

# 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](mailto:support@magenest.com)

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

- [Introduction](#)
  - [Highlight Features](#)
- [Configuration](#)
- [Refund by reward points](#)
- [Manage Reward Points](#)
- [Store Front Functions](#)
  - [View reward points in each product details](#)
  - [Track reward points on My account page](#)
  - [Use reward points as discount for products](#)
- [Update](#)
- [Support](#)

## 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:

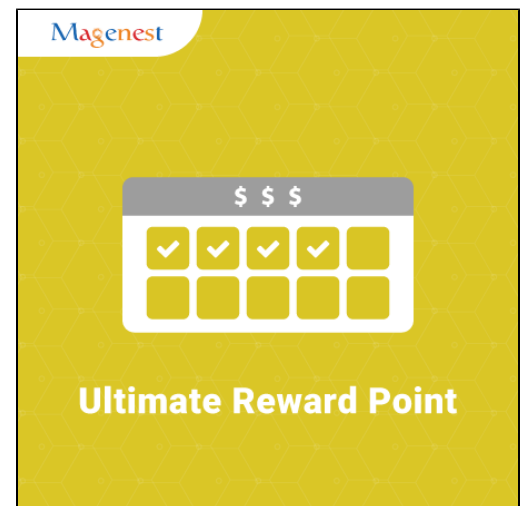
+ My Reward Points

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, Sales, and System. The main content area is titled 'Configuration' and shows the 'MAGENEST' section expanded. Under 'MAGENEST', the 'Reward Points' sub-section is selected. The configuration is divided into three tabs: 'General', 'View Settings', and 'Label Display Settings'. The 'General' tab is active, showing the 'Enable module' dropdown set to 'Yes'. The 'View Settings' tab shows two dropdowns for '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'. The 'Label Display Settings' tab shows 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.

Membership Addon

Enable Addon  
[store view]

No

Yes

No

You can refer to the settings [here](#).

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

The screenshot displays the 'Rules Manager' section of a dashboard. On the left is a vertical sidebar with icons for various modules: Home, Dashboard, Sales, Catalogue, Customers, Marketing, Stores, and System. The main header area includes the title 'Rules Manager' and user information 'Imageneer'. Below the header is a large light gray box containing a search bar and a 'New Rule' button. A black arrow points from the 'New Rule' button down towards the table. Below the search bar are controls for filters, default view, columns, and export. The table itself has columns for Actions, ID, Rule Title, From Date, To Date, Rule Type, Earning Points, Status, and Action. It contains 11 rows of rule data.

## Rules Manager

Imageneer ▾

Filters Default View ▾ Columns ▾ Export ▾

Actions ▾ 11 records found

20 per page < 1 of 1 >

	ID	Rule Title	From Date	To Date	Rule Type	Earning Points	Status	Action
<input type="checkbox"/>	79	TEST			Behaviour Rule		Enabled	<a href="#">View</a>
<input type="checkbox"/>	77	Social sharing - Facebook			Behaviour Rule		Enabled	<a href="#">View</a>
<input type="checkbox"/>	75	size			Product Rule	5	Enabled	<a href="#">View</a>
<input type="checkbox"/>	74	Product Color			Product Rule	10	Enabled	<a href="#">View</a>
<input type="checkbox"/>	69	Tweet			Behaviour Rule	100	Enabled	<a href="#">View</a>
<input type="checkbox"/>	68	Newsletter			Behaviour Rule	100	Enabled	<a href="#">View</a>
<input type="checkbox"/>	67	fb			Behaviour Rule	50	Enabled	<a href="#">View</a>
<input type="checkbox"/>	62	Customer Birthday			Behaviour Rule	50	Enabled	<a href="#">View</a>
<input type="checkbox"/>	61	sign in			Behaviour Rule	100	Enabled	<a href="#">View</a>
<input type="checkbox"/>	60	google	2018-10-01	2018-10-31	Behaviour Rule	100	Enabled	<a href="#">View</a>
<input type="checkbox"/>	59	point			Product Rule	2	Enabled	<a href="#">View</a>

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

From Date:

To Date:

Copyright © 2018 Magento Commerce Inc. All rights reserved. Magento ver. 2.2.5 Account Activity | Report an Issue

## 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

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.

