

PROOFPOINT

Training Manual

Prototype v0.3 · May 2026 · Confidential

■ Brand / Client

The paying customer. Signs up, pays ProofPoint directly, and owns all campaign data. Approves agency access.

■ Campaign Manager

The agency operator. Manages campaigns, supervisors, and reporting on the brand's behalf.

■ Supervisor

On-ground data entry. Collects paper tally sheets from reps hourly and inputs batch totals via tablet.

This manual covers every screen in the ProofPoint v0.3 prototype — three roles, updated commercial model, paper tally workflow, and data security commitments.

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01 Getting Started

The ProofPoint prototype is a single HTML file that opens in any web browser. No installation, internet connection, or account setup required. All data is representative — nothing is stored or transmitted.

Opening the prototype

- | | |
|---|--|
| 1 | Locate the file
Find proofpoint-prototype.html — it was sent alongside this manual. |
| 2 | Open in your browser
Double-click the file. Chrome, Safari, Edge, and Firefox all work. Use desktop or laptop for the best experience. |
| 3 | Tap the splash screen
Click anywhere to proceed to the login screen. |
| 4 | Select a test account
Click one of the three credential tiles to fill your email automatically, then hit Sign in. |
| 5 | Explore freely
Navigate using the sidebar (Brand / Manager) or bottom tab bar (Supervisor). |

Tip: To switch roles, refresh the browser (F5 or Cmd+R) and select a different test account.

02 Login & Commercial Model

Understanding who pays for ProofPoint — and why — is central to the design of every billing and access screen.

Commercial structure

The brand / client is the paying customer. ProofPoint bills the brand directly — not the agency. The agency operates the platform on the brand's behalf as a licensed operator. Brands have full visibility over their data and spending. Agencies focus on running the execution.

Role	Who they are	What they pay	Access level
Brand / Client	The company whose product is promoted (e.g. Flavour Brand Co.)	Monthly ProofPoint subscription	Dashboard, analytics, exports, billing, agency management
Campaign Manager	Marketing agency (e.g. ActivateCo) licensed by the brand	Nothing — access granted by brand	Control centre, campaigns, supervisors, reports
Supervisor	On-ground team member at each store location	Nothing	Mobile batch entry app only

Test accounts

Name	Email	Role	Routes to
Thuli Dlamini	thuli@flavourbrand.co.za	Brand	Brand portal — dashboard, analytics, billing
Thabo Nkosi	thabo@activateco.co.za	Manager	Manager dashboard — control centre, supervisors
Nomsa Abrahams	nomsa@activateco.co.za	Supervisor	Supervisor mobile app — batch entry

Note: In production, accounts are created by an administrator. Brands set up their account and grant agency access. Users receive an invite email with a one-tap setup link. Roles are assigned at account creation and cannot be changed by the user.

03 Brand / Client Portal

The brand portal is what the paying customer sees. Clean, data-rich, and fully self-service — the brand never needs to ask the agency for an update.

Sidebar navigation

Section	What it does
■ Dashboard	Live KPIs — total interactions, confirmed sales, conversion rate, sales uplift, hourly trend chart, demographic donut charts. Updates every few seconds.
■ Analytics	Deeper breakdown — top performing segment, best location, peak hour, location comparison table with uplift bars.
■ Campaigns	Archive of all campaigns run on the brand's behalf. Active at top, archived below.
■ Exports	Self-service downloads — demographics PNG, uplift PNG, aggregate CSV, full PDF report. All carry a data ownership notice.
■ Billing	Current plan, monthly cost, next invoice date, list of authorised agency operators, and upgrade options.

Billing screen — key commitments

- The brand is the account holder — ProofPoint bills them directly, not the agency.
- Authorised agency operators are listed explicitly — the brand controls who has access.
- Data ownership is confirmed on the plan card: the brand owns all campaign data.

Note: The brand cannot see individual supervisor names, raw tally sheets, or shift details. They see only aggregated, anonymised campaign metrics. Enforced at the database level.

04 Campaign Manager Dashboard

The manager experience is for the agency's operations team. They configure campaigns, assign supervisors, monitor live performance, and generate client reports — all on behalf of the brand.

