2. Reward Point User Guide

Thank you for purchasing our extension. If you have any questions that are beyond the scope of this document, do not hesitate to leave us an email via support@magenest.com

By: Magenest | **Support Portal:** **http://servicedesk.izysync.com/servicedesk/customer/portal/18**

Introduction

Magento 2 Reward Points by Magenest is a Loyalty Program that helps store owners to reward and manage the rewarding points given to customers.

Highlight Features

For Customers

➕ Customers can earn points by:

- Purchasing products in the store.
- Purchasing a specific type of product.
- Signing up to store.
- Reviewing a product.
- Subscribing to the newsletter.
- Sharing the referral code to their friends
- Gifting on the customer's birthday.

➕ Customers use points to get a discount (for example 10 points can be redeemed for 1$ discount).

➕ Customers can manage their reward points in My Reward Points Dashboard: view rewarded points and point transaction history.

➕ Customers (both logged in users and guests) can view the points earned alongside the product price on the product page, category page.

For Admin

➕ Easily configure new point earning rules for customers:

⭐ Rule Types:

- Behavior rules: Rule relevant to Event.
- Catalog rules: Rule relevant to Product.

⭐ Conditions:

- Behavior rules: List of events to trigger reward points action (product's review, customer registration,...).
- Catalog rules: Attribute of products to trigger reward points action (attribute set, category...).

➕ Admin can add or deduct points to the user manually.

➕ Admin can check the transaction history of all users

➕ Admin can create a membership [New]

System Requirement

Your store should be running on Magento 2 Community Edition version 2.1.x, 2.2.x; 2.3.x.

Video Tutorial

Configuration

In Magento 2 back end, go to **Stores > Configuration > Magenest > Reward Points.**

General setting

➕ **Enable module**: Choose Yes to enable Reward Points module.

View settings

- **Show number of points earned for each product on the Home page:** Display reward points for each product on the home page.
- **Show number of points earned on the Product Listing page:** Display reward points for each product on the product list.
- **Show number of points earned on Product Detail page:** Display reward points for each product on the product detail page.
- **Show number of points earned for Guest**: If enabled, the points earned will be shown to guests as well

View Settings

Show number of points earned for each product on Home page [store view]	No	☑ Use system value
Show number of points earned on Product Listing page [store view]	Yes	☑ Use system value
Show number of points earned on Product Detail page [store view]	Yes	☑ Use system value
Show number of points earned for Guest [store view]	Yes	

Label Display Settings

➕ **Point unit:** Your custom point unit will be added after the number of points. For example, your reward points unit is "Points", then the point display will be +10 Points. If you leave this field blank, the default unit is P.

➕**Text size:** The font size of the reward points.

➕**Text color:** The color of the reward points.

Label Display Settings

Point unit (default: P) [store view]	Points
	E.g: if set as P, the label with be displayed as + 10 P.
Text size (px) [store view]	12
Text color [store view]	#011178

Point Settings

➕**Point redemption rate:** This defines how many points are worth a single currency unit (e.g $1). For example: Point redemption rate = 10, the customer gets a $1 discount for every 10 points spent.

➕**Enable point earning for order with applied points:** Choose Yes to allow customers to earn points for the orders that have been discounted with reward points. If you choose No, customers will not earn points from these orders.

➕**Enable points earning for order with discount:** Choose Yes to allow customers to earn points for the orders that have been discounted. If you choose No, customers will not earn points from these orders.

➕**Deduct reward points earned when order is refunded:** Choose Yes to enable the function to deduct receivable points according to price after discount. For example, for an order of a $10 item, the total amount after the discount is $7, then reward points will be counted based on new price ($7). Note that this deduction **does not** apply for reward point rule with fixed points.

➕**Return reward points when refund order:** Allow returning the applied reward points along with a refunded order.

➕**Point rounding rule:** You can choose to round the decimal number of points up (ceiling) or down (flooring).

➕**Point expiry time:** The expiry time of the points can be set in days. The maximum time is 1000 days. If you fill in 0, the points will never expire.

➕**Points are rewarded when order is:** Set the order status to reward points to the customer's point balance.

➕**My Reward Points tab description:** You can add the description as your loyalty program's terms and conditions. This description will be displayed in the customers' My account page.

➕**Reward Points program landing page:** Choose one CMS page to set as a landing page. There is a Reward Points CMS page by default.

➕**Display landing page link in footer:** Enable this option to add a landing page to the page footer menu.

⊕Enable reward points notification: Notify guests at the cart page to sign up for reward points.

