# **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 sup port@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

	Configuration			🛕 💄 magenest 🗸
DASHBOARD SALES	Store View: Default Config •			Save Config
CATALOG	MAGENEST	General		0
CUSTOMERS	Reward Points	Enable module [store view]	Yes 💌	
MARKETING	GENERAL	View Settings		0
STORES	CATALOG	Show number of points earned for each product in Broduct		
SYSTEM	CUSTOMERS	List page [store view]	Yes *	
	SALES	Show number of points earned when buying in Product Detail page [store view]	Yes 💌	
	DOTMAILER	Label Display Settings		0
	ADVANCED	Point unit (default: P)	point: 0	
		[store view]	Le: if set as P, the label with be displayed as + 10 P.	
		Text size [store view]	12	
		Text color [store view]	#2e2020	

#### 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.

#### Cabel 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 size: The font size of the reward points

Text color: The color of the reward points

Point Value		$\odot$
Point value [store view]	10 This defines how many points are worth a single currency unit (e.g. \$1). For example: Point value = 10, customer gets a \$1 discount for every 10 points spent.	
Enable point earning for orders with applied points [store view]	No  If No, when customer uses reward point for discount on an order, customer will not receive point for this order.	
Enable point earning for orders with discounts [store view]	No If No, when customer applies discount on an order, customer will not receive point for this order.	
Deduct receivable points when customers use discounts [store view]	Yes If Yes, when customer uses a discount code on an order, the amount of points earned will be reduced accordingly.	
Deduct Reward Points from Refund Amount Automatically [goba]	No +	
Earned point will be [store view]	Round Up (Cell)         •           Eg: 2.1 ~> 3 (Round Up) / 2.1 ~> 2 (Round Down)	
Point expiration time [store wew]	0 The duration before reward points expires after they're earned: 1 - 1000 (days). Choose 0 if you want to turn of this feature.	
Points are rewarded when an order is [grobal]	Please Select -     Pending     Processing     Suspected Fraud     Complete     Closed     Canceled     On Hold     Order statuses used to validate used points (modify this only if you know what you are doing)     Default values: Processing and Complete.	
My reward point description (processed)	Show / Hide Editor	
Landing page [store view]	Reward Points *	
Display landing page link in footer [store view]	Yes 🔹	
Enable reward points notification [store view]	Yes 🔹	

### Point value

Point value: how many points are worth a single currency unit (e.g 1\$). For instance, point value = 10, 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 receivable points when customer use discounts:** 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 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 to return the applied reward points along with a refunded order.

Earned points will be: 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 an order is: Set the order status to reward points to customer's point balance.

My reward point description: You can add the description as your loyalty program's terms and conditions. This description will be displayed in customers' My account page.

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

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

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

ſ	Membership Addon		$\odot$
	Enable Addon [store view]	No	
		Yes No	

#### Membership (Add-on)

If you purchase the Membership Add-on for Magento 2, you can enable this add-on in Reward Points Configuration.

You can refer to the settings here.

#### Create a reward rule

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

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

	Rul	es Manage	er					🌲 上 ma	agenest 🔻		
SALES		New Rule									
CATALOG							▼ Filters    ● Default View •	🔅 Columns 👻 🛃	Export 👻		
CUSTOMERS	Actio	ins	11 records found				20 💌 per page	< 1 of	1 >		
		t di	Rule Title	From Date	To Date	Rule Type	Earning Points	Status	Action		
7775		79	TEST			Behaviour Rule		Enabled	View		
STORES		77	Social sharing - Facebook			Behaviour Rule		Enabled	View		
		75	size			Product Rule	5	Enabled	View		
313124		74	Product Color			Product Rule	10	Enabled	View		
		69	Tweet			Behaviour Rule	100	Enabled	View		
		68	Newsletter			Behaviour Rule	100	Enabled	View		
		67	fb			Behaviour Rule	50	Enabled	View		
		62	Customer Birthday			Behaviour Rule	50	Enabled	View		
		61	sign in			Behaviour Rule	100	Enabled	View		
		60	google	2018-10-01	2018-10-31	Behaviour Rule	100	Enabled	View		
		59	point			Product Rule	2	Enabled	View		
			. From				1				

In the 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.

