

Reward Points

for Magento 2



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Reward Points extension for Magento 2 introduces an in-store currency promoting additional purchases:

- Customer lifetime sales as a points earning condition;
- Points use statistics: total earned & spent;
- Social network activity earning conditions (share pages on Facebook, twitter, Google+.);
- Special block on frontend with price discounted by available points;
- Mass customer point balance updates;
- Category exceptions for points checkout;
- Point balance update notifications;
- Refund to points;
- Point balance use limitations.

The extension promotes additional purchases at the store by adding Points – an in-store currency customers can use to pay for order, partially or in full. The Points are earned by either participating in the store activities like sharing store pages on the social networks, subscribing to newsletter, registering at the store, or by placing orders.

Store administrator can set point earn rates, for example every \$100 spent grants customer 10 points; and spend rates, for example 1 point = \$1. In addition, to create a sense of urgency, administrator can set points expiration time, for example, once earned points can be spent within 30 days. Considering all available options it is possible to create live and active sales campaign that encourages placing more orders to benefit from the discount available.

If required, some of the categories along with all the subcategories can be excluded from the Points and Rewards campaign. Products that belong to such categories cannot be purchased with points, however can earn customer set amount of points if purchased.

General Settings

Before the Getting Around section it will be required to configure extension settings. It is a necessary step as right after the installation no earn or spend rates are set for points, meaning no in-store currency is available.

The extension settings can be found under **Store > Configuration > Aheadworks extensions > Reward Points**.

Calculation

Calculation is the first and the most important configuration section. It allows setting up earn and spend rates – the main aspects of the extension functionality.

Web Site	Customer Group	Customer Lifetime Sales >=	Base Currency	Points	Action
Main	ALL C	0	10	1	
Main	ALL C	100	10	2	

[Add Earn Rate](#)

Here store administrator can set up several tiers of the point earn and spend rates to promote more sales and reward customers who spend the most with additional points per purchase.

Both Earn Rates and Spend Rates blocks act the same way: by clicking [Add Earn Rate](#) and [Add Spend Rate](#) buttons, one can add new tiers, each tier comes with the following settings:

- **Web Site** – allows defining store website for the tier;
- **Customer Group** – allows specifying customer group the rates are applied to;
- **Customer Lifetime Sales >=** – allows specifying the amount customer should spend for the rates to apply to him;
- **Base Currency** – defines the amount in base currency that should be used as a reference to point exchange rate;
- **Points** – defines the amount of points equal to the particular amount of base currency when calculating earn and spend rates.

Another setting available under the Earn and Spend Rate blocks is **Reward points expire in, days** – it allows

Earn and spend rates are calculated on the following scheme:

Earn rate – every time customer spends amount set in the **Base Currency** field they are granted worth amount of points specified in the **Points** field.

Spend rate – every point spend by customer equals to a worth amount of currency specified in the **Base Currency** field.

specifying after how many days the points will expire on the customer's account.

The other settings under the Calculation section:

- **Refund to Reward Points Automatically** – if enabled the 'Refund to Reward Points' checkbox at the Credit Memo page will always be pre-ticked;
- **Points can't be used unless the balance is greater than** – defines the point balance value required to start using points. For example customers will only be able to pay with the points for an order if the point balance equals or greater than 100;
- **Share of purchase that could be covered by points, %** – defines the % of the order total that can be covered with points. Helps avoiding zero checkouts;
- **Cancel points earned on refunded order** – defines if the points that customer earned by placing an order should be deducted from their balance if the order is refunded;
- **Reimburse Points Spent on Refunded Order** – defines if the points customer spent on an order should be automatically added to their balance if the order is refunded;
- **Reward points expire in, days** – defines for what amount of time customers can use earned points. Helps urging customers to place new orders.