Point Settings

Point redemption rate [store view]	10	☑ Use system value

This defines how many points are worth a single currency unit (e.g $1).
For example: Point exchange rate = 10, customer gets a $1 discount for every 10 points spent.

Enable point earning for orders with applied points [store view]	No ▼	☑ Use system value

If No, when customer uses reward points for discount on an order, customer will not receive points for this order.

Enable point earning for orders with applied coupon [store view]	No ▼	☑ Use system value

If No, when customer applies coupon on an order, customer will not receive points for this order.

Deduct receivable points when customers use discounts [store view]	No ▼	☑ Use system value

If Yes, when customer uses reward points for discount or applies coupon on an order, the amount of points earned will be reduced accordingly.

Deduct reward points earned when order is refunded [global]	No ▼	☑ Use system value

Point rounding rule [store view]	Round Up (Ceil) ▼	☑ Use system value

E.g: 2.1 -> 3 (Round Up) / 2.1 -> 2 (Round Down)

Point expiration time [store view]	0	☑ Use system value

The duration before reward points expires after they're earned: 1 - 1000 (days). Choose 0 if you want to turn off this feature.

Points are rewarded when an order is [global]

- Pending
- Processing
- Suspected Fraud
- Complete
- Closed
- Canceled
- On Hold

☑ Use system value

Order statuses used to validate used points (modify this only if you know what you are doing)
Default values: Processing and Complete.

My Reward Points tab description [store view]   Show / Hide Editor   ☑ Use system value

Each time you shop with us, you automatically get rewarded. With every purchase you make, you can start earning Points to spend on your future purchases. The more you shop, the more points you earn and the more you can use to spend. Buy more, save more!

Write a short description for your customer's My Reward Point tab. You should specifies the Earning and Spending Rules of your store.

Reward Points program landing page [store view]	Reward Points ▼	☑ Use system value

Display landing page link in footer [store view]	Yes ▼	☑ Use system value

Enable reward points notification [store view]	Yes ▼	☑ Use system value

Notify customers about reward points when they place orders (for customers who have not yet registered an account)

Point Redemption Rules

- **Enabled:** Choose **Yes** to enable the point redemption rule for each order
- **Redeemable points**

Fixed number: Set the maximum reward points a customer can use in an order

- **Maximum number of redeemable points:** If the field is left blank or set as 0, the maximum points spent will be by default.

Point Redemption Rules   ⌃

Enabled [store view]	Yes ▾	☐ Use system value
Redeemable points [store view]	Fixed number ▾	☐ Use system value
Maximum number of redeemable points [store view]	50	☐ Use system value

Unit: point(s). Enter the maximum number of points can be redeemed for an order. If it is 0, there is no limitation.

Percentage of total order value: Set the percentage of points that could be spent in an order. *E.g*: If the customer has 100 points, and this field is set at 50% on the backend, and the order price is 200$, the customer will only be able to spend the amount of total order price x 50%(this amount will not exceed the total reward points you're having), which is: 200x50%= 100.

- **Percent of redeemable points:** If the field is left blank or set as 0, the maximum percentages spent will be by default.

Point Redemption Rules   ⌃

Enabled [store view]	Yes ▾	☐ Use system value
Redeemable points [store view]	Percent of total order value ▾	☐ Use system value
Percent of redeemable points [store view]	20	

Unit: %. The number of redeemable points for an order is calculated as percent of total order value.

Email Configuration

➕ Point Expiration Notification

- **Notify Customers When They Login:** Choose **Yes** to notify the customer about the upcoming expired reward points when they login to your site.
- **Send Email To Notify Customer About Point Expiration:** Choose **Yes** to send reminder emails to the customer about the upcoming expired reward points.
- **Email template:** Choose the corresponding email template.
  - ⚠ *Note*: To change the Email template, go to **Marketing > Email Template.** The instruction to create a new Email Template can be found here.
- **Send Before:** Admin can set the days for the email to be sent before the expiration date. If the field is left blank or set as 0, no reminder notification will be sent.

➕ Point Balance Update Email

- **Enabled:** Choose **Yes** to send a notification email to customers when their point balance changes.
- **Email template:** Choose the corresponding email template.

Refer a Friend

➕ General

- **Refer By Link:** Allow customers to refer a friend with a referral link.
- **Path of Referral Link:** Fill in the URL key after the domain. For instance, with the path "customer/customer/account", the referral link follows this format https://yoursite.com/customer/account/create?referralcode=XXXXXXXXXXXX
- **Referral code patterns:** The referral code format. [A5] means to generate 5 random alphabetical characters, [N4] will generate 4 random numbers. "Magenest" is the hard code
  Example: Magenest-[A3][N2] will generate code like Magenest-afl23 or Magenest-afo09 ...

