Social Growth
TECHNOLOGIES

Card Linked Offers Mobile App

The most frictionless online to offline coupon solution

Version 1
Published 05/12/15
Created by Alex Hachey

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Change History

May 12, 2015 5:30 PM

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	Initial draft

May 12, 2015 5:30 PM

CLO redeption workflow

This section compares the high level workflow for redeeming CLO's with traditional online only offers.

Comparative workflow

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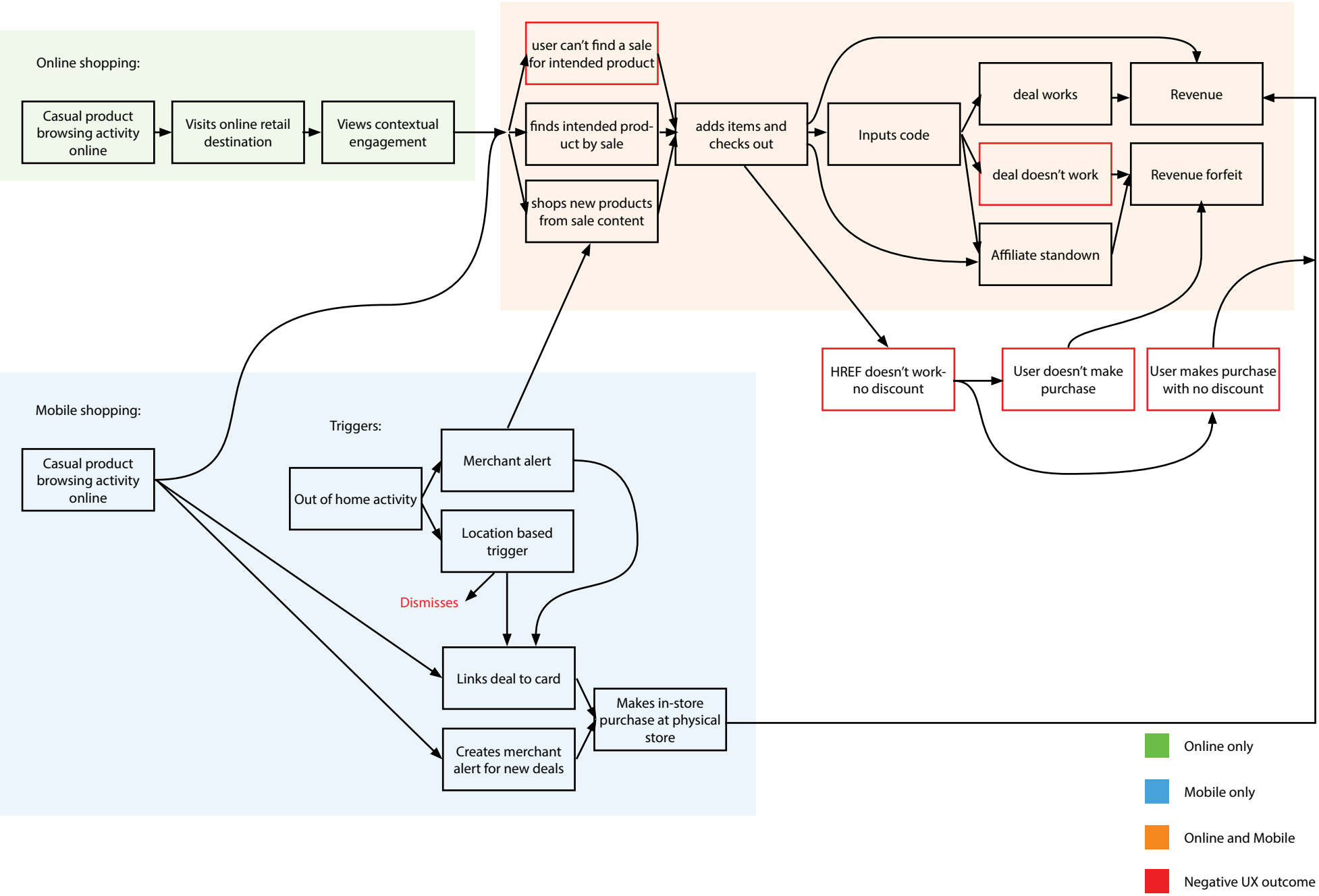

Card Linked Opportunity Stats

This section shows stats and figures associated with Card Linked Offers (CLO) along with stats on mobile spend and in-store purchase rates compared to online purchase rates.

Noteworthy facts

- **Consumers purchase in physical stores an estimated 90% of the time compared to purchasing online 10% of the time**
- **MCommerce sales are steadily rising, card linked offers link online promotions to in-store sales while capitalizing on location-based offers with "push" marketing capabilities**
- **Redemption is much easier than traditional coupons, nothing to print, nothing to scan at checkout**
- **NO additional requirements or training to redeem in store**
- **Merchants can selectively target consumers based on purchase history**
- **Card linked offer industry is growing rapidly- we won't be first entrant but don't want to be left behind by competitors**
- **No vouchers or breakage associated with CLO's**

Time spent mobile vs desktop

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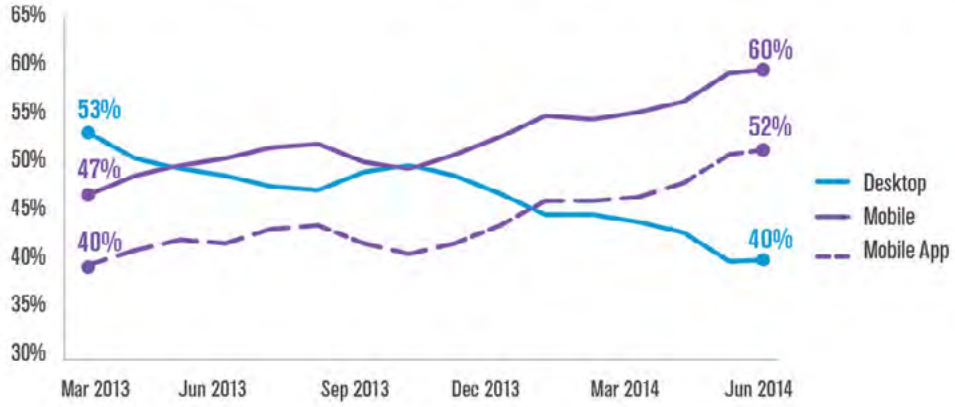
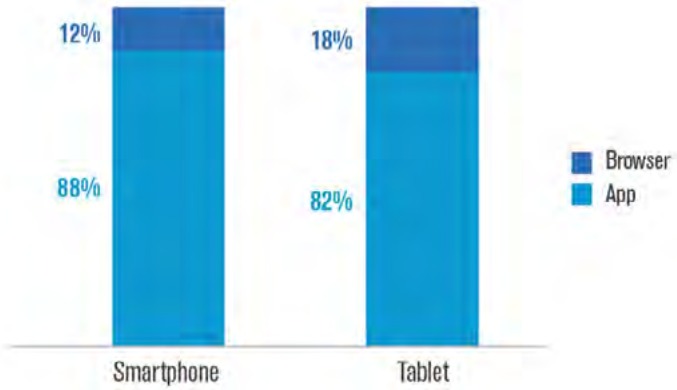
Share of U.S. Digital Media Time Spent by Platform

Source: comScore Media Metrix Multi-Platform & Mobile Metrix, U.S., March 2013 - June 2014



Mobile App vs. Browser Splits

Source: comScore Mobile Metrix, U.S., Age 18+, June 2014



Share of Time Spent per Day with Major Media by US Adults, 2010-2014

% of total

	2010	2011	2012	2013	2014
Digital	**29.6%**	**33.8%**	**38.5%**	**43.4%**	**47.1%**
—Mobile (nonvoice)	3.7%	7.1%	13.4%	19.2%	23.3%
—Online*	22.0%	22.6%	20.7%	19.2%	18.0%
—Other	3.9%	4.1%	4.3%	5.0%	5.9%
TV	**40.9%**	**40.4%**	**39.2%**	**37.5%**	**36.5%**
Radio	**14.9%**	**13.9%**	**13.0%**	**11.9%**	**10.9%**
Print**	**7.7%**	**6.5%**	**5.4%**	**4.4%**	**3.5%**
—Magazines	4.6%	3.8%	3.1%	2.5%	1.9%
—Newspapers	3.1%	2.7%	2.3%	1.9%	1.6%
Other	**7.0%**	**5.5%**	**4.0%**	**2.8%**	**1.9%**
Total (hrs:mins)	**10:46**	**11:18**	**11:49**	**12:03**	**12:14**

Average Time Spent per Day with Major Media by US Adults, 2010-2014

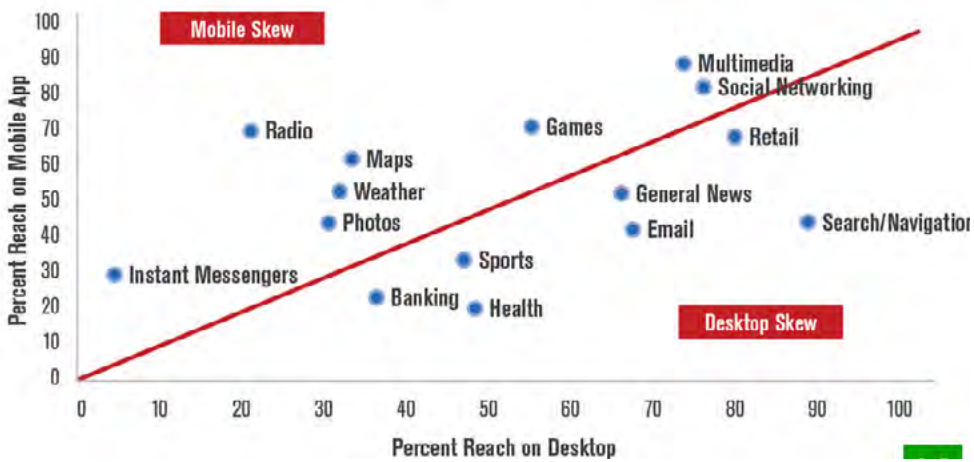
hrs:mins

	2010	2011	2012	2013	2014
Digital	**3:11**	**3:49**	**4:33**	**5:14**	**5:46**
—Mobile (nonvoice)	0:24	0:48	1:35	2:19	2:51
—Online*	2:22	2:33	2:27	2:19	2:12
—Other	0:25	0:28	0:31	0:36	0:43
TV	**4:24**	**4:34**	**4:38**	**4:31**	**4:28**
Radio	**1:36**	**1:34**	**1:32**	**1:26**	**1:20**
Print**	**0:50**	**0:44**	**0:38**	**0:32**	**0:26**
—Newspapers	0:30	0:26	0:22	0:18	0:14
—Magazines	0:20	0:18	0:16	0:14	0:12
Other	**0:45**	**0:37**	**0:28**	**0:20**	**0:14**
Total	**10:46**	**11:18**	**11:49**	**12:03**	**12:14**

Mobile app usage

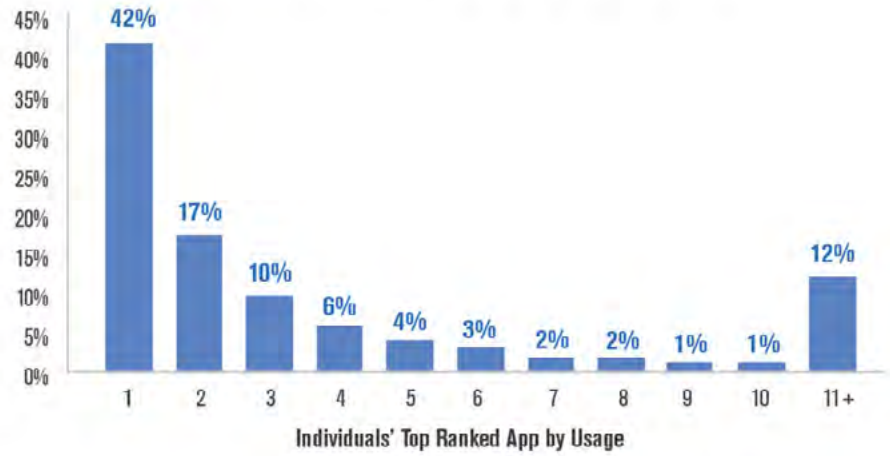
Percent Audience Reach on Desktop and Mobile App by Category

Source: comScore Media Metrix & Mobile Metrix, U.S., June 2014



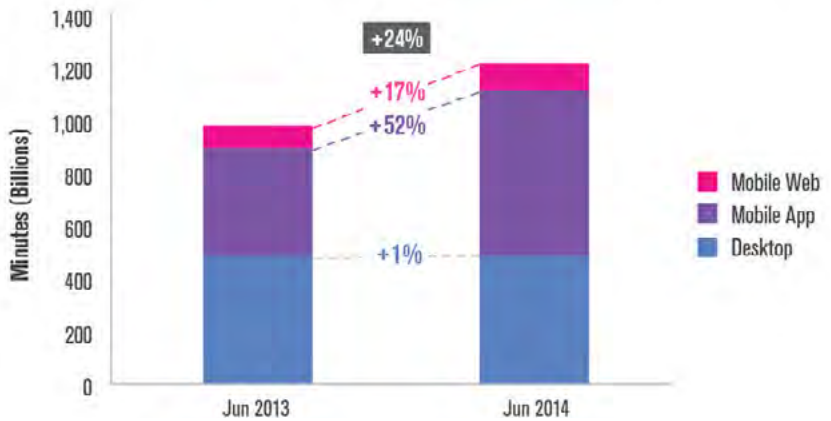
Share of Time Spent on Apps Across Ranks

Source: comScore Custom Analytics, U.S., Age 18+, June 2014



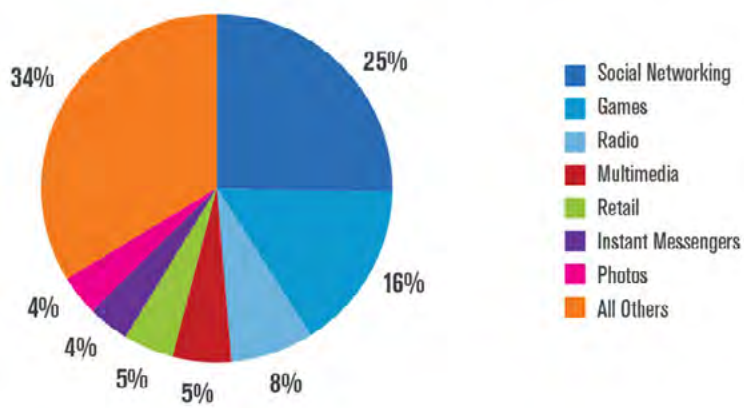
Digital Time Spent Growth Driven by Apps

Source: comScore Media Metrix Multi-Platform & Mobile Metrix, U.S., June 2013 - June 2014



Share of Mobile App Time Spent

Source: comScore Mobile Metrix, U.S., Age 18+, June 2014



Mobile transaction data

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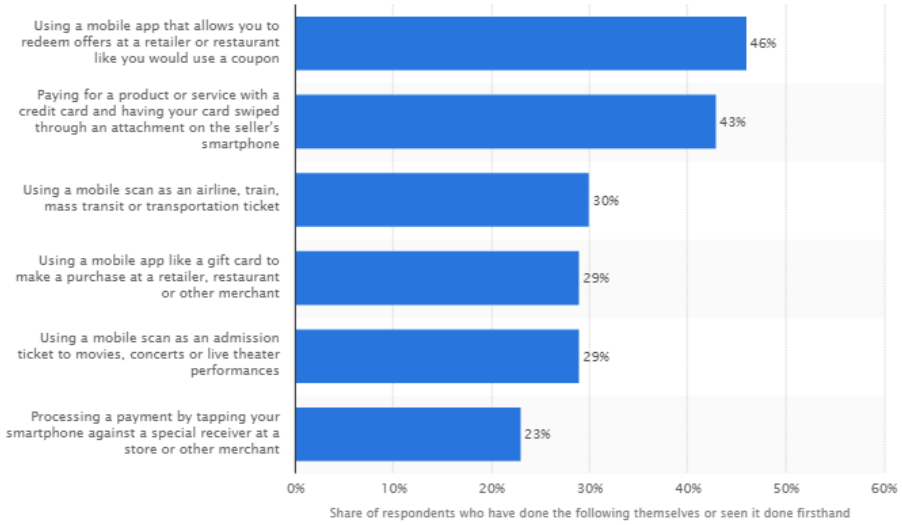
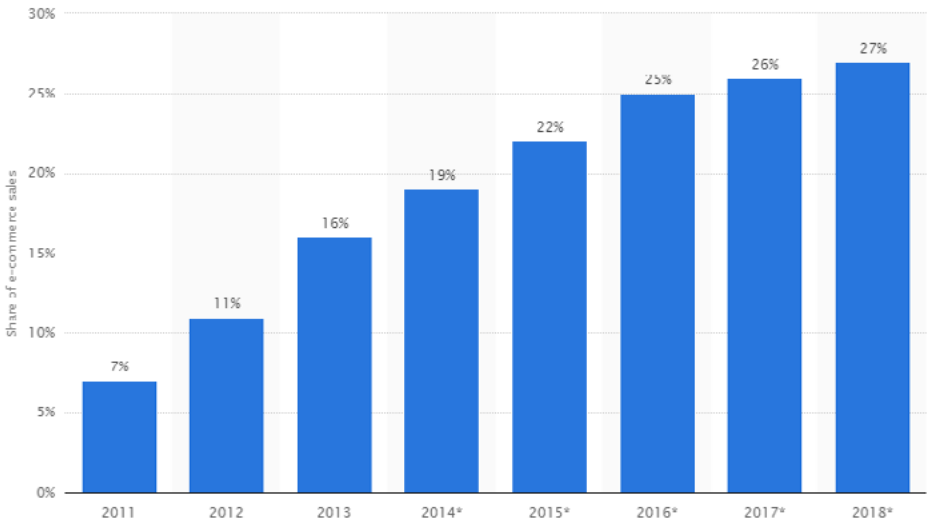
Mobile transaction experiences of smartphone users in the United States as of September 2013

This statistic highlights mobile transaction experiences of smartphone users in the United States as of September 2013. During the survey period it was found that 30 percent of respondents had used or seen a mobile scan being used as an transportation ticket.



U.S. mobile retail commerce sales as percentage of retail e-commerce sales from 2011 to 2018

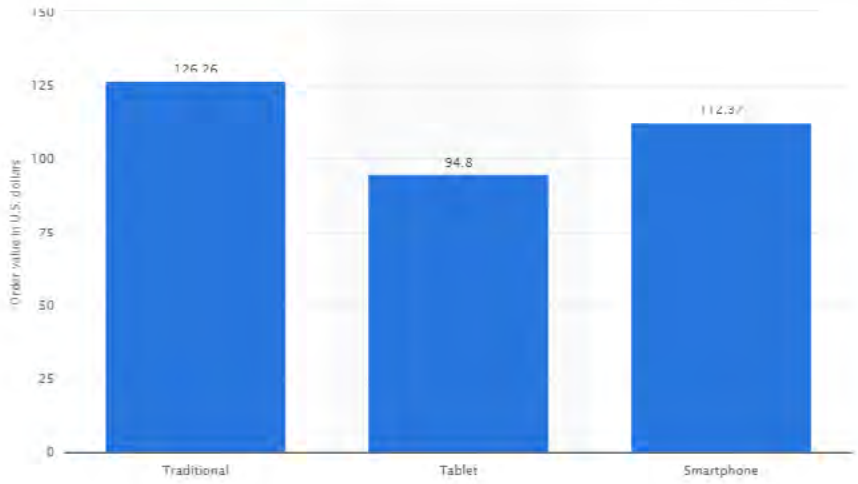
This statistic gives information on the US mobile retail commerce sales as percentage of total retail e-commerce sales from 2011 to 2013, with a projection until 2018. In 2016, 25 percent of all retail e-commerce is expected to be generated via m-commerce.



Higher global spend via mobile

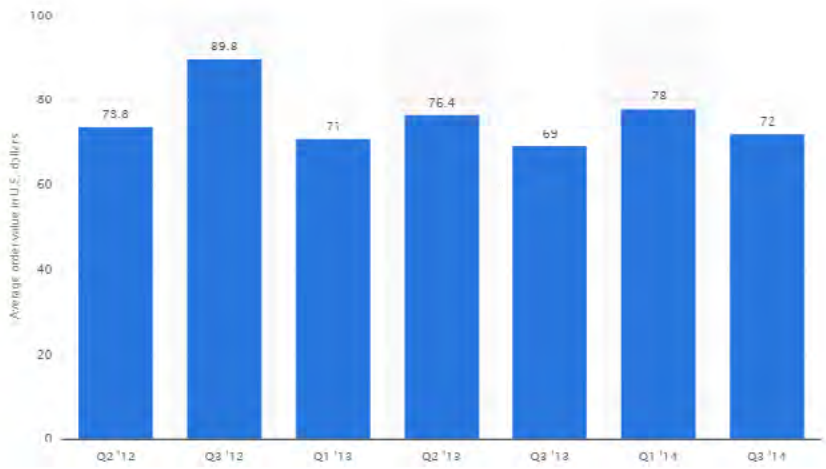
Average value of global online shopping orders in 4th quarter 2014, by device (in U.S. dollars)

This statistic provides information on the average order value of online shopping orders worldwide in the fourth quarter of 2014, differentiated by the type of device from which the order was made. During that quarter, online orders which were placed from a smartphone had an average value of 112.37 U.S. dollars.



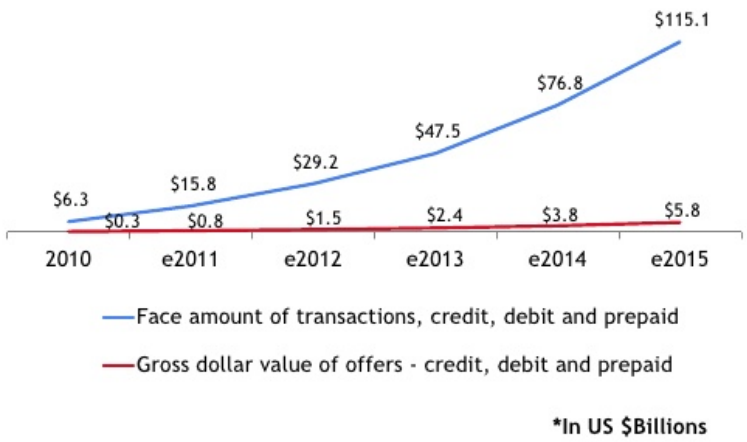
Average value of online shopping orders in the United States from 2nd quarter 2012 to 3rd quarter 2014 (in U.S. dollars)

This statistic provides information on the average order value of U.S. online shopping orders from the second quarter of 2012 to the third quarter of 2014. During the most recent quarter, online orders which were placed from a desktop device had an average value of 72 U.S. dollars.



$112 global average smartphone transaction amount in 2014 compared with $72 dollar US-based e-commerce transaction in Q3 2014

Gross Dollar Value Transactions With Card-Linked Offer Redemptions



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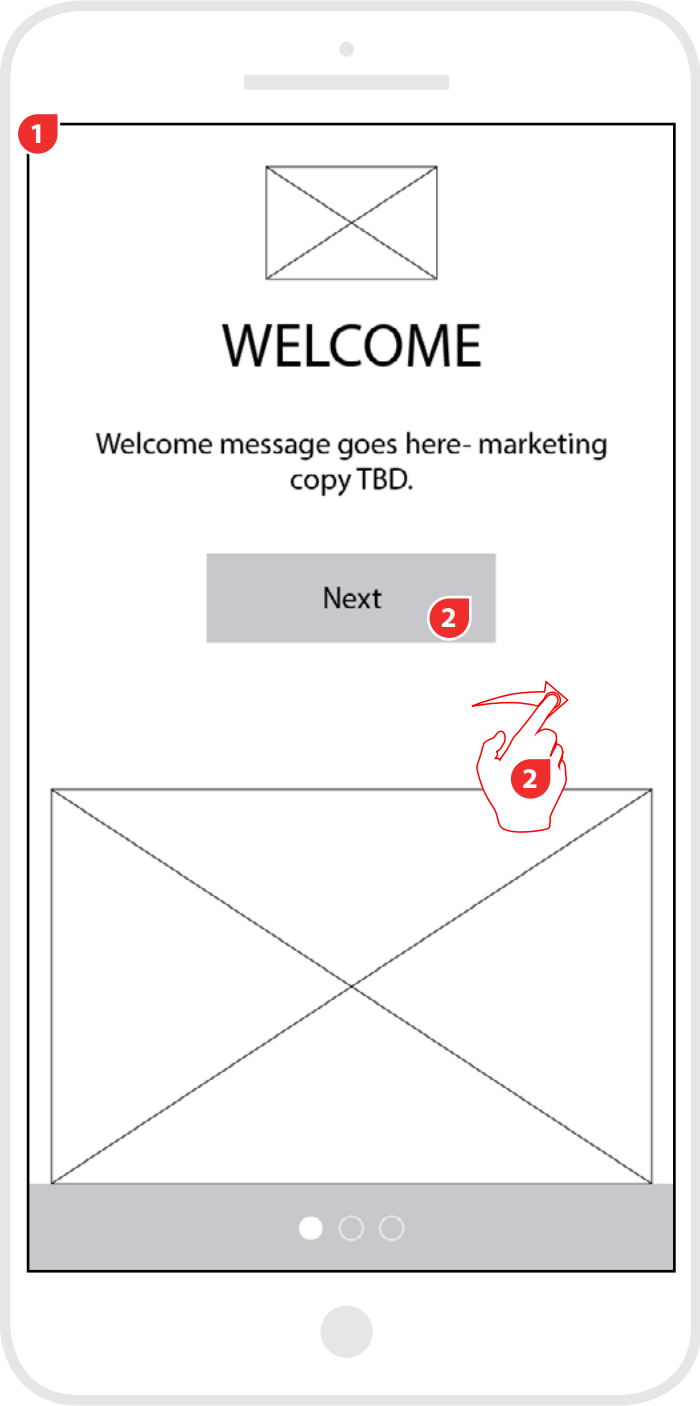
Welcome tutorial

This section describes the beginning experience for first time users opening the app.

