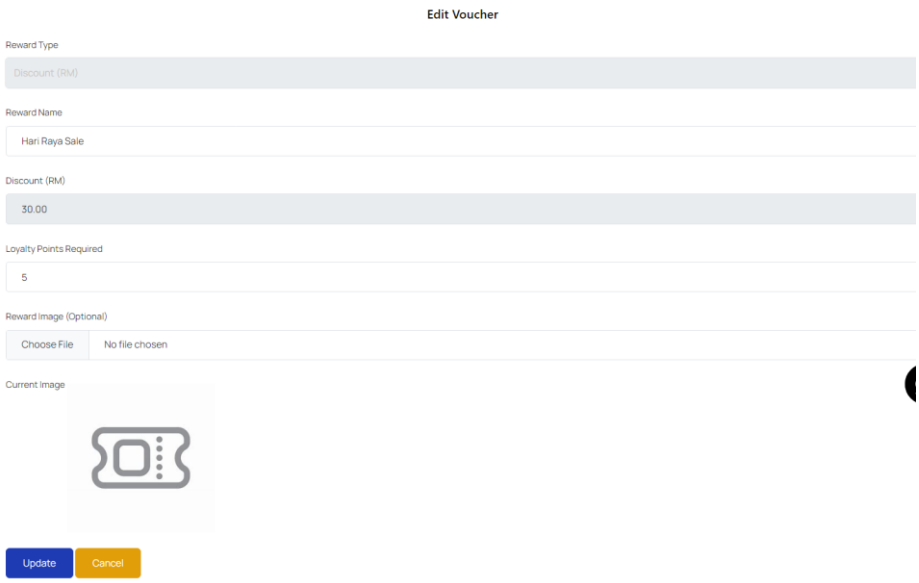


User will be led to the voucher detail page. On this page, users can view the voucher details such as:

- Voucher name
- Voucher ID
- Total Quantity
- Quantity Available
- Reward Type
- Discount Value
- Voucher Picture

In addition, user can view the redeem history for the voucher, as well as the status of the voucher (active or used)

To edit the voucher, click “Edit Voucher”.



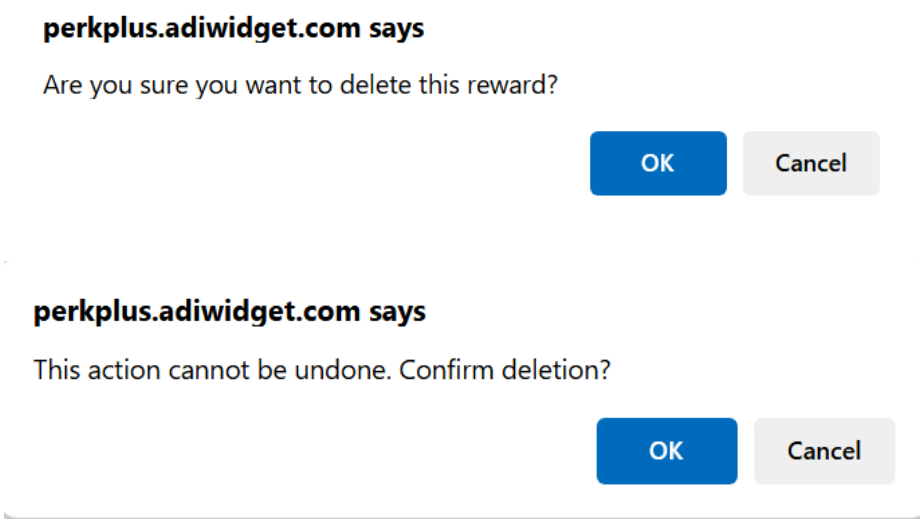
User can edit his/her voucher here. Particulars that is allowed to be edited are:

- Reward Name
- Loyalty Points Required
- Reward Image (Optional)

When the edit is done, click on “Update” button

4.5.2 Delete Voucher

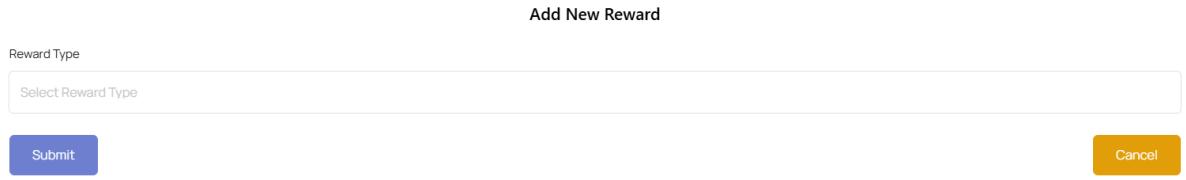
To Delete a voucher, click on the corresponding “Delete” button, a popup massage will appear twice, confirming the voucher deletion actions



When user confirm to delete the voucher, click OK.