Sidebar navigation

Section	What it does
■ Control centre	Real-time overview of all active campaigns. Hourly batch chart, alert feed, location performance table. Interaction counter updates live as supervisors submit batches.
■ Campaigns	All campaigns across all brand clients. Each card shows brand name, location count, supervisor count, and live KPIs.
■ Supervisors	All supervisors across active campaigns. Name, location, interactions today, and batch count. Paper tally model status shown prominently.
■ Reports	PDF report builder — section toggles, live preview, download and email-to-brand buttons.
■ Integrations	Sales data source config — supervisor-confirmed (default), CSV upload, promo code generator.

Agency access is brand-scoped. A manager at ActivateCo can only see campaigns they are authorised to manage. If they work with competing brands, each brand's data is completely isolated — cross-referencing is architecturally impossible.

05 Supervisor — Mobile App

The supervisor is the data entry point for the field operation. One per store location. They manage paper tally collection and input batch totals via tablet.

Tab bar navigation

Tab	What it does
■ Home	Shift hub — campaign brief, check-in/out, running totals (interactions, sales, conversion), and paper tally protocol reminder.
■ Log batch	Core supervisor screen. Tally counters for age range, gender, and outcomes. Batch total auto-calculated. Submit fires live dashboard update.
■ Stats	Location stats — interactions, purchases, conversion rate, batch count, reps on floor, location rank vs. other sites.
■ History	All batches submitted today — batch number, interaction count, purchase count, conversion rate, timestamp.

Log Batch screen — field by field

Field	What to enter	Why it matters
Age range counters	Total interactions per age bracket pulled from the paper sheet for this batch.	Builds the demographic age chart on the brand dashboard.
Gender counters	Total interactions by gender for this batch.	Feeds the gender donut chart in brand and manager analytics.
Outcome counters	Total Purchased, Declined, and Maybe for this batch.	Purchased = confirmed sales KPI. Maybe tracks follow-up potential.
Batch total	Auto-calculated from outcome counters.	Confirms totals match the paper sheet. Mismatch signals a transcription error.
Submit batch	Saves and pushes to all live dashboards simultaneously.	Manager and brand see the update within seconds.

06 Paper Tally Workflow

Reps use paper in the field. Supervisors collate and input. This keeps reps focused on customers and centralises data quality through a single accountable person per location.

Step-by-step process

1	Rep engages a customer The field rep pitches the product, notes age, gender, and outcome on their paper tally sheet. No device required.
2	Hourly collection At the top of each hour, the supervisor collects completed sheets from all reps. Reps receive fresh sheets and continue working.
3	Supervisor inputs batch Supervisor opens Log Batch on their tablet and enters aggregate totals from the collected sheets — age counts, gender counts, outcome counts.
4	Live update fires Within seconds of submitting, the manager's Control Centre and the brand's Dashboard both update.
5	Sheets retained All paper sheets are kept until end of day as a physical audit trail. Supervisor checks out at shift end.

Tip: The paper model uses hourly resolution rather than per-interaction timestamps. For all reporting purposes, hourly batch data is more than sufficient.

Note: If a supervisor misses a scheduled hourly collection, they can input a combined batch covering the missed period. The system timestamps submission rather than the original interaction time — note this in campaign reports if it occurs.

07 Data Security & Ownership

The answers to these questions must be communicated clearly to every brand client before they sign a subscription.

Q: Who owns the campaign data?

The brand / client owns all data generated during their campaigns. ProofPoint is a data processor — it stores and presents the data on the brand's behalf but has no ownership claim. This is stated explicitly in the terms of service.

Q: Can a competitor access my data?

No — enforced at the architecture level. Each brand's data is stored in isolated partitions with row-level security (RLS) policies at the database layer. A query from one brand account cannot return another brand's data. This is a hard technical constraint, not a policy.

Q: Can the agency see data across multiple brand clients?

A manager can only see campaigns they are explicitly authorised to manage by the relevant brand. If an agency works with competing brands, data is completely isolated — cross-referencing is architecturally impossible.

Q: Does ProofPoint use client data for any other purpose?