Points awarded for

This configuration section defines the triggers events that add particular amount of points to the customer's account:

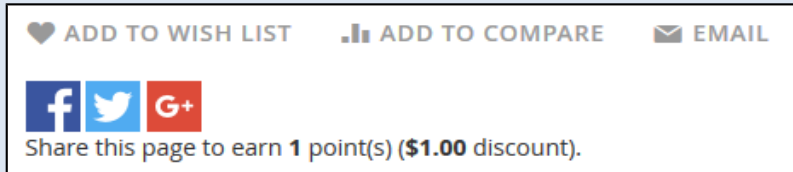
Points Awarded for	
Registration <small>[website]</small>	<input type="text" value="5"/>
Newsletter signup <small>[website]</small>	<input type="text" value="5"/> <small>Only for customers who subscribed for the first time.</small>
Sharing on social network <small>[website]</small>	<input type="text" value="1"/> ?
Sharing on social network daily limit, points <small>[website]</small>	<input type="text" value="0"/>
Sharing on social network monthly limit, points <small>[website]</small>	<input type="text" value="10"/>

The first set of award options available is:

- **Registration** – awards customer with the amount of points set upon registering account at the store. This may prove useful if you want to avoid guest checkouts and get more information on your customers;
- **Newsletter signup** – whenever customer subscribes to newsletter or is subscribed by the store administrator the set amount of points is added to their account;
- **Sharing on social network** – whenever customer shares a store page on the social network the set amount of points is added to their account;
- **Sharing on social network daily limit, points** – allows limiting total amount of points customer can earn per day by sharing store pages on the social networks;
- **Sharing on social network monthly limit, points** – allows limiting total amount of points customer can earn per month by sharing store pages on the social networks, can work in conjunction with the previous award option.

Social network sharing

Once installed Reward Points extension adds Facebook, Twitter and Google+ buttons to the product pages.



By clicking a relevant button customer can share the product page in the social network account earning a set amount of points.

Product review [website]	<input type="text" value="5"/>
	After approval by administrator
Product review daily limit, points [website]	<input type="text" value="5"/>
	empty or 0 - no limitations
Product review points awarded to product owners only [website]	<input type="text" value="Yes"/>

The second set of award options available is:

- **Product review** – whenever customer writes product review the set amount of points is added to their account. Points are added to the account only after the review is approved;
- **Product review daily limit, points** – allows limiting total amount of points customer can earn per day by writing product reviews;
- **Product review points awarded to product owners only** – allows limiting the point awards only to customers who have purchased the product.

Storefront

This section controls the extension's behavior on the frontend.

Storefront	
Points Balance in Top Link	<input type="text" value="Yes"/>
Hide the top-link if Reward Points balance is empty	<input type="text" value="Yes"/>
Reward program explainer page	<input type="text" value="Reward Points"/>
Display prices discounted by available points	<input type="text" value="Yes"/>
Display social sharing buttons at product page	<input type="text" value="Yes"/>

- **Points Balance in Top Link** – defines if the points available to customer should be displayed below the product title at the product page;
- **Hide the top-link if Reward points balance is empty** – defines if the point balance in the top link should not be displayed if customer has zero point balance;
- **Reward program explainer page** – defines the CMS page that will act as Points user guide;
- **Display prices discounted by available points** – defines if the prices of the products should be displayed with available points balance applied;
- **Display social sharing buttons at product page** – defines if the social sharing buttons should be displayed at the product pages.

That is all for the Reward Points settings, now it is high time to see the extension in action.

Email notifications

This section controls the email notifications sent to customers upon point balance updates. Since 1.1.0 version the store owners can send point balance updates and point expiration email notifications.

Email Notifications

Sender	General Contact	▼
Subscribe Customers to Reward Points Notifications by Default	Yes	▼
Balance Update Template	Balance update (Default)	▼
Points balance notifications sent when	Balance adjusted by admin Order canceled Refund by Reward Points	
Points expiration reminder template	Points expiration reminder (Default)	▼
Expiration reminder timing, days	1	

- **Sender** – defines an email address from which the point balance notification emails should be sent;
- **Subscribe Customers to Reward Points Notifications by Default** – defines if customers are subscribed to point balance notification by default or should manually subscribe from their account;
- **Balance Update Template** – defines the email template for sending notifications on the point balance updates;
- **Points balance notifications sent when** – defines upon what event the notifications should be sent to customers;
- **Points expiration reminder template** – defines the email template for sending point expiration reminders
- **Expiration reminder timing, days** – defines before how many days the notification on points expiration should be sent.