DASHBOARD	New Reward Points Rule					🌲 🏦 magenest 🔻
\$ SALES				← Back	Reset	Save and Continue Edit
CATALOG						
CUSTOMERS	MAGENEST REWARD POINTS CONFIGURATION	General Information				
	General Information 🖌	Rule Name *	Social sharing - Facebook This will be shown in custome transaction history.			
STORES		Status *	Active			
SYSTEM		Rule Type *	Product Rule A			
		From Date	Behaviour Rule			
		To Date				
	$(\!\!\!\!)\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!$					Magento ver. 2.2 Account Activity   Report an Issi

Product Rule: Set the rule based on product attributes

Û							
DASHBQARD	Edit Rule 'Product Color'						🛓 magenest 🔹
\$ SALES			← Back	Delete Rule	Reset	Save and Continue Edit	Save Rule
	MAGENEST REWARD POINTS CONFIGURATION	Product Restriction (don't add conditions if rule is applied to all produ	icts)				
	General Information	If ALL of these conditions are TRUE :					
<u>m</u>	Conditions	Please choose a condition to add.					
STORES SYSTEM	Actions	Please choose a condition to add. Conditions Combination Product Attribute					
	Copyright © 2018 Magento Commerce Inc. All rights reserved.	Attribute Set Category Category Category Category Category Category Category Category Eco Color Eco Color				Account A	Magento ver. 2.2.5 thely   Report an Issue

### 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.

0									
DASHBOARD	Edit Rule 'Product Color'								1 magenest 🔹
\$ SALES				<del>(</del>	Back	Delete Rule	Reset	Save and Continue Edit	Save Rule
CATALOG									
CUSTOMERS	MAGENEST REWARD POINTS CONFIGURATION	Set appropriate point action							
	General Information	Apply	Give X points to customer	Give X po For each	pints to custo \$Y spent, giv	mer e X points			
STORES	Conditions	Number of points (X) *	10						
SYSTEM	Actions								
	$(\!\!\!\!\ )\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!$							Account A	Magento ver. 2.2.5 activity   Report an Issue

#### Give X points to customer

Ŵ								
DASHBOARD	Edit Rule 'Product Color'							1 magenest 🔹
\$ SALES				← Back	Delete Rule	Reset	Save and Continue Edit	Save Rule
CUSTOMERS	MAGENEST REWARD POINTS CONFIGURATION	Set appropriate point action						
	General Information	Apply	For each \$Y spent, give X points					
	Conditions	Number of points (X) *	10					
	Actions 🖌	Step (Y) 🔹						
	(i) Copyright © 2018 Magento Commerce Inc. All rights reserved.						Account A	Magento ver. 2.2.5 ctivity:   Report an Issue

For each \$Y spent, give X points

#### Behavior Rule: Set the rule based on customers' behaviors

Ŵ								
DASHEGARD	Edit Rule 'Newsletter'						Q 4	🙆 🧘 reward 🗸
\$ SALES				← Back	Delete Rule	Reset	Save and Continue Edit	Save Rule
CATALOG								
CUSTOWERS	MAGENEST REWARD POINTS CONFIGURATION	Condition						
	General Information	Condition	Customer subscribes to newsletter					
CONTENT	Conditions 🖌		Customer writes a product review Customer signs up in store Customer subscribes to newsletter					
	Actions		Einst Purchase Lifetime Amount Refer A Friend (Add-on)					
STORES								
SYSTEM	Copyright © 2018 Magento Commerce Inc. All rights reserved	l.					Account Ar	Magento ver. 2. ttivity   Report an Ist
FIND PARTNERS & EXTENSIONS								

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.

Û	New Memo		← Back Reset
DASHBOARD	Order Total		
\$ SUITS	Credit Memo Comments	Refund Totals	
30.5	Comment Text	Subtotal	\$101.25
CATALOG		Reward Amount (50 points)	-\$5.00
		Refund Shipping	5
		Adjustment Refund	0
		Adjustment Fee	0
		Grand Total	\$101.25 Update Totals
7775		Append Comments	
STORES		Email Copy of Credit Memo	
SYSTEM		Refund as Reward Points 101.25 5 + 1013 point(s)	
FIND PARTNERS		Return Applied Reward Points (30 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.

