ento 2 Customer Reward Management - Admin Guide

by CedCommerce Docs - Products User Guides

1. Overview 3
2. Reward System Configuration Settings 3
3. Catalog Rule 6
3.1. Set Up the Product Reward Point **7**
3.2. Update the Product Information **8**
3.3. Delete the Product from the Reward System **12**
3.4. Enable or Disable the Product for the Reward System **14**
4. Shopping Cart Rule 16
4.1. Add A New Rule **16**
4.2. Edit the Existing Rule **19**
5. Customer Report 22
6. Front-end User Panel 23
6.1. View the Reward Points **24**
6.2. Refer To Friends **24**

1. Overview

Customer reward management is a system to provide interest and motivation to the customers. The **Customer Reward Management** extension for Magento ® 2 provides a facility to the new customers (front-end users) to earn the reward points after successful registration; Helps the registered users to earn the reward points after successful order completion. They can use those points as a discount on their next purchase. Thus, the Reward Point Management System helps the Magento 2 store owners to make their store popular among the customers.

Also, the users have facility to eran the reward points through referring their friends – on sign up of the each referred user and also when the referred users purchase the products.

Prerequisites:

- **CedCommerce Multi-Vendor Marketplace Extension(http://cedcommerce.com/magento-2-extensions/marketplace-basic)**

*Benefits of the **Customer Reward Management** extension for the store owners are as follows*:

- Easy Installation without affecting any core Magento 2 functionality.
- Nurtures and establishes a healthy customer-seller relationship.
- Provides unlimited rules, that is, there is no fixed pattern for rewarding customers. Admin can set any rules that work best for the business requirements and the interests of the customers.
- Facilitates the admin to change or discard any rule at any point.
- New users can earn the reward points after registering successfully to the store.
- Admin can view the total earned points and used points by the various customers.
- This extension empowers admin to decide the point value the customer can earn.
- Auto-expiration of the rule based on the timeline set by the admin.
- Admin can set the same reward points for all the products or can set it on the product basis.
- Admin can manage refund point management for order cancellation or refund.

*Benefits of the **Customer Reward Management** extension for the front-end users are as follows*:

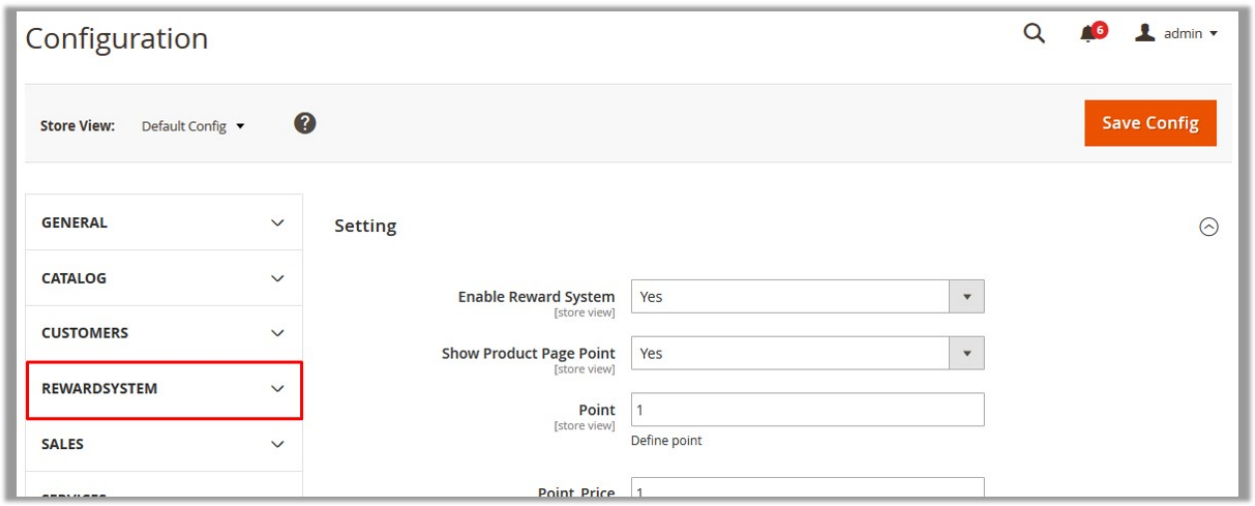
- Customers can easily redeem the reward points during there next purchase from the store at fronted.
- Customers receive a notification on the wallet balance or reward points after each successful purchase.
- Customers can view the Earned points and used points status on their dashboard.

2. Reward System Configuration Settings

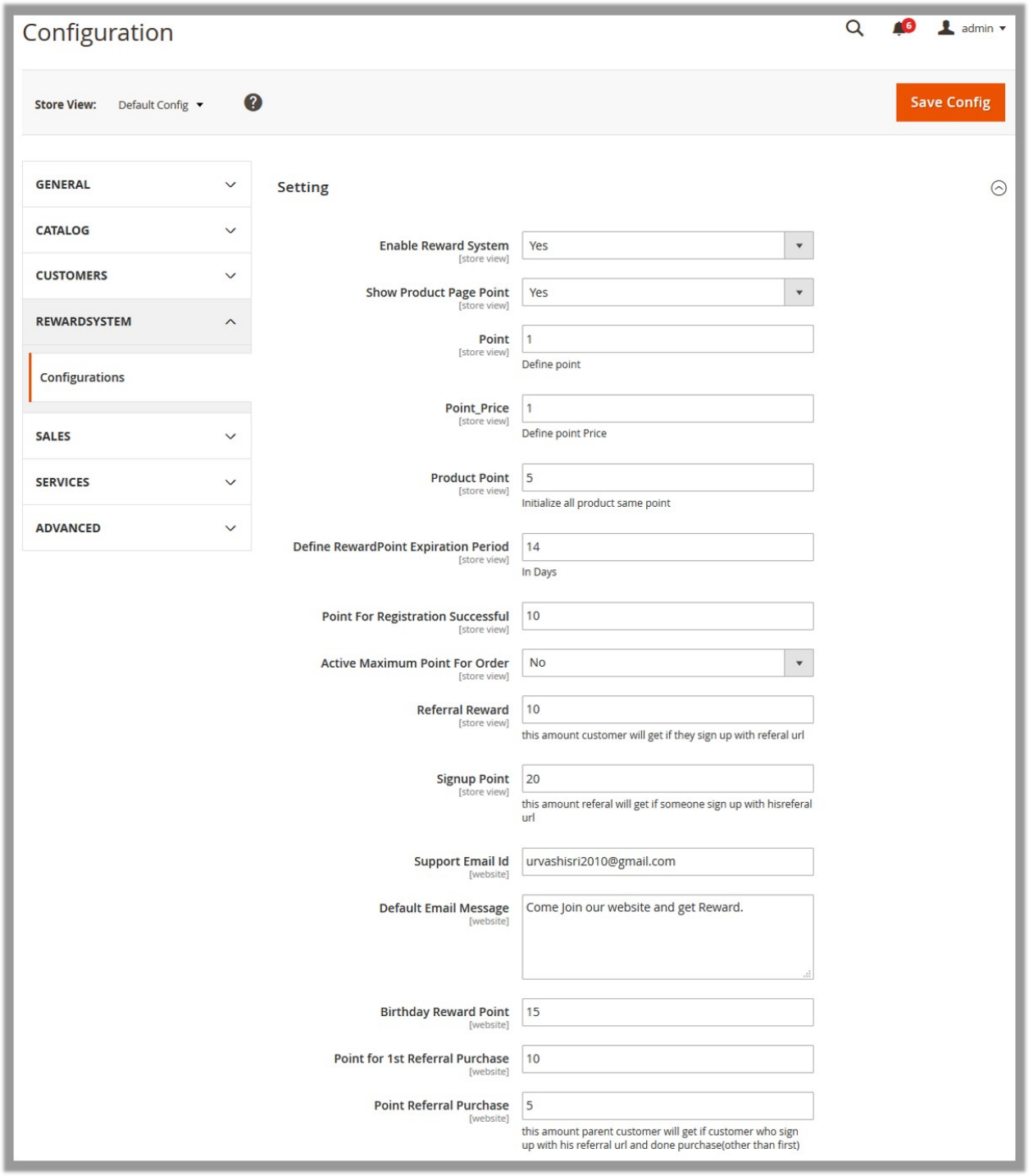
Once the Magento 2 store owner installs the **Customer Reward Management** extension, the **REWARD SYSTEM** menu appears on the left navigation bar of the Admin panel. Admin has to set up the configuration settings to enable the features of the extension and to use the extension.

To set up the Reward System Configuration Settings

1. Go to the Admin panel.
2. On the left navigation bar, click the **STORES** menu, and then click **Configuration**.
   The **Configuration** page appears as shown in the following figure:



3. In the left navigation panel, click the **REWARDSYSTEM** menu.
   The page appears as shown in the following figure:



4. In the right panel, under the **Setting** section, enter the required value in the following fields:
    - **Enable Reward System**: Select **Yes** to enable the extension features.
    - **Show Product Page Point**: Select **Yes** to display the reward points on the Product page.
    - **Point**: Set up the Reward Point value.
    - **Point Price**: Set up the price amount for the Reward Point value.
      For instance,

        - **Point** = 1; **Point Price** = 1
          then 1 point = $1
        - **Point** = 2; **Point Price** = 1

then 2 points = $1

- **Product Point**: Point defined for each product.
- **Define RewardPoint Expiration Period**: Set up the Number of days to define the expiration period of the reward point.
- **Point For Registration Successful**: Set up the Points that the front-end users can earn after successful registration.

- **Active Maximum Point For Order**: Select one of the following options:
  - **Yes**: The **Define Maximum Point For Order** field appears. Set up the maximum point, which the customer can earn on placing orders.
    For instance,
    Product Point = 10
    Number of Orders placed = 50
    Earned Points = 500
    Define Maximum Point For Order = 50
    In this case, the customer can **get the 50 points** only and the rest **450 point will be discarded**.