This chapter includes:

- **Location permissions**
- **Notifications permissions**
- **Welcome text**

Welcome tutorial 1/3



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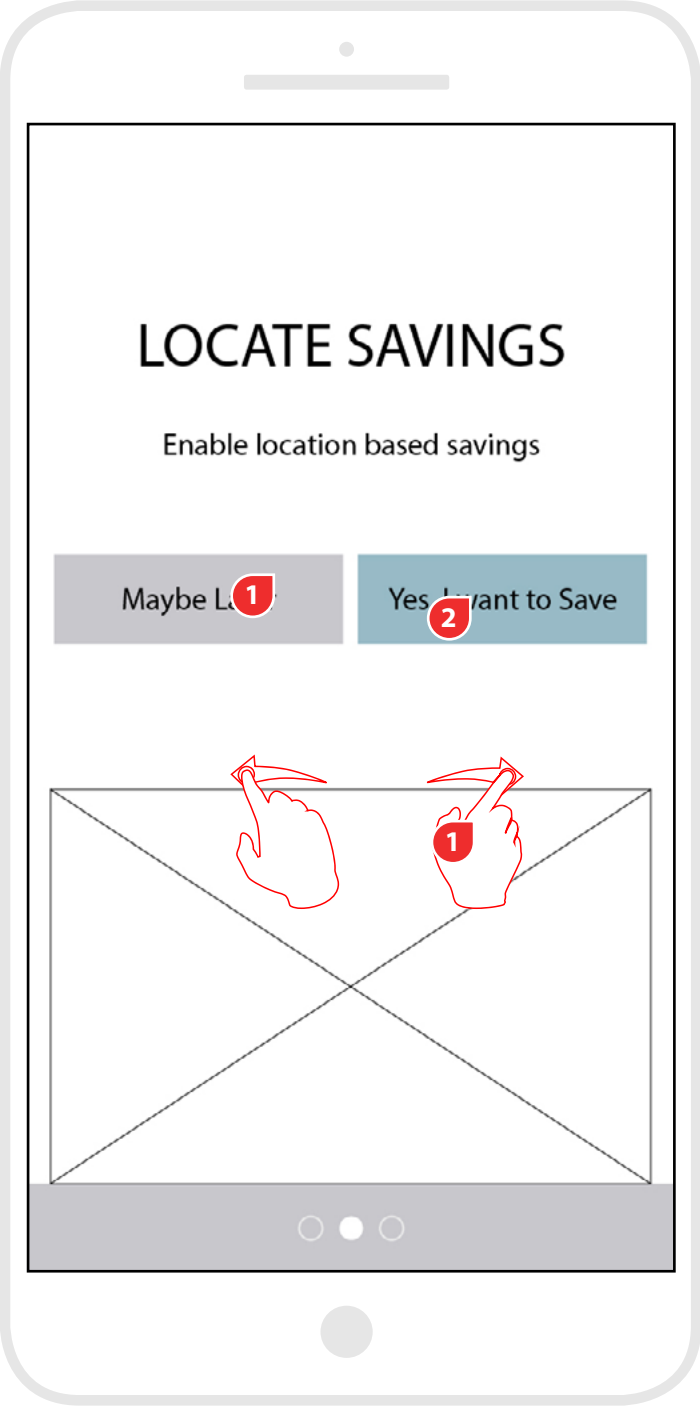
Functional Notes

1. Upon opening the app for the first time, a welcome tutorial begins.
2. Proceeds to second page of tutorial.

Welcome tutorial 2/3



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Functional Notes

1. Skips this section and proceeds with location settings turned off.
2. Prompts the system permission alert for location awareness.

Welcome tutorial 2/3 system

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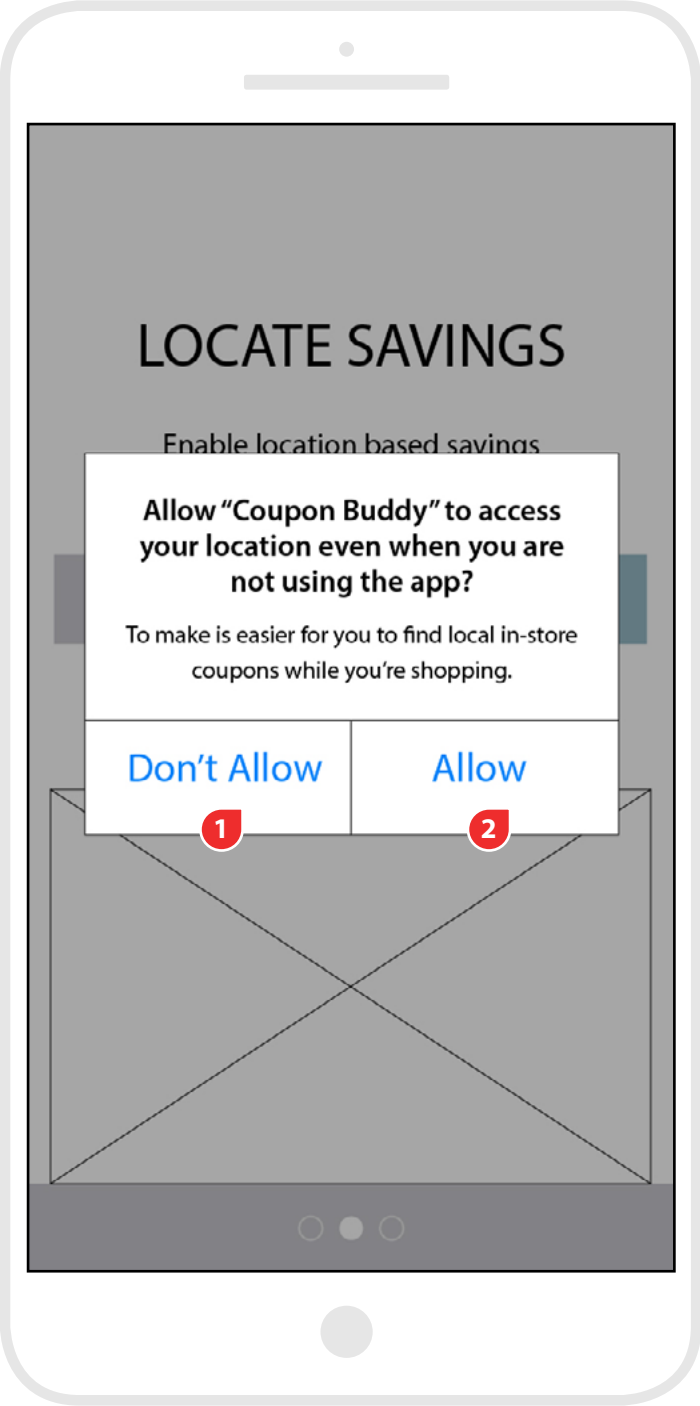
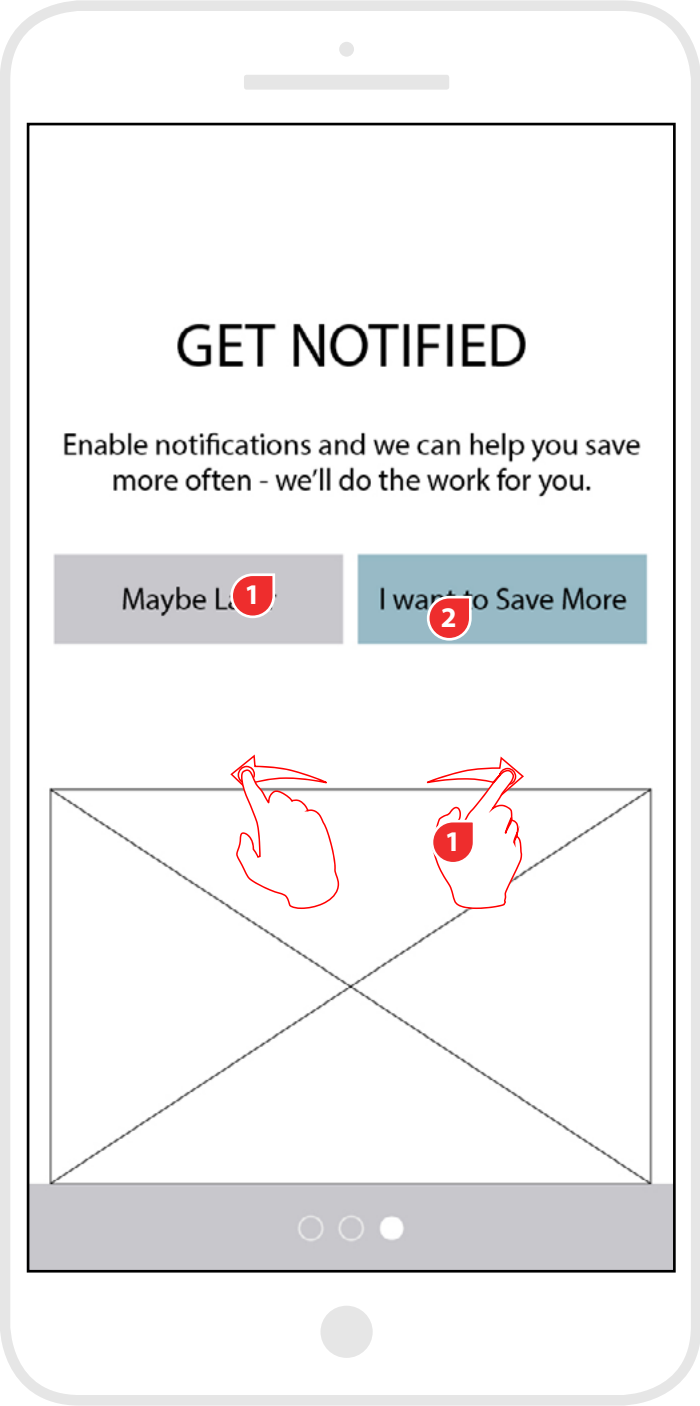


Functional Notes

1. Closes modal.
2. Turns on location awareness in the background of the application.

Welcome tutorial 3/3



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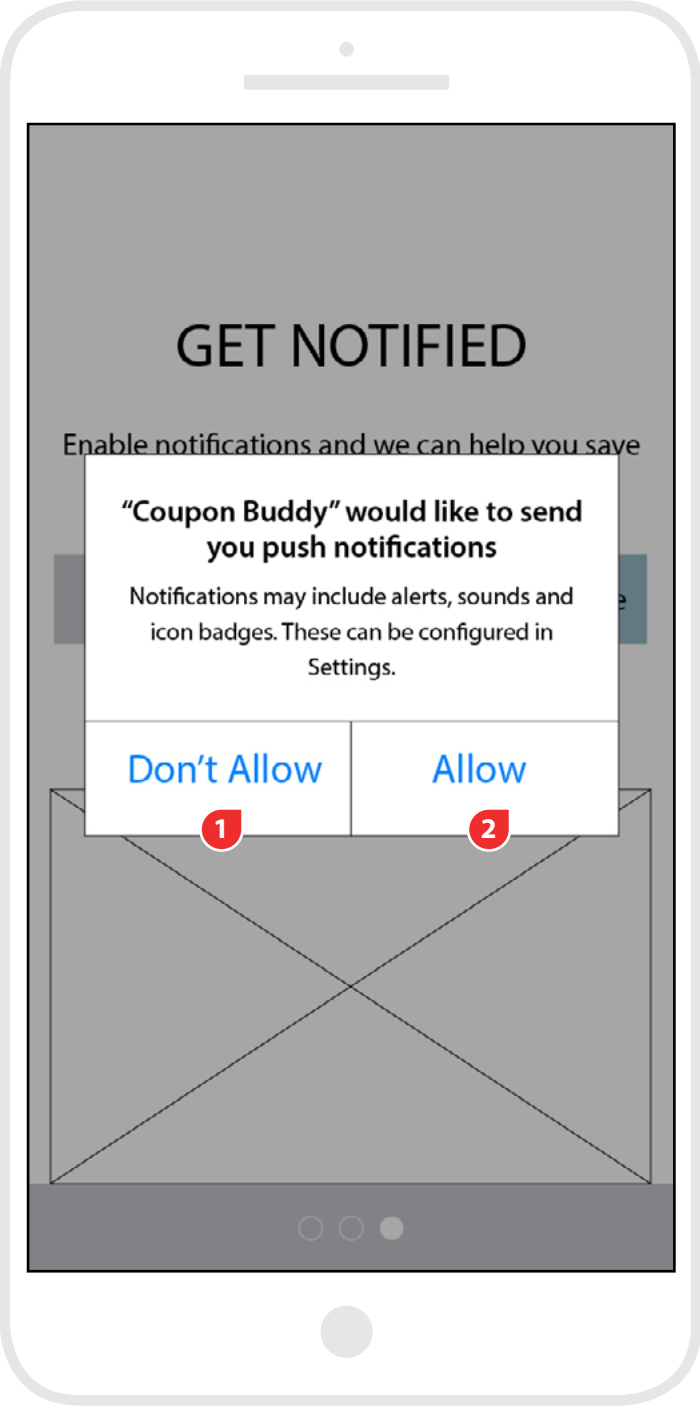
Functional Notes

1. Skips this section and proceeds with location settings turned off.
2. Prompts the system permission alert for notifications.

Welcome tutorial 3/3 system



Functional Notes

1. Closes modal.
2. Turns on notification permission for the application.

Start saving tutorial

This section describes the beginning experience for first time users viewing the main screen for the first time.

This chapter includes:

- **Featurted tab**
- **Value prop**
- **Online shopping**
- **Login prompt**

Home/ featured deals screen

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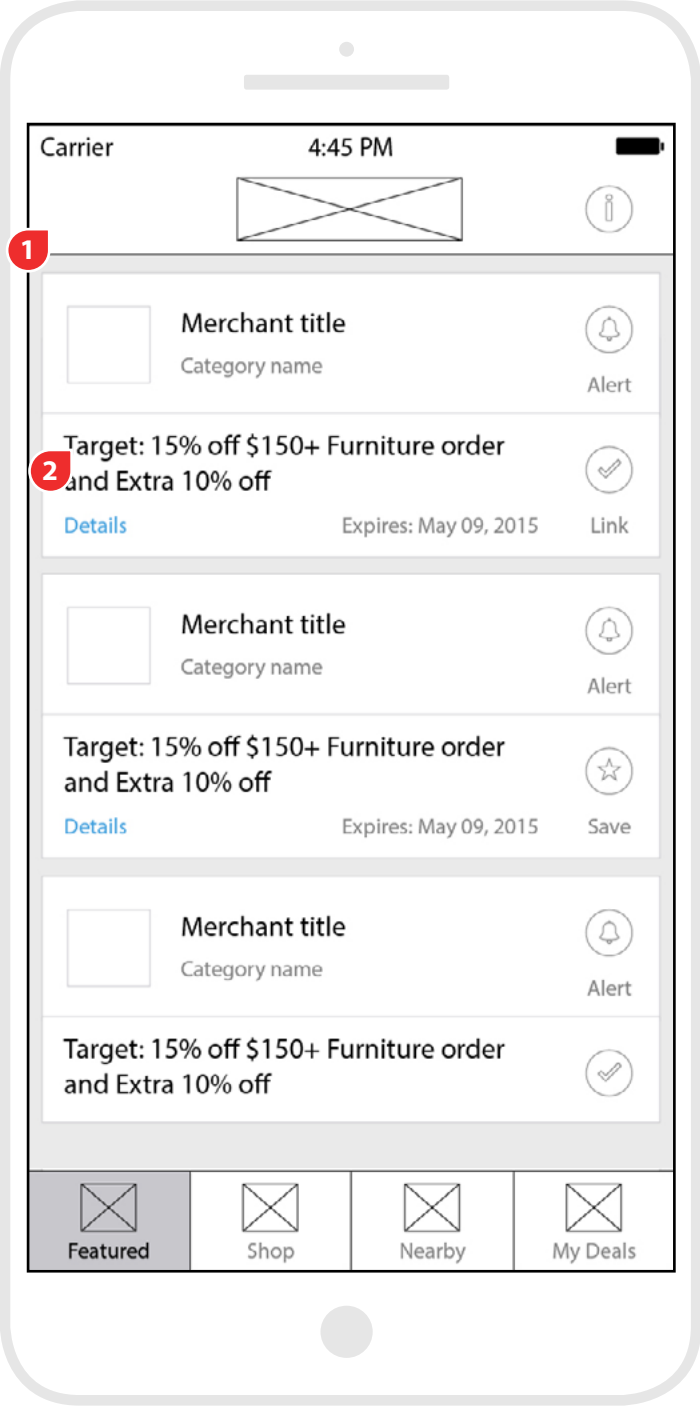


Functional Notes

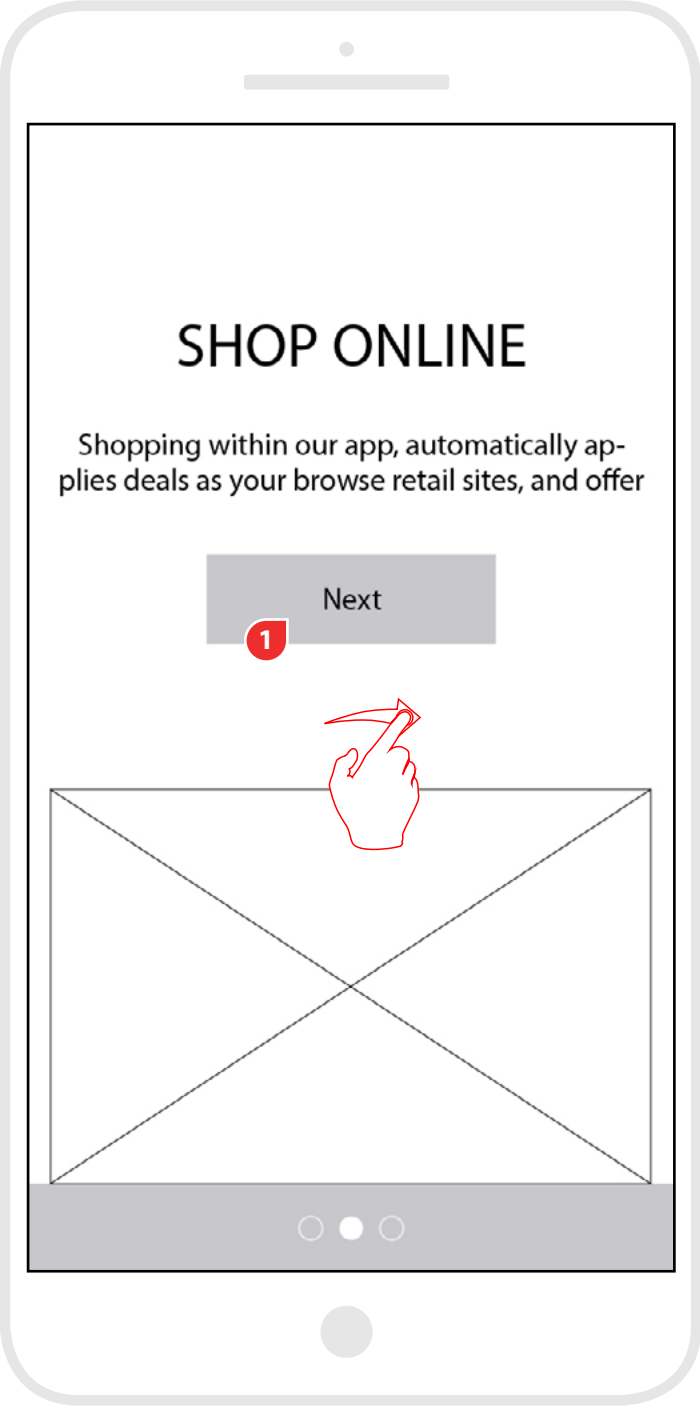
1. Home screen for the app- shows prepopulated deals with the most engagement from total user base. Merchants will be weighted and ranked higher if a user has created an alert for this merchant.
2. Only the single most active deal per the most active merchants will be shown in this list.
3. Interacting with anything on this landing screen for the first time prompts the "how to save" tutorial.

