



Documentation for v. 1.0.x of J2T Reward points module

## Summary

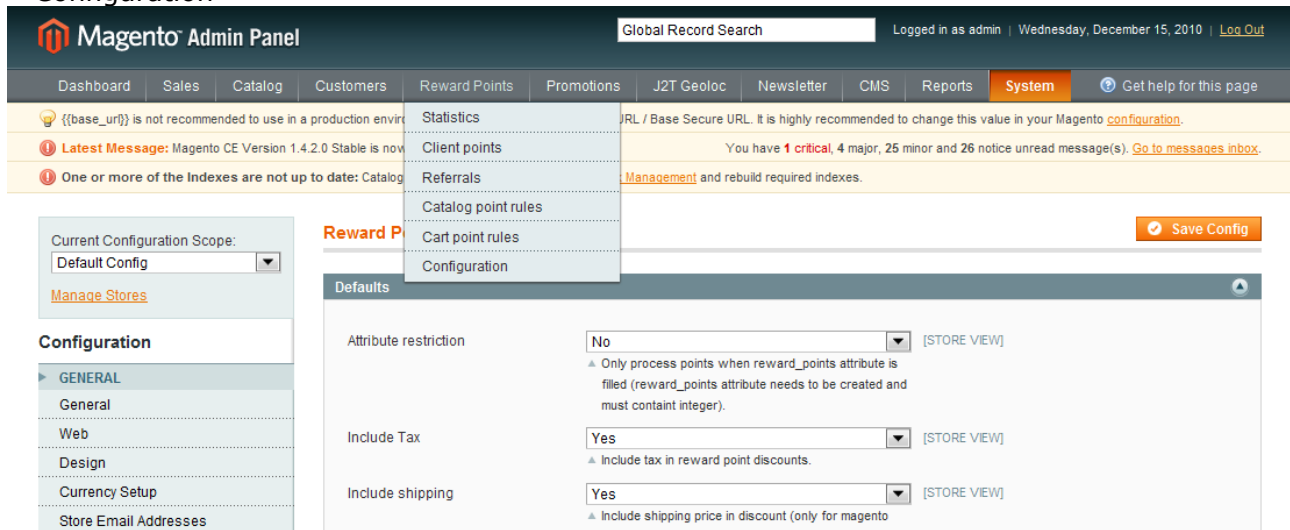
How to install.....	2
How to configure.....	3
Description of configuration fields.....	3
Default configuration.....	3
Registration/Referral points configuration.....	4
Statistics page.....	5
Client points.....	5
Referrals.....	5
Catalog point rules & Cart point rules.....	5
Add points to customers.....	5
Points history from customer admin page.....	6
Importing points into the system.....	6
Preparing the file to be imported.....	6
csv file format type.....	6
Import process.....	7
1. Fields configuration.....	7
2. Select website scope.....	8
3. Choose csv file & click on save config.....	8
Export process.....	8

## How to install

1. Unzip all files at the root directory of your magento installation
2. Empty your magento cache
3. Logout & log back to your magento administration

# How to configure

Connect to your administration panel and go to « Reward points » section, then « Configuration »



## Description of configuration fields

### Default configuration

- Attribute restriction: Only process reward\_points attribute. You can set a magento attribute to products, allowing you to specify product points per product.
- Include Tax: Include tax in reward points discount
- Include shipping: Include shipping price in reward points discount
- Process currency rate: Use currency exchange rate while calculating points & discount (default magento base currency is used).
- Points gathered / unit of money spent: Points gathered for 1 unit of money spent. (e.g. if set to 2, you will obtain 100 points for \$50 spent).
- Points to obtain 1 unit of money: Amount of points required to obtain a discount.
- Points validity duration: Points validity duration in days (use 0 for unlimited).
- Maximum points collected per order: Maximum points to be collected per order (use 0 for unlimited).
- Maximum points used per order: Maximum points to be used per order (use 0 for unlimited).
- Automatic use of points: Use maximum amount of point while in shopping cart.
- Apply points by step: Apply credit points step by step. e.g. 250, 500, 750, etc.  
Step value: The step value (e.g. 50 will generate a select field with these values : 50, 100, 150, etc.)
  - step value must be specified.
  - slider can be used. This will appear in shopping car reward points section.
- Use max amount of points: Apply the maximum amount of point to the order

- Math method: Math method applied to point calculation.
- Coupon codes restriction: If yes, customers will not be able to use coupon codes and reward points at the same time within an order.
- Apply store scope: If yes, the points collected will be available only for the store where the points were earned.