  - **No**: There is no limitation on earning the product points on placing the orders.
- **Referral Reward**: The referral reward points that the referred customers can earn if they sign up with the referral URL.
- **Signup Point**: The reward points that the customer can earn when any of the referred customers sign ups with the referral URL.
- **Support Email Id**: Email Id of the support team.
- **Default Email Message**: Email message content that the customers can receive.
- **Birthday Reward Point**: The reward points that the customers can receive on their birthday.
- **Point for 1st Referral Purchase**: Points that the customers can earn when their referreals make their first purchase.
- **Point Referral Purchase**: Points that the customers can earn when their referreals make their purchases other than the first purchase.

5. Click the **Save Config** button.

3. Catalog Rule

Using the Catalog Rules option, the admin can set the products for sale under certain terms and conditions in a selective manner.

These conditions define a subset of a catalog to which the admin wants to apply the rules. User can set the reward points for the specific product.

These are the discounts that are applicable on the products before they are being added to a cart.

The admin can perform the following tasks:

- Set the Reward Point for the Product(https://docs.cedcommerce.com/magento-2/customer-reward-system-extension-for-magento-2?section=set-up-the-product-reward-point)

- Update the Product Information(https://docs.cedcommerce.com/magento-2/customer-reward-system-extension-for-magento-2?section=update-the-product-information)

- Delete the Products from the Reward System(https://docs.cedcommerce.com/magento-2/customer-reward-system-extension-for-magento-2?section=delete-the-product-from-the-reward-system)

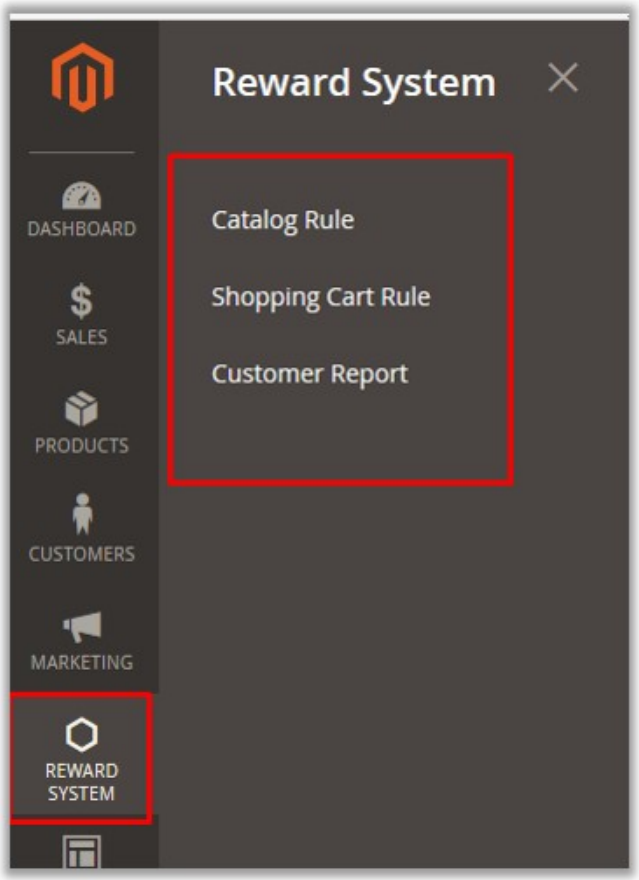
- Enable or Disable the Product for the Reward System(https://docs.cedcommerce.com/magento-2/customer-reward-system-extension-for-magento-2?section=enable-or-disable-the-product-for-the-reward-system)

3.1. Set Up the Product Reward Point

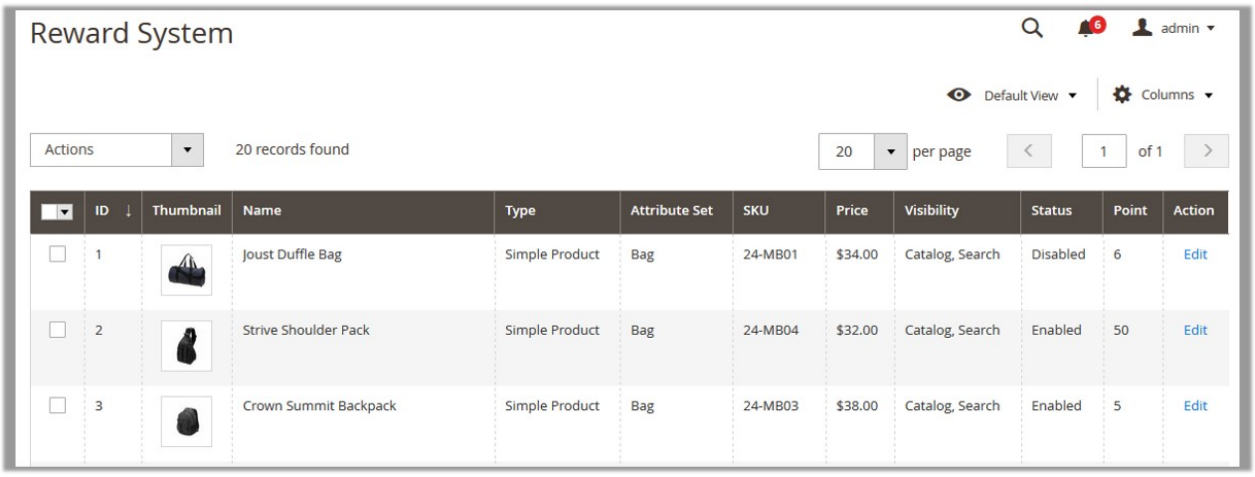
Admin can define the product reward point, which is defined only for the specific product. It means, admin can define different reward points for different products.

To set up the product reward point

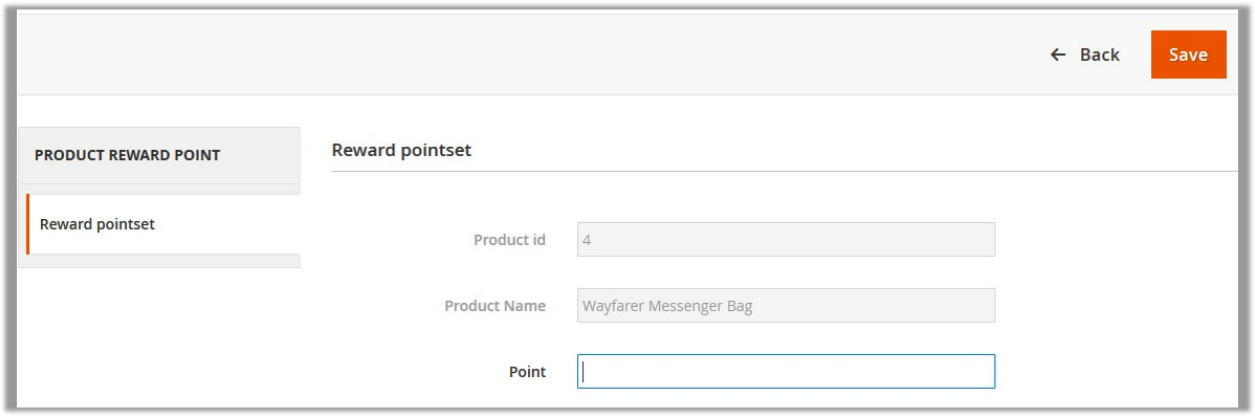
1. Go to the Admin panel.
2. On the left navigation bar, click the **REWARD SYSTEM** menu.
   The Menu appears as shown in the following figure:



3. Click **Catalog Rule**.
   The page appears as shown in the following figure:



4. Scroll down to the required product.
5. In the **Action** column, click the **Edit** link associated with the required product.
   The page appears as shown in the following figure:



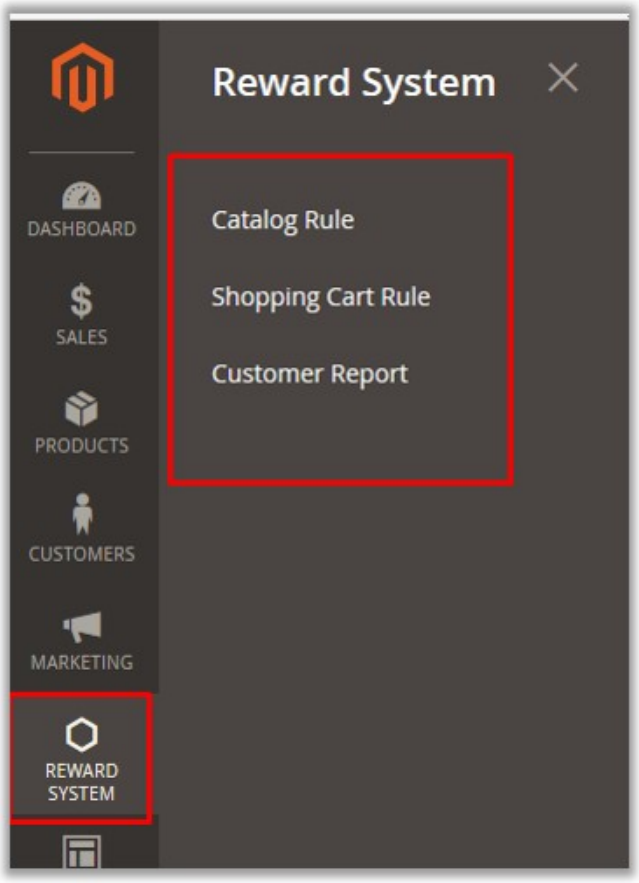
6. In the right panel, in the **Point** box, enter the reward point for the current product.
7. Click the **Save** button.