No. ProofPoint contractually commits to never aggregating, cross-referencing, or using client data for internal analytics, product training, benchmarking, or any other purpose without explicit written consent.

Q: What data protection law applies?

Jamaica: Data Protection Act 2020. South Africa: POPIA. Both align closely with GDPR. Aggregate age range and gender data — collected without names or individual identifiers — is anonymised by design and does not constitute personal data under these frameworks.

08 Sales Data Strategy

ProofPoint uses a layered approach — multiple methods can run simultaneously on the same campaign. No single integration is required.

Method	How it works	Real-time?	Status
Supervisor confirmed	Supervisor enters purchased counts in the batch outcome counter after transcribing from paper sheets.	Yes	✓ MVP default
QR / promo code	Unique code shared by supervisor or rep. Redeemed at checkout — sale auto-attributed to campaign.	Yes	✓ Available
CSV upload	Manager uploads end-of-day sales export from retailer's existing POS. ProofPoint parses and maps to campaign.	No — daily	✓ Fallback
Retailer data partnership	Commercial deal with retail chain for live SKU-level sales feed.	Yes	v1.0
POS API (middleware)	Direct API to Yoco, iKhokha, Lightspeed, or Oracle MICROS. Real-time webhooks.	Yes	v1.0
Receipt OCR	Supervisor photographs customer receipts. ProofPoint extracts SKU, quantity, timestamp via OCR.	Near-real-time	v2.0

09 Prototype Limitations

This is a v0.3 prototype for validation — not production use.

Feature	In Prototype v0.3	In Production
Login	Email matched to local lookup table	Supabase Auth + JWT role claims
Brand billing screen	Static display	Live Stripe subscription
Brand analytics	Mocked data + live counter sim	Real-time Supabase subscriptions
Supervisor batch entry	Fully interactive — updates all dashboards	Same + server validation + audit log
PDF report	Toast confirmation only	Real branded PDF generated server-side
POS integration	Toast — coming in v1.0	API connector + CSV parser
GPS check-in	Toggle, no real GPS	Device GPS vs. store geofence
Offline sync	Not demonstrated	WatermelonDB queue + auto-sync
Campaign wizard	Toast — coming in v1.0	Full 5-step guided wizard

10 Glossary

Terms used throughout the ProofPoint platform:

Term	Definition
Activation	An in-store marketing event where field reps engage shoppers on behalf of a brand.
Agency operator	A marketing agency licensed by a brand client to run campaigns on their behalf. Does not pay ProofPoint directly.
Baseline	Pre-campaign sales volume used as the reference for measuring uplift.
Batch	A single supervisor submission covering all interactions logged from paper sheets for one hourly collection period.
Brand / Client	The company whose product is being promoted. The paying customer of ProofPoint.
Campaign	A defined activation with set dates, locations, supervisors, and KPI targets.
Check-in	GPS-verified shift start. Signals the manager the supervisor is active at their assigned location.
Confirmed purchase	A sale recorded in the Purchased counter during a batch submission.
Control Centre	The manager's live dashboard showing all active campaigns.
Conversion rate	$\text{Purchases} \div \text{total interactions} \times 100$.
CSV	Comma-separated values — spreadsheet format compatible with Excel, Google Sheets, and BI tools.
Data isolation	Architectural guarantee that one brand's data cannot be accessed by another brand's account. Enforced via database row-level security.
Data processor	ProofPoint's legal role — processes and stores data on behalf of the brand but does not own it.
JWT	JSON Web Token — secure packet returned after login, containing the user's role. Determines screen access.
KPI	Key Performance Indicator — measurable target set before a campaign.
Outcome	Result of an interaction: Purchased, Declined, or Maybe.
Paper tally model	Reps record on paper sheets; supervisor collects hourly and inputs batch totals via tablet.
POS	Point of Sale — the till or checkout system used by a retailer.
RLS	Row-Level Security — database policy restricting which rows a given account can read or write.
Sales uplift	Percentage increase in sales during campaign vs. pre-campaign baseline.
Supervisor	On-ground team member who collects paper tally sheets and inputs batch data. One per store location.

Term	Definition
Toast	Brief notification confirming an action completed.

For questions about this prototype or to provide feedback, contact the ProofPoint product team.