Getting Around

Once installed and properly configured Reward Points extension allows customers to participate in the reward campaign by purchasing products and participating in such social activities as: reviewing products, sharing product pages on social networks, subscribing to the newsletter and registering at the store.

First of all, Reward Points extension adds its section to the customer's account.

Your current balance is **109 points**
It can be redeemed for **\$109.00** at checkout

Click [here](#) to learn more about Reward Points program.

Transaction ID	Points	Comment	Transaction Date	Expiration Date
7	100	100 points at your disposal	Dec 6, 2016	-
6	9	Reward points for order #000000004	Dec 6, 2016	-
5	-9	Spent reward points on order #000000004	Dec 6, 2016	-
4	4	Reward points for order #000000003	Dec 6, 2016	-
1	5	Reward points for registration	Dec 6, 2016	-

Here customers can see current points balance, read about the points and rewards policies and look through the transaction history. If store administrator has set up a point award for registration, the first transaction should already be available to customers who created new account.

Moving forward to browsing the product catalog, customers can find a point information block right below the product name at the product pages:

Stellar Solar Jacket

★★★★★ 3 Reviews [Add Your Review](#)

\$75.00 **IN STOCK**
SKU#: WJ01

You have **109 point(s)** which gives **\$109.00** discount. You can apply your points on checkout.

Points information block displays available points balance and the discount customer can get if the points are applied at the checkout.

At the checkout, points can be applied to the order at the Review & Payments step:

Reward points ^

Use reward points 109 store reward points available (\$109.00)

By clicking [Use reward points](#) button customers can apply available amount of points to the order. This action will be accordingly reflected on the order total and in the order invoice:

Order Summary	
Cart Subtotal	\$52.00
52 Reward Points	-\$52.00
Shipping	\$0.00
Best Way - Table Rate	
Order Total	\$0.00

Every time customer spends points an appropriate transaction is added to the **Reward Points** section of the customer's account.

Managing points

In addition to the extension settings Reward Points extension introduces its section to Marketing > Reward Points by Aheadworks.

Transactions

Transactions ▾ [Add New Transaction](#)

[Filters](#) [Default View](#) ▾ [Columns](#) ▾

54 records found 20 per page < 1 of 3 >

ID ↑	Customer Name	Customer Email	Comment To Customer	Comment To Admin	Balance Change	Balance	Balance Adjusted	Status
54	customer.aw1@tut.by customer.aw1@tut.by	customer.aw1@tut.by	vis for cust	vis for admin	+1	1	0	Active
53	customer.aw5@tut.by customer.aw5@tut.by	customer.aw5@tut.by	vis for cust	vis for admin	+1	108	0	Active

Transactions section offers an overview of all the points ins and outs. Here store administrator with the help of filters available can look for transaction history for particular period of a particular customer.

- [Columns](#) button allows adding/disabling the grid columns, some may be excessive and some relevant to your current tasks;
- [Filters](#) button allows looking for the transaction matching a set of attributes;
- [Default View](#) button allows saving perfect grid look you found to quickly load it whenever required.

To add new transaction click [Add New Transaction](#) button.

Website *	<input type="text" value="Main Website"/>
Points balance adjustment *	<input type="text" value="100"/> <small>You can use negative value to decrease points balance.</small>
Comment (visible for customer)	<input type="text" value="Thank you for being part of our community!"/>
Comment (visible for admin only)	<input type="text" value="100 points on anniversary"/>
Expire	<input type="text" value="In X days"/>
Expire in, days	<input type="text" value="30"/> <small>0 or empty value means the transaction will never expire</small>

New Transaction page offers a set of options for updating point balance of customers:

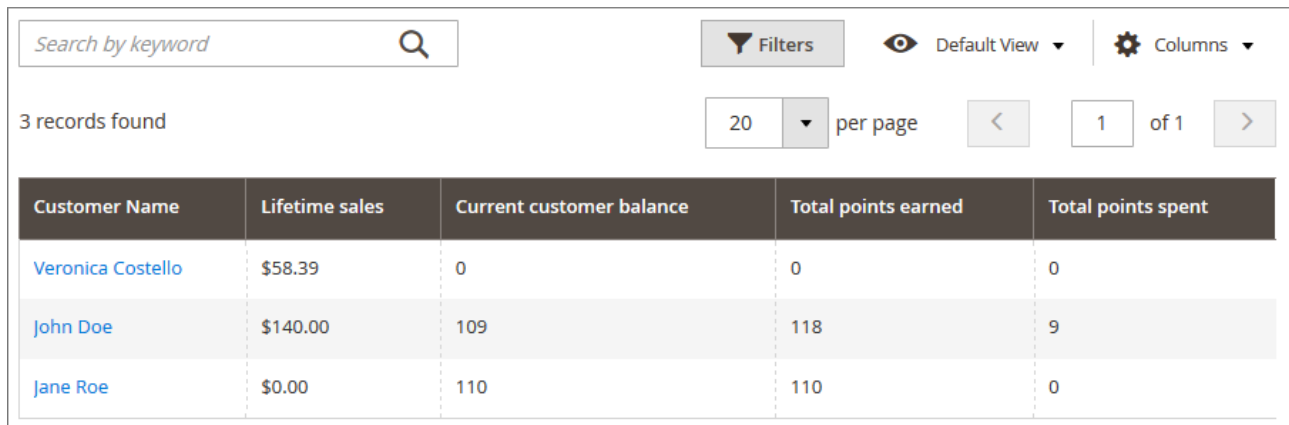
- **Website** – allows specifying the website for updating points balances;
- **Points balance adjustment** – defines the number of points that should be added/subtracted from the points balances;
- **Comment (visible for customer)** – allows specifying a message for customers to identify the points transaction;
- **Comment (visible for admin only)** – allows specifying a message for store administration to identify the points transaction;
- **Expire** – defines if the points should expire on a particular date of after a set number of days.

Customers section of the **New Transaction** page allows specifying store customers that will be eligible to receive a point balance update. The section offers the same navigation options in terms of filters and grid customization as the **Transactions** section.

- To start adding customers click **Add Customers** button;
- With the help of filters available find customer(s) that you want to update points balance for;
- Once done, click **Add Selected Customers** button.

Now click **Save Transaction** button to add points to the balances of the selected customers.

Customers



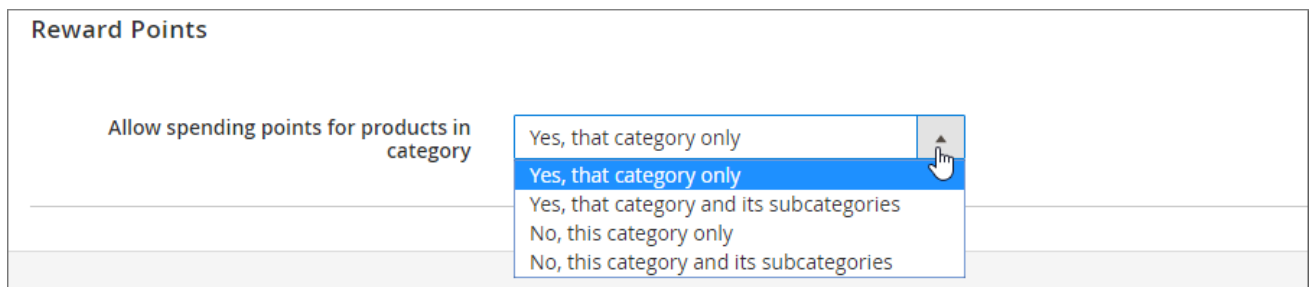
Customer Name	Lifetime sales	Current customer balance	Total points earned	Total points spent
Veronica Costello	\$58.39	0	0	0
John Doe	\$140.00	109	118	9
Jane Roe	\$0.00	110	110	0

Customers section of the Reward Points extension offers an overview of the customers and their current points balance. The section has the same navigation options as the **Transactions** section and proves useful for keeping track of the point use of a particular customer(s).