➕ Setting

- **Referral Points Are Awarded To:** Select the receiver of the referral points. You can set the receiver as the referrer, the referred friend, or both.
- **Referral Coupon Are Awarded To:** Select the receiver of the referral coupons. You can set the receiver as the referrer, the referred friend, or both.
- **When coupon is sent to the Referee**
  - **Sign up a new account:** When the referred friend signed up a new account.
  - **Sign up and make a purchase:** When the referred friend signed up and made the first purchase.
- **When coupon is sent to the Referrer**

- ○ **Sign up a new account:** When the referred friend signed up a new account.
  - ○ **Sign up and make a purchase:** When the referred friend signed up and made the first purchase.
- **Send Referral Link To Friend Email Template:** Choose a corresponding email template.
- **Send Coupon To Referee Email Template:** Choose a corresponding email template.
- **Send Coupon To Referrer Email Template:** Choose a corresponding email template.
- **Apply Shopping Cart Rule To Referee:** Choose a corresponding cart price rule.
- **Apply Shopping Cart Rule To Referrer:**Choose a corresponding cart price rule.
  - ○ ⚠️ *Note:*The **Promotion Rule** must meet the requirements (If you can't see your promotion rule, please re-configure the promotion rule as below):
    - Is Active.
    - Coupon: Specific Coupon.
    - Coupon: Use Auto Generation

After enabling the referral code function, go to **Marketing > Reward Points > Rules** and create a behavior rule - **Refer a friend.**

Create a new reward point rule

Set the condition as Refer a friend

Set the points earned by referring a friend for the referrer and referred friend

Membership

- **Enable Membership:** Choose Yes to enable Membership.
- **Membership Description:** You can add the description as your membership program's terms and conditions.
- **Email notification:** Choose Yes to send email to customers when they level up.

Create a reward rule

➕You can add a new reward rule on the Rule Manager page.

➕On the left menu, go to **Marketing > Reward Points > Rules > New Rule.**

General information

➕ You can name the rule, enable or disable the rule, choose the rule type and set the rule expiry date.

➕ There are 2 options for the rule types: **Product Rule** or **Behavior Rule.**

Product Rule

➕ Set the rule based on product attributes.

➕ **Actions**

- ○ **Apply:** You can choose to give a fixed number of points to the customer or to give X points for every Y spent. Y is in dollar ($).
- ○ **Number of points (X):** The fixed value of points customers can earn for this product rule.
- ○ **Step (Y):** The point value to exchange from the order amount to reward points.

Give X points to the customer

For each $Y spent, give X points

Behavior Rule

Set the rule based on customers' behaviors.

ID	Event Name	Description
1	Customer signs up in store	When customers create a new account on your site, they will receive corresponding reward points according to the created rule in the back end.
2	Customer writes a product review	When customers write reviews for a product, they will receive corresponding reward points according to the created rule in the back end.
		Note: The points will only be given when the reviews are approved by the store owners.
3	Customer subscribes to newsletter	When customers subscribe to the newsletter, they will receive corresponding points according to the created rule in the back end.
4	Customer birthday	Customers will receive the reward points on their birthday.
5	First-time purchase	Customers will earn points for their first order

6	Lifetime Amount	When customers' spending reach an amount that is set by admin, customers will receive reward points
7	Customer Gratitude	When a customer number X registers a new account after a specific number of user accounts created. E.g: The customer will receive reward points (Admin configuration) if he/she is the 1000th signed-up user.
8	Refer a friend	When customers refer the store to their friends, referrer and/or referee can earn reward points. Learn more

⊕ Notification Settings

- **Notification Status:** You can enable or disable the notification
- **Content**: Content for announcements
- Display Position

- **Customer Page:** The message will be displayed on the customer page.
- **Cart Page:** The message will be displayed on the cart page.