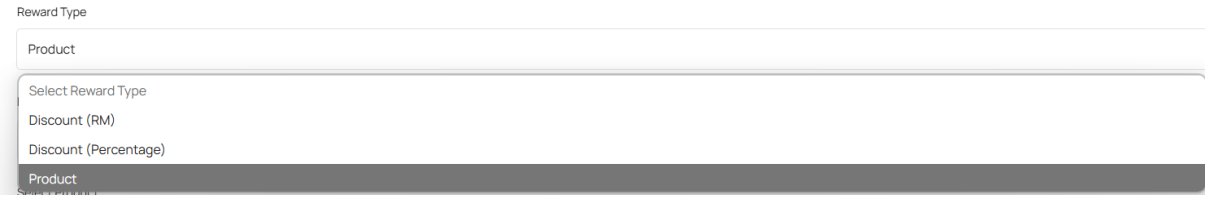
4.5.3 Add New Reward

To create a new voucher, click “Add New Voucher” in the Loyalty Page



The system allows retailers to create new vouchers to attract and retain customers. There are three types of vouchers you can create:

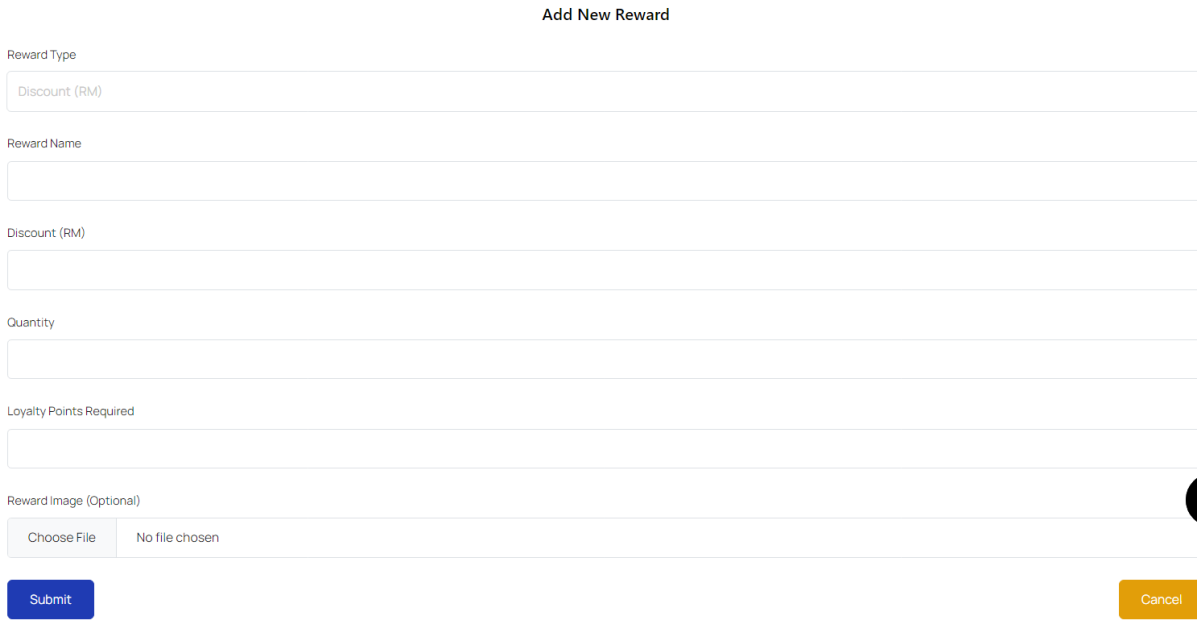
1. **Discount (Amount)** – Provides a fixed monetary discount on a customer's purchase.
2. **Discount (Percentage)** – Offers a percentage-based discount on the total purchase amount.
3. **Product** – Allows customers to redeem a free product as a gift.