Exceptions

Along with the points management options Reward Points extension allows excluding particular product categories from the points campaign. It means that customers will still earn points for purchasing products from such categories; however, customers will not be able to PAY with points for such products at the checkout. This option has been introduced to let store owners decide what products they want to be discounted and what not.

To put a category in the exception list, navigate to this category settings.



Reward Points

Allow spending points for products in category

- Yes, that category only
- Yes, that category only
- Yes, that category and its subcategories
- No, this category only
- No, this category and its subcategories

In the category settings find Reward Points section and set Allow spending points for products in category to one of the following:

- **Yes, that category only** – only products from the currently selected category can be purchased with points;
- **Yes, that category and its subcategories** – products from currently selected category and all subcategories can be purchased with points;
- **No, this category only** – only products from the currently selected category can NOT be purchased with points;
- **No, this category and its subcategories** – products from currently selected category and all subcategories can NOT be purchased with points;


Once done with the category click  button.

Point balance import/export

Export

Version 1.4.0 of Reward Points extension introduced a possibility to export point balance to the .xml or .csv files.

The point balance can be exported at **Customers grid Marketing > Reward Points by Aheadworks > Customers**.

To export the points balance click  button, you will be suggested with the file extension of the export table. Choose whatever suits best for your needs.

Opened in the Microsoft Excel, the .csv file with the points balance will look something like this:

	A	B	C	D	E	F	G	H	I
1	Customer	Name,"Customer Email",	"Lifetime sales",	"Current customer balance",	"Total points e				
2	Veronica Costello,	roni_cost@example.com,	116.9500,	10,104,94,"Main Website",	"Not Subscrib				
3	first_w2	first_w2,first_w2@tut.by,	130.0000,	0,0,0,webs2,	Subscribed,	Subscribed			
4	second_w2	second_w2,second_w2@tut.by,	774.0000,	0,0,0,webs2,	Subscribed,	Subscribed			
5	tata tata,	tata1@example.com,	0.0000,	21,57,36,"Main Website",	Subscribed,	Subscribed			
6	webs3_customer1	webs3_customer1,	webs3_customer1@tut.by,	38.0000,	103,103,0,"third web				
7	webs3_customer2	webs3_customer2,	webs3_customer2@tut.by,	67.0000,	160,160,0,"third web				
8	webs3_customer3	webs3_customer3,	webs3_customer3@tut.by,	0.0000,	103,103,0,"third webs				
9	webs3_customer4	webs3_customer4,	webs3_customer4@tut.by,	0.0000,	3,3,0,"third webs",	Sub			
10	webs3_customer5	webs3_customer5,	webs3_customer5@tut.by,	0.0000,	3,3,0,"third webs",	Sub			
11	webs2_example1	webs2_example1,	webs2_example1@example.com,	0.0000,	3,3,0,webs2,	Subs			
12	webs2_example2	webs2_example2,	webs2_example2@example.com,	0.0000,	3,3,0,webs2,	Subs			
13	webs2_example3	webs2_example3,	webs2_example3@example.com,	0.0000,	3,3,0,webs2,	Subs			

The export table mirrors the **Customers** grid including all of the most important columns.

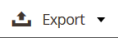
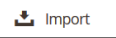
You may want to save the .csv file in case you are planning to import point balance updates to the store.

The .csv file with the import data should have the same look and appearance.

Import

The point balance can be imported at **Customers grid Marketing > Reward Points by Aheadworks > Customers**.

All updates are imported via .csv files. The easiest way of composing the point balance .csv is to export existing balance first.

- 1) Export existing balance into a .csv file by clicking  button.
- 2) Open the .csv file in any suitable editor. For example you can open it in Microsoft Excel.
- 3) When editing an import .csv make sure to preserve the table structure and change only required values.
- 4) You can import any balance values you want.
- 5) Once you have pasted all the updates to the .csv file click  button to upload it.

6) After a page reload you can check the grid for point balance updates.

The importing functionality is useful if you are migrating to Aheadworks solution from any third party loyalty module or from a Magento 1 store and want the balances updated accordingly on your Magento 2.

For an in-depth look, visit Reward Points demo store at the extension's [product page](#).

Feel free to contact our support team with any questions:

[Submit a help desk ticket](#)

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