- **Display for Guest:** Allow to display notifications to guests
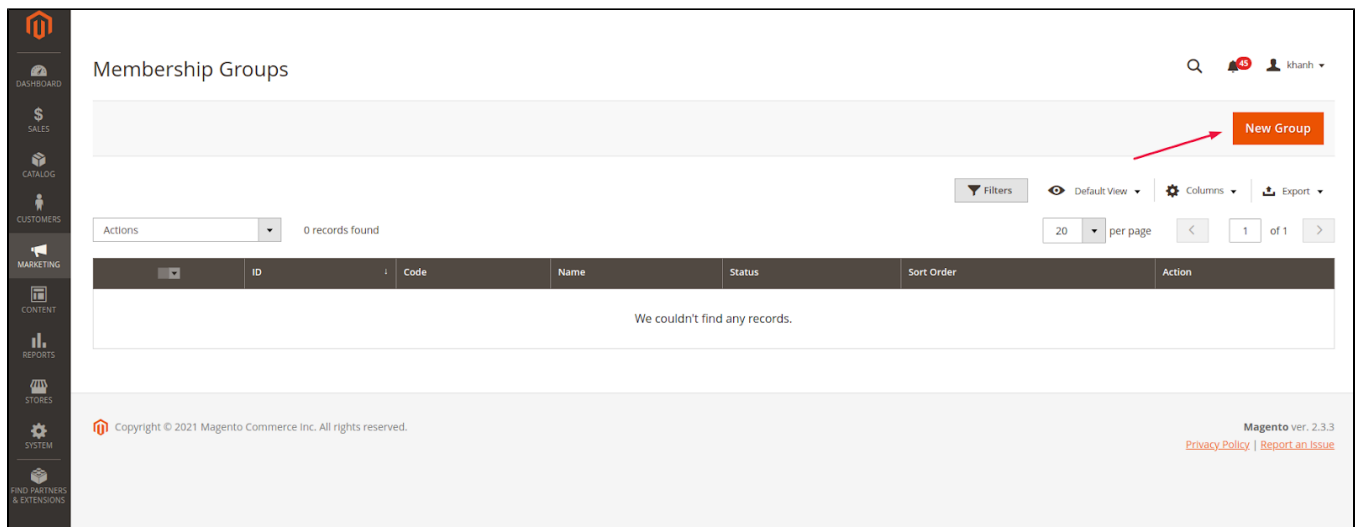
> ⚠ For the Behavior Rule, you should set only one corresponding rule with the rule type instead of multiple rules with the same behavior condition. Or else they might conflict with each other.

Create a membership

On the admin sidebar, **Marketing > Reward Points > Membership > New Group.**

General Information

- **Is Active:** Choose Yes to enable Membership Group.
- **Name:** Name the group.
- **Code:** Enter the code for the group (code is unique)
- **Description:** Short description of the membership group.
- **Benefit:** List the benefits that customers can get from joining your program
- **Requirements:** Fill in your requirements to be able to join the program
- **Sort Order:** Sorting order of the group.
- **Criteria to Reach Tier:**

  Point Number: Calculated based on customer points accumulated.

  Spend Point: Calculated based on the number of points the customer has spent.

- **Value of Criteria to Reach Tier:** Points value for leveling up.
- **Tier Logo:** Upload your logo.

- **Additional Earning Points:** Choose Yes to enable additional earning points
- **Added Value Type:**

  Fixed Amount: Fixed value of the number of points a customer can receive

  Percent of the normal point: The amount of points received is based on the percentage amount and the number of points received at the payment

- **Amount:** Additional points for customers.

Customer In Group

- In **Customer in Group** settings, there is a grid table that displays the customer list in-store. You can set the membership tier by selecting the customers on the list, then **Save Group** or **Save** and **Continue Edit.**

- You can track the current status of each customer in the **Current Membership Group** column.
- For example: To change customer "Veronica" from Silver Membership Group to Gold Membership Group, go to Gold Membership Group, select Veronica, then Save Group.

Refund by reward points

➕ When you create a credit memo in Magento 2 back end, there will be 2 options to refund with the reward points.

- **Refund as Reward Points**: Refund the order amount by reward points
- **Refund applied reward points**: Refund the reward points that were applied for a discount for this order.

Points Management

➕ You are able to track the reward points history in **Marketing > Reward Points > Points.**

➕ There are customer emails, the rule applied, and a number of points change before and after.

Points Manager

5 records found

ID ↑	Customer First Name	Customer Last Name	Customer Email	Total Points	Spent Points	Current Points
36				100	0	0
19				351	0	343
11	Veronica	Costello	roni_cost@example.com	710	0	710
2				41	0	41
1				210	100	110

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You can also track the transaction history in **Marketing > Reward Points > Transaction History.**

Transaction History Manager

54 records found

Transaction ID ↑	Customer ID	Customer Email	Comment	Rule Title	Points Change	Insertion Date	Points After
164	1	roni_cost@example.com	Product Name: Kenobi Trail Jacket	Tweet	100	2018-10-17 07:49:33	710
154	36		Order #: 000000040	size	5	2018-10-16 11:14:54	343
153	36		Order #: 000000040	point	2	2018-10-16 11:14:54	338
142	53		Expired. Transaction ID : 113		-100	2018-10-11 14:54:05	0
118	36		Expired. Transaction ID : 89		-2	2018-10-10 06:09:04	336
117	36		Expired. Transaction ID : 88		-2	2018-10-10 06:05:07	338
116	36		Expired. Transaction ID : 87		-2	2018-10-10 05:01:04	340
115	36		Expired. Transaction ID : 85		-2	2018-10-10 03:13:04	342
113	53		sign in	sign in	100	2018-10-09 14:53:23	100
89	36		Order #: 000000035	point	2	2018-10-08 06:08:48	344

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StoreFront Functions

View reward points in each product details

- Customers can see the reward points shown in each product on Category Page.