How to save tutorial 1/3

Functional Notes

1. Next screen.

How to save tutorial 2/3



Functional Notes

1. Next screen.

How to save tutorial 3/3

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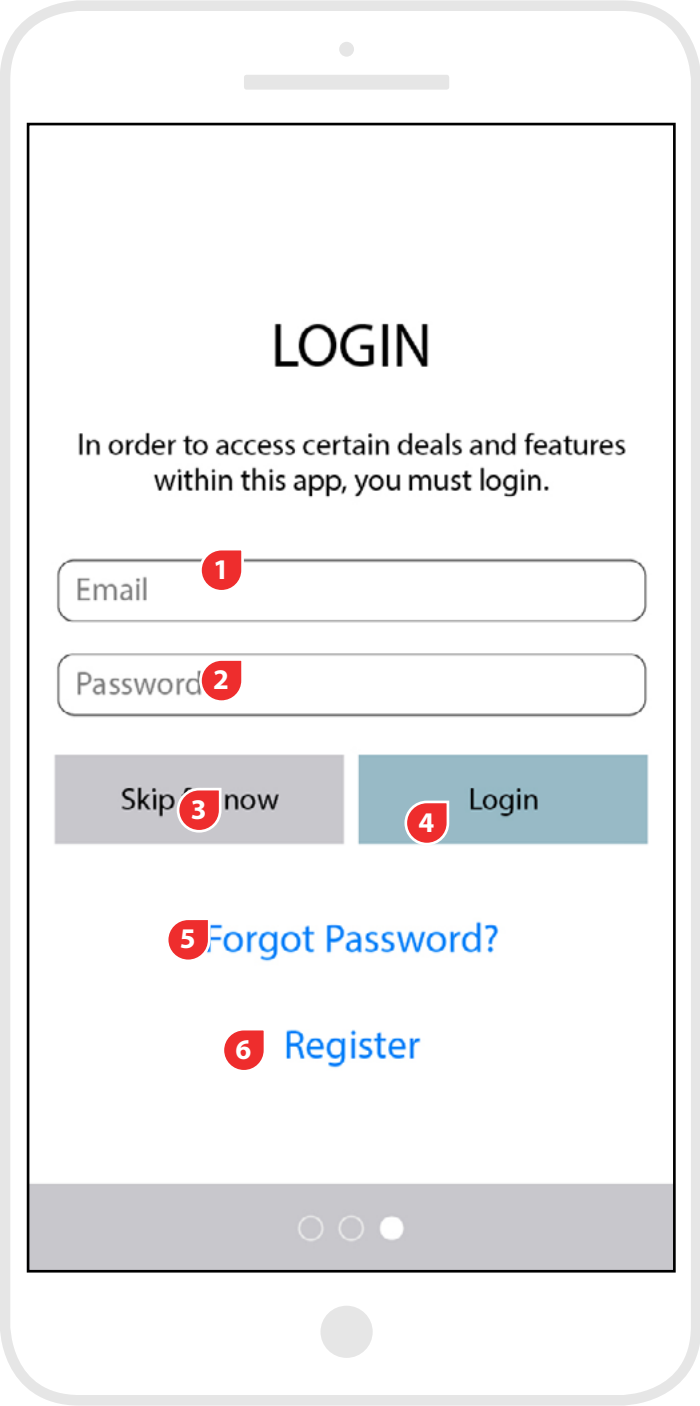
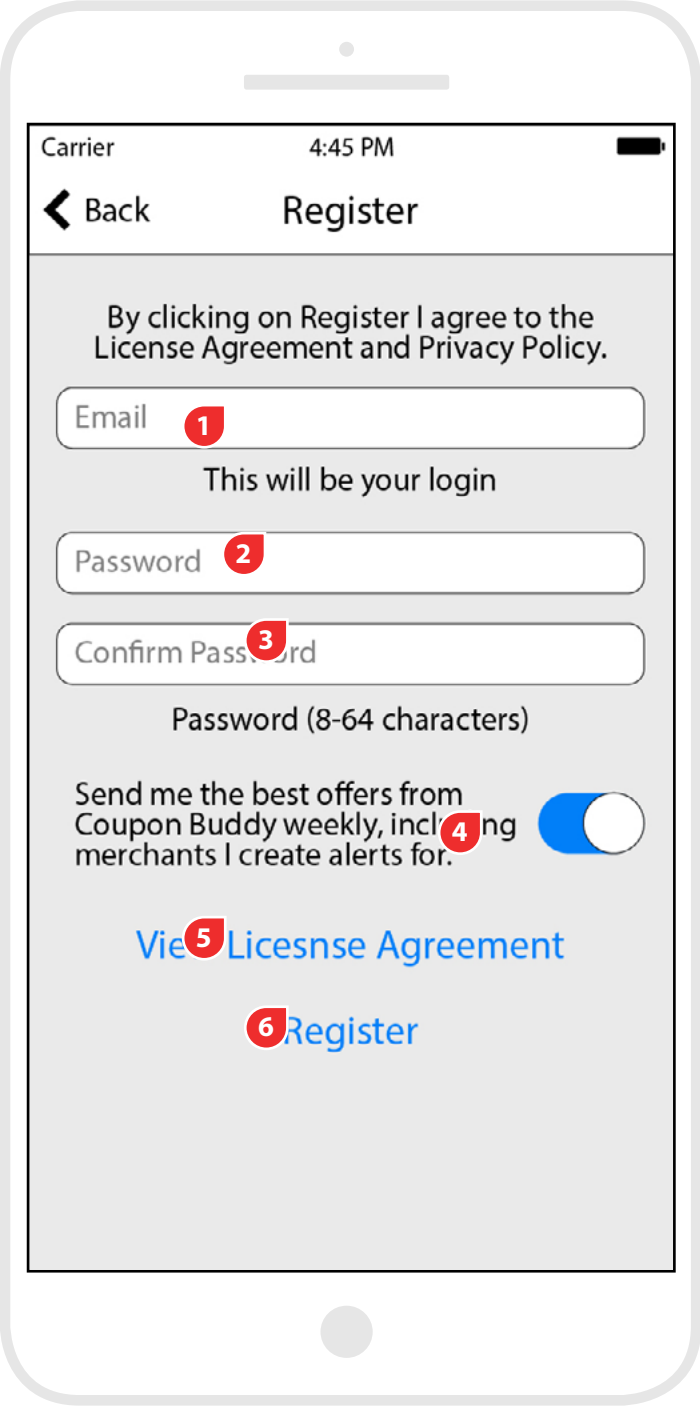


Functional Notes

1. Enter email address
2. Enter password
3. Skips to home/feature screen with no account logged in. Note: features like alerts, saving deals and notifications are unavailable. Only links for online shopping will be available.
4. Submit login credentials.
5. Forgot password screen
6. New account registration screen

New registration



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Functional Notes

1. Input email
2. Enter password
3. Enter password
4. Automatically turned on by default. If turned on, users will receive a weekly email including the top featured deals for that week. Any merchant that a user has created an alert for will be included in this email, including the top deal for that selected merchant.
5. License agreement, text only
6. Submit and complete registration

Registered users on home screen

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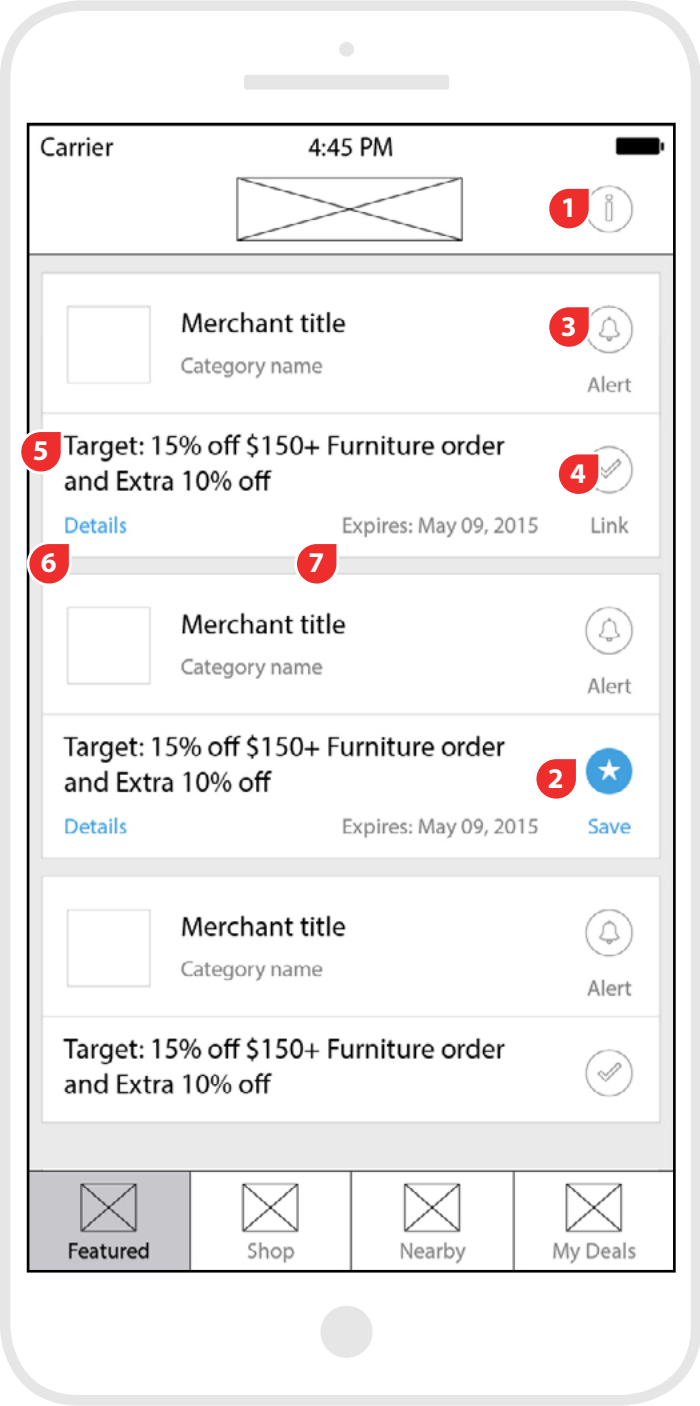

Functional Notes

1. Help screen
2. Registered users are able to save deals, saved deals are populated in the "my deals" tab until they expire.
3. Registered users are able to create merchant alerts. Setting a merchant alert to on adds that merchant to the weekly email newsletter if it is not already included as a featured deal. Note: this requires users to have the email offer toggled on in the registration screen.

   Merchant alerts for users who have notifications and location awareness permissions turned on, allow the app to schedule notifications when a users' physical location comes within 0.1 mile of a physical merchant store with a coupon available. This will be shown as an interactive notification and should be capped at a maximum 3 notifications per hour.
4. To link deals to cards a user must register their debit or credit card in the app. This opens the "how to link offers to cards" tutorial.
5. Offer title
6. Offer details screen
7. Expiration data associated with that specific offer.

Non registered, permissions disallowed

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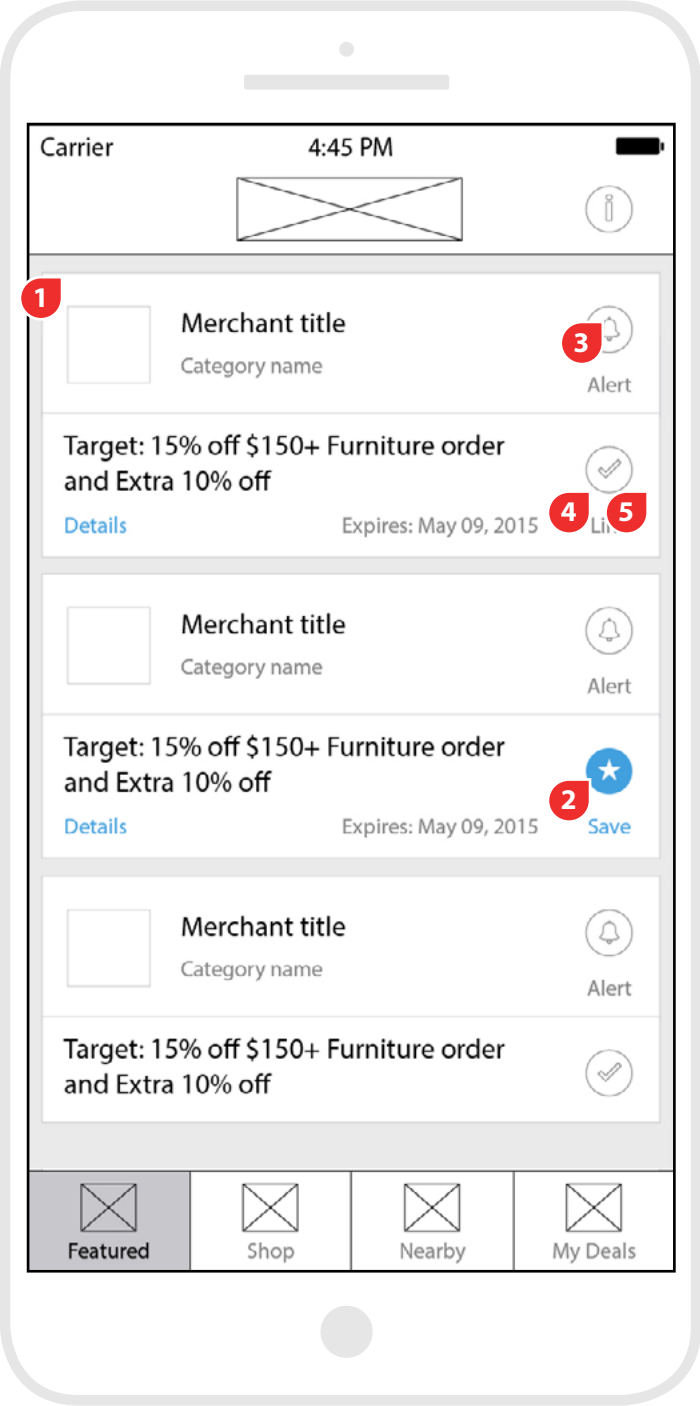
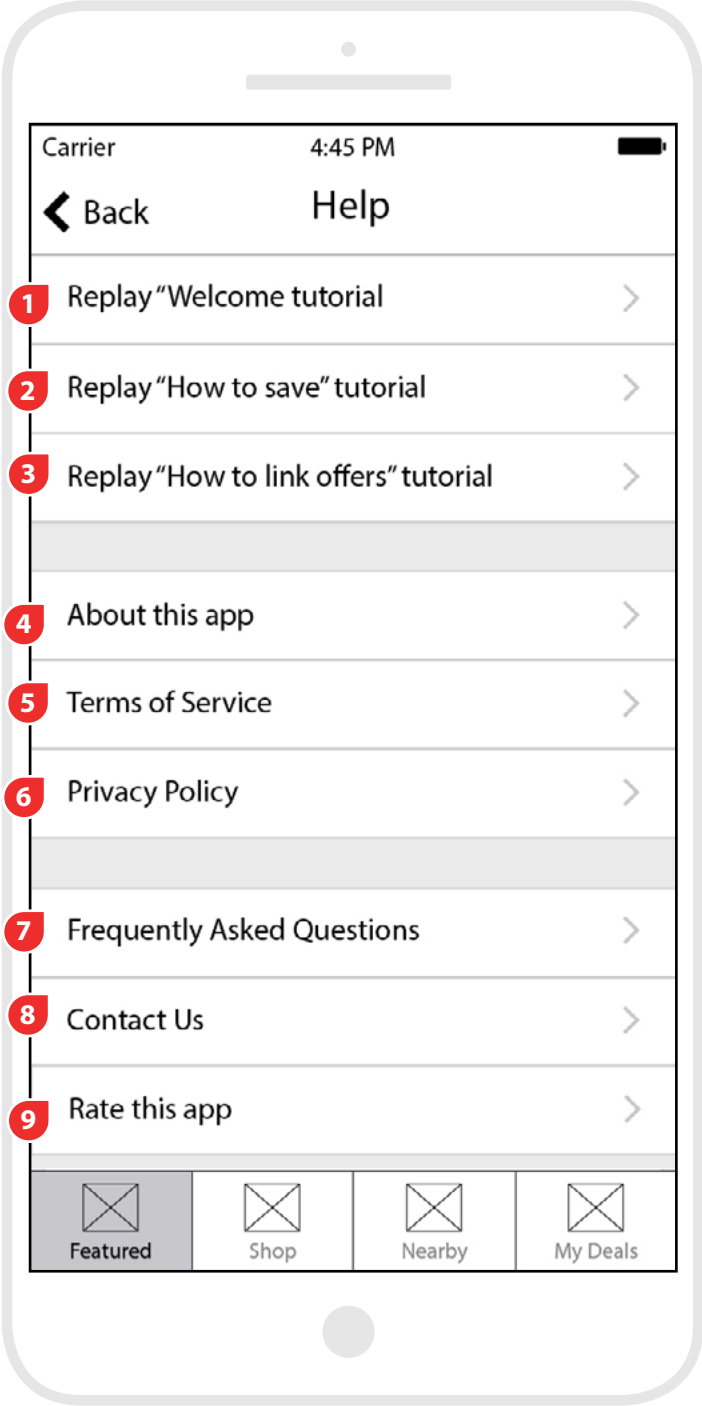


Functional Notes

1. Users who proceeded through the "how to save" tutorial without registering or permitting notifications or location awareness cannot create alerts or save deals until they register. Note: buttons will still be enabled to push users to the appropriate tutorial screens that inform and prompt permission alerts upon tapping them.
2. If an unregistered user tries to save a deal they will be prompted to screen 3/3 of the "how to save" tutorial.
3. If a user hasn't allowed location or notification permissions and taps "alert," screen 2/3 of the welcome tutorial will appear to inform and prompt the user toward re-setting their permissions.
4. If a user is registered,. but hasn't added a card and clicks "link," the "how to link your card" tutorial will appear and they will be prompted to link their card.
5. If a user is NOT registered, hasn't added a card and clicks "link," screen 3/3 of the "how to save" tutorial appears.

Help screen



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Functional Notes

1. Replays welcome tutorial
2. Replays how to save tutorial
3. Replays how to link offers tutorial
4. Screen including text description of the app TBD
5. Screen including text description of the apps terms of service TBD
6. Screen including text description of the apps privacy policy TBD
7. Screen including text description of the apps frequently asked questions TBD
8. Screen including contact/support links TBD
9. Opens the app in the app-store with the review section in view.

How to link offers to cards

This section describes how to link a credit or debit card one time, in order to gain access to in-store deals without needing to scan or clip coupons.

This chapter includes:

- **Card linked offers**
- **Add your card**
- **Notification method**
- **Complete setup**

Card linked offer tutorial 1/4

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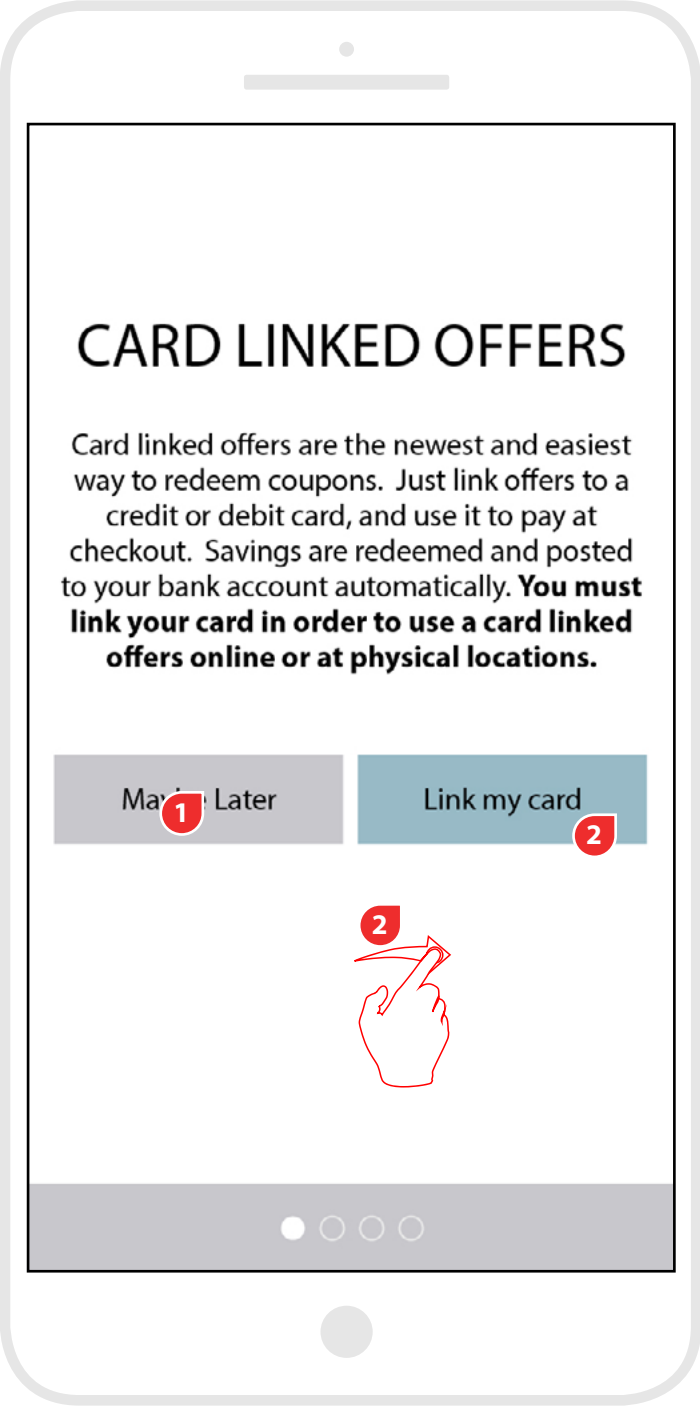

Functional Notes

1. Skips card linking and returns to previous screen.
2. Next screen.

CLO tutorial - add card 2/4

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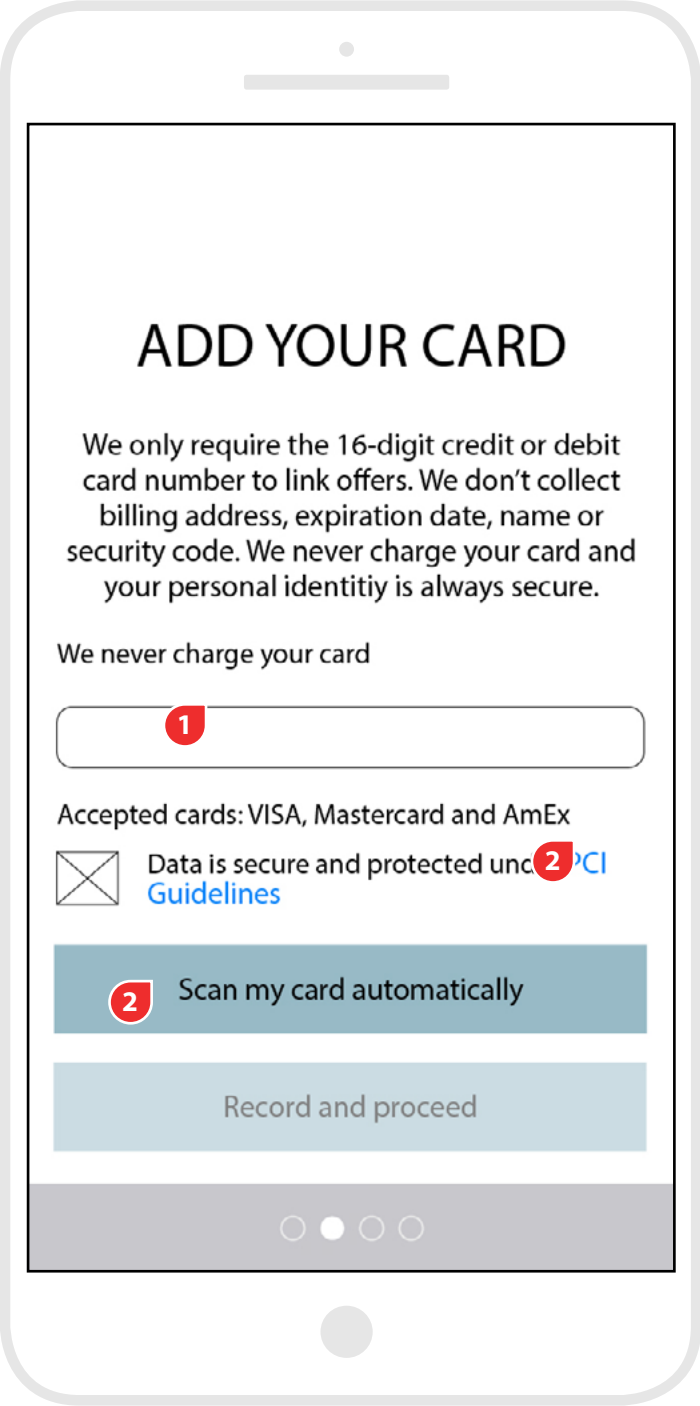
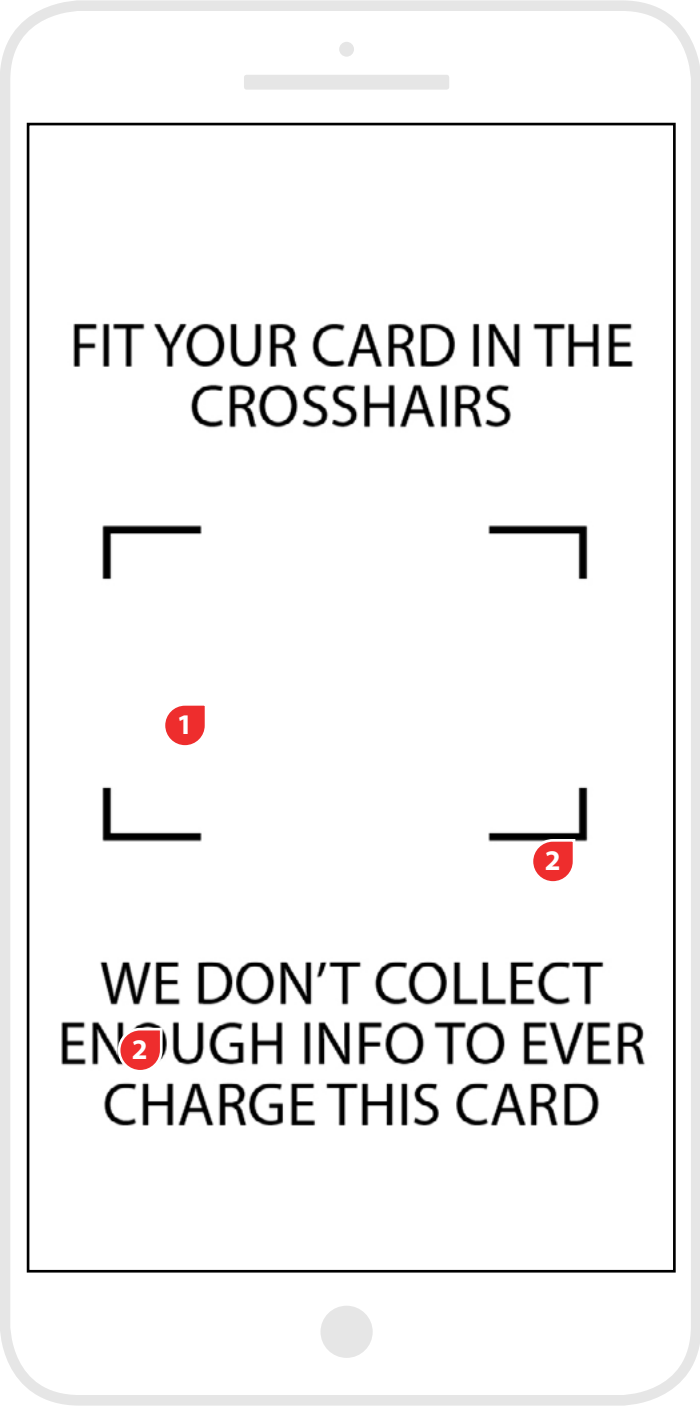


Functional Notes

1. Users can manually type their 16 digit credit card number.
2. text only screen including info about PCI Guidelines.
3. Opens credit card scanning tool card.io.
4. A valid card number must be entered to record and proceed.

