

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

Updated: 19/12/2018 | By: Magenest | Support Portal: <http://servicedesk.izysync.com/servicedesk/customer/portal/18>

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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

- Allow customers to earn points when:

+ Spend money in store:

For example, for every 2\$ spent, customer will receive 1 Reward Point.

+ Buy specific type of products:

Customer can get bonus Reward Points when buying specific type of products (configured by store's admin)

+ Sign up to store:

Reward customers when they create a new account.

+ Review a product:

Customer will receive some points when they write a product's review (review has to be approved by store admin)

+ Subscribe to newsletter:

When customer subscribe to store newsletter with their email, they will receive Reward Points (points will be canceled if they unsubscribe)

+ On customer's birthday

Customers will receive reward points as gifts from the store on their birthday

+ Refer a friend (Add-on)

Customer can share the referral code to their friends to earn reward points

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

- Customers can manage their reward points in My Reward Points Dashboard:

+ My Reward Points

Total Points, Current Points, Spent Points

+ Point Transactions History.

Rule Title, Comment, Points Change, Insertion Date.

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



For Admin

- Admin can easily configure new earning rules for customers:
- Rule Type:
 - + Behavior rules: Rule relevant to Event.
 - + Catalog rules: Rule relevant to Product.
- Condition:
 - + Behavior rules: list of events to trigger reward points action (product's review, customer registration,...).
 - + Catalog rules: attribute of product to trigger reward points action (attribute set, category...).
- Admin can add or deduct points to user manually
- Admin can check transaction history of all users

System Requirements

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

For more details, please refer to our [tutorial video](#).

Configuration

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

The screenshot shows the Magento 2 Configuration interface. On the left is a sidebar with navigation links: Home, Stores, Catalog, Customers, Marketing, Reports, and System. The main content area is titled 'Configuration' and shows the 'MAGENEST' section expanded. Under 'MAGENEST', 'Reward Points' is selected. The 'General' tab is active, showing the 'Enable module' dropdown set to 'Yes'. Below this are 'View Settings' with two dropdowns: 'Show number of points earned for each product in Product List page' and 'Show number of points earned when buying in Product Detail page', both set to 'Yes'. At the bottom are 'Label Display Settings' with fields for 'Point unit (default: P)' (set to 'points'), 'Text size' (set to '12'), and 'Text color' (set to a dark red color).

+ General setting

Enable module: Choose Yes to enable Reward Points module

+ View settings

Show number of points earned for each product in Product List Page: Display reward points for each product on Category Page

Show number of points earned when buying in Product Detail Page: Display reward points for each product on Product Detail Page.

+ Label Display Settings

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

Text color: The color of the reward points

+ Point value

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.

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

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

New Reward Points Rule

← Back Reset Save and Continue Edit

MAGENEST REWARD POINTS CONFIGURATION

General Information

Rule Name Social sharing - Facebook
This will be shown in customer transaction history.

Status Active

Rule Type Product Rule
Product Rule
Behaviour Rule

From Date

To Date

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Product Rule: Set the rule based on product attributes

Edit Rule 'Product Color'

← Back Delete Rule Reset Save and Continue Edit Save Rule

MAGENEST REWARD POINTS CONFIGURATION

General Information

Conditions

Actions

Product Restriction (don't add conditions if rule is applied to all products)

If ALL of these conditions are TRUE:

Color is Red

Please choose a condition to add.

Please choose a condition to add.

Conditions Combination

Product Attribute

Activity

Attribute Set

Category

Category Gear

Climate

Collar

Color

Eco Collection

Errin Recommends

Features

Format

Gender

Material

New

Pattern

Performance Fabric

SKU

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+ Actions

Apply: You can choose to give a fixed number of points to 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 order amount to reward points.

Edit Rule 'Product Color'

← Back Delete Rule Reset Save and Continue Edit Save Rule

MAGENEST REWARD POINTS CONFIGURATION

General Information

Conditions

Actions

Set appropriate point action

Apply Give X points to customer Give X points to customer Give X points to customer

Number of points (X) 10

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Give X points to 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 a corresponding reward points according to the created rule in back end.
2	Customer writes a product review	When customers write reviews for product, they will receive a corresponding reward points according to the created rule in 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 newsletter, they will receive corresponding points according to the created rule in 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	Refer a friend	When customers refer the store to their friends, referrer and/or referee can earn reward points. Learn more



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.

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 discount for this order.