3.2. Update the Product Information

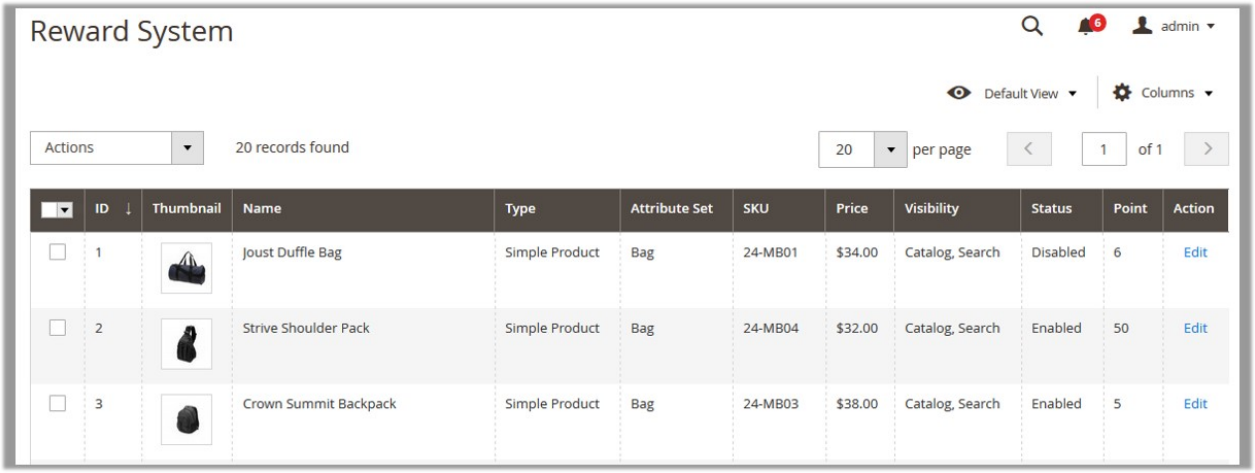
With the help of this feature, the admin can update not only the attributes of the product but also the product inventory and the websites where the product has to be displayed.

To update the product information

1. Go to the Admin panel.
2. On the left navigation bar, click the **REWARD SYSTEM** menu.
   The Menu appears as shown in the following figure:

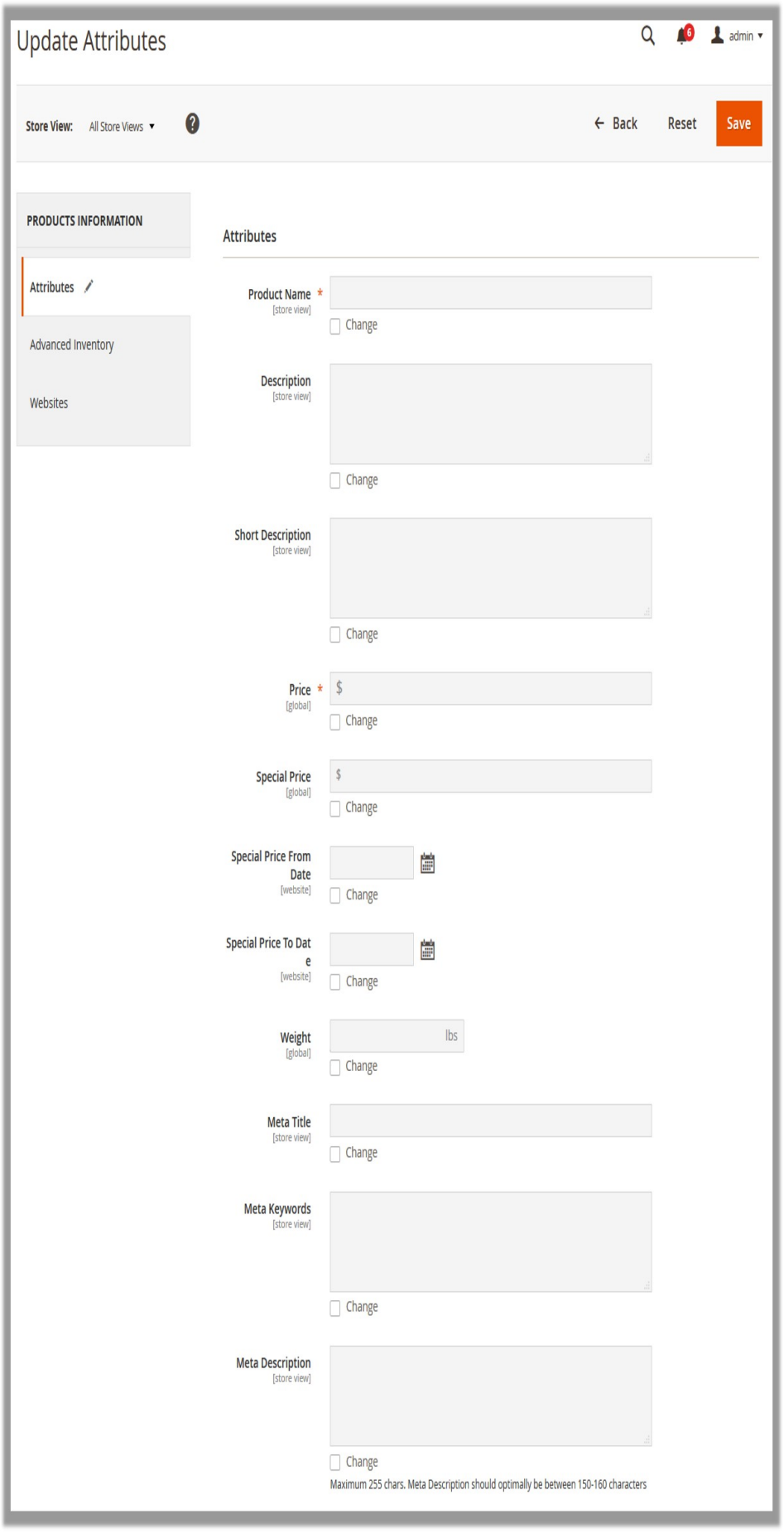


3. Click **Catalog Rule**.
   The page appears as shown in the following figure:



	ID	Thumbnail	Name	Type	Attribute Set	SKU	Price	Visibility	Status	Point	Action
☐	1		Joust Duffle Bag	Simple Product	Bag	24-MB01	$34.00	Catalog, Search	Disabled	6	Edit
☐	2		Strive Shoulder Pack	Simple Product	Bag	24-MB04	$32.00	Catalog, Search	Enabled	50	Edit
☐	3		Crown Summit Backpack	Simple Product	Bag	24-MB03	$38.00	Catalog, Search	Enabled	5	Edit

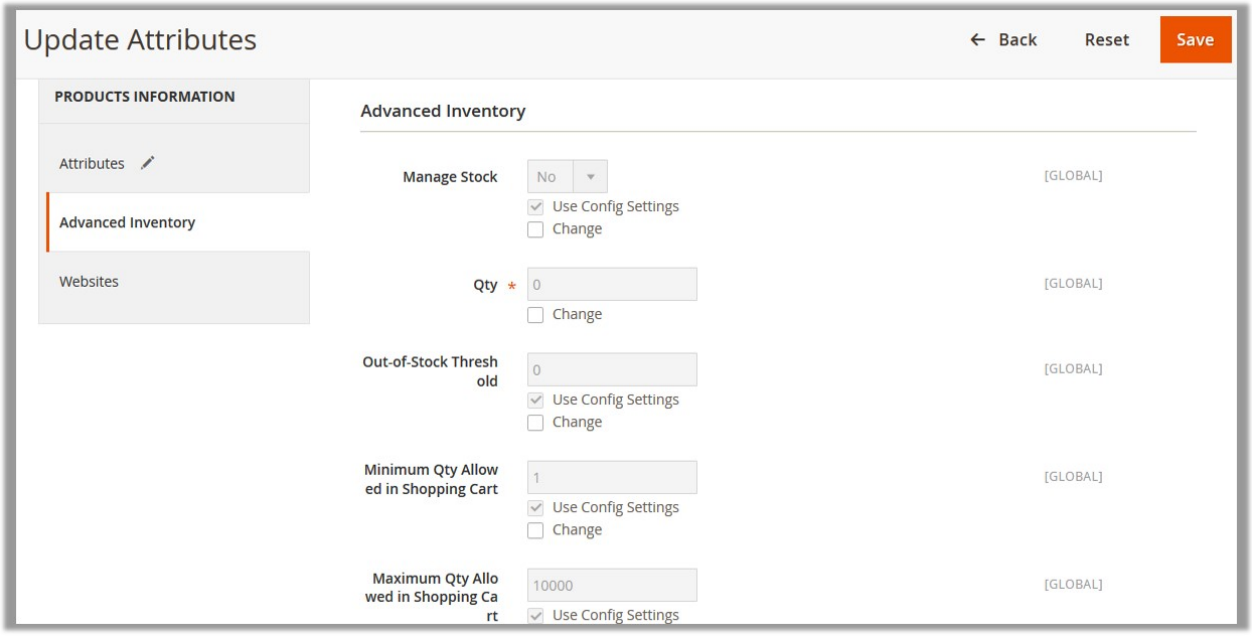
4. Select the check box associated with the required product.
5. In the **Actions** list, select the **Update attributes** option.
   The page appears as shown in the following figure:


Update Attributes
admin
Store View: All Store Views
Back
Reset
Save
PRODUCTS INFORMATION
Attributes
Advanced Inventory
Websites
Attributes
Product Name * [store view]
Change
Description [store view]
Change
Short Description [store view]
Change
Price * [global]
$
Change
Special Price [global]
$
Change
Special Price From Date [website]
Change
Special Price To Date [website]
Change
Weight [global]
lbs
Change
Meta Title [store view]
Change
Meta Keywords [store view]
Change
Meta Description [store view]
Change
Maximum 255 chars. Meta Description should optimally be between 150-160 characters

Note: In the right panel, under the **Attributes** section, by default all the fields are inactivated.

a. To enter the new values in the corresponding fields, select the check box associated with the **Change** text displayed below of the respective field.
The field is activated.
b. Enter the required value in the respective field.