- Customers can see the reward points shown on the Product Detail Page.

- ### **Track reward points on My account page**

  On My Account Page, customers can track the reward points usage as well as the transaction history.

My Reward Points

Referral Code: 70047ceadbacbc7bd9985225bf099517

Input Referral Code:

[   ] [Apply]

Points Summary

Total Points	Current Points	Spent Points
610	610	0

Transaction History

Transaction Id	Rule Title	Comment	Points Change	Points After	Insertion Date	Expiry Date
56	Referral code points	Referer code	+100	610	2018-10-05 04:10:27	2018-11-04 04:10:27
54		Order #: 000000024	+3	510	2018-10-04 07:42:22	2018-11-03 07:42:22
53		Order #: 000000024	+2	507	2018-10-04 07:42:22	2018-11-03 07:42:22
52		Order #: 000000024	+50	505	2018-10-04 07:42:22	2018-11-03 07:42:22
51		Order #: 000000023	+10	455	2018-10-04 07:03:52	2018-11-03 07:03:52
50		Order #: 000000023	+10	445	2018-10-04 07:03:52	2018-11-03 07:03:52
49		Order #: 000000023	+2	435	2018-10-04 07:03:52	2018-11-03 07:03:52

Sidebar navigation:
- Account Dashboard
- My Orders
- My Downloadable Products
- My Wish List
- Address Book
- Account Information
- Stored Payment Methods
- Billing Agreements
- My Product Reviews
- Newsletter Subscriptions
- **My Reward Points**

Compare Products

You have no items to compare.

Recently Ordered

☐ Stellar Solar Jacket

[Add to Cart] View All

- With Refer a friend Add-on, customers can send refer a friend, if their friend (referee) register for a new account, the referee will earn reward points for registration. Then he can send his referral code to the referrer, the referrer can input this code on My Reward Points page to redeem and receive the points for referring.

⊕ Use reward points as a discount for products

At check out page, customer can enter their available points to be redeemed for money.

There will be a message informing the reward points balance of the customer. Customers can only redeem the maximum points they have in their balance.

Payment

Check / Money order

☑ My billing and shipping address are the same

Justin Queen
United States,
Alaska, Alaska 10000
United States
096364478

[Place Order]

Redeem Loyalty Points ∧

You can apply maximum 36 points for this order.
Every 3 point(s) can be redeemed for 1 USD

[30]

[Apply]

Order Summary

Cart Subtotal	$12.00
Shipping Flat Rate - Fixed	$5.00
Order Total	**$17.00**

1 Item in Cart ∧

Riona Full Zip Jacket — $12.00
Qty: 1

Ship To: ✎

Justin Queen
United States,

Membership

➕ After the add-on is enabled (in the Reward Points Configuration), you can set up the add-on in **Marketing > Reward Points > Membership.**

➕ On the Membership groups page, you can manage the created groups in the grid table, or create a new membership group by clicking on the **New Group** button.

➕ In the **General Information**, you can set the group Name and Code.

In **Customer in Group** settings, there is a grid table that displays customer list in-store. You can set the membership tier by selecting the customers on the list, then **Save Group** or **Save and Continue Edit**.

- You can track the current status of each customer in the **Current Membership Group** column.
- If you want to update the Membership Group/change customer's membership group, go to the Membership group you want to update, select the customer, then Save Group.
- For example: To change customer "Veronica" from Silver Membership Group to Gold Membership Group, go to Gold Membership Group, select Veronica, then Save Group.

In each reward point rule, there is a point set for each membership group.

Update

- When a new update is available, we will provide you with a new package containing our updated extension.
- You will have to delete the module directory and repeat the installation steps above.
- Flush the config cache. Your store and newly installed module should be working as expected.

Support

- We will reply to support requests within **2 business days**.
- We will offer a **lifetime free update and 6 months of free support for all of our paid products**. Support includes answering questions related to our products, bug/error fixing to make sure our products fit well in your site exactly like our demo.
- Support **DOES NOT** include other series such as customizing our products, installation and uninstallation service.

Once again, thank you for purchasing our extension. If you have any questions relating to this extension, please do not hesitate to contact us for support.