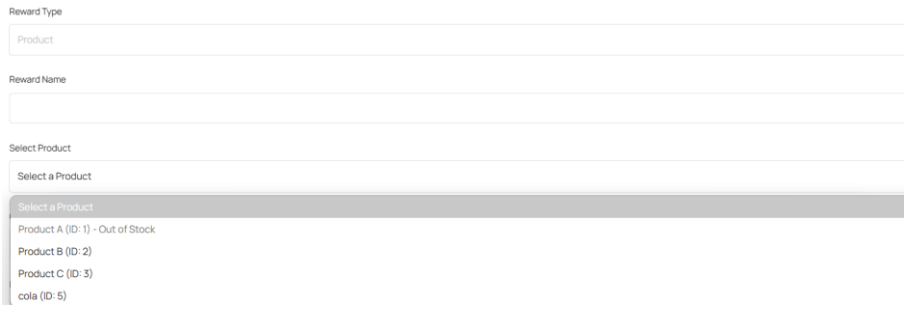
After choosing the reward type you wish to create, complete the form by filling the particulars required:

- Reward name
- Discount (not applicable if “Product” is chosen as reward type)
    - In RM for “Discount (Amount)” as reward type
    - In % for “Discount (Percentage)” as reward type
- Select Product (For “Product” as reward type only)

- Quantity
- Loyalty points required
- Reward image (Optional)



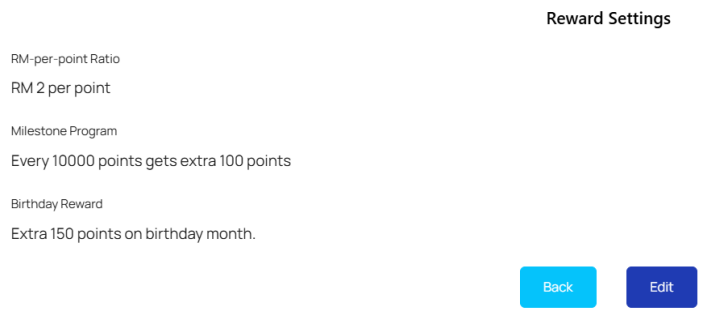
Note: For **“**Product” as reward type, users are not allowed to choose product that is currently out of stock.



After completing the form, click “Submit” to create the voucher.

4.5.4 Reward Setting

To view the reward setting, click on “Reward Setting” on the Loyalty Page.

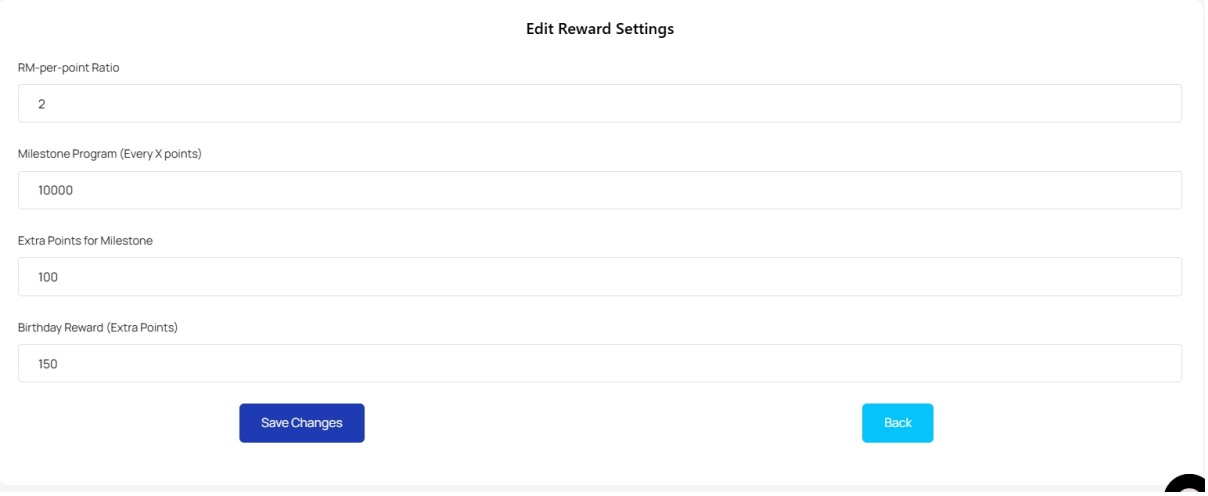


The system allows retailers to customize reward settings, enabling flexible and engaging loyalty programs. Retailers can define point accumulation rates, milestone rewards, and special birthday rewards to enhance customer engagement.