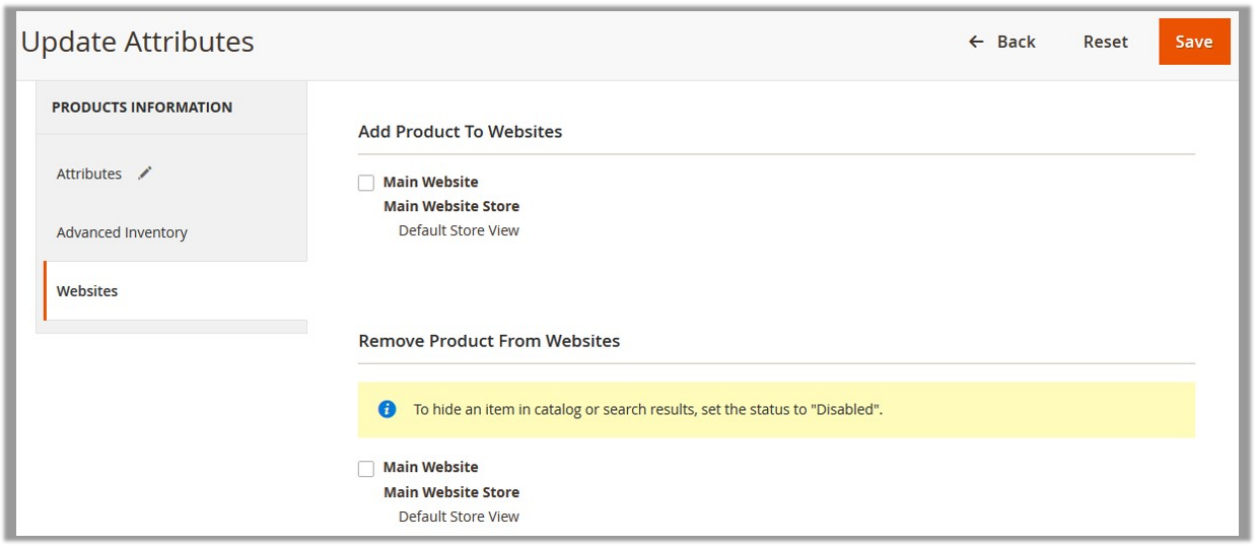
6. In the left navigation panel, click the **Advanced Inventory** menu.
The page appears as shown in the following figure:



Note: In the right panel, under the **Advanced Inventory** section, by default all the fields are inactivated and the **Use Config Settings** check box is selected, it means, the default values are used.

a. To enter the new values in the corresponding fields, select the check box associated with the **Change** text displayed below of the respective field.
The field is activated.
b. Enter the required value in the respective field.

7. In the left navigation panel, click the **Websites** menu.
The page appears as shown in the following figure:



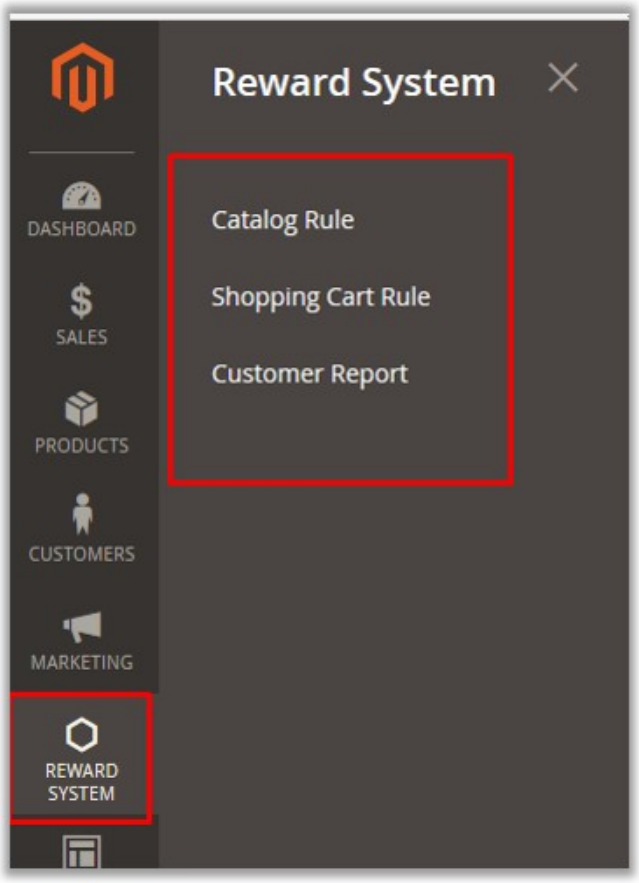
8. Under **Add Product to** Websites, do the following step to add the product to the selected Web site.
    - Select the check box associated with the **Main Website** field.
9. Click the **Save** button.

3.3. Delete the Product from the Reward System

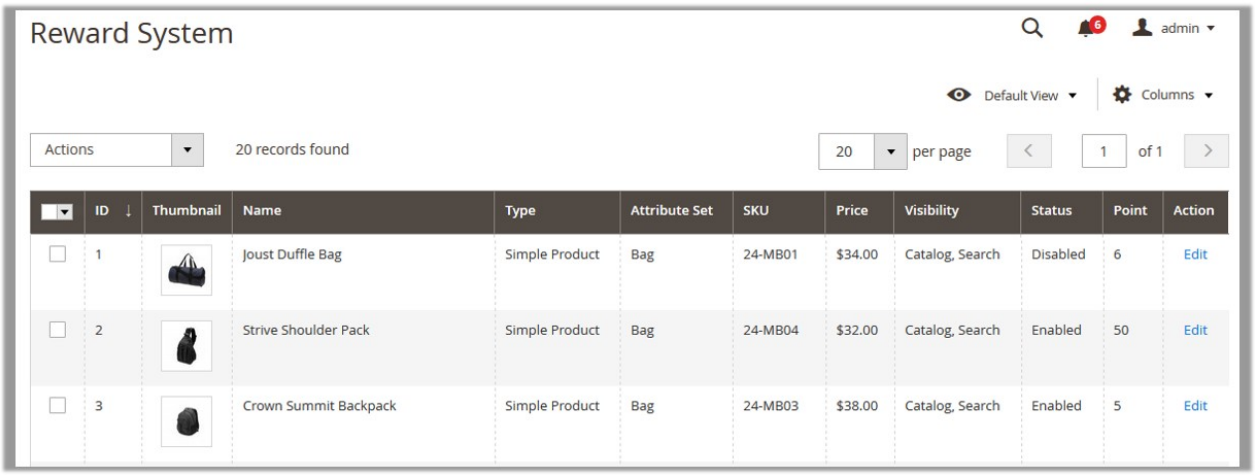
With the help of this feature, the admin can delete the selected products from the Reward System.

To delete the selected products from the Reward System

1. Go to the Admin panel.
2. On the left navigation bar, click the **REWARD SYSTEM** menu.
   The Menu appears as shown in the following figure:



3. Click **Catalog Rule**.
   The page appears as shown in the following figure:



	ID	Thumbnail	Name	Type	Attribute Set	SKU	Price	Visibility	Status	Point	Action
☐	1		Joust Duffle Bag	Simple Product	Bag	24-MB01	$34.00	Catalog, Search	Disabled	6	Edit
☐	2		Strive Shoulder Pack	Simple Product	Bag	24-MB04	$32.00	Catalog, Search	Enabled	50	Edit
☐	3		Crown Summit Backpack	Simple Product	Bag	24-MB03	$38.00	Catalog, Search	Enabled	5	Edit

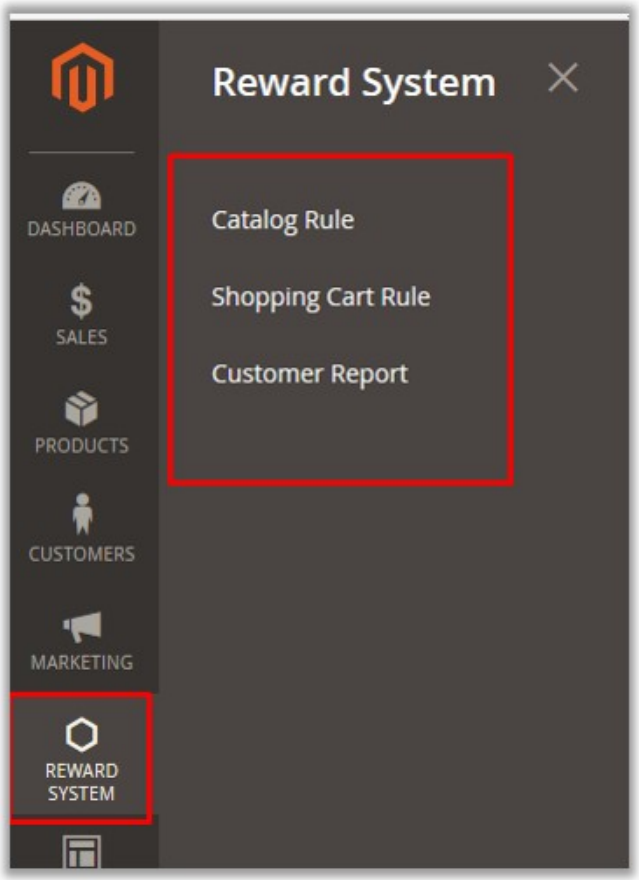
4. Select the check boxes associated with the products those are no more required.
5. In the **Actions** list, select the **Delete** option.
   A confirmation dialog box appears.
6. Click the **OK** button.
   The selected prodcuts are removed from the reward system management.