	Points N	<i>l</i> anager					🌲 💄 magenest 🗸
s	5 records found					<ul> <li>Default View •</li> <li>20 • per page</li> </ul>	Columns • Export •
	iD †	Customer First Name	Customer Last Name	Customer Email	Total Points	Spent Points	Current Points
85	36		5	And the product of	100	0	0
	19	-		10.000	351	0	343
١.	11	Veronica	Costello	roni_cost@example.com	710	0	710
	2	5 M	1000 B (1000 B)	and the second	41	0	41
	1		1997 - C	i-pip-i	210	100	110
	n Copyright	D 2018 Magento Commerce Inc. All rights res	erved.				Magento ver. 2.23 Account Activity   Report an Issue

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

Cashedaad Dashedaad Sales	Transaction His	tory Manager	r			<b>Y</b> Filters	Default View     Per page     <	magenest      magenest       ms
CATALOG	Transaction ID	t Customer ID	Customer Email	Comment	Rule Title	Points Change	Insertion Date	Points After
CUSTOMERS	164	1	roni_cost@example.com	Product Name: Kenobi Trail Jacket	Tweet	100	2018-10-17 07:49:33	710
	154	36	integral Without services	Order #: 000000040	size	5	2018-10-16 11:14:54	343
MARKETING	153	36	Adapted States	Order #: 000000040	point	2	2018-10-16 11:14:54	338
STORES	142	53	der Tillen ber	Expired. Transaction ID : 113		-100	2018-10-11 14:54:05	0
	118	36	March March and	Expired. Transaction ID : 89		-2	2018-10-10 06:09:04	336
	117	36	March 1996 Avenue	Expired. Transaction ID : 88		-2	2018-10-10 06:05:07	338
	116	36	A REAL PROPERTY AND	Expired. Transaction ID : 87		-2	2018-10-10 05:01:04	340
	115	36	Address of the second sec	Expired. Transaction ID : 85		-2	2018-10-10 03:13:04	342
	113	53	The Colored The	sign in	sign in	100	2018-10-09 14:53:23	100
	89	36	CALIFORNIA DE	Order #: 000000035	point	2	2018-10-08 06:08:48	344
	û Copyright © 2018 Magent	o Commerce Inc. All rights	reserved.				Accou	Magento ver. 2.2.5 nt Activity   Report an Issue

## **Store Front 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

Home > Women > Tops > Jackets > Stellar Solar Jacket	
	Stellar Solar Jacket
20	★★★☆★ 3 Reviews Add Your Review
0	As low as
	\$ <b>75.00</b>
	+93 points
	Size
	S M L
	Qty
	1
	Add to Cart
🛃 🧸 💽 👗	🎔 ADD TO WISH LIST 🔄 ADD TO COMPARE 🛛 EMAIL

### • 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 Rev	ward Poir	nts				
My Downloadable Products My Wish List Address Book Account Information	Referral Code Input Referral	: 70047ceadbacbc Code:	7bd9985225bf099	517			
Stored Payment Methods Billing Agreements	Points Summa	ary	Current Points			Spent Points	
My Product Reviews	610		610			0	
Newsletter Subscriptions			0.0			•	
My Reward Points	Transaction H	istory					
	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 04:10:2
ompare Products	54		Order #: 000000024	+3	510	2018-10-04 07:42:22	2018-11-03 07:42:2
ou have no items to compare.	53		Order #: 000000024	+2	507	2018-10-04 07:42:22	2018-11-03 07:42:2
	52		Order #: 000000024	+50	505	2018-10-04 07:42:22	2018-11-03 07:42:2
ecently Ordered	51		Order #: 000000023	+10	455	2018-10-04 07:03:52	2018-11-03 07:03:5
Stellar Solar Jacket	50		Order #: 00000023	+10	445	2018-10-04 07:03:52	2018-11-03 07:03:5

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	Order Summary	
My billing and shipping address are the same	Cart Subtotal	\$12.00
Justin Queen United States,	Shipping Flat Rate - Fixed	\$5.00
Alaska, Alaska 10000 United States	Order Total	\$17.00
096364478	1 Item in Cart	^
Place Order	Riona Full Zip Jacket Qty: 1	\$12.00
Redeem Loyalty Points 🔨		
You can apply maximum 36 points for this order. Every 3 point(s) can be redeemed for 1 USD	Ship To:	de la
30		
Apply	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.