CLO tutorial - add card 2/4



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Functional Notes

1. Using the card.io open source tool, a user must hover the crosshairs over the card- upon doing so the app will take a photo and capture only the credit card number on the card.
2. After collecting the card number, the screen will revert back to add card screen with the credit card number populated.

CLO tutorial - add card 2/4

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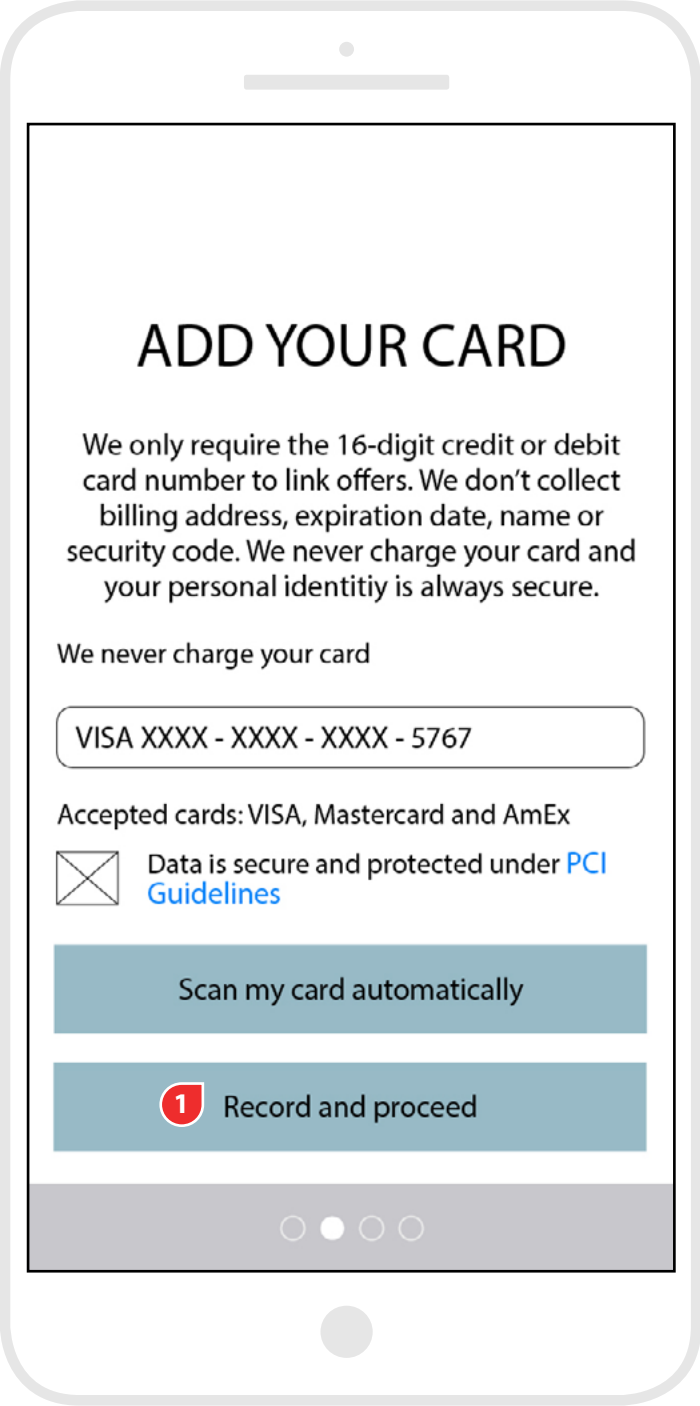
Functional Notes

1. Records the card number and proceeds to next scree.



CLO tutorial - notification method 3/4

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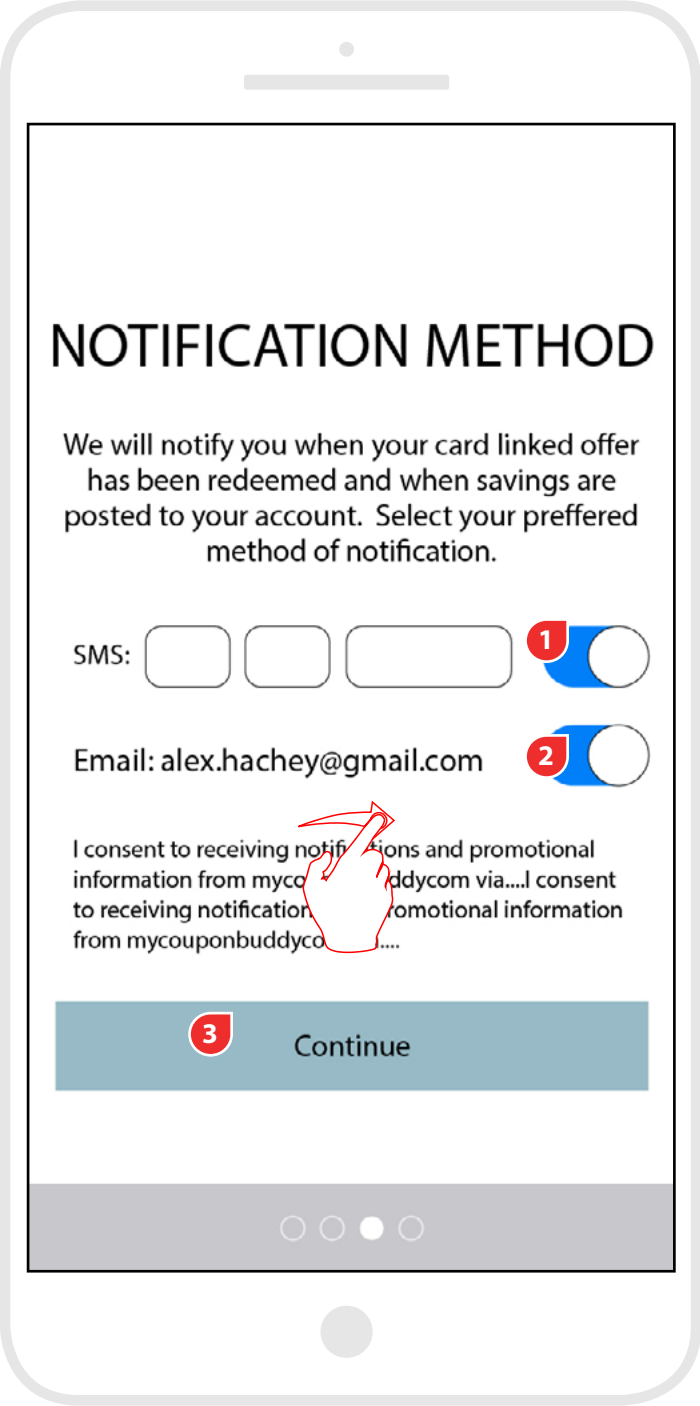
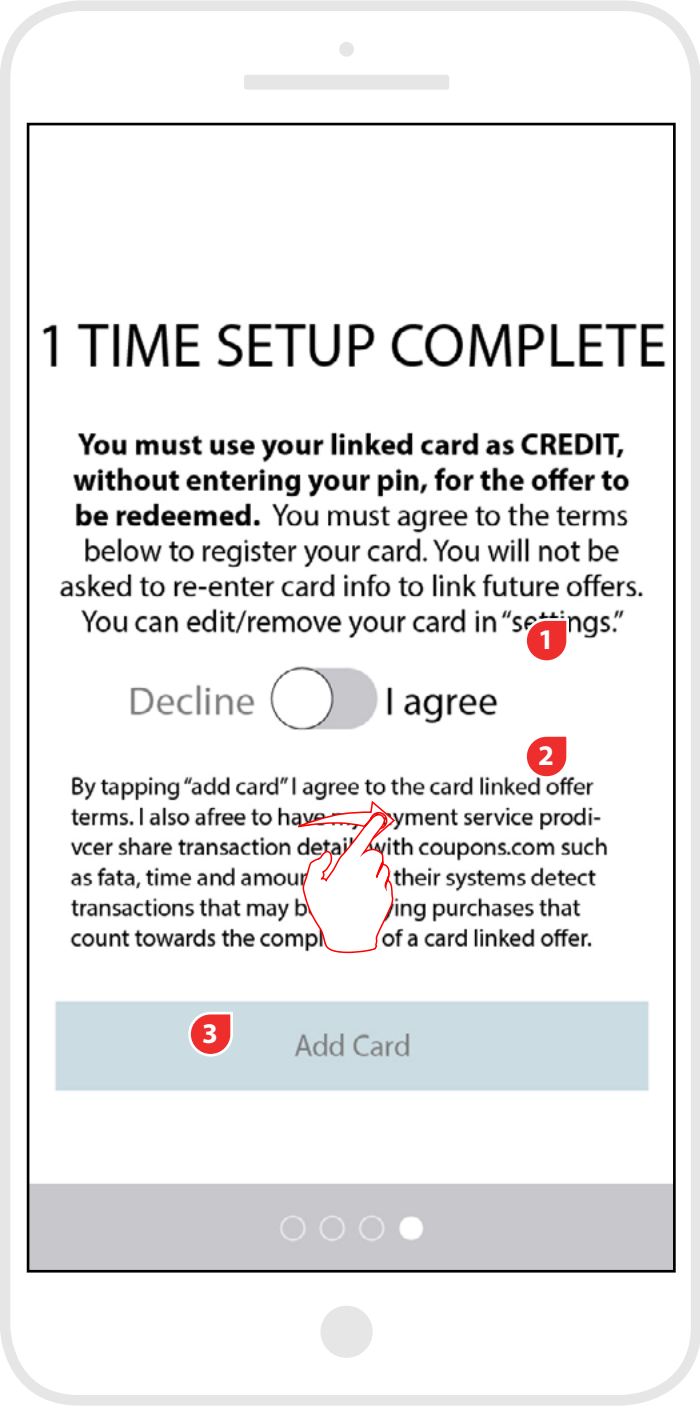


Functional Notes

1. Users can opt-in to receive SMS notifications when their offer has been redeemed by merchants. A valid mobile phone number must be entered before the toggle can be turned on.
2. By default the notification method will use the email address registered by the user when they create an account.
3. Proceed to next screen.

CLO tutorial - complete 4/4

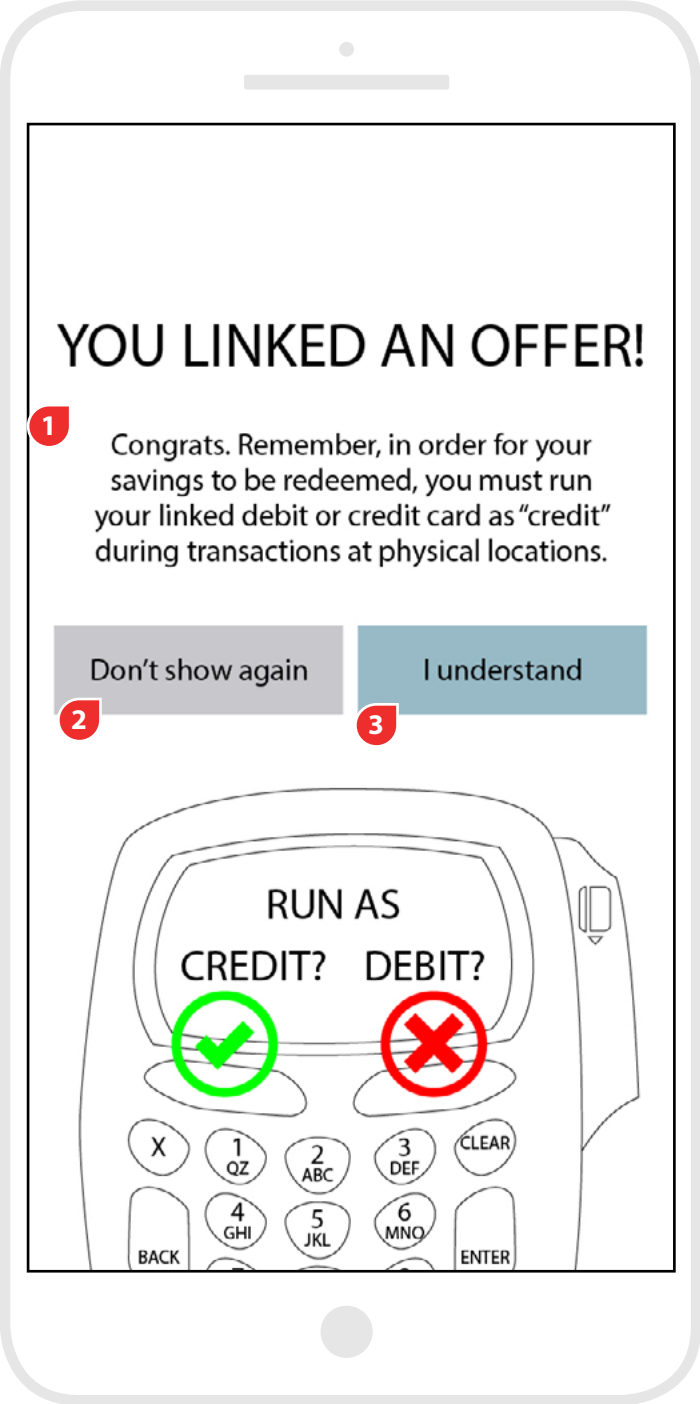


Functional Notes

1. Users must toggle "I agree" in order to enable the "add card" button.
2. Adds the card to the user account and exits the tutorial.

   Note: only one card can be linked per account at a time. Users can remove and re-enter a different card if necessary.

First time linking an offer



Functional Notes

1. The first time a user taps the "link" button on a CLO after registering their credit card number, the confirmation overlay prompts notifying the user that they must run their card transaction at a physical checkout as "credit" to redeem the savings.
2. Removes the prompt and never shows the overlay again.
3. Removes the prompt and continues to show the overlay every time a CLO has been linked to an added card.

Using card linked offers

This section describes the frictionless process of using card-linked offers.

This chapter includes:

- **Methods for linking offers to cards**
- **Redeeming card linked offers**
- **Card linked offer redemption notifications**
- **Card linked offer deposit notifications**

Linking CLO's - methods

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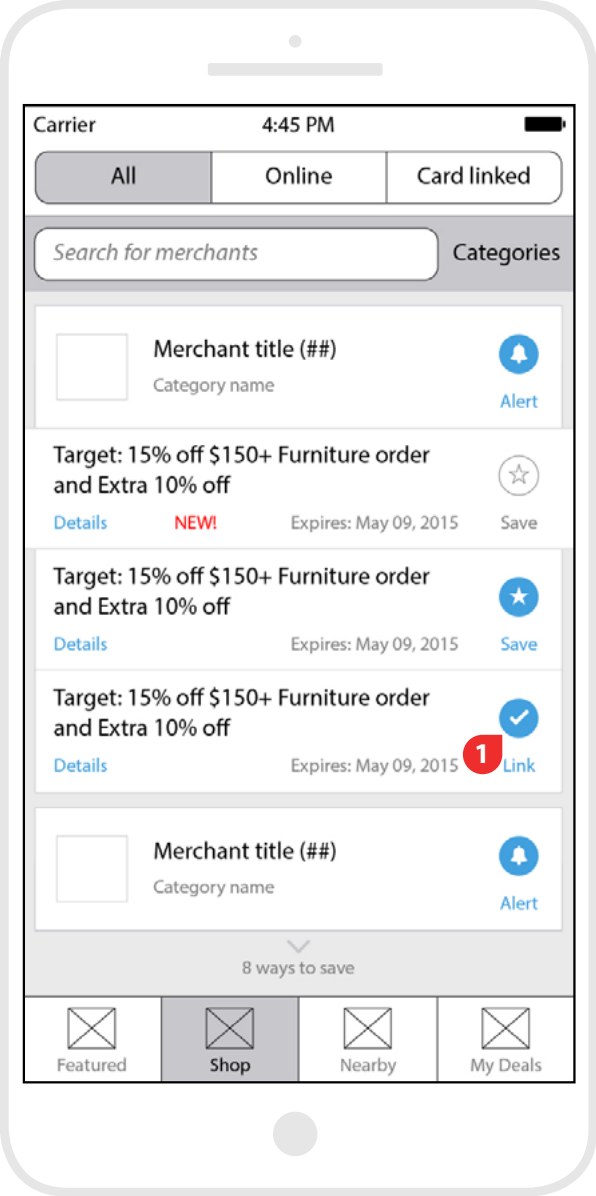

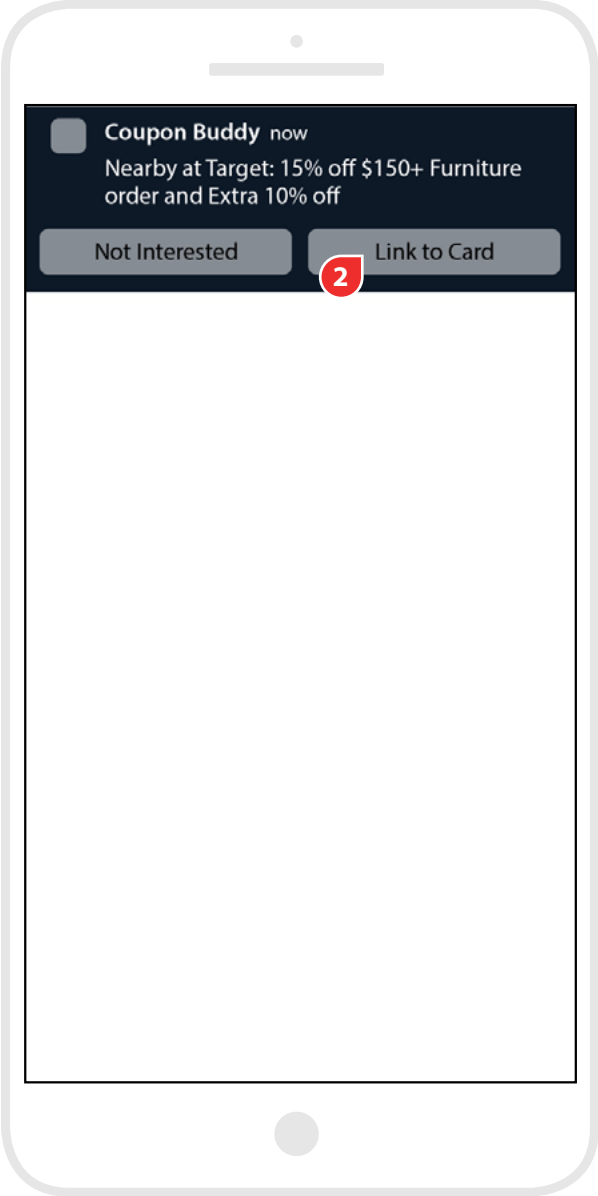

Functional Notes

1. Users can identify the active card-linked offers they want to use in-store or online by tapping the "link" button in the offer list item. Note: only card linked offers can be linked to cards- affiliate links and coupon codes cannot be used in store or added to cards.

Location based interactive banner notifications and alerts also allow users to link a specific CLO for a nearby merchant. Note: more details are described in the "location based coupons" section.

NOTE: **Users must register a credit or debit card once in order to link an offer**- if they do not have a registered card and tap the "link" button, they will be prompted to register a card and the "how to link a card" tutorial will appear.

Viewing previously "linked" offers

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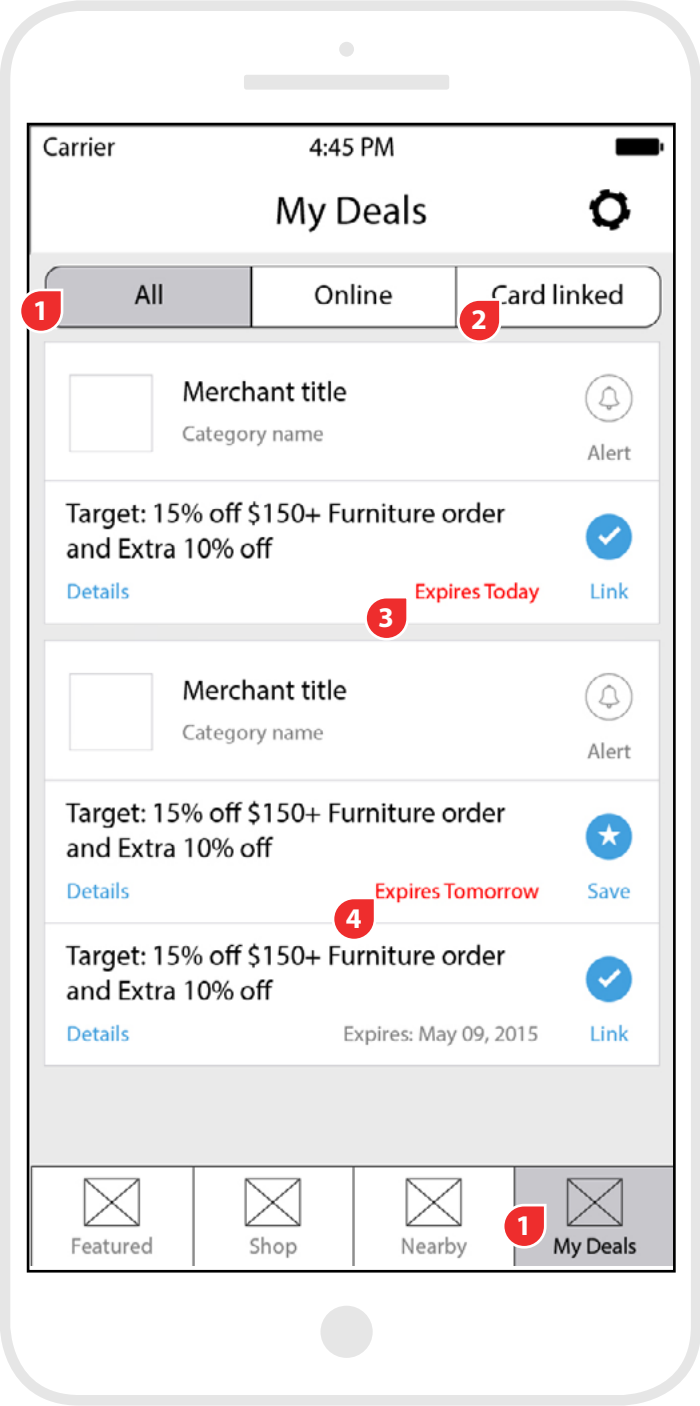

Functional Notes

1. All previously saved or linked offers will be shown by merchant in the "my deals" tab of the app. Merchant will be listed alphabetically and offers within merchants will be listed by expiration date. If a previously linked or saved deal expires, it is permanently removed from this list, until the expiration date is adjusted or the offer duplicated.
2. By default the "My Deals" tab shows all online and CLO offers, users can filter to show only CLO offers by tapping the "Card Linked" toggle button.
3. When the local device date is the same as the listed expiration date, the expiration will change to show in red with the text displaying "Expires Today."
4. When the local device date is one day before the listed expiration date, the expiration will change to show in red with the text displaying "Expires Tomorrow."