3.4. Enable or Disable the Product for the Reward System

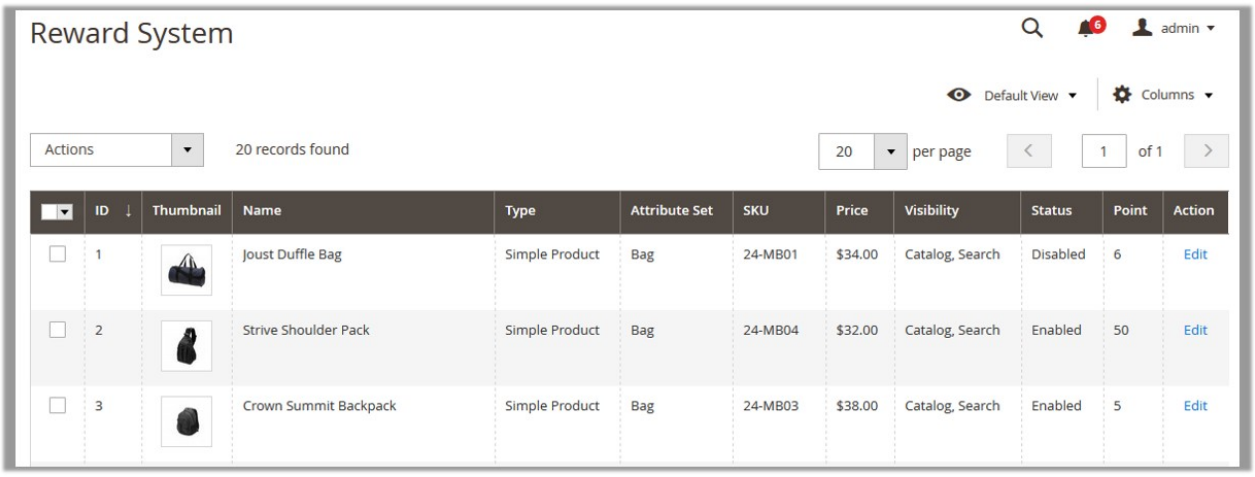
With the help of this feature, the admin can enable or disbale the selected products for the Reward System.

To enable or disable the selected products

1. Go to the Admin panel.
2. On the left navigation bar, click the **REWARD SYSTEM** menu.
   The Menu appears as shown in the following figure:

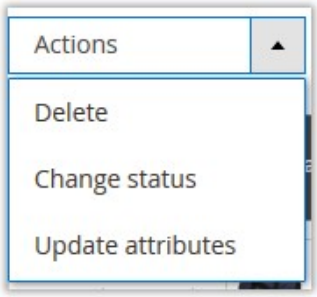


3. Click **Catalog Rule**.
   The page appears as shown in the following figure:

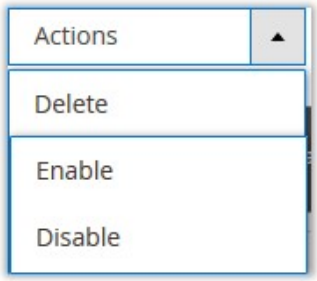


	ID	Thumbnail	Name	Type	Attribute Set	SKU	Price	Visibility	Status	Point	Action
☐	1		Joust Duffle Bag	Simple Product	Bag	24-MB01	$34.00	Catalog, Search	Disabled	6	Edit
☐	2		Strive Shoulder Pack	Simple Product	Bag	24-MB04	$32.00	Catalog, Search	Enabled	50	Edit
☐	3		Crown Summit Backpack	Simple Product	Bag	24-MB03	$38.00	Catalog, Search	Enabled	5	Edit

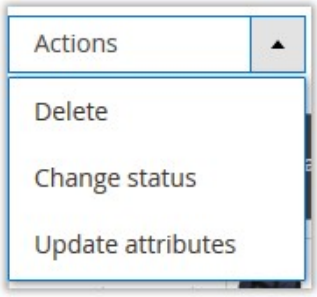
4. To enable the selected products, do the following steps:
   a. Select the check boxes associated with the products those are disabled and need to be enabled.
   b. In the **Actions** list, select the **Change Status** option.



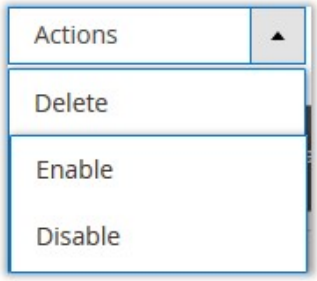
The menu appears as shown in the following figure:



   c. Select the **Enable** option.
   The selected products are enabled and a success message appears.
5. To disable the selected products, do the following steps:
   a. Select the check boxes associated with the products those are enabled and need to be disabled.
   b. In the **Actions** list, select the **Change Status** option.



The menu appears as shown in the following figure:



c. Select the **Disable** option.
The selected products are disabled and a success message appears.

4. Shopping Cart Rule

The Shopping Cart rule feature is used to set up the discounts that are applicable only to the products those are added in the shopping cart.

The admin can create a Shopping cart rule to apply discounts on orders at the checkout level, based on different combinations of conditions. The discounts are applied automatically when the conditions are satisfied. When the rules are applied, the discount appears on the shopping cart page under the subtotal.

After creating the rules, the user can use it as per the requirement by changing its status and date range.

Shopping Cart rules are discounts that are applicable after the products are being added to a cart.

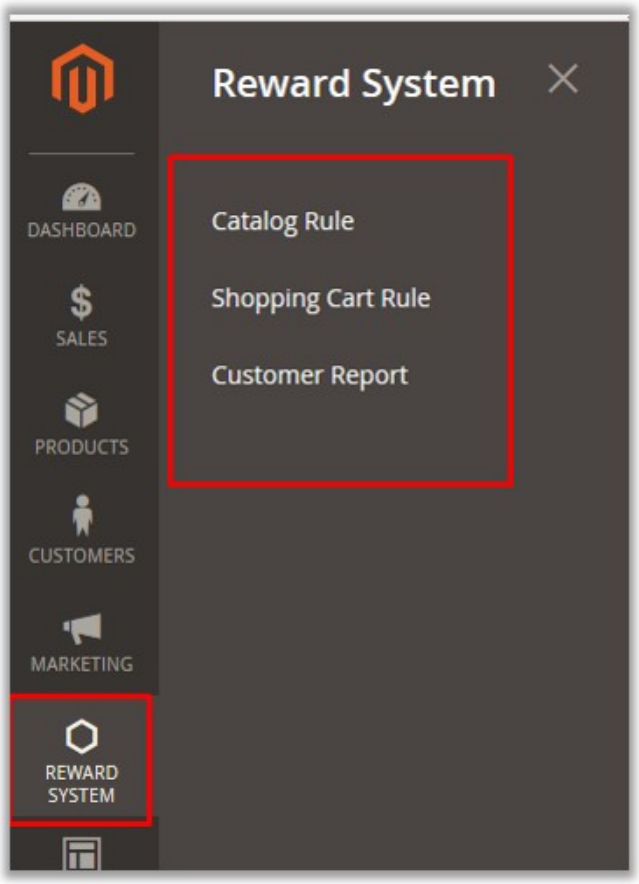
Admin can perform the following tasks:

- Add a New Rule(https://docs.cedcommerce.com/magento-2/customer-reward-system-extension-for-magento-2?section=add-a-new-rule)
- Edit the Existing Rule(https://docs.cedcommerce.com/magento-2/customer-reward-system-extension-for-magento-2?section=edit-the-existing-rule)

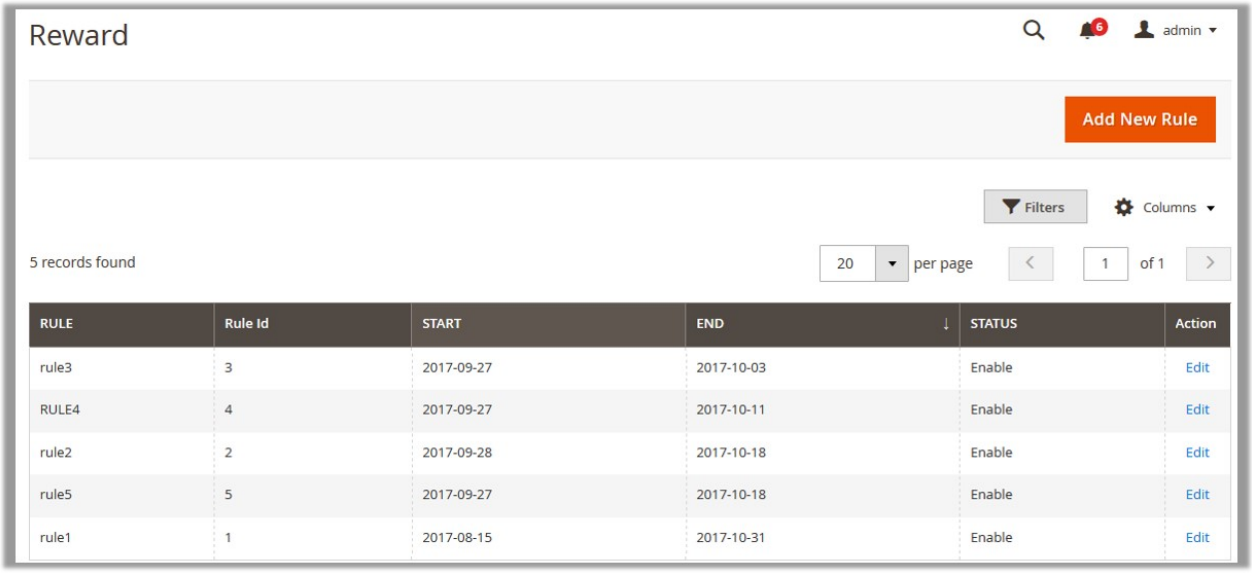
4.1. Add A New Rule

To add a new shopping cart rule

1. Go to the Admin panel.
2. On the left navigation bar, click the **REWARD SYSTEM** menu.
   The menu appears as shown in the following figure:

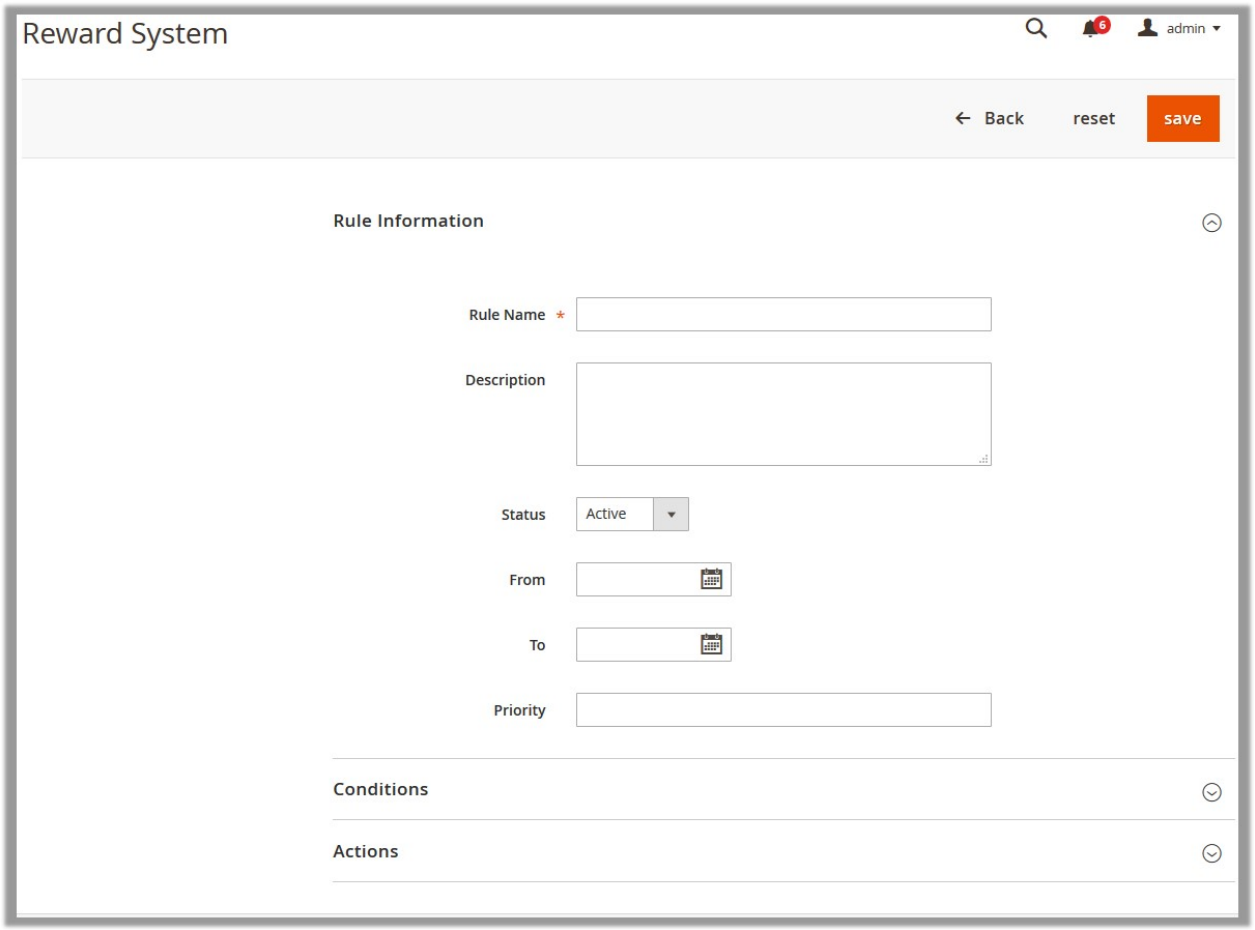


3. Click **Shopping Cart Rule**.
   The page appears as shown in the following figure:



RULE	Rule Id	START	END	STATUS	Action
rule3	3	2017-09-27	2017-10-03	Enable	Edit
RULE4	4	2017-09-27	2017-10-11	Enable	Edit
rule2	2	2017-09-28	2017-10-18	Enable	Edit
rule5	5	2017-09-27	2017-10-18	Enable	Edit
rule1	1	2017-08-15	2017-10-31	Enable	Edit

4. Click the **Add New Rule** button.
   The page appears as shown in the following figure:

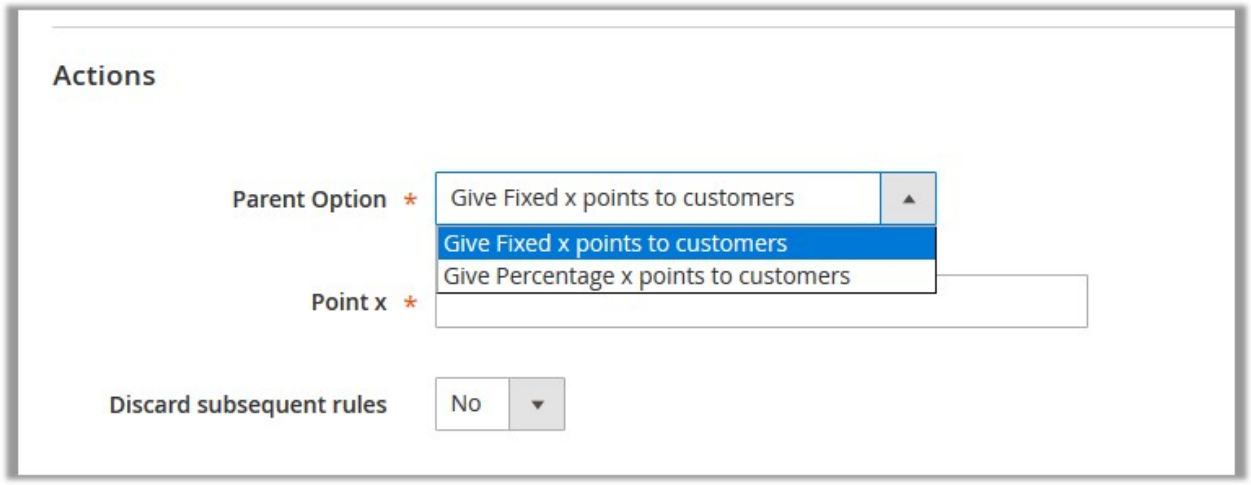


5. Under the **Rule Information** section, do the following steps:
   a. In the **Rule Name** box, enter the name of the rule.
   b. In the **Description** box, enter the description of the rule.
   c. In the **Status** list, select one of the following statuses.
      `. **Active**: The rule is activated.
      `. **Inactive**: The rule is inactivated.
   d. In the **From** box, click the **Calendar** icon to select the starting date of the rule, that is, the date from when the rule is applicable.
   e. In the **To** box, click the **Calendar** icon to select the end date of the rule, that is, the date till when the rule is applicable.
6. Scroll down to the **Conditions** tab, and then click the tab.
   The tab is expanded and the relevant fields appear as shown in the following figure:

7. Under the **Conditions** sections, do the following steps:
   - Click the **ALL** link, and then select **ALL** or **ANY** from the list.
   - Click the **TRUE** link, and then select **TRUE** or **FALSE** from the list.
   - Click the **Add**

     icon, and then select the required condition from the list.

     Note: To apply the rules to all the product, do not change the conditions value.
8. Scroll down to the **Actions** tab, and then click the tab.
   The tab is expanded and the relevant fields appear as shown in the following figure:



9. Under the Actions section, do the following steps:
   a. In the **Parent Option** list, select one of the following options:
      `. Give Fixed x points to customers
      `. Give Percentage x points to customers
   b. In the **Point x** box, enter the required value based on the option selected in the **Parent Option** list.
   c. In the **Discard Subsequent rule**s list, select **Yes** or **No**.

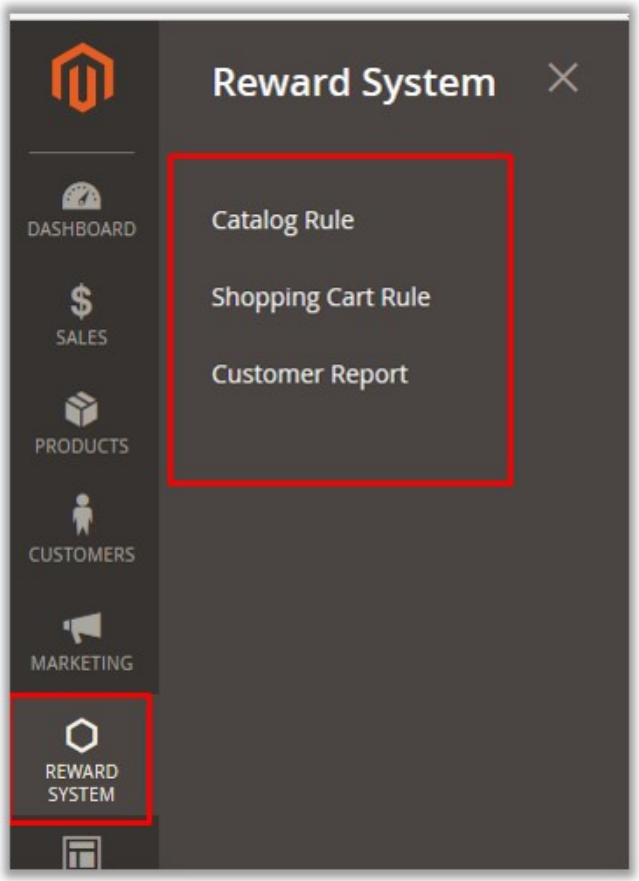
   Note: If the user selects the **Yes** option, the processing of other rules after this rule is stopped. This prevents the customers from receiving the multiple discounts for the same product.
10. Click the **Save** button.