Product Attribute

Activity

Attribute Set

Category

Category Gear

Climate

Collar

Color

Eco Collection

Erm Recommends

Features

Format

Gender

Material

New

Pattern

Performance Fabric

SKU

Copyright © 2018 Magento Commerce Inc. All rights reserved. Magento ver. 2.2.5 Account Activity | 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.

**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

For each \$Y spent, give X points.

Number of points (X): 10

Copyright © 2018 Magento Commerce Inc. All rights reserved. Magento ver. 2.2.5 Account Activity | Report an Issue

*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. <a href="#">Learn more</a>



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

Copyright © 2018 Magento Commerce Inc. All rights reserved.

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

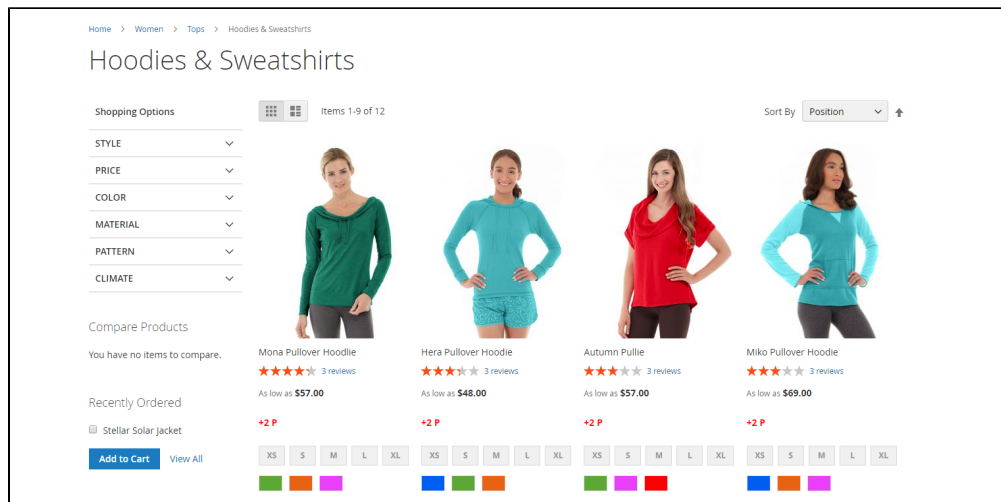
You can also track the transaction history in **Marketing > Reward Points > Transaction History**

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

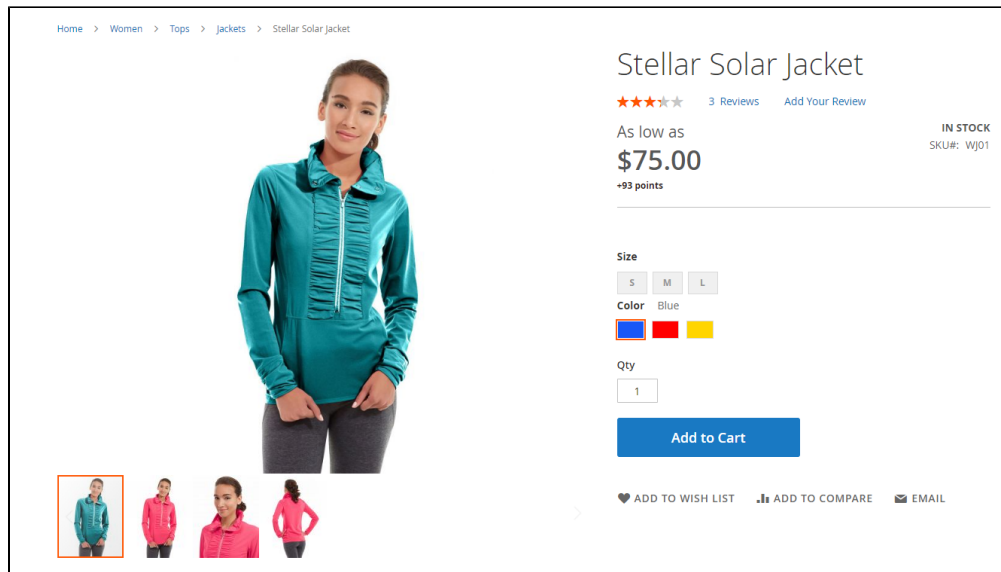
## Store Front Functions

- View reward points in each product details

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



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.