Redeeming CLO's in store

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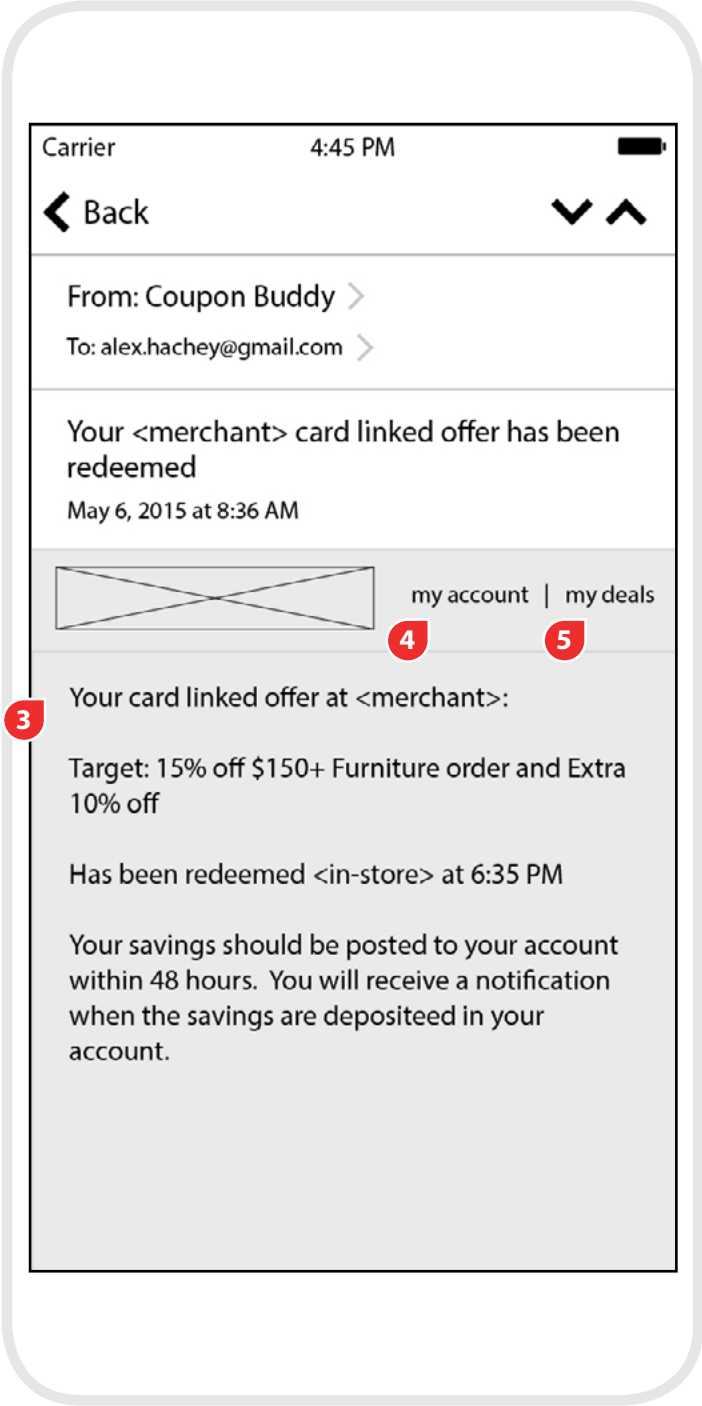


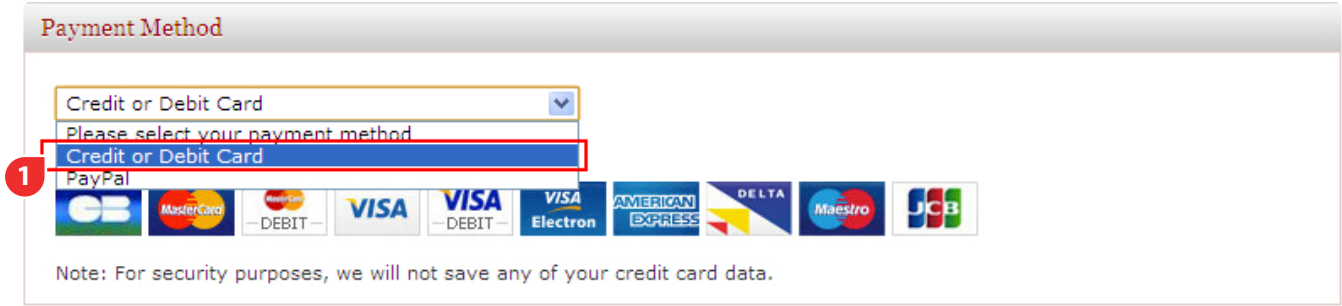
Functional Notes

1. To redeem savings of card-linked offers, users simply use the linked card to pay for good and run the transaction as "credit."
2. Linked debit cards ran as debit will not redeem the offer and savings will not be deposited in the users bank account.
3. Once an offer has been redeemed the user will be notified via email that the offer was accepted/redeemed and savings will be posted to their account within 48 hours.

   Note: The numerous API's and technology ponderers that power card linked offers have some discrepancies. The exact back-end functionality is TBD but this generally captures the user-interaction.
4. Opens the app showing the my account screen in view.
5. Opens the app showing the my deals tab selected.

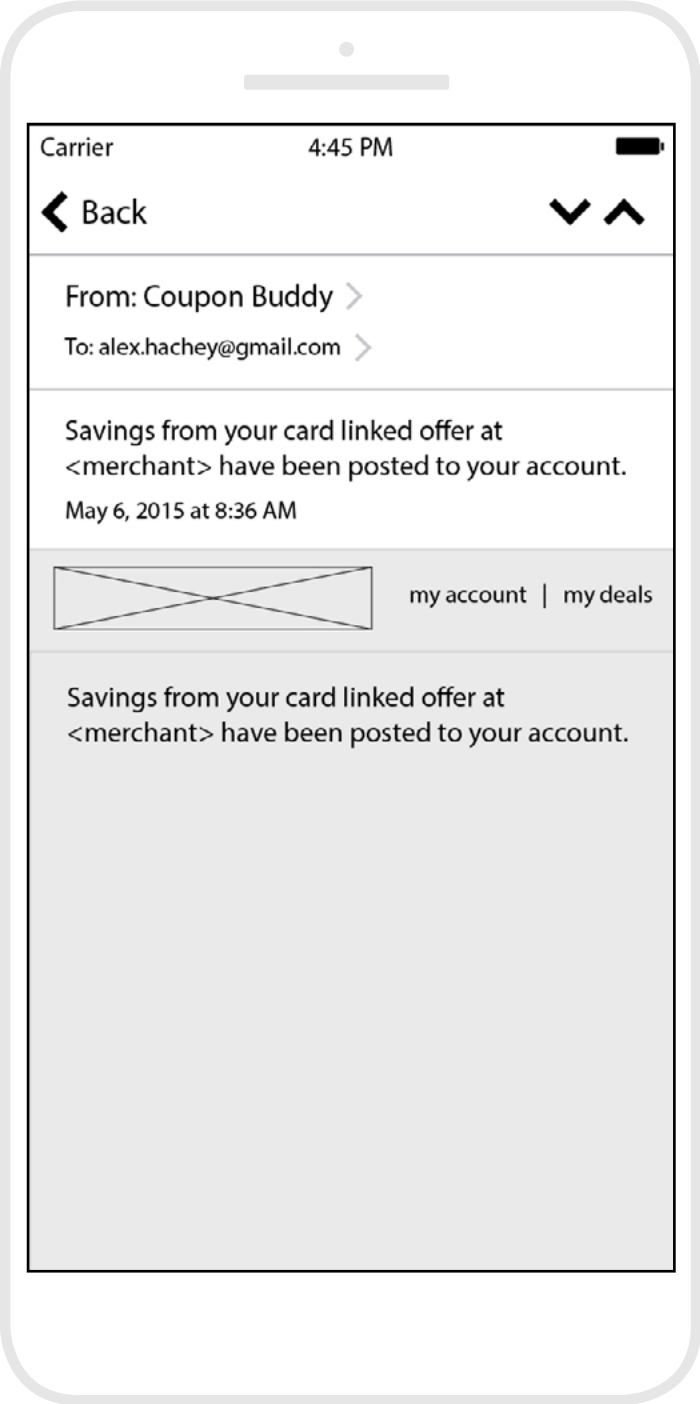
Redeeming CLO's online

Functional Notes



1. Since all card transactions online are ran as credit, anytime a users makes a purchase with their linked card, they will redeem the offer and savings will be posted to their account automatically. There is no additional effort after an offer has been linked outside using the linked card to make the purchase.

Savings deposited notification



Functional Notes

1. After the processing period is completed and savings credited to a users account, the user will be notified via email.

   Note: The numerous API's and technology ponderers that power card linked offers have some discrepancies. The exact back-end functionality is TBD but this generally captures the user-interaction.

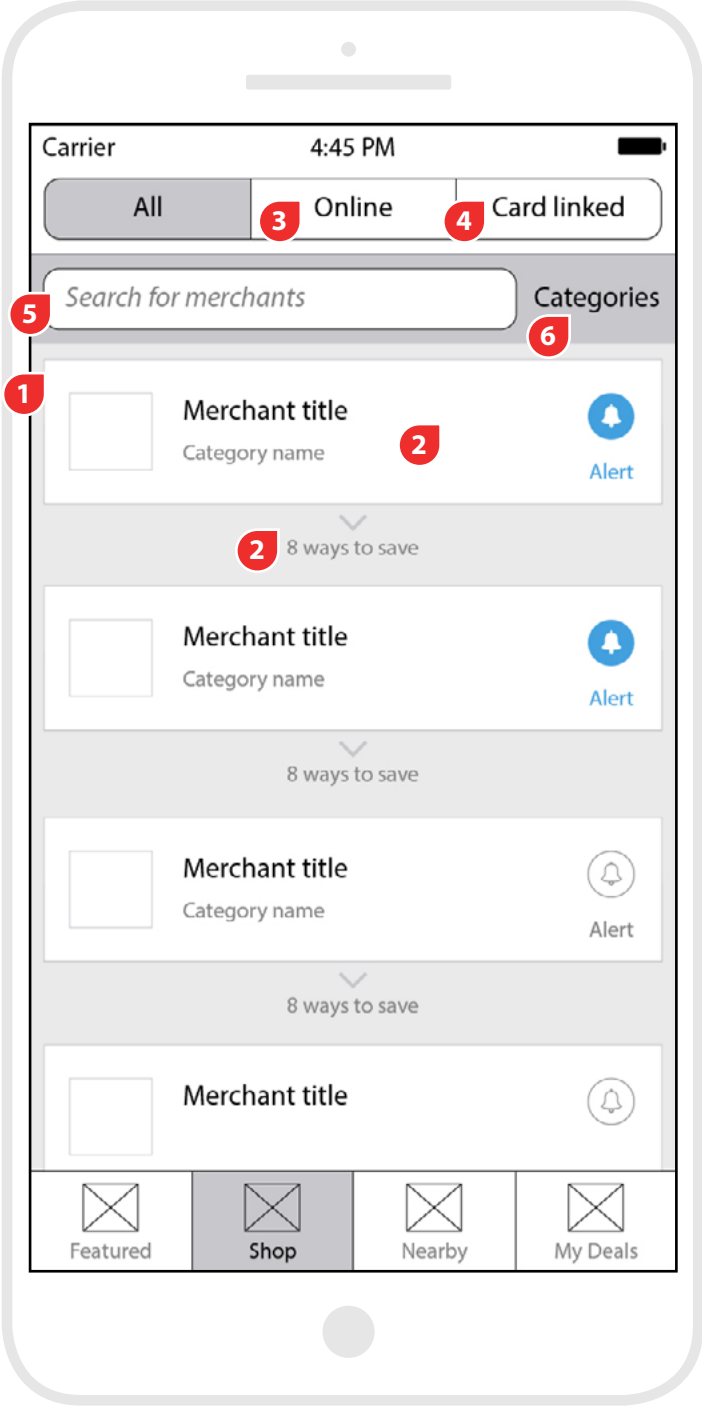
Shopping

This section describes functionality associated with the "shopping tab" in the app.

This chapter includes:

- **Expanding offers**
- **Expanded offer**
- **Filtering by category**
- **Filtering by keyword**
- **Offer details**
- **Activating sale offers**
- **Activating code offers**
- **Changing activated offers from the same merchant**

Shopping offers by merchant



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Functional Notes

1. The shopping tab lists offers by merchant. Merchants will be listed alphabetically, with alert merchants listed at the top alphabetically, and non-toggle alerts listed below alphabetically.
2. Tap the merchant list item or "# ways to save" to expand an accordion view including all the available offers for that merchant.
3. Toggles merchants/offers showing only online sale and coupon links.
4. Toggles merchants/offers showing only card linked offers.
5. Filters merchants by keyword
6. Expands list of categories to filter merchant by category.

Expanded merchant offers

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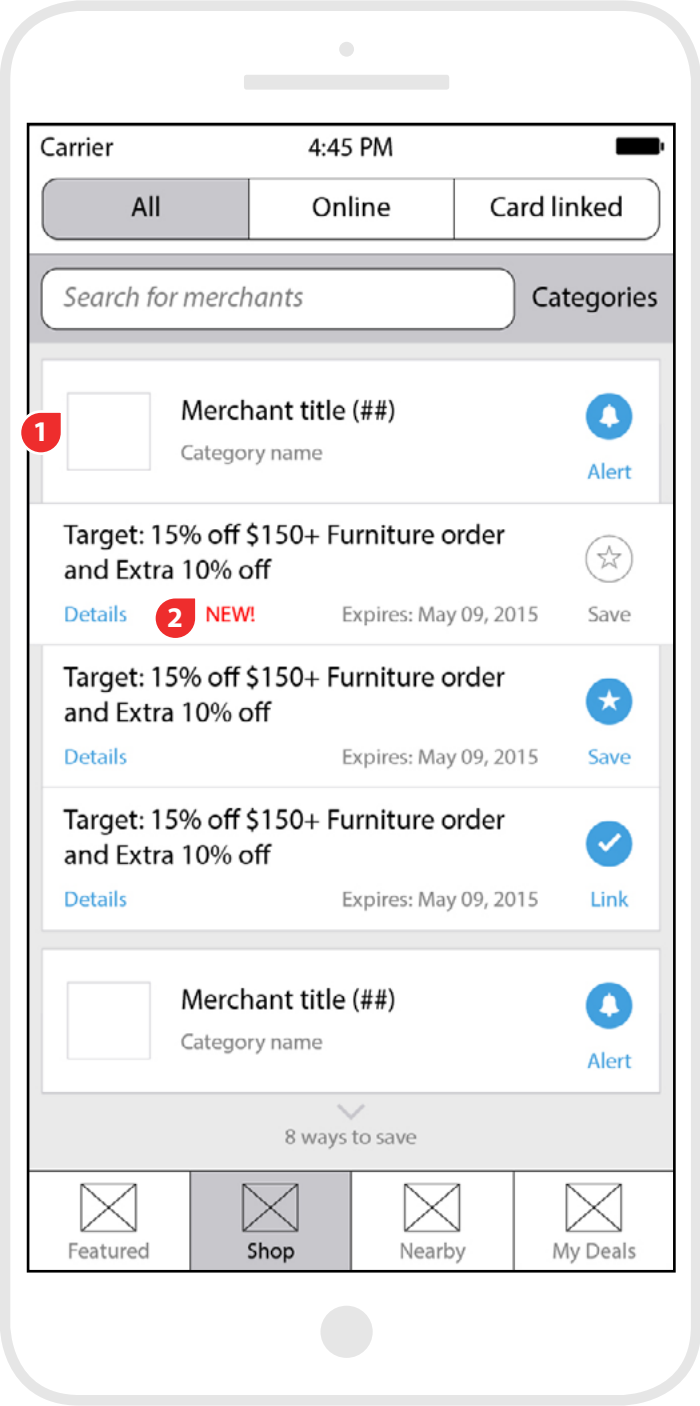
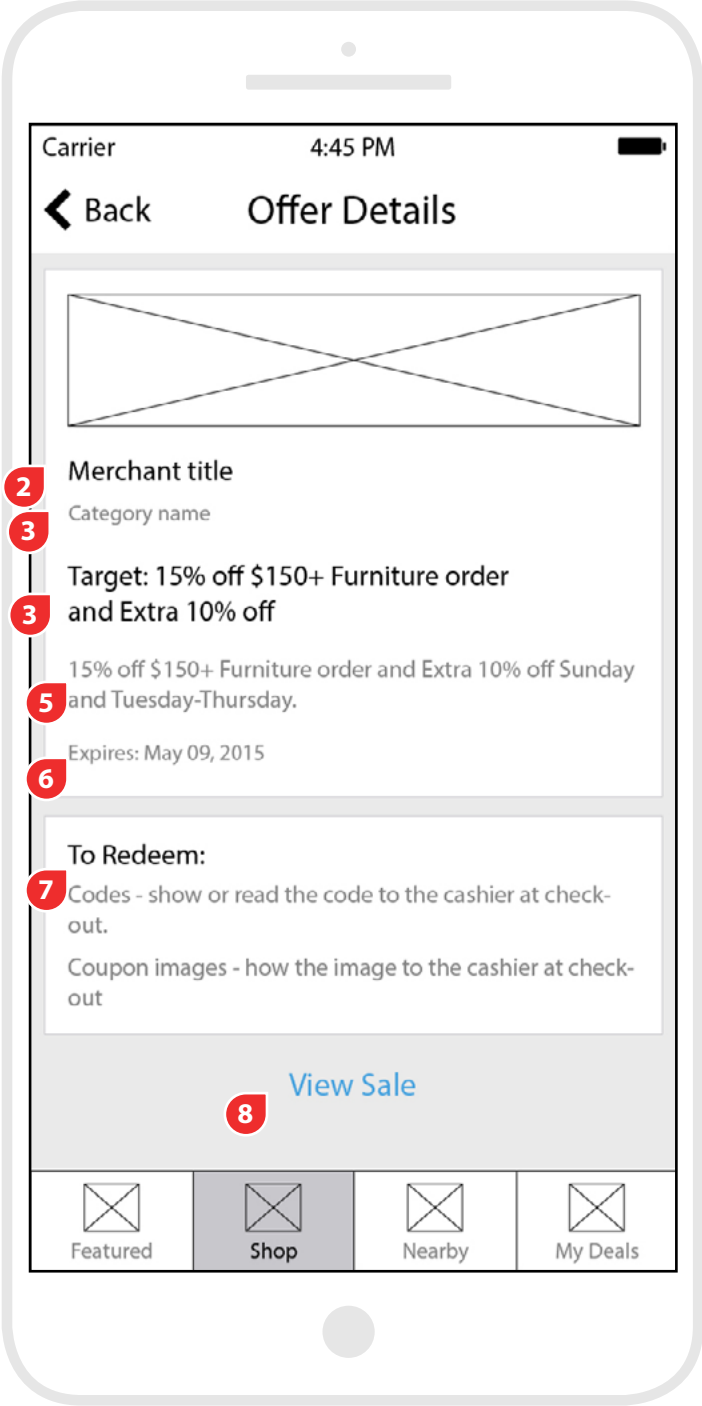


Functional Notes

1. Expanding a merchant reveals all available offers in an accordion view. Tapping the merchant list item again minimizes the accordion view.
2. Newly added offers that weren't published since last expanded, are marked as new with a label, slightly larger list item and shown at the top of the list.

Offer category



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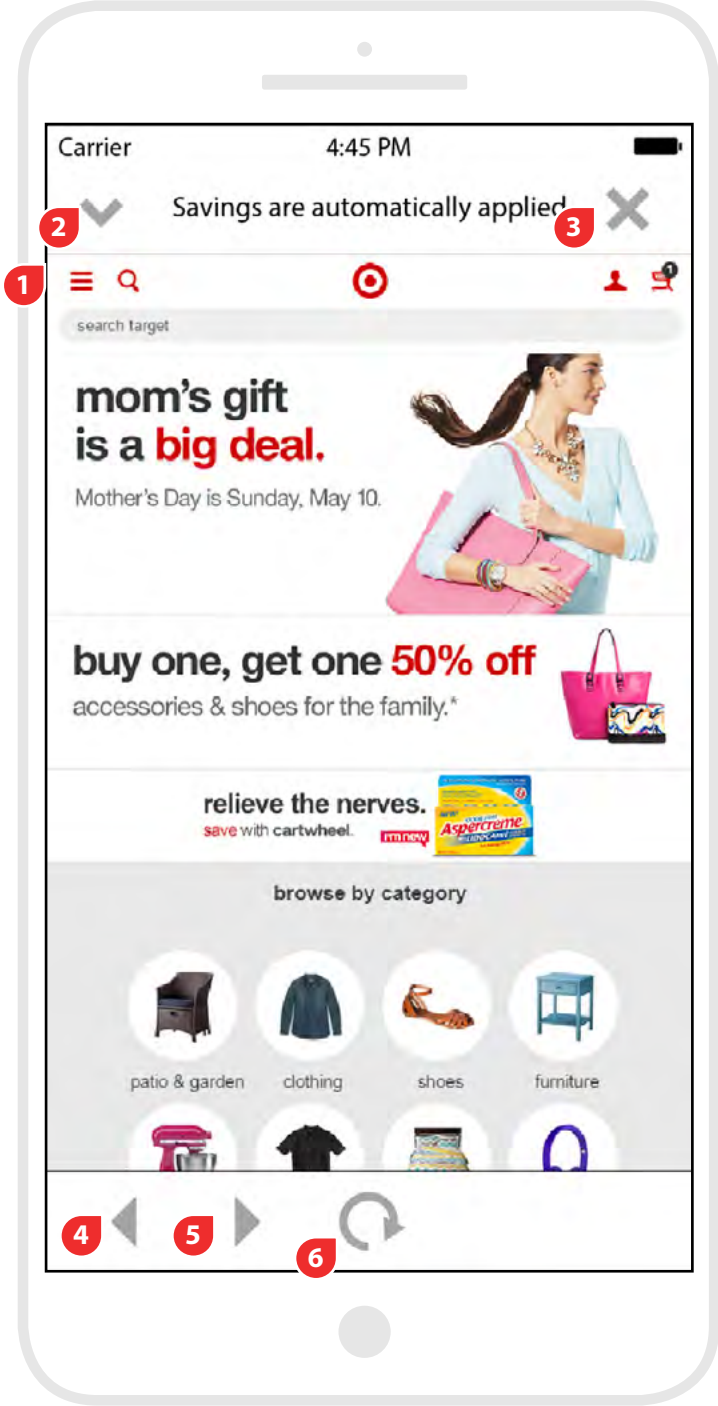
Functional Notes

1. All offers have:
2. Merchant titlles
3. Merchant category
4. Offer title
5. Offer description
6. Expiration date
7. Redemption instructions based on offer type
8. Trackable link

HREF link destination



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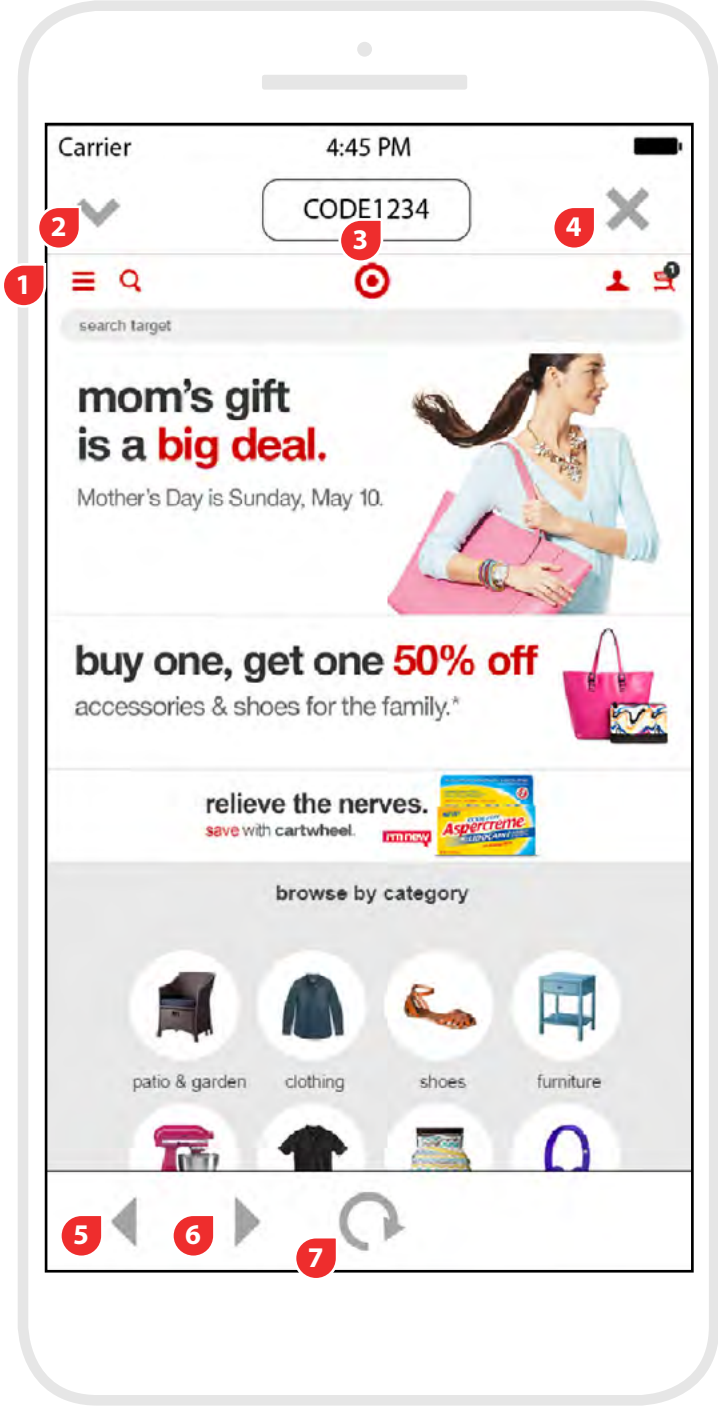
Functional Notes