Reward Settings Features

1. **RM-Per-Point Ratio**
   a. Define how much customers need to spend to earn a loyalty point.
   b. Example: RM 2 per point (customers earn 1 point for every RM 2 spent).
2. **Milestone Program**
   a. Reward customers with bonus points when they reach specific milestones.
   b. Example: Earn an extra 100 points for every 10,000 points accumulated.
3. **Birthday Reward**
   a. Offer additional points during a customer's birthday month.
   b. Example: Earn 150 extra points on their birthday month.

To edit the setting, click "Edit".

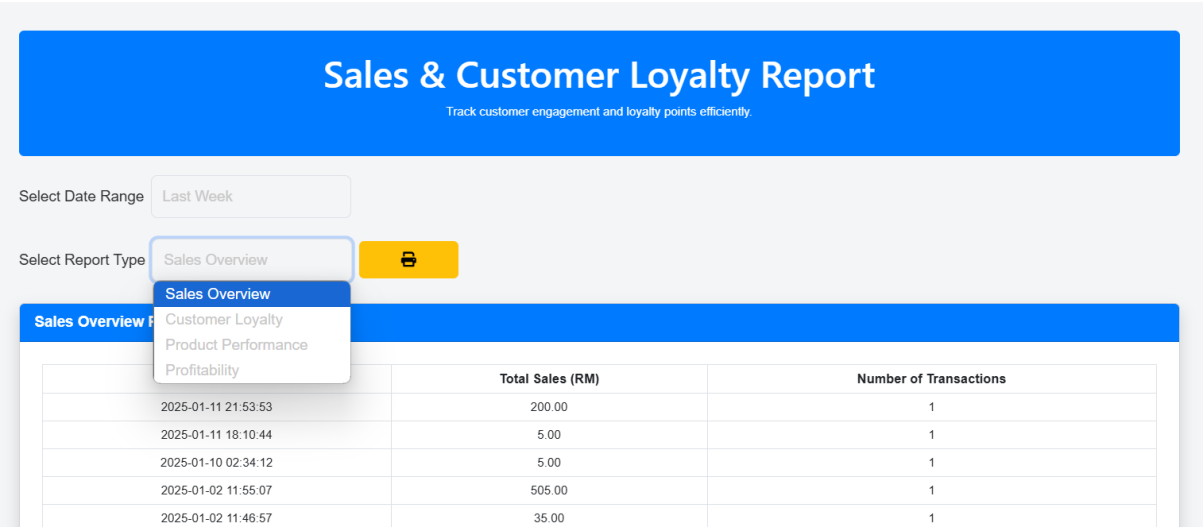


User can edit their reward settings here. Particular that is editable are:

- RM-Per-Point Ratio
- Milestone Program (Every X points)
- Extra points for milestone
- Birthday reward

Note: Milestone Programme and Birthdate Reward are unavailable in this version. It will be updated in the next version.

4.6 Reports



The Report Page provides retailers with the ability to generate and analyze various types of reports. Retailers can filter reports by date, select the desired report type, and print them for record-keeping or analysis.

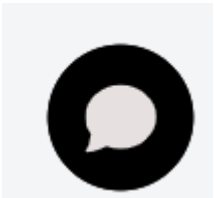
Report Types

- Sales Overview
- Customer Loyalty
- Product Performance
- Profitability

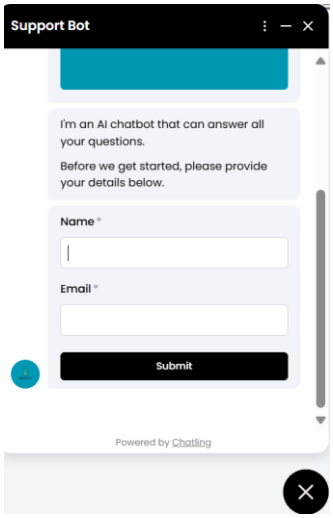
Steps to Generate a Report

1. Access the Report Page
2. Set the Date Range
3. Choose the Report Type
4. Generate and Review the Report
5. Print the Report

4.7 Chatbot

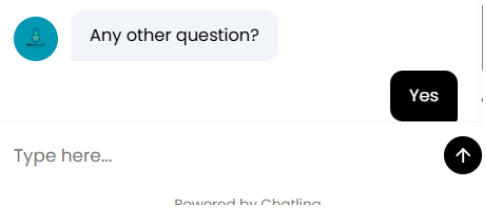


In every page, users can use the chatbot by clicking the icon located in the right bottom corner.

