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**

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:
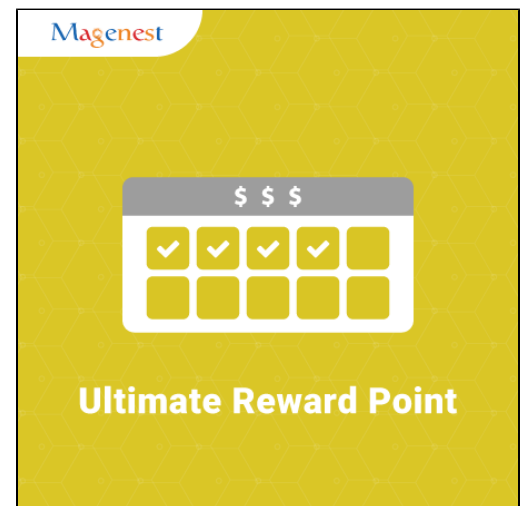
  + My Reward Points

    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**

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

Text color: The color of the reward points

⊕ 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.

➕ **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**

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.**

Product Rule: Set the rule based on product attributes

⊕ 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.

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.

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.

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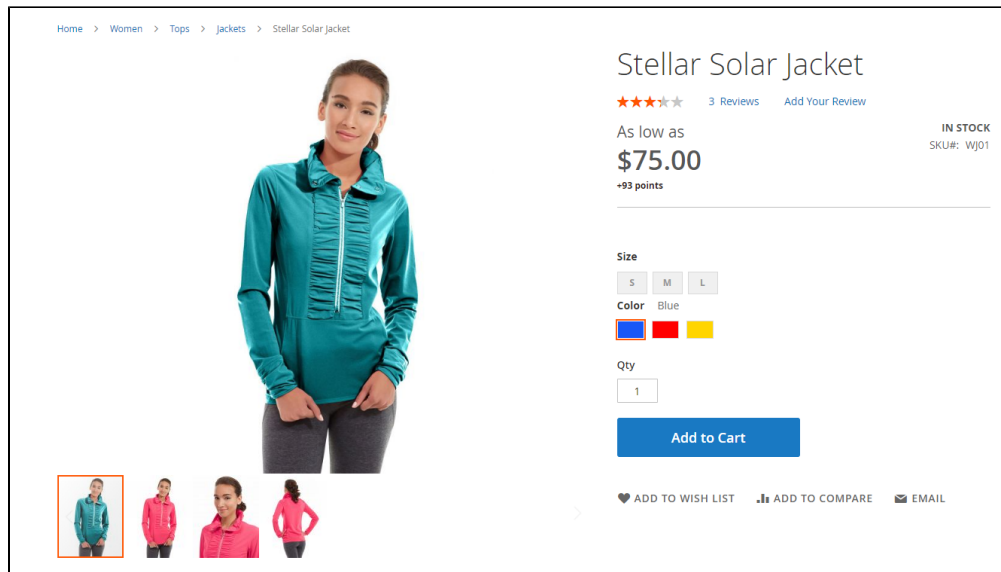
Store Front Functions

- **View reward points in each product details**

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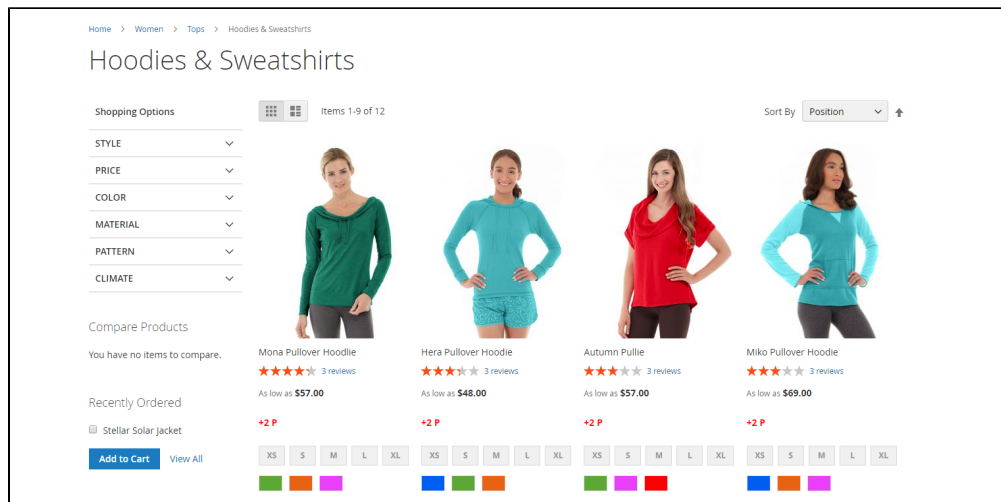
Customers can see the reward points shown on the Product Detail Page

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

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

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.

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.