1. Upon tapping an online offer that is a non-code trackable link, an iframe slides into view from below with the mobile optimized HREF link destination for that merchant.
2. Reveals a dropdown list of the available offers associated with this merchant.
3. Closes iframe (slides down out of view).
4. Back page
5. Forward page
6. Refresh page

Code link destination



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Functional Notes

1. Upon tapping an online offer that is a non-code trackable link, an iframe slides into view from below with the mobile optimized HREF link destination for that merchant.
2. Reveals a dropdown list of the available offers associated with this merchant.
3. Tapping the code copies the code to the clipboard to use at checkout.
4. Closes iframe (slides down out of view).
5. Back page
6. Forward page
7. Refresh page

Live shopping offer dropdown

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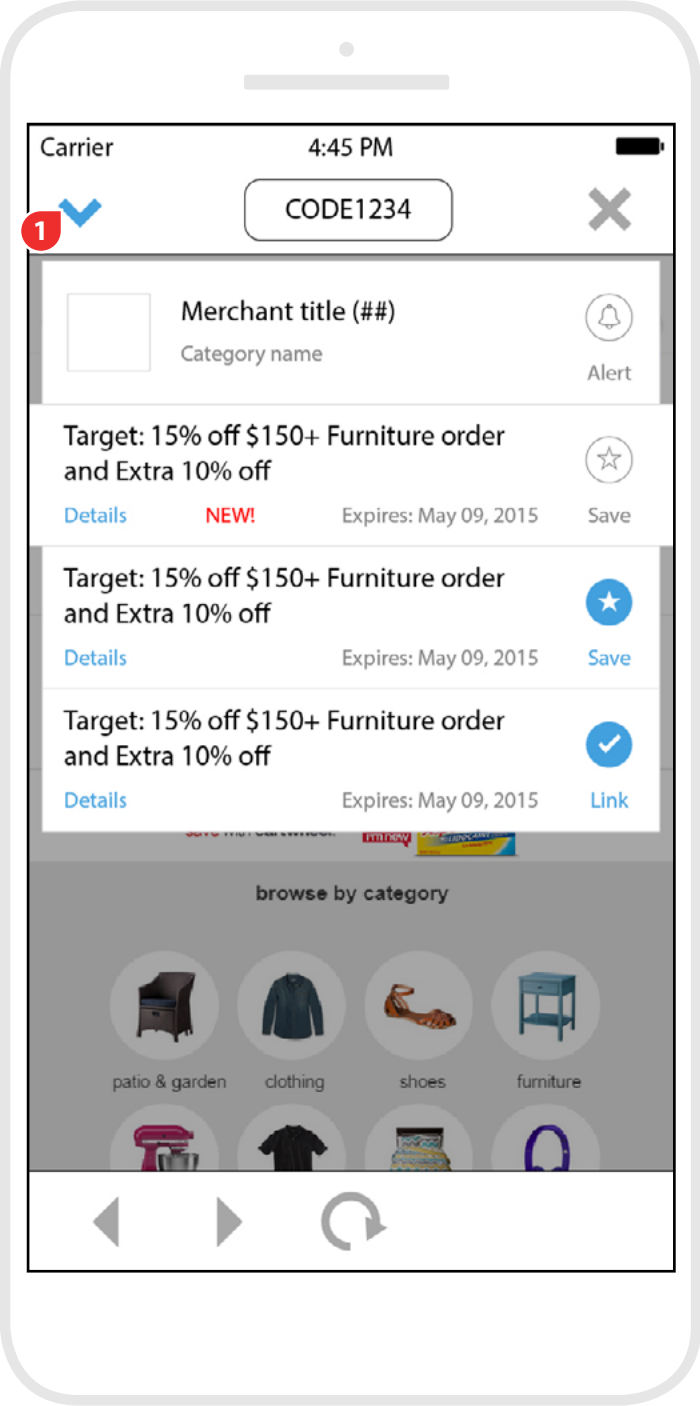

Functional Notes

1. All active offers drop down from above to allow users to save other deals or activate different offers as they shop. Offers are organized just as they would in other list views.

Filtering merchants by keyword

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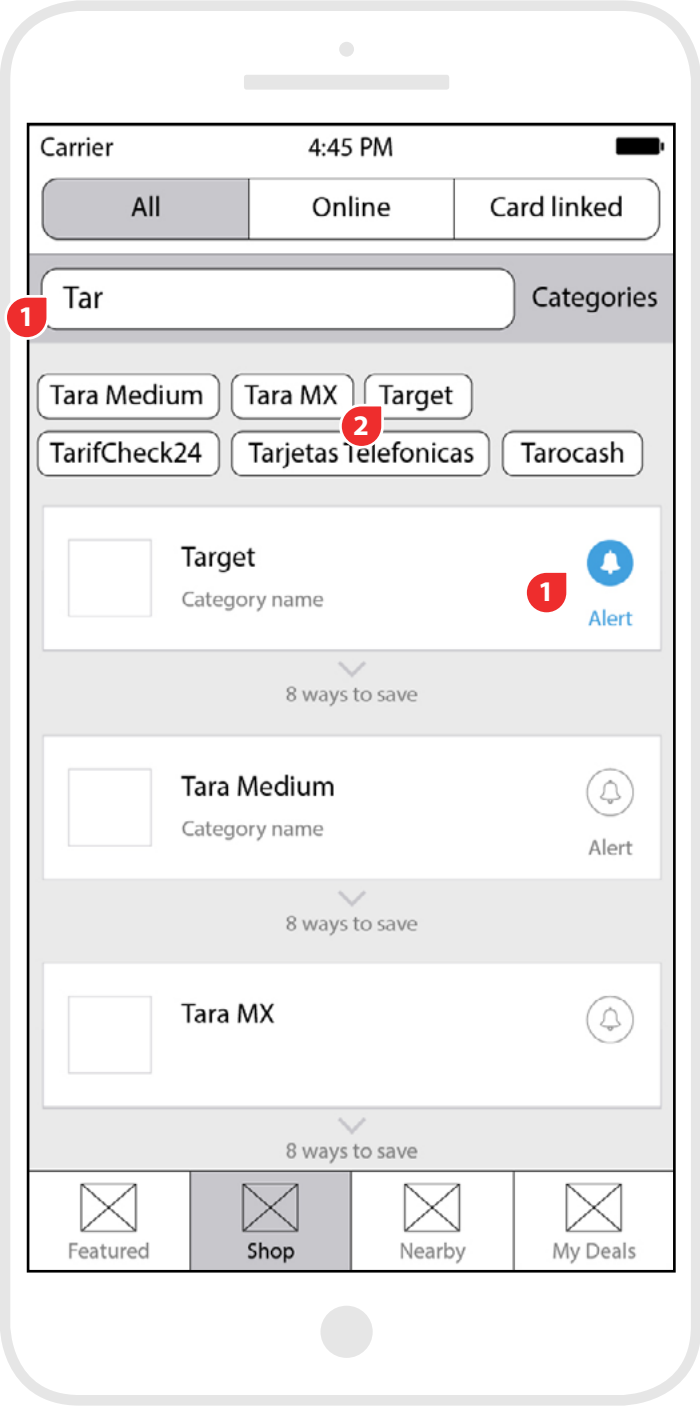

Functional Notes

1. Filter merchants by keyword. Merchants suggestions will be dynamically populated as characters are entered. Merchants with alerts turned on will be placed higher in the list of suggested merchants matching the keyword entry.
2. Tapping any of the suggestions enters the text in the keyword filter and shows the merchant accordion list item.

Filtering merchants by category

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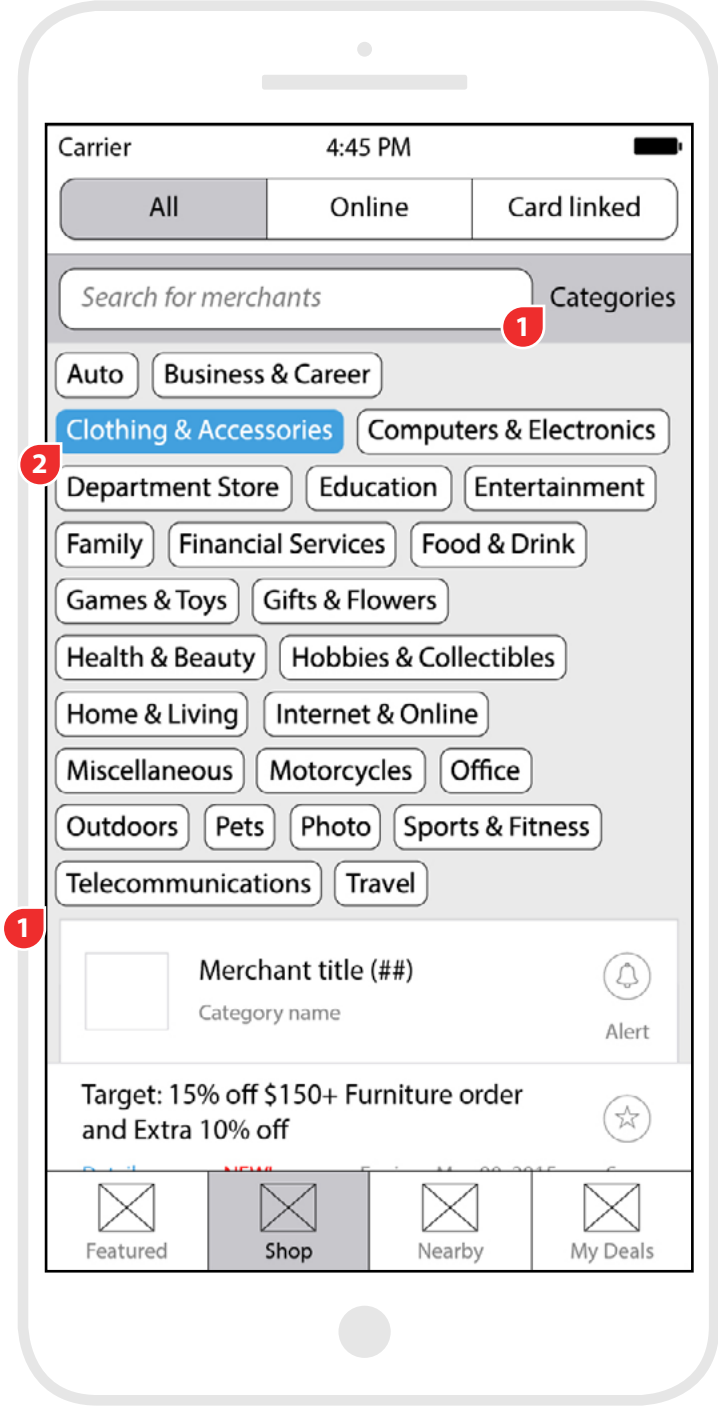
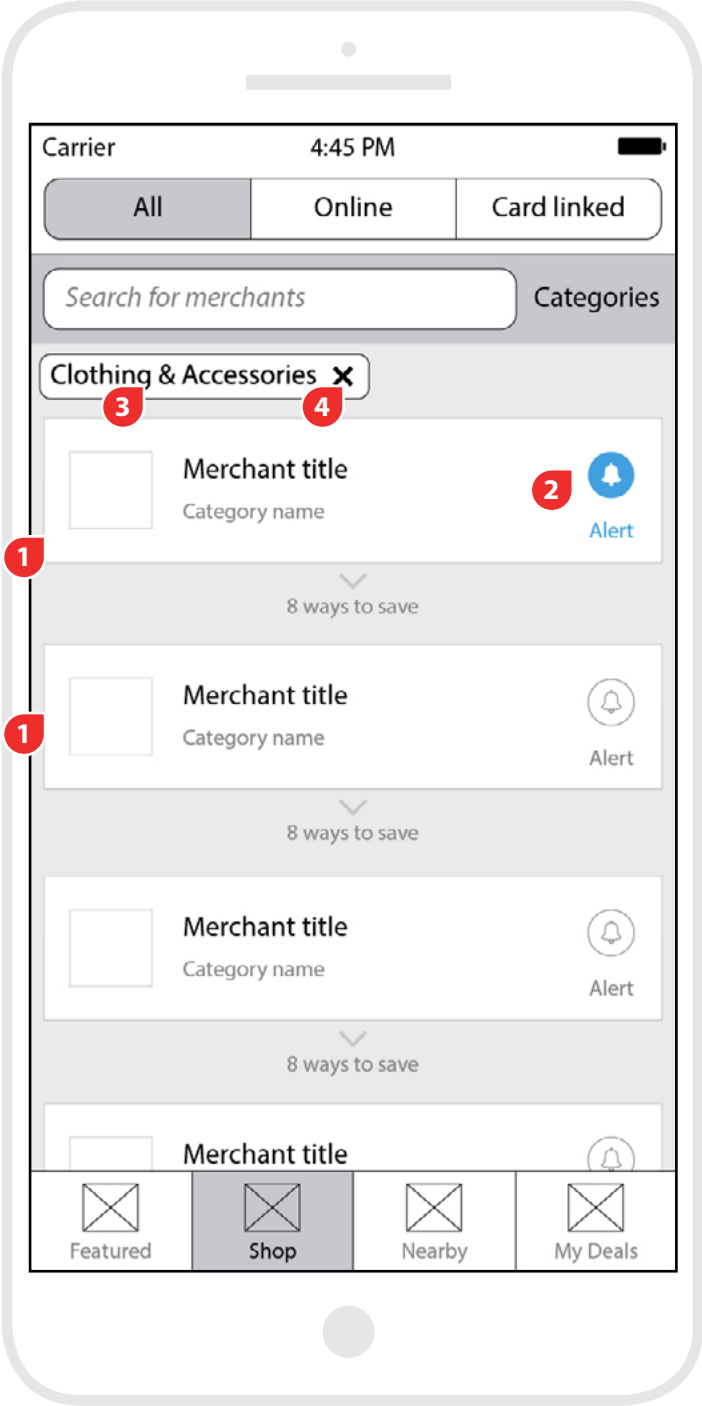


Functional Notes

1. Tapping categories reveals a list of categories to filter merchants by.
2. Tapping a category filters all the merchants by their merchant category.

Merchant display by category



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Functional Notes

1. Merchants are organized alphabetically by the selected category.
2. Merchants with an alert turned on are displayed at the top of the list.
3. Merchant category is shown above the results.
4. Tapping the "x" removes the category filter and re-loads the merchant results.

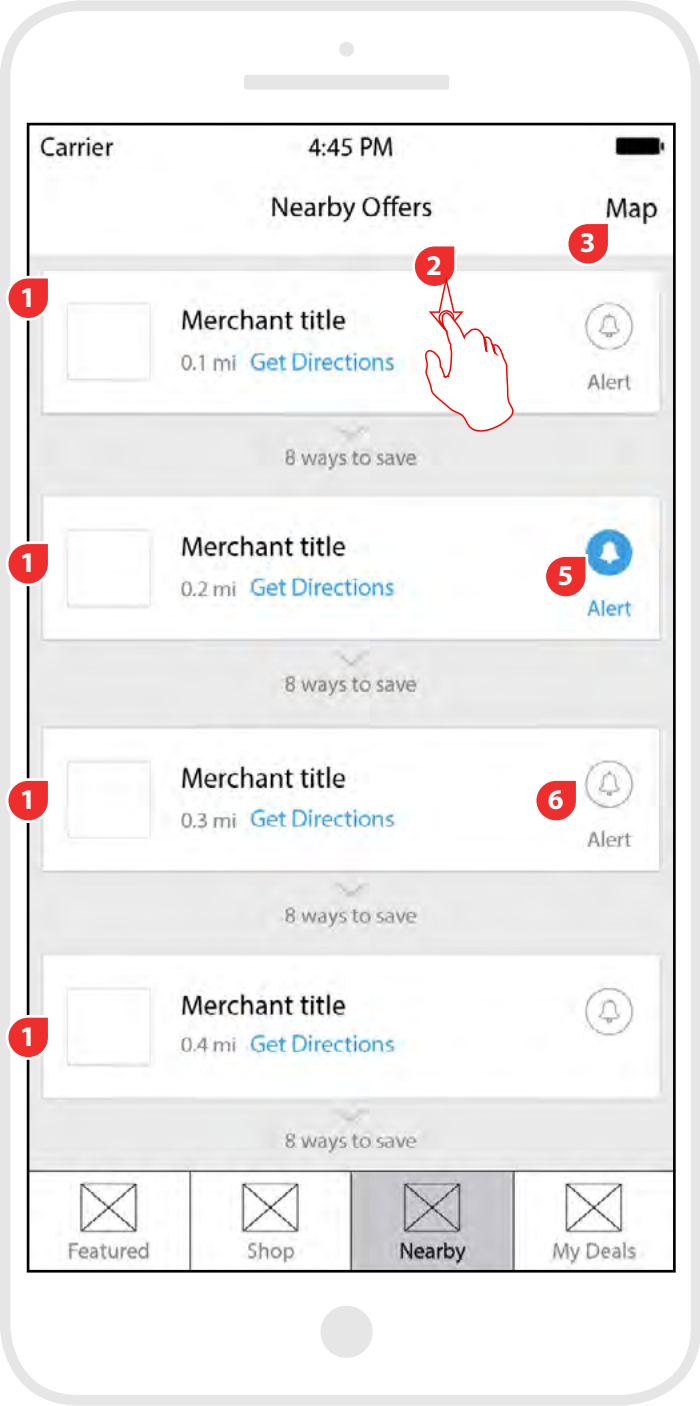
Location based coupons

This section describes functionality associated with nearby offers.

This chapter includes:

- **Nearby offers**
- **Map view**
- **Location based offers**
- **Location based notifications**

Nearby deals



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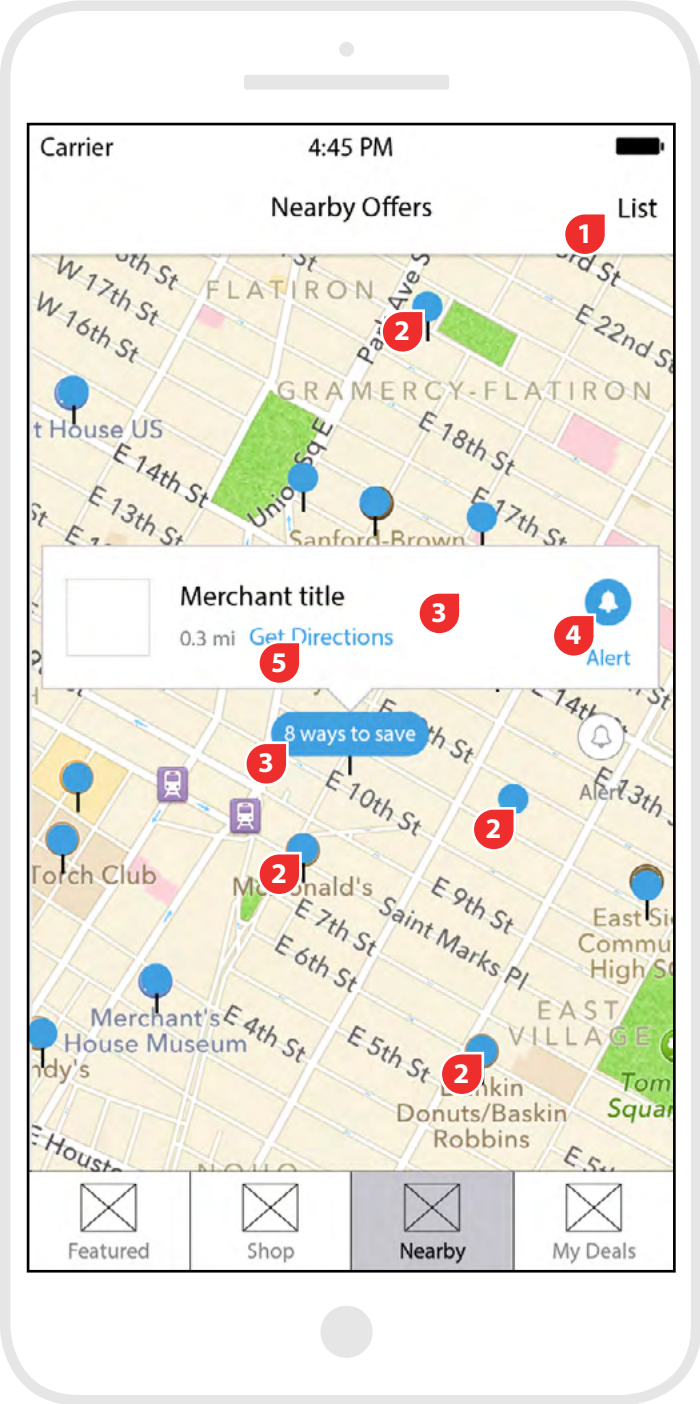
Functional Notes

1. Merchants are organized by proximity of location.
2. Sliding the list down refreshes the list based on your most current location.
3. Opens the map view showing all merchants offering coupons nearby.
4. Opens the map view for that specific merchant.
5. When users have alerts turned on for a merchant, location permissions and notification permissions turned on, users will receive notifications on their phone for available CLO deals at the selected merchant when they are within <1> mile of the physical location.
6. If deal alerts are not selected for a merchant but the user still has location and notification permissions turned on, they can still receive location based alerts for active CLO deals when they are within 0.1 miles of a physical location.

Nearby deals map



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Functional Notes

1. Flips screen back to list view.
2. Tapping any POI marker reveals a tooltip including the same merchant information in the list view. Note: upon tapping the selected POI will pan to the center of the screen to show the tooltip centered.
3. Users can tap "# ways to save" or the tooltip item and are taken to the expanded accordion view for that merchant, showing all available deals.
4. Users can turn on alerts for merchants.
5. Opens the system map view with directions to the POI prepopulated.

Banner notifications w/o interactions

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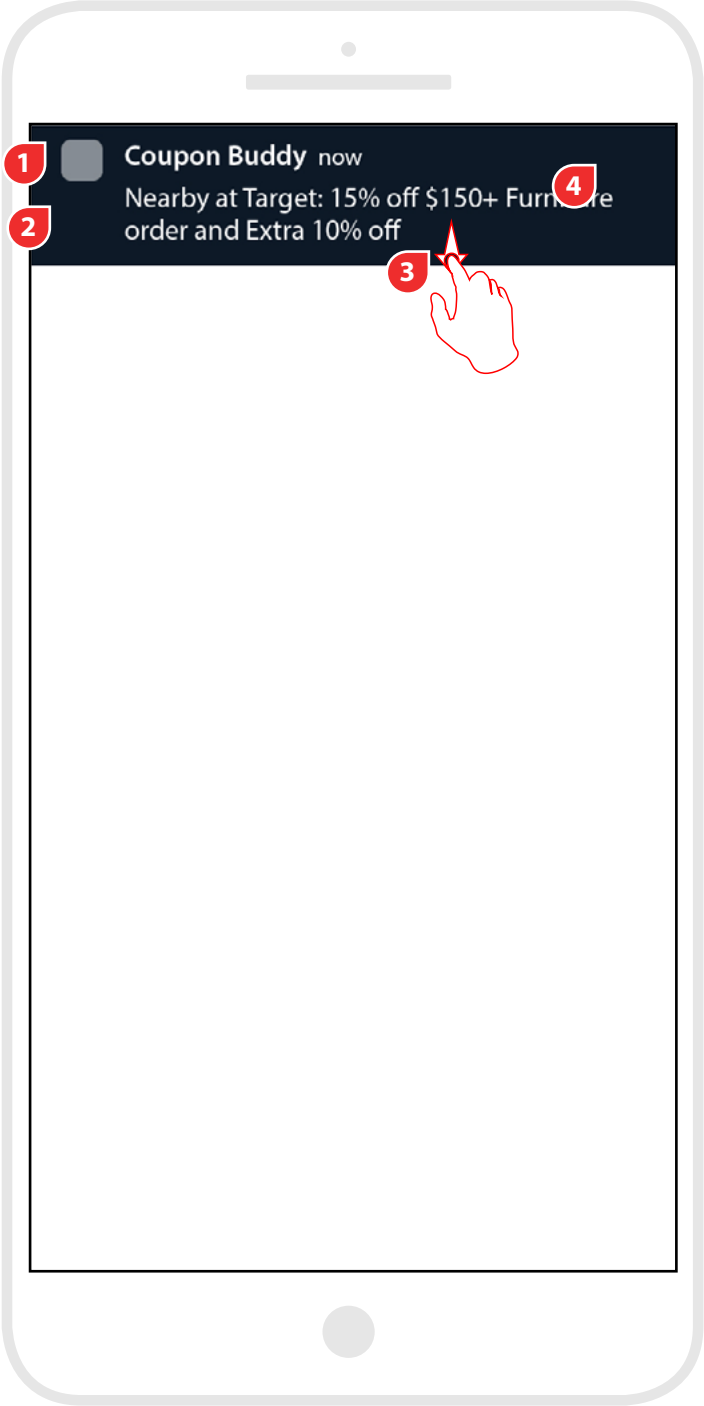

Functional Notes

1. When users have alerts turned on for a merchant, location permissions and notification permissions turned on, users will receive notifications on their phone for available CLO deals at the selected merchant when they are within <1> mile of the physical location.
2. If deal alerts are not selected for a merchant but the user still has location and notification permissions turned on, they can still receive location based alerts for active CLO deals when they are within 0.1 miles of a physical location.
3. for iOS 8 devices, users can swipe down on banner notification to respond quickly to the offer.
4. Tapping anywhere on the notification will link to the app with the nearyby tab selected and merchant expanded for the user to link if desired.