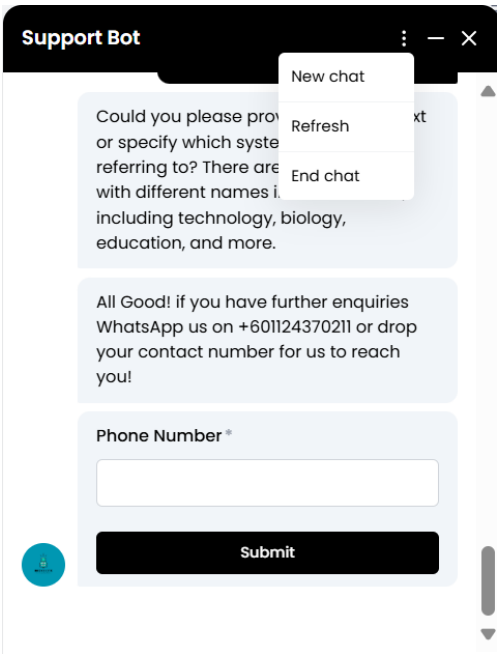


After clicking the button, users are required to keyin the name and email in the chatbox before using the chat.

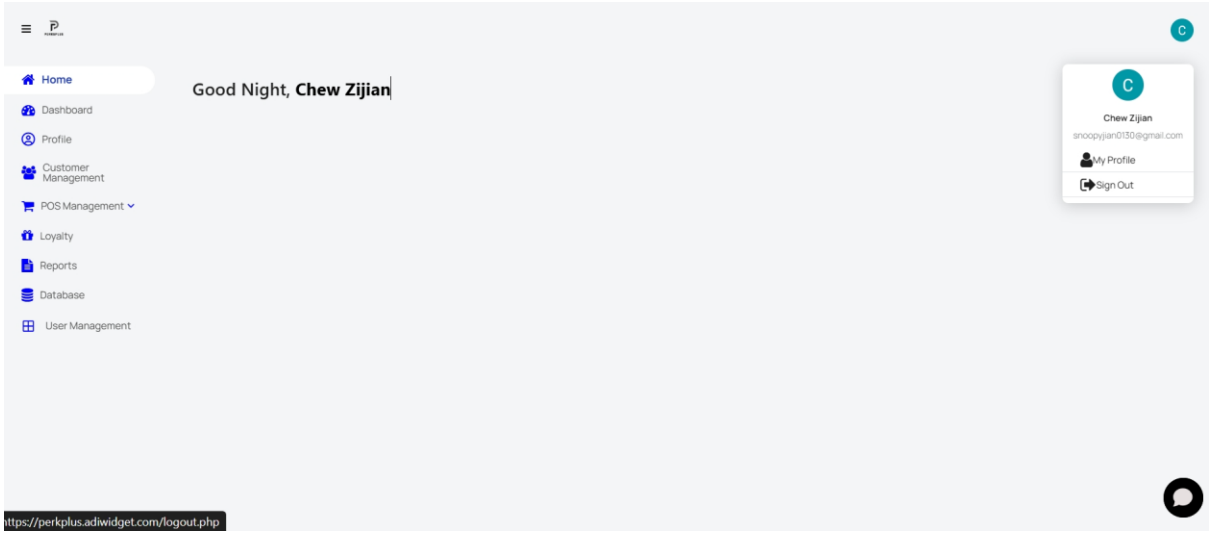
Then, users can ask the chatbot the inquiry. The chatbot can answer 3 custom questions each time



After the user has used up 3 times of questions users can opt to restart the chatbot by clicking 3 vertical dots on the top right corner of the chatbot and click “New chat” or make enquiries as per the instruction provided by chatbot.