Dashboard

Sales

Catalog

Customer

Marketing

Content

Reports

Tools

System

Advanced Search & Extensions

New Memo

← Back

Reset

Order Total

Credit Memo Comments

Comment Text

Refund Totals

Subtotal

\$101.25

Reward Amount (50 points)

-\$5.00

Refund Shipping

5

Adjustment Refund

0

Adjustment Fee

0

Grand Total

\$101.25

Update Totals

☐ Append Comments

☐ Email Copy of Credit Memo

☒ Refund as Reward Points

101.25

\$

1013

points

☒ Return Applied Reward Points (50 points)

Refund Offline

Manage Reward Points

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

There are customer email, the rule applied, and number of points change before and after.

Dashboard

Sales

Catalog

Customer

Marketing

Stores

System

Advanced Search & Extensions

Points Manager

🔔

👤 magenest

Filters

👁 Default View

⚙ Columns

📄 Export

5 records found

20 per page

1 of 1

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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Magento ver. 2.2.5
[Account Activity](#) | [Report an Issue](#)

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

Transaction History Manager							
54 records found							
Transaction ID	T	Customer ID	Customer Email	Comment	Rule Title	Points Change	Points After
104	1	ron_loss@example.com	ron_loss@example.com	Product Name: Kenobi Trail Jacket	Tweet	100	710
154	36			Order #: 000000040	size	5	345
153	36			Order #: 000000040	point	2	338
142	53			Expired, Transaction ID : 113		-100	0
118	36			Expired, Transaction ID : 89		-2	336
117	36			Expired, Transaction ID : 88		-2	338
116	36			Expired, Transaction ID : 87		-2	340
115	36			Expired, Transaction ID : 85		-2	342
113	53			sign in	sign in	100	100
89	36			Order #: 000000035	point	2	344

Store Front Functions

- View reward points in each product details

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

Home > Women > Tops > Hoodies & Sweatshirts

Hoodies & Sweatshirts

Shopping Options

STYLE

PRICE

COLOR

MATERIAL

PATTERN

CLIMATE

Items 1-9 of 12

Sort By Position

Mona Pullover Hoodie

★★★★★ 3 reviews

As low as \$57.00

+2 P

XS S M L XL

Hera Pullover Hoodie

★★★★★ 3 reviews

As low as \$48.00

+2 P

XS S M L XL

Autumn Pullie

★★★★★ 3 reviews

As low as \$57.00

+2 P

XS S M L XL

Miko Pullover Hoodie

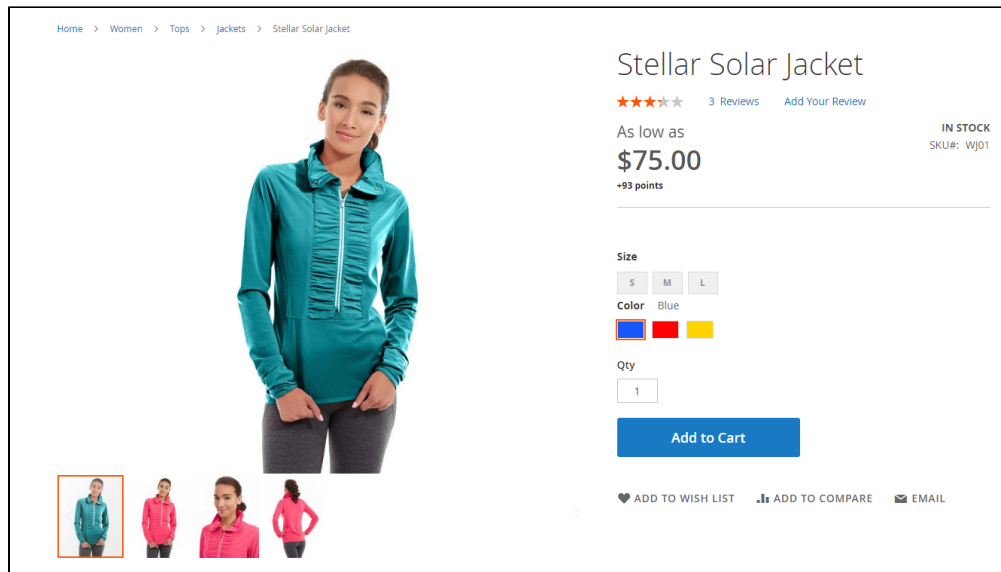
★★★★★ 3 reviews

As low as \$69.00

+2 P

XS S M L XL

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.

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

My Reward Points

Referral Code: 70047ceadbacbc7bd9985225bf099517

Input Referral Code:

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	Referrer 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

Compare Products
You have no items to compare.

Recently Ordered
☐ Stellar Solar Jacket

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 discount for products**

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

There will be message informing the reward points balance of customer. Customer 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\$5.00

Flat Rate - Fixed

Order Total\$17.00

1 Item in Cart ^

Riona Full Zip Jacket
Qty: 1

\$12.00

Ship To:

Justin Queen
United States,

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 installing 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 **lifetime free update and 6 months 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.