   Note: notifications banners can appear when the screen is in lock mode, in the foreground of other apps and when the coupon app is backgrounded. Users can always alter the type of notifications they receive or remove notification permissions on a per-app basis in their device's settings.

Banner notifications w interactions

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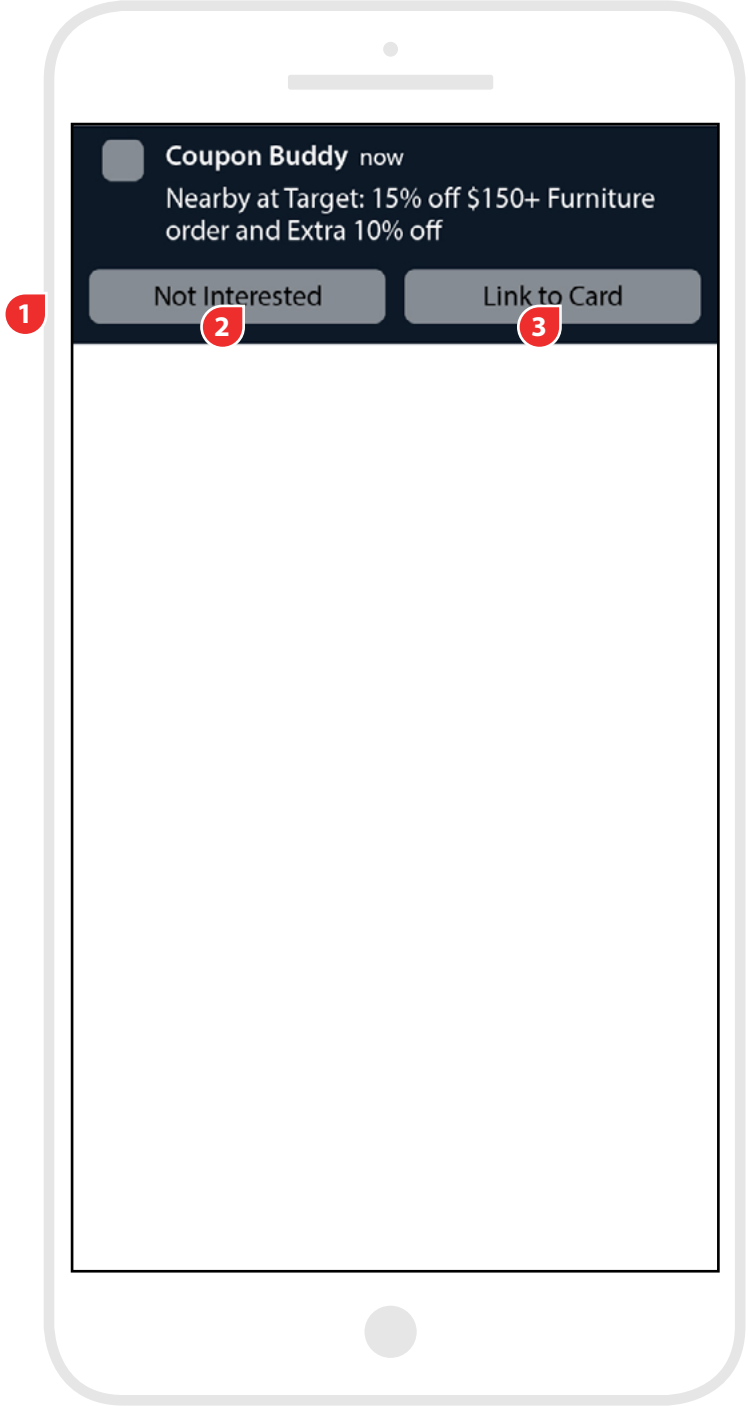
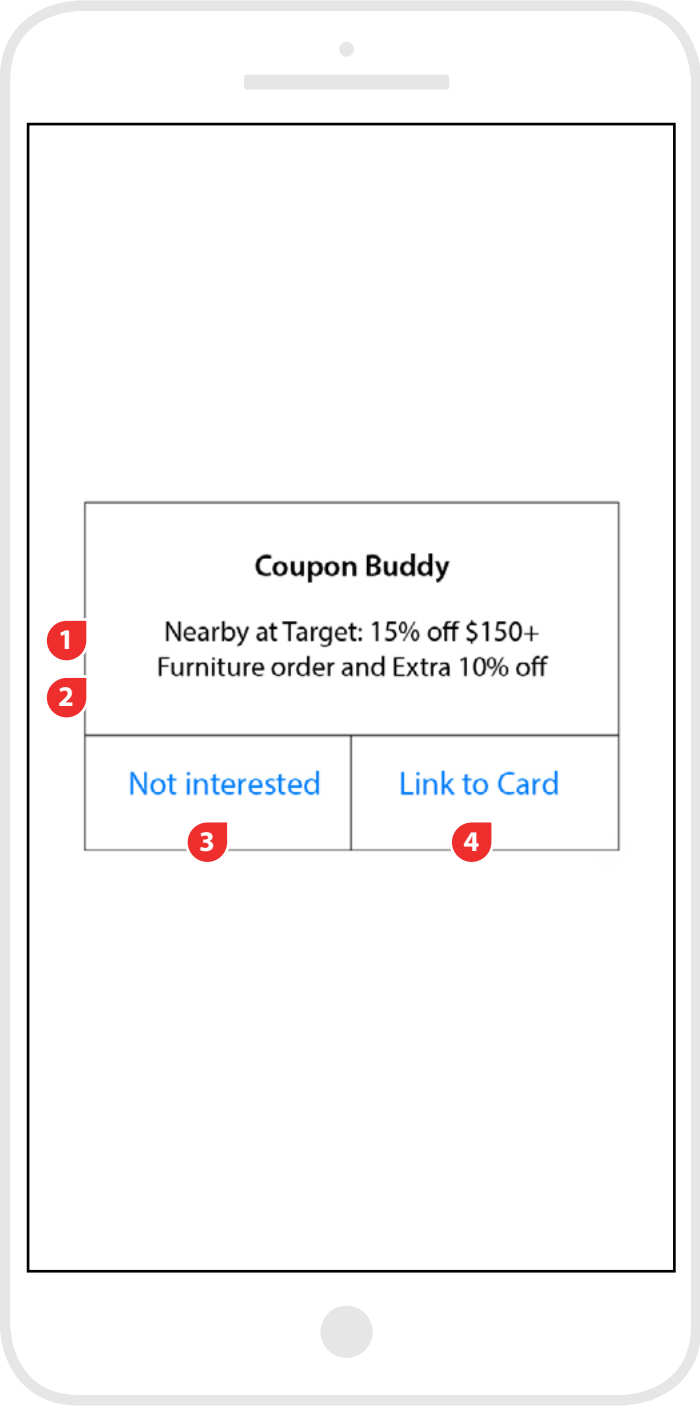


Functional Notes

1. After swiping down on the banner notification, the user will see 2 possible interactions.
2. Tapping “not interested” hides the notification. TBD since we have previously set the cap of location based notifications at a max 3 per hour, we may want to consider adopting a simple algorithm for scoring up and scoring down merchants who have received positive and negative feedback from individual users at specific times.
3. Tapping “link to card” opens the app with the nearby tab selected, the merchant offers expanded and the CLO offer linked.

Alert notification



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Functional Notes

1. When users have alerts turned on for a merchant, location permissions and notification permissions turned on, users will receive notifications on their phone for available CLO deals at the selected merchant when they are within <1> mile of the physical location.

2. If deal alerts are not selected for a merchant but the user still has location and notification permissions turned on, they can still receive location based alerts for active CLO deals when they are within 0.1 miles of a physical location.

3. Tapping "not interested" hides the notification. TBD since we have previously set the cap of location based notifications at a max 3 per hour, we may want to consider adopting a simple algorithm for scoring up and scoring down merchants who have received positive and negative feedback from individual users at specific times.

4. Tapping "link to card" opens the app with the nearby tab selected, the merchant offers expanded and the CLO offer linked.

   Note: notifications alerts can appear when the screen is in lock mode, in the foreground of other apps and when the coupon app is backgrounded. Users can always alter the type of notifications they receive or remove notification permissions on a per-app basis in their device's settings.

Weekly Email notifications and alerts

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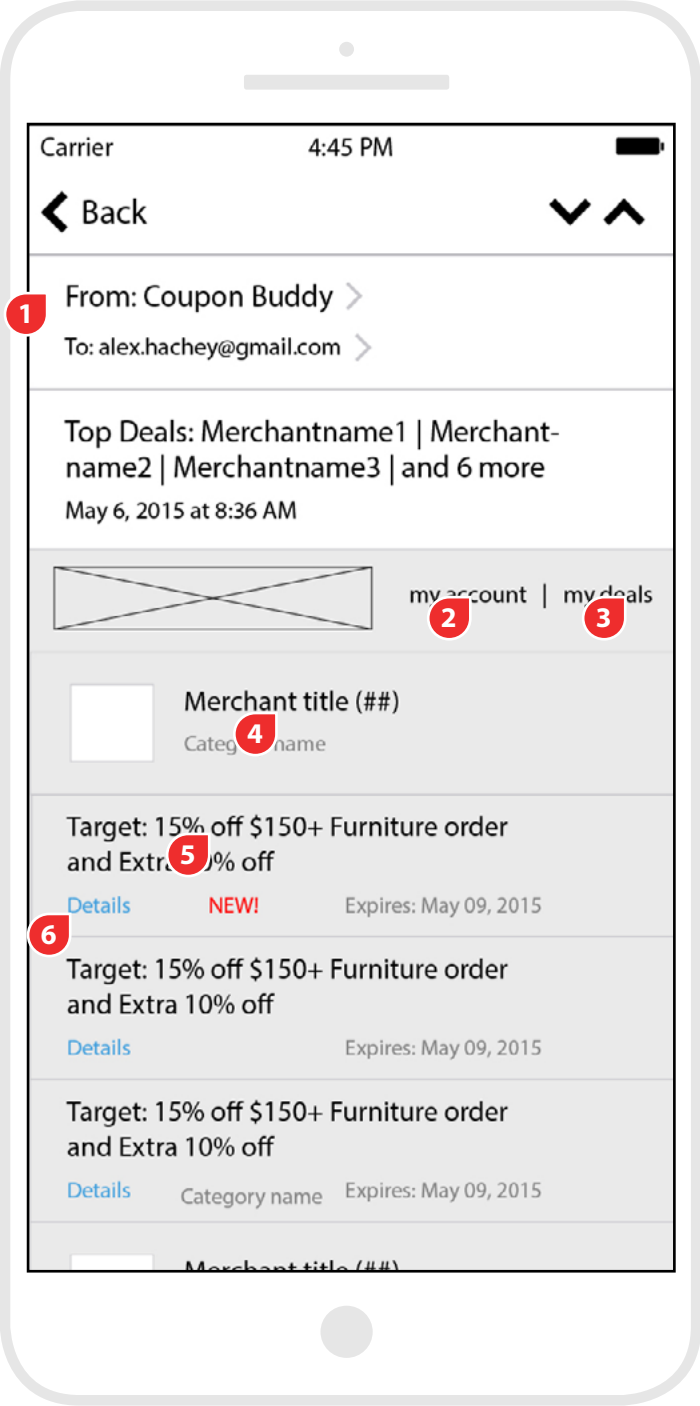

Functional Notes

1. In the new registration screen, the permission to receive weekly offers is by default positioned to "on." This can be adjusted in the notifications screen. When this is "on" the user will receive a weekly email from Coupon Buddy showing all the featured coupons and all the coupons for the merchant he/she created alerts for. Merchant with alerts will be organized higher in the list, alphabetically, with the newest deals positioned highest on the list.
2. Opens the app with the account screen in view.
3. Opens the app with the "my deals" tab selected.
4. Opens the app with the shopping tab selected and the merchant expanded.
5. Opens the app with the iframe of the shopping destination in view.
6. Opens the app with the offer details in view.

Account settings

This section describes functionality associated with a user account. Some functionality will be available to users who have not registered or signed in, including basic online shopping using clickable links and codes. Any additional functionality includes and account and OS permissions.

This chapter includes:

- **My deals**
- **Settings**
- **Account w/o linked card**
- **Linking cards (non-tutorial method)**
- **Account w linked card**
- **Logging in/out**
- **Forgotten password**
- **My location permissions**
- **My notification permissions**

Accessing settings through my deals

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By Alex Hachey
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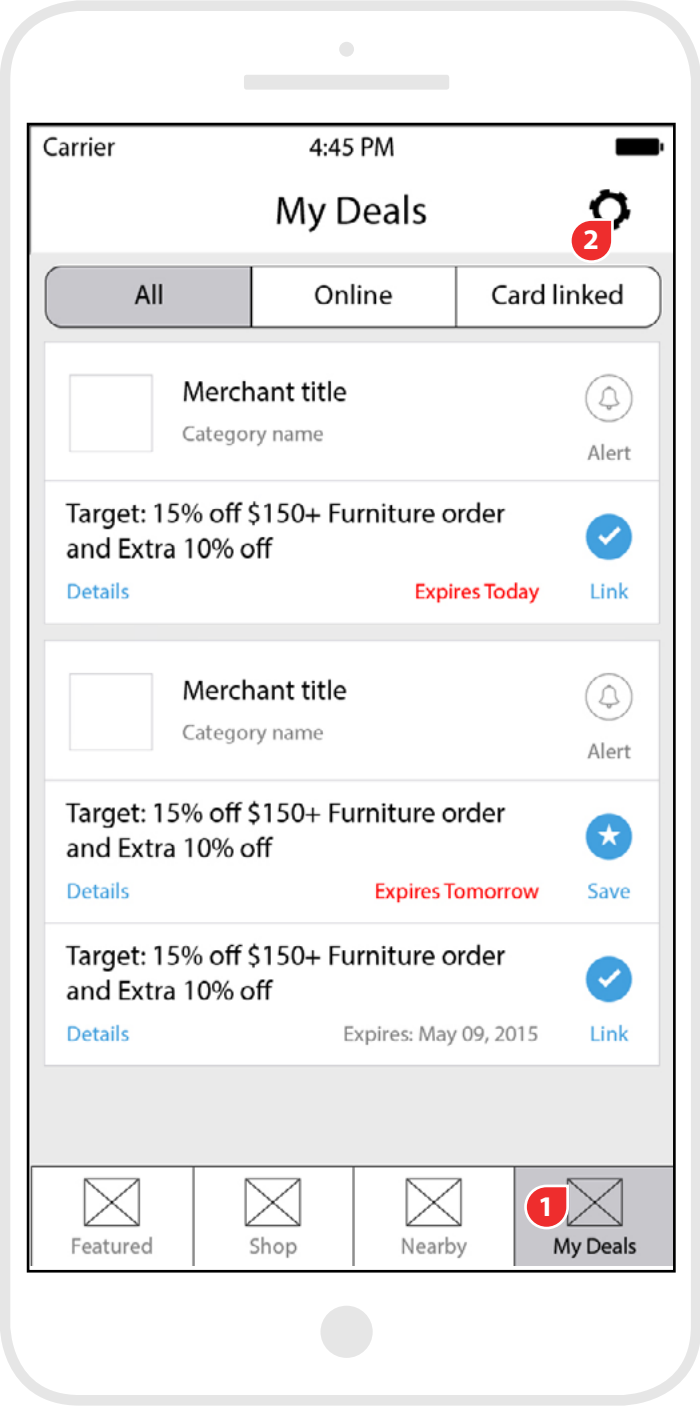
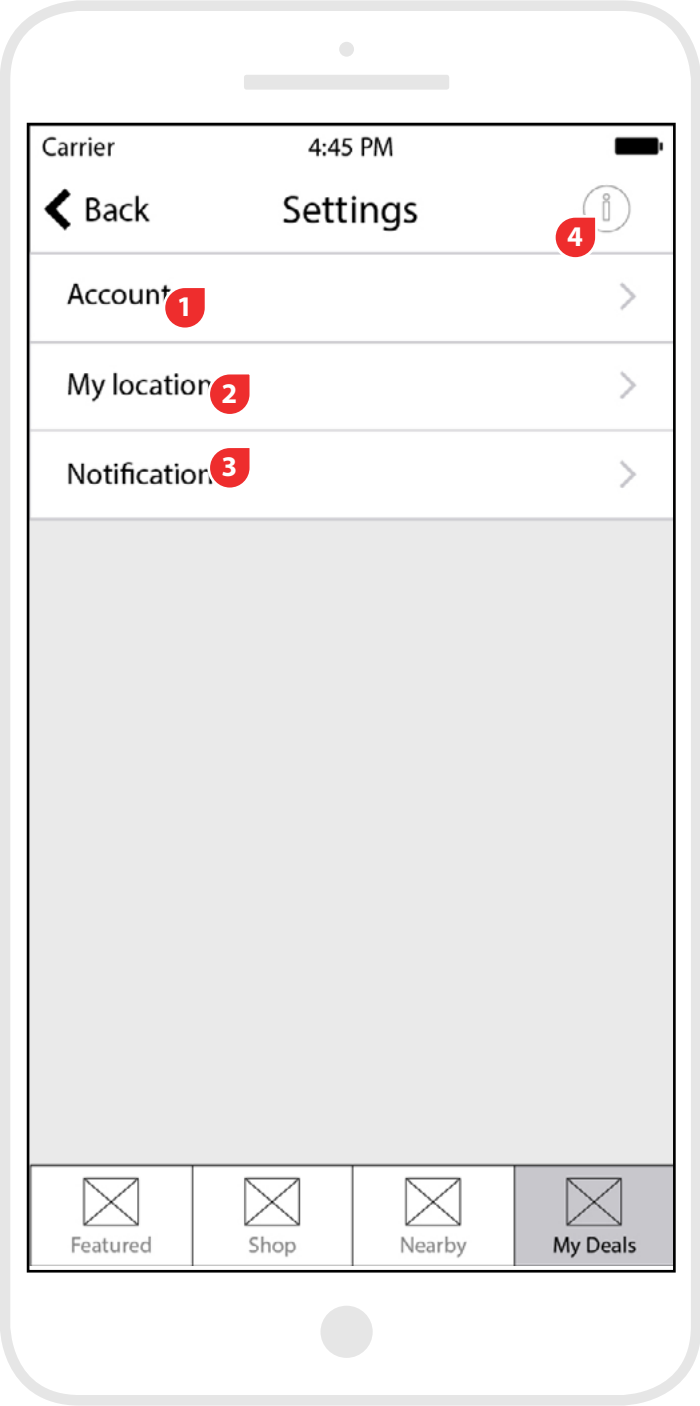
Social Growth TECHNOLOGIES



Functional Notes

1. To access settings the user must tap "my deals."
2. Links to settings screen.

Settings



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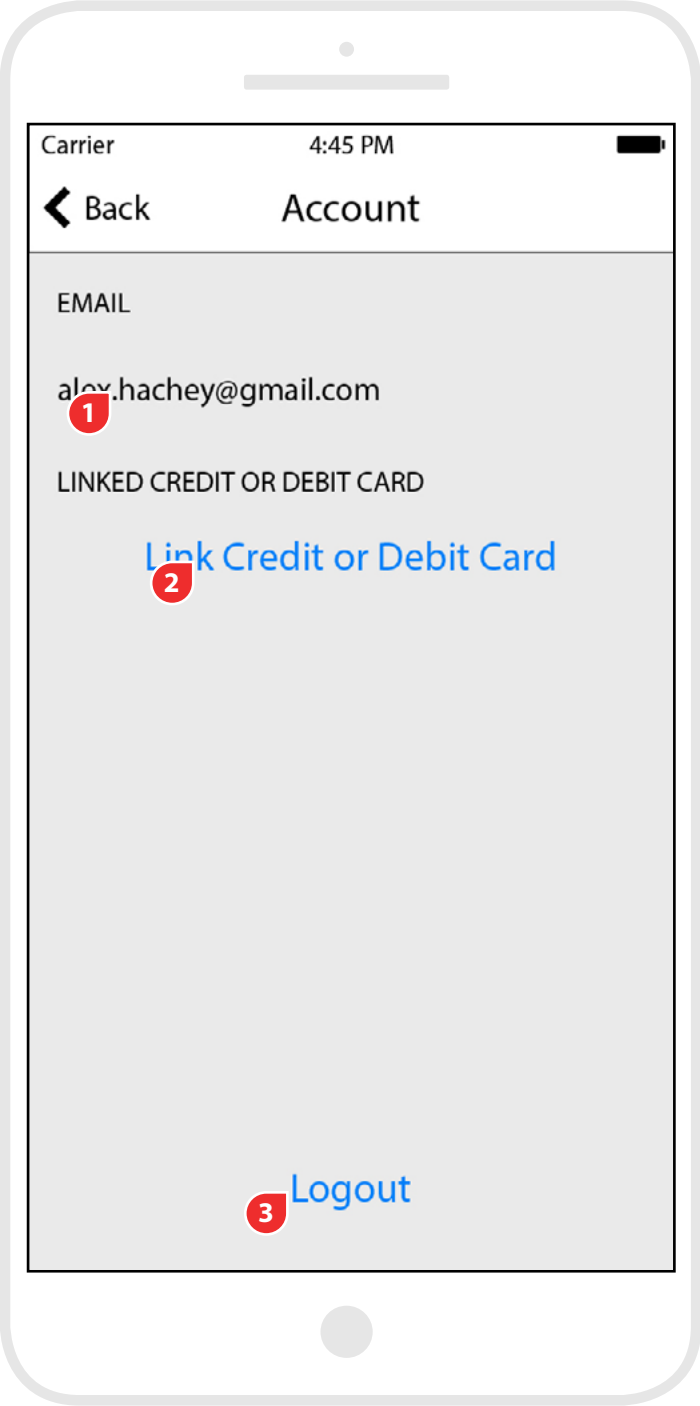
Functional Notes

1. Account screen
2. My location permissions
3. My notification permissions
4. Thge "help screen" button is shown here and the featured screen.

Account w/o linked card



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Functional Notes

1. The email is used from the registration. The email cannot be edited and always acts as the email for admin communication.
2. Link card screen (non-tutorial). The link card tutorial screen only appears when users try to link an offer with no card on file.
3. Logs user out.