Chapter 5: Super Admin



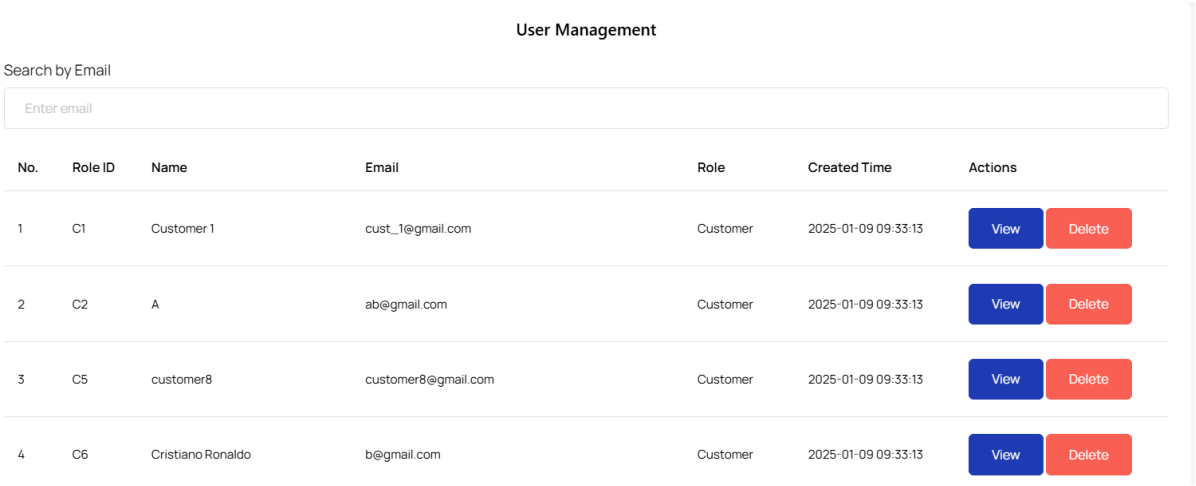
Role of super admin is unobtainable by the normal users, regardless of register methods, and are explicitly for the developers. It holds the **same function as Retailer** but with additional functions which are in **bold text**:

- Dashboard
- Profile
- Customer Management
- POS Management
- Loyalty
- Reports
- Chatbot
- **Database**
- **User Management**

For the non-bold word functions, please refer to **Chapter 4: Retailer**

To sign out, click on the picture on the right top corner and click “Sign out”.

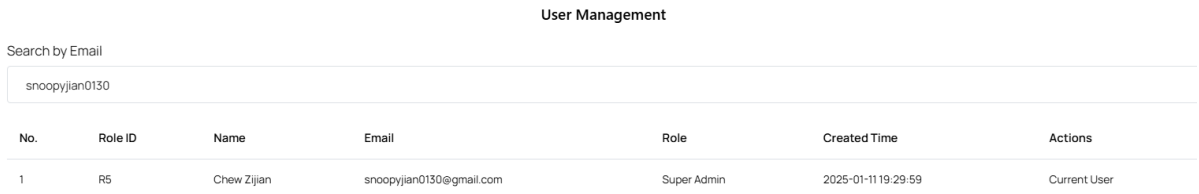
5.1 User Management



Through the user management page, super admin can manage all the users, including customers, retailers and super admins through the user management table, which consists of:

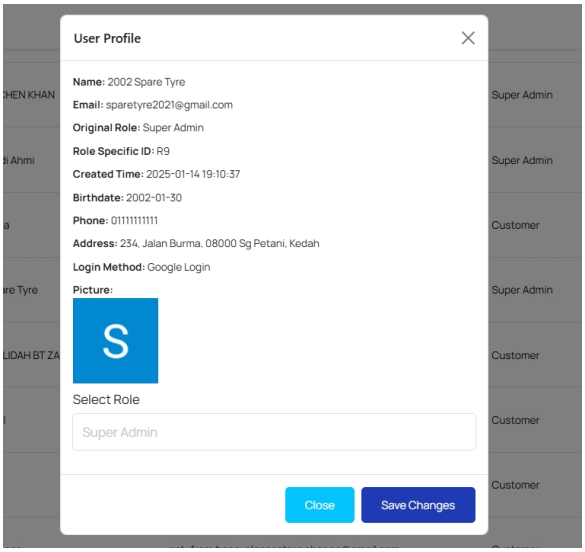
- Role ID
- Username
- Email
- Role
- Created time

Super admin can find the users they desired to view by using the search bar



Note: The current user (super admin) cannot perform view profile, role change and profile deletion on his own behalf.

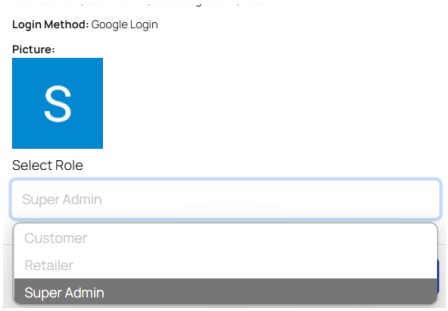
To view and change role of a user, click on the “View” button on the corresponding user row. An on-window popup screen will be shown.