4.2. Edit the Existing Rule

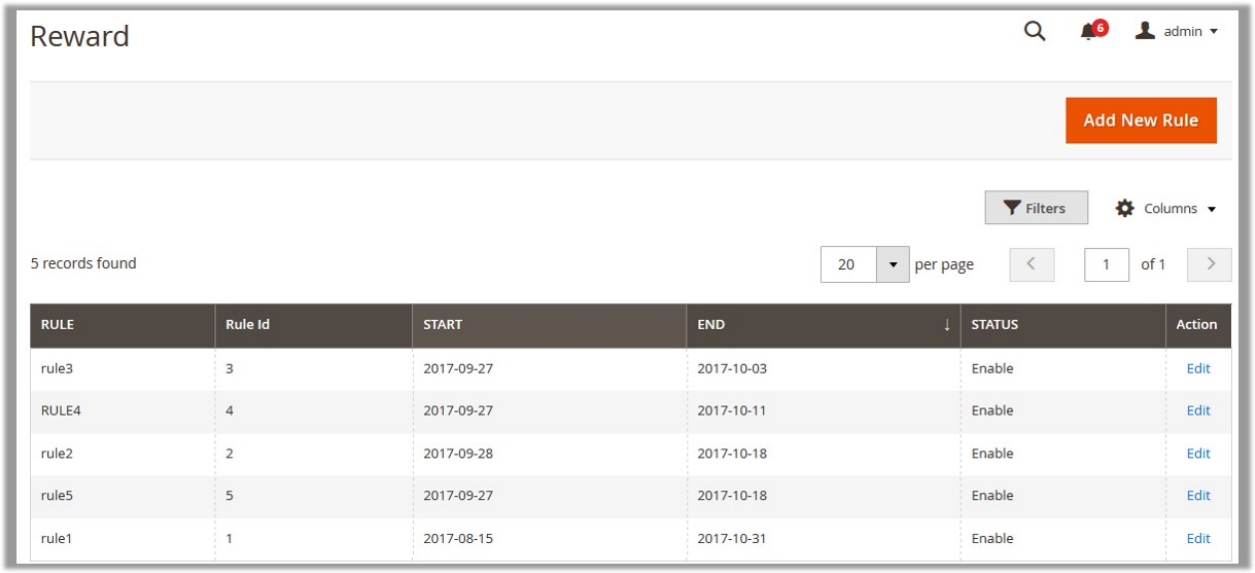
Based on further requirement, the admin can make some changes in the rule and activate it again.

To edit the existing rule

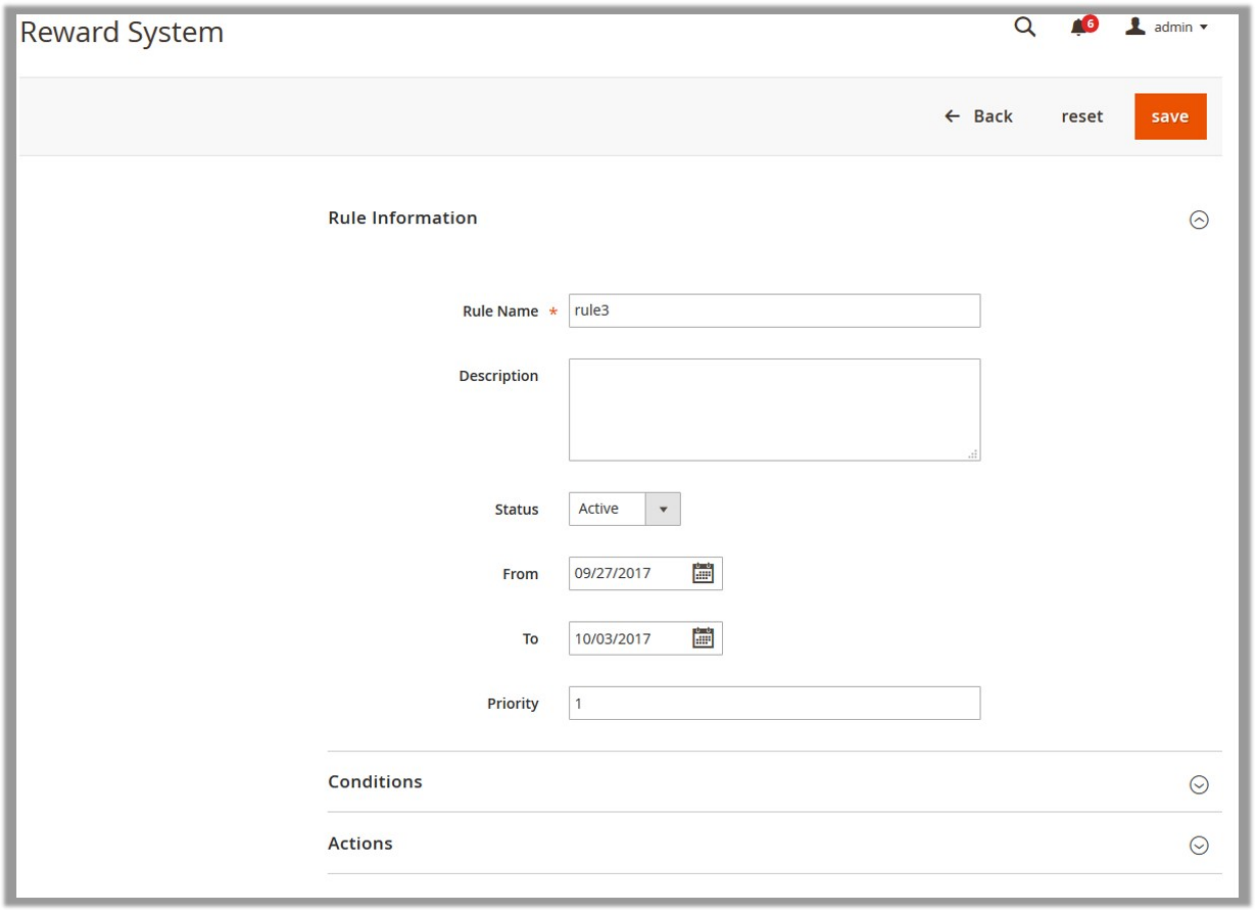
1. Go to the Admin panel.
2. On the left navigation bar, click the **REWARD SYSTEM** menu.
   The menu appears as shown in the following figure:



3. Click **Shopping Cart Rule**.
   The page appears as shown in the following figure:



4. Scroll down to the required rule to edit.
5. In the **Action** column, click the **Edit** link associated with the required account.
   The page appears as shown in the following figure:



6. Make the changes based on the requirements.
7. Click the **Conditions** tab and/or the **Actions** tab if required to make the appropriate changes.

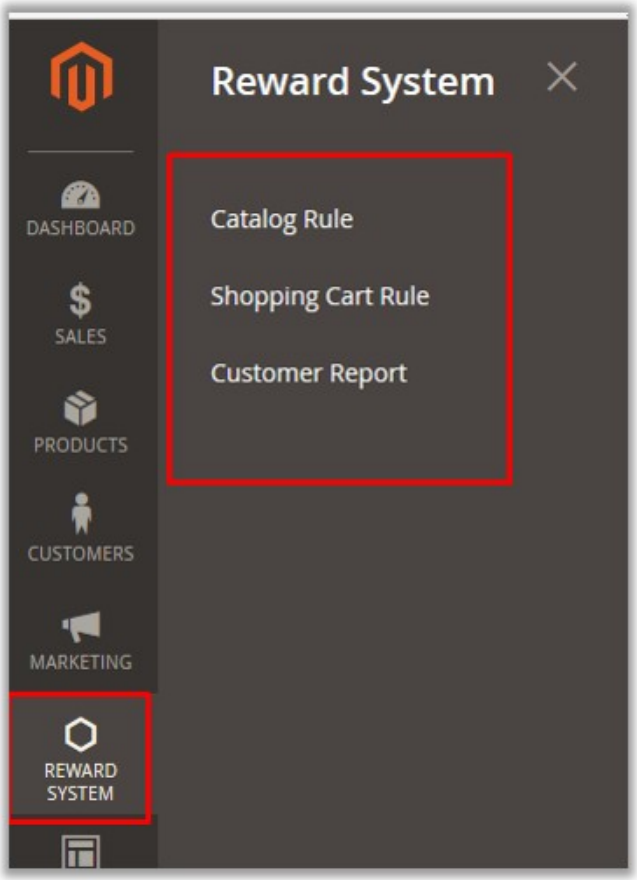
8. Click the **Save** button.
   The changes are saved and a success message appears.

5. Customer Report

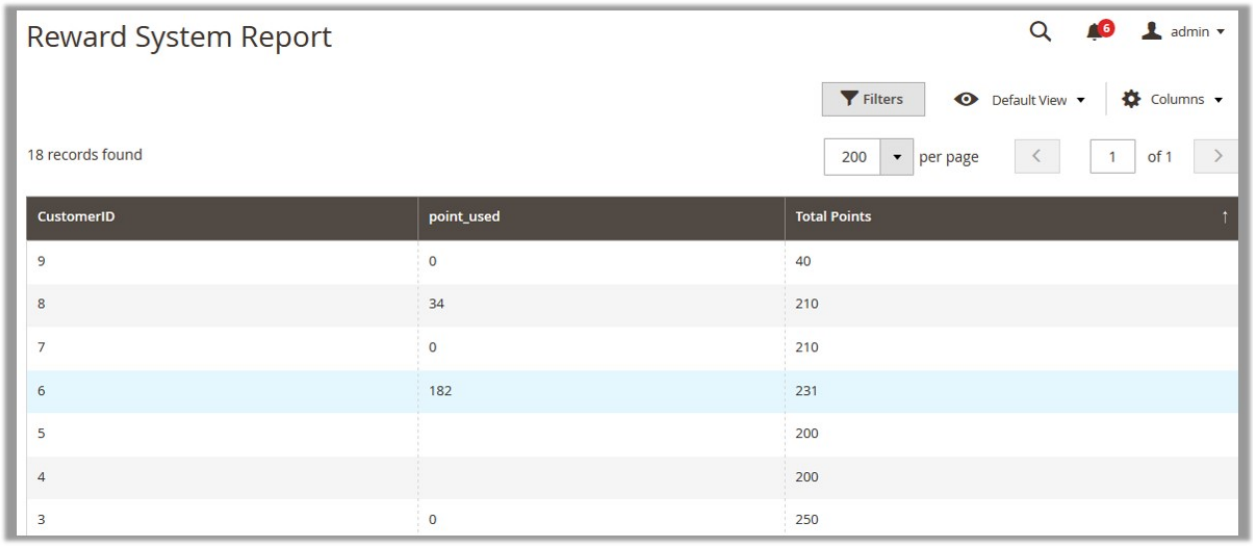
Admin can view the full report on the customer reward system. Depending upon the requirements, the admin also has the facility to filter the report by entering the using the various filter options.