Linking a card - non-tutorial

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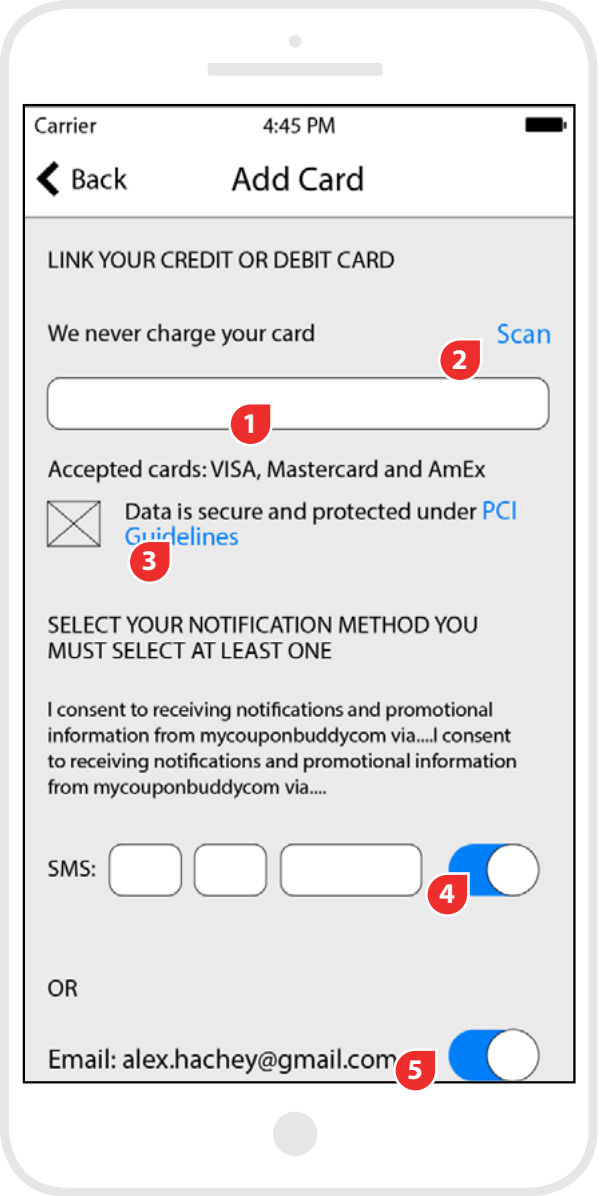
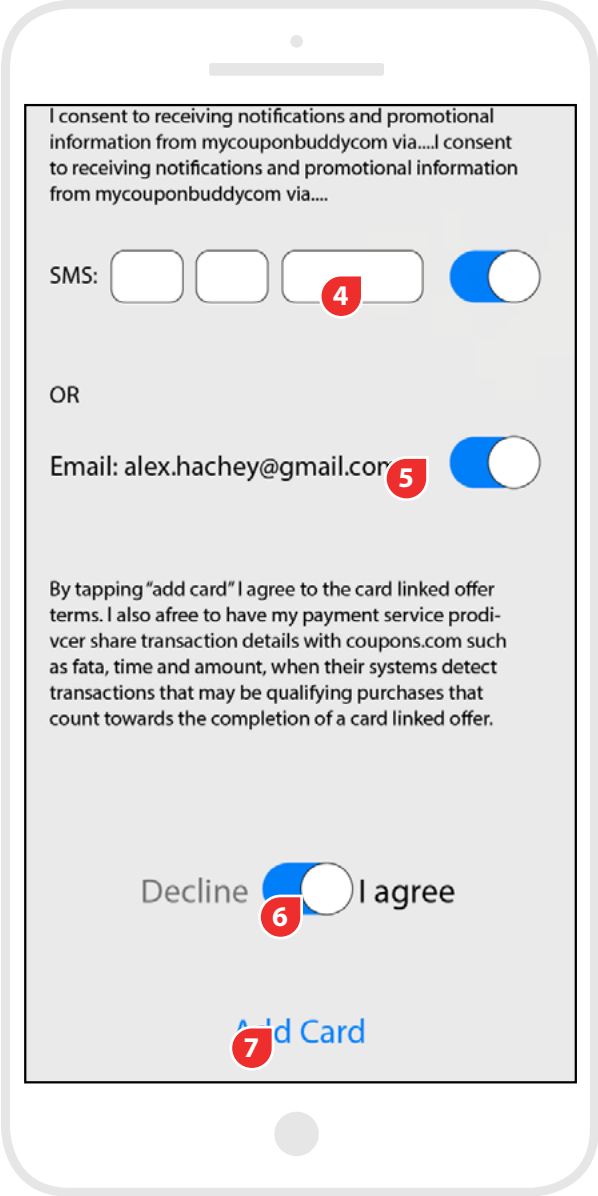
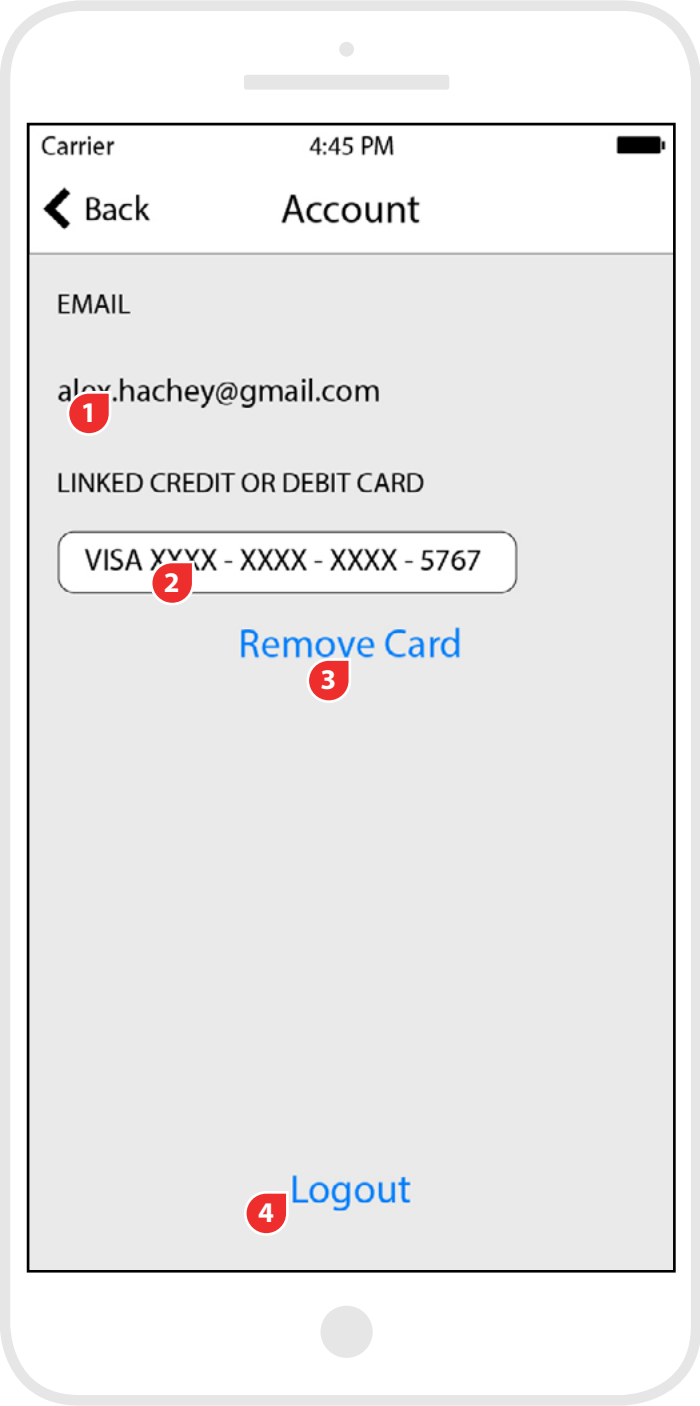




Functional Notes

1. Users can manually enter their card number.
2. Users can scan their card using card.io tools- upon positioning in the cross-hairs it will automatically retrieve the card number and populate in this area.
3. Links to static screen showing PCI standard security guidelines.
4. Users can opt in to receive SMS messages when CLO's have been redeemed and savings deposited. Users must manually enter their phone number.
5. By default the email is prepopulated, turned on and used as the primary method of notification. At least one method of notification must be selected.
6. A user must agree to the terms in order to add their card.
7. Adds the card number to the file and returns to the account screen.

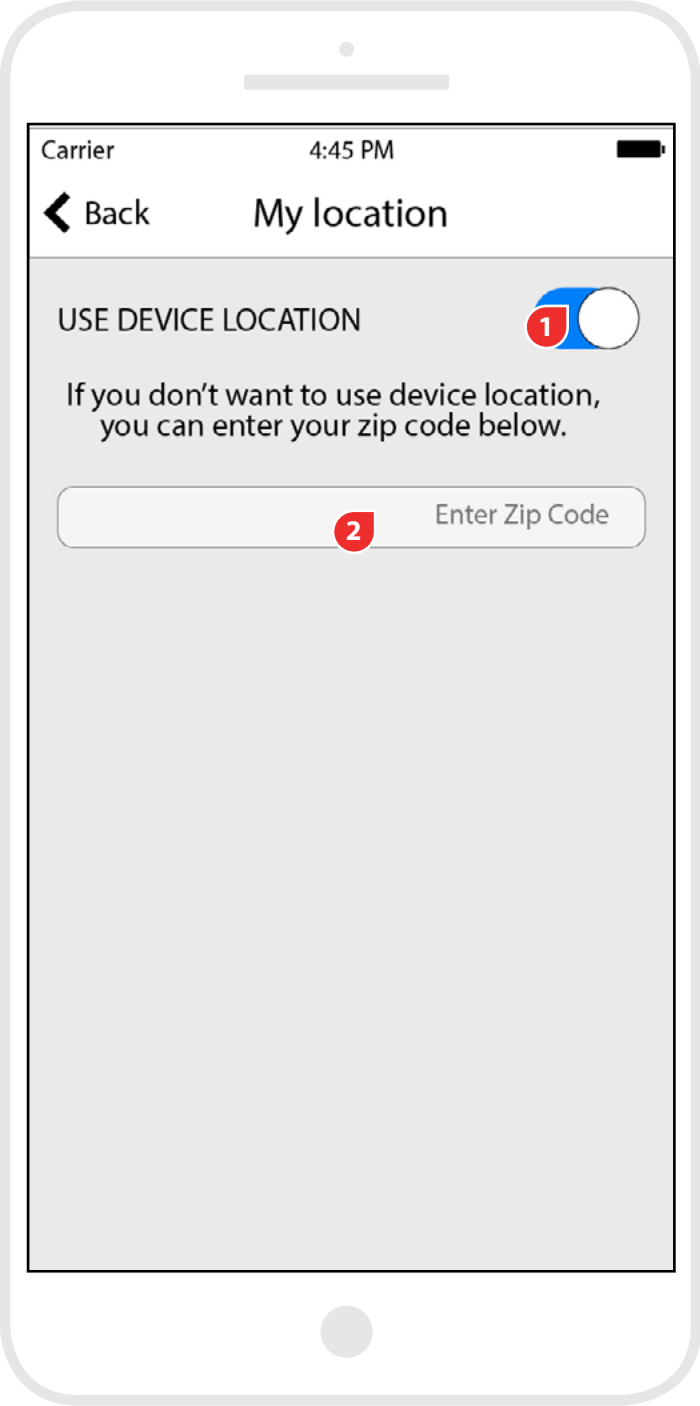
Account w/ linked card



Functional Notes

1. The email is used from the registration. The email cannot be edited and always acts as the email for admin communication.
2. The user cannot edit the card number here.
3. Removes the card on file with the account. The user can re-add the card to the account if needed.
4. Logs user out.

My location settings - on



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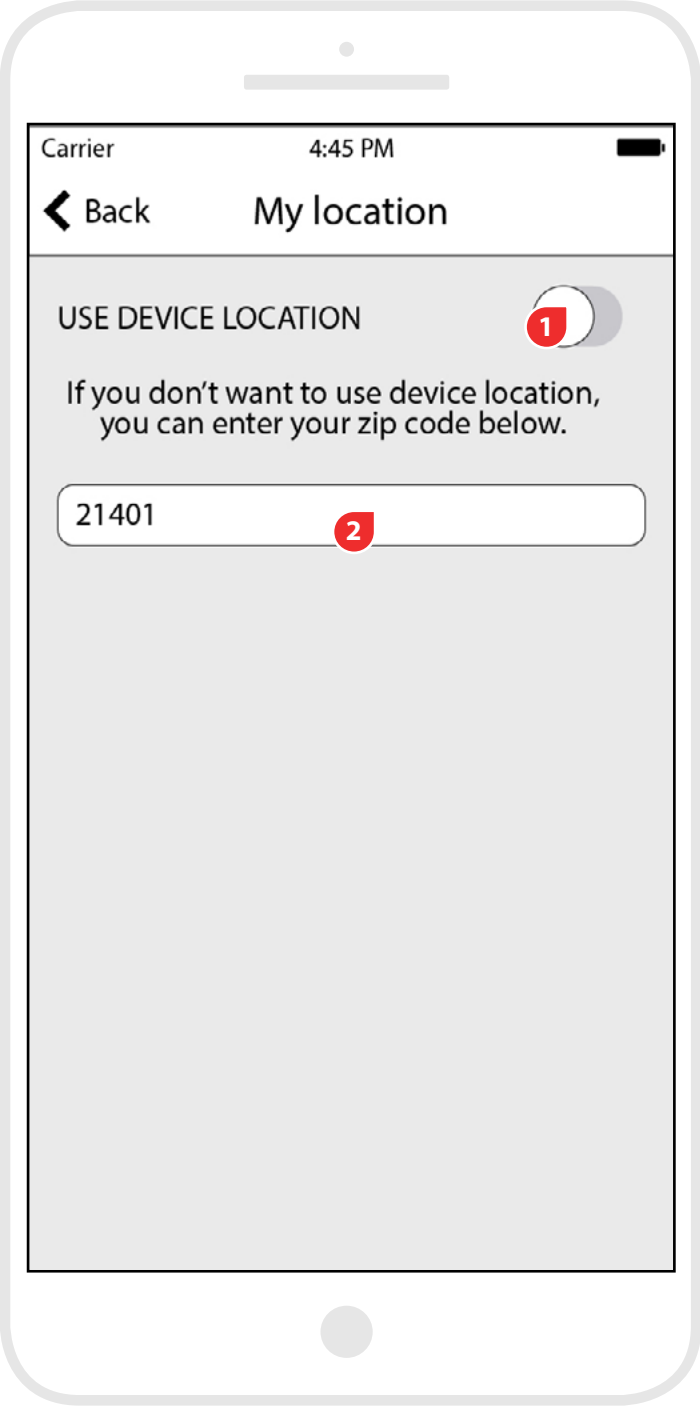
Functional Notes

1. If a user grants permission for the app to use the device location, the toggle is switched on.
2. When on, a user can't default to use their zip code to show nearby deals.

My location settings - off



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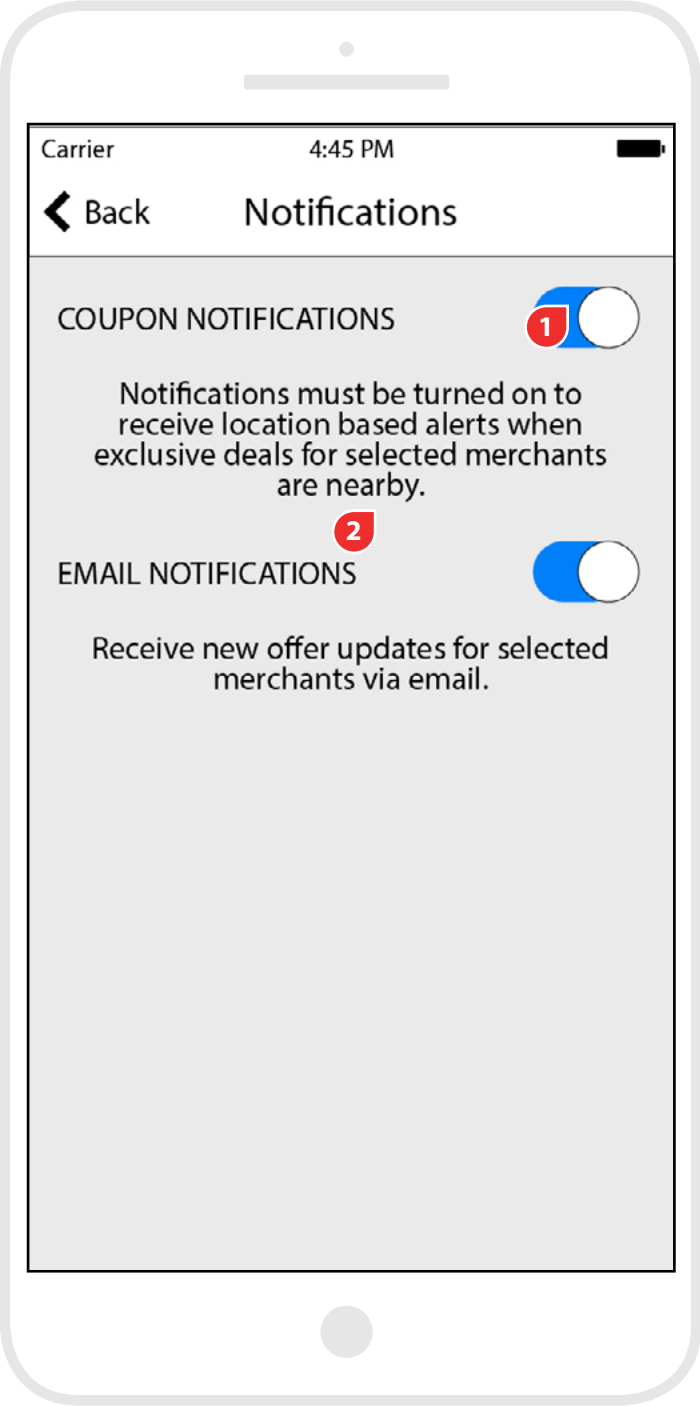
Functional Notes

1. If a user does not grant permission for the app to use the device location, the toggle is switched off.
2. When off, a user can choose to manually enter their zip code to show merchant offers around the entered zip code. With the zipcode enabled, the nearby offers will be organized by best fit proximity to the zip and organized alphabetically if closest proximity cannot be identified.

My notification settings



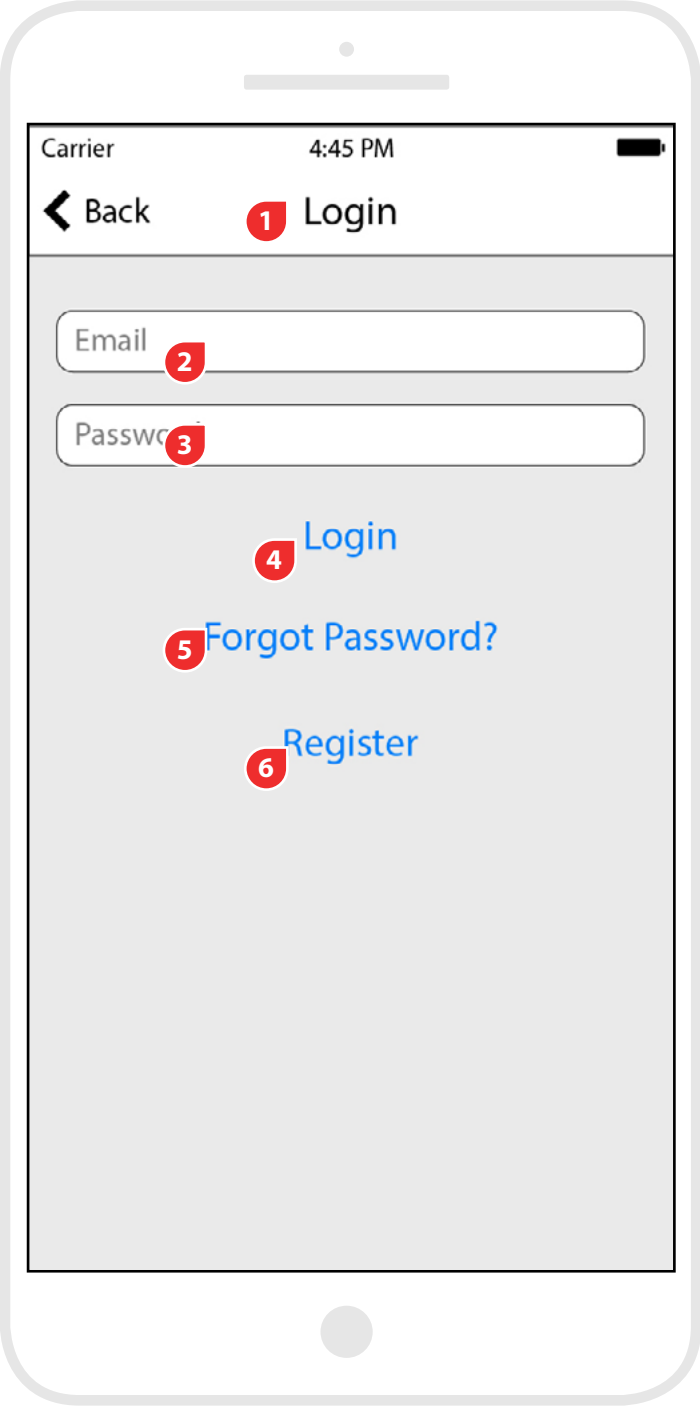
Functional Notes

1. If a user grants permission for the app to send notifications the toggle will be switched on, if not it will be switched off and no notifications will be sent.

2. Upon new registration, email notifications allowing new offer updates is switched on. A user can switch it off here. Once on, a user will receive weekly featured deals and deals from any merchant with an alert turned on. If switched off, a user will not receive any weekly emails.

   Note: if a user redeems a CLO, they will still receive email notifications informing the user that the offer has been redeemed, and savings distributed to their account. Turning off email notifications will not change that.

Login



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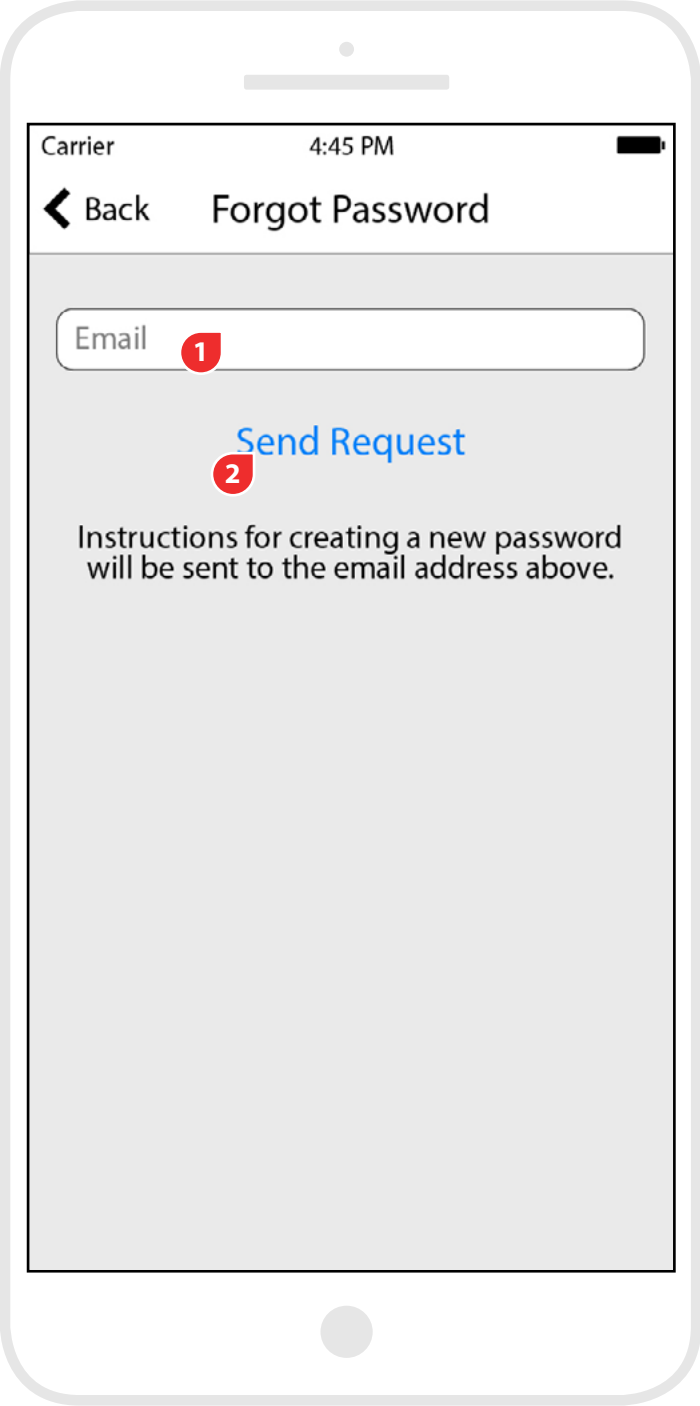
Functional Notes

1. When a user logs out, the account destination from the settings screen will be replaced with a login screen.
2. User must input their registered email address. If the input email is incorrect when "login" is tapped, a message above the email field will say "Email doesn't match any accounts on record."
3. User must input their registered password. If the input password is incorrect when "login" is tapped, a message above the email field will say "Password doesn't match the Email provided."
4. Logs the user in if the email and password are correct.
5. Forgot password screen.
6. New registration screen.

Forgot password



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Functional Notes

1. Input an email on record. If the email provided is incorrect an error message aboce the email field will say "Email provided does not match any on record."
2. Sends an email to the provided address including the user's password on record.