The pop-up screen consists of:

- Name
- Email
- Original Role
- Role ID
- Account creation time
- Birthdate
- Phone
- Address
- Login method
- Profile picture

The super admin can alter the role of a user by choosing the role in the dropdown list

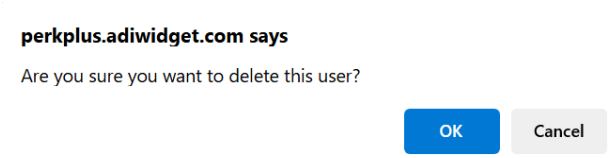


After the user has selected the role, click “Save change” button. A popup will be shown, informing the role has been successfully changed.

The role change might not be reflected in the modal upon change, but it instantly reflected in the user management table

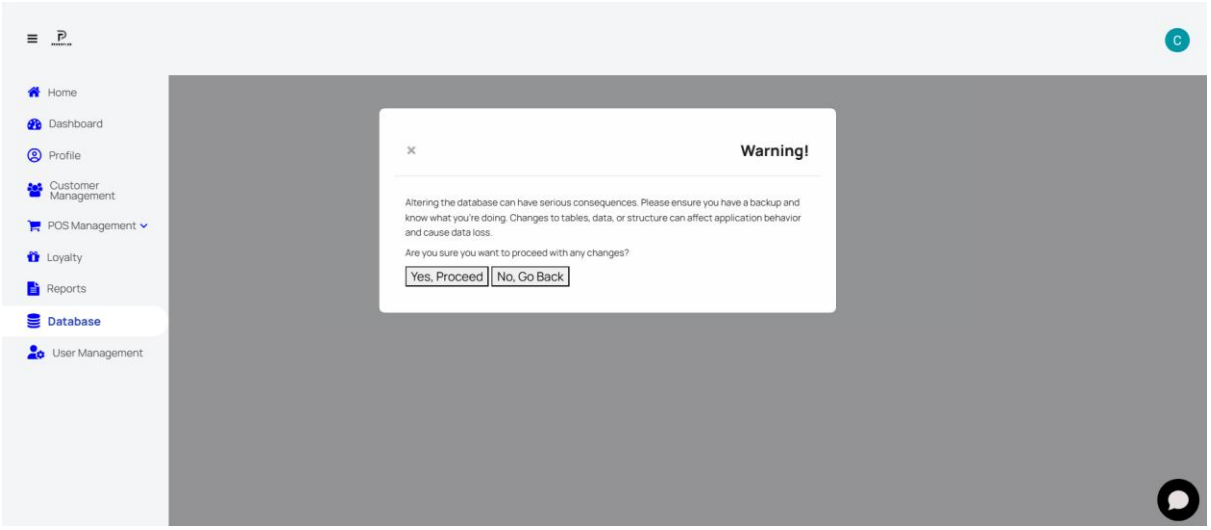
To cancel the change or to close the popup, click on the “X” or the “Close” button. Alternatively, click on the grey area around the popup window.

To delete the user, click on the corresponding “Delete” button. A waring popup will be shown



Click “OK” to delete the user.

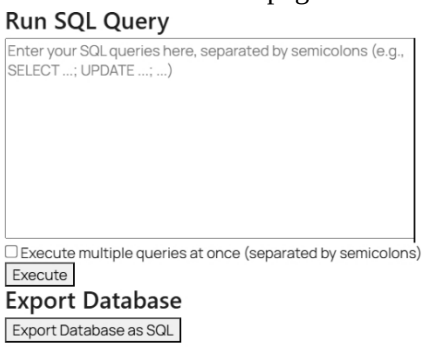
5.2 Database



WARNING: Unless it is necessary, DO NOT access this page and make modification on the database.

When the super admin access the database page, it will show out the popup, warning the user the consequences of altering database. After reading the warning message, click “Yes, Proceed” button.

*Click anywhere else will redirect the user to home page.



After confirming the popup message, the page will be successfully loaded. User will be able to create, alter, or delete data and structure here by filling the textbox. User also are able to export the database by clicking “Export Database as SQL”.

Below is the tutorial for SQL:

https://www.w3schools.com/sql/default.asp