To view the customer reward system report

1. Go to the Admin panel.
2. On the left navigation bar, click the **REWARD SYSTEM** menu.
   The menu appears as shown in the following figure:

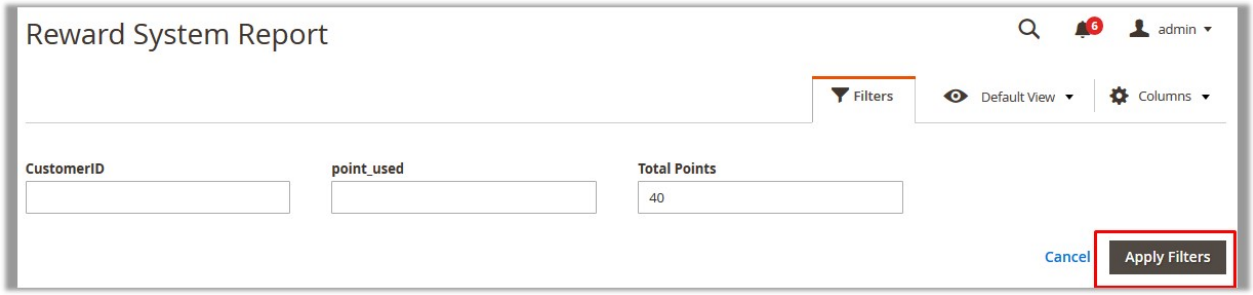


3. Click **Customer Report**.
   The **Reward System Report** page appears as shown in the following figure:



The full report on customer reward system appears. If required, admin can use the filter selections to view the various types of reports for better understanding.

4. To filter the report, click the **Filter** button.
   The corresponding fileds appear as shown in the following figure:



5. Enter the required selection value in the required field, and then click the **Apply Filters** button.
   The report based on the filter selection appears.

6. Front-end User Panel

The Customer Reward System extension facilitates the front-end users (customers) to view their reward points and earn more reward points through using the refer a friend feature.

*Benefits of the **Customer Reward Management** extension for the front-end users are as follows*:

- Users can view their Reward points to get an overall idea of total earned points, used points, status and expiration of the points.
- Users can earn more points through the referral system provided with the extension
- Users can easily redeem the reward points during there next purchase from the store at fronted.
- Users receive a notification on the wallet balance or reward points after each successful purchase.
- Users can view the Earned points and used points status on their dashboard.

Users can perform the following tasks:

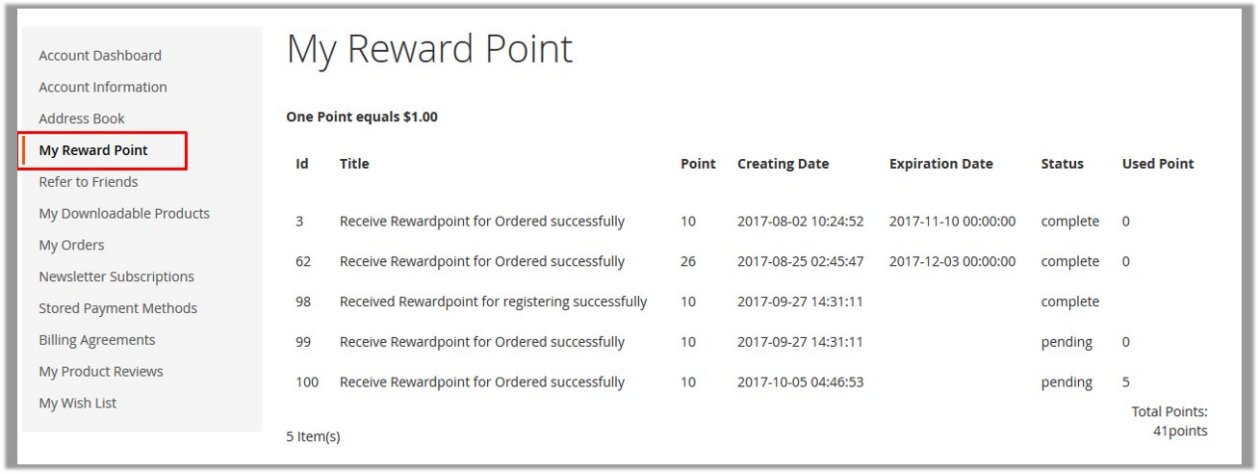
- View the Reward Points(https://docs.cedcommerce.com/magento-2/customer-reward-system-extension-for-magento-2?section=view-the-reward-points)
- Refer To Friend(https://docs.cedcommerce.com/magento-2/customer-reward-system-extension-for-magento-2?section=refer-to-friends)

6.1. View the Reward Points

Users can view the certain details of their reward points to get an overall idea so that they can use the earned reward points accordingly on their next purchase.

To view the reward points

1. Go to the front-end user panel.
2. In the left navigation panel, click the **My Reward Point** menu.
   The page appears as shown in the following figure:



The information provided on this page are as follows:

- **Id**: Identification Number of the Reward point.
- **Title**: Name of the event for which the user has earned the reward point.
- **Point**: Total number of earned reward points.
- **Creating Date**: Date, when the user has earned the reward points.
- **Expiration Date**: Points Expiry Date, after when the user cannot redeem the points.
- **Status**: Status of the points – Cpmplete or Pending. Only when the status is Comnplete, the user can use the points.
- **Used Point**: Total number of used reward points.

6.2. Refer To Friends

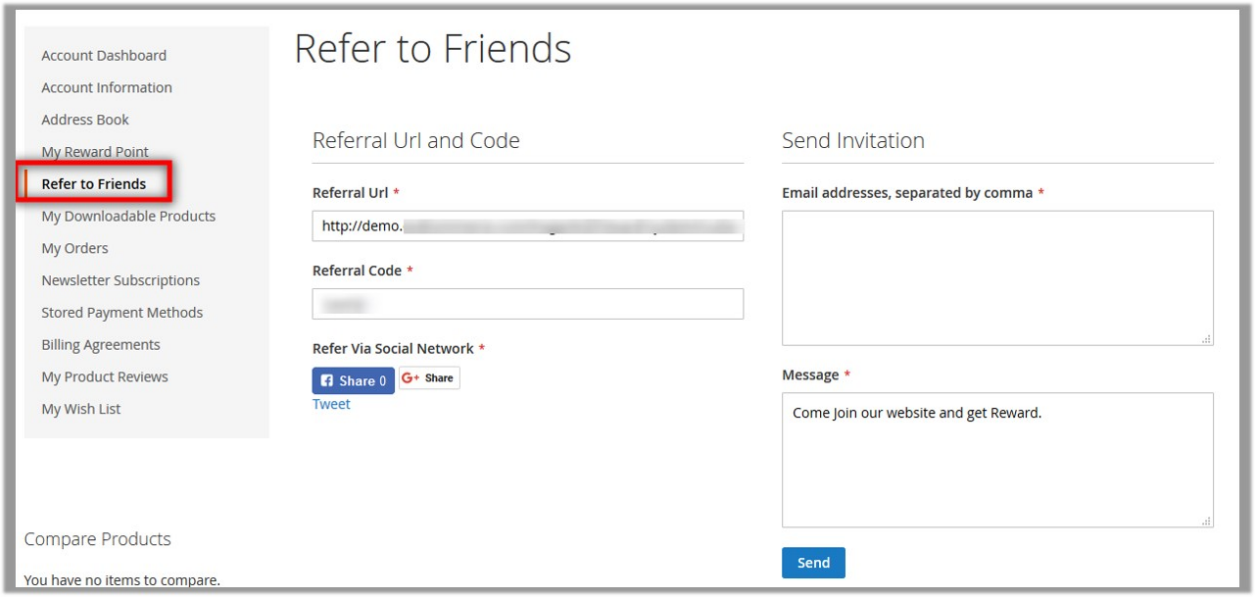
The **Refer to Friend** feature of the extension enables the users to invite their friends to the Magento Store to sign-up and make a purchase of the products, and thus earn the reward points based on each sign-up and per product sale. Thus, it helps the admins to increase their sales.

Users get a unique Referral URL and code, which they can send to their friends, so that, when their friends use this unique code to place orders in the store, they will receive the reward points.

Note: The Referral Url and code are available by default. The users can send the Referral Url and code to their friends through an invitation email from the Affiliate account itself. Also, can send the Referral Url and code to their friends using the social media network such as Facebook, Google+, and Twitter.

To refer a friend

1. Go to the front-end user panel.
2. In the left navigation panel, click the **Refer to Friends** menu.
   The **Refer to Friends page** appears as shown in the following figure:



   By default the **Referral Url** value and the **Referral Code** value appears in the respective field box.
3. To send the **Referral Url** and **Referral Code** through **Social** Netwoking **Web sites**, in the right panel, click the respective **Social media Web site icon,** and then follow the corresponding process.
4. To send an invitation, in the right panel, under **Send Invitation**, do the following steps:
   a. In the **Email addresses** box, enter the email ids.
   b. In the **Message** box, enter the message.
   c. Click the **Send** button.