## **Registration/Referral points configuration**

- Registration points: Points earned upon customer registration
- Points per validated review: Points the customer get while sending a valid review.
- Show referral link: Show refer a friend link in user account.
- Referral points: Points earned when referred friend orders.
- Referral child points: Points earned by referred friend for first order.
- Show referral permanent link: This will allow customers to share permanent their permanent link to refer friends.
- Share with addthis: Allow customers to share permanent link using addthis. Visit [addthis.com](http://addthis.com) to create an account.
  - addthis account name
- Select email template (Referral subscribe): email template sent while a referral request is sent
- Select email template (Referral confirm): email template sent while a referred customer registers

## Statistics page

The statistics page allow you to show the points that the customers have. You can also add points to a specific customer by clicking on « Add New » Button from this page.

## Client points

In this section, you can access to the client points history

## Referrals

The referral section allow you to check the customers that have referred emails and check if the referres have ordered

## Catalog point rules & Cart point rules

As the shopping cart rules & catalog price rule, you can specify catalog point rules and cart point rules allowing you to add or remove points within an order.

## Add points to customers

Points can be added to customers by clicking on « Add New » button from statistics.

**Add Point** Back Reset Save Point

Order details	
Customer ID *	<input type="text"/>
Store ID *	<input type="text"/>
Points are	<input type="text" value="Related to Order ID"/>
Order ID	<input type="text"/>

Reward points	
Reward points	<input type="text"/>
Points Spent	<input type="text"/>

Here you have to know the customer ID, put the store ID and then tell if the points are related or not to an order. You can add or remove points by using « Reward points » or « Points spent » fields.

# Points history from customer admin page

Reward points history is available from customer page.

The screenshot shows the 'Customer Information' sidebar on the left with options like 'Customer View', 'Reward Points', 'Account Information', 'Addresses', 'Orders', 'Billing Agreements', 'Shopping Cart', 'Wishlist', 'Newsletter', 'Product Reviews', and 'Product Tags'. The main area displays the customer's name 'Jon Jon' and a toolbar with buttons: 'Back', 'Reset', 'Create Order', 'Delete Customer', 'Save Customer', and 'Save and Continue Edit'. Below this is a pagination bar showing 'Page 6 of 6 pages', 'View 20 per page', and 'Total 117 records found'. A table lists points history with columns: ID, Points type, Accumulated points, Spent points, Stores, and Referred customer. The table contains 7 rows of data.

ID	Points type	Accumulated points	Spent points	Stores	Referred customer
105	Points related to order #100000094	7399	0	English	-
109	Points related to order #100000098	1358	0	English	-
114	Points related to order #100000102	200	0	English	#4 ***** (****@yopmail.com)
116	Points related to order #100000103	1432	0	English	-
117	Points related to order #100000103	0	250	English	-
119	Points related to order #100000104	349	0	English	-
120	Points related to order #100000105	149	0	English	-

## Importing points into the system

### Preparing the file to be imported

In order to be able to import points to the system, you need to setup a csv file.

Required columns are:

- Email
- Reward points value, which are points that will be allocated to the user. To setup spent points, you will have to use negative values.

Optional fields may be required:

- Order ID (use -1 if gift points)
- Store Ids (point scope within stores)

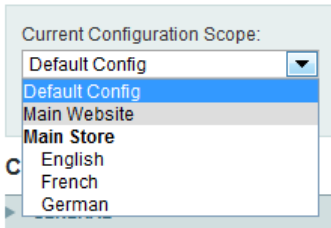
### csv file format type

The file to be imported must use UTF-8 encoding and the following configuration:



# Import process

## 1. Fields configuration



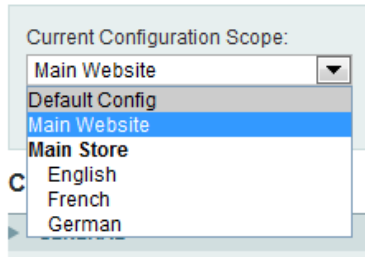
In default configuration scope, specify the fields that will be imported and click on save.

**Import profile**

Exports are available from 'Default config store' scope and Import is available from website scope. No referral points nor validation dates are imported.

Email address	<input type="text" value="First column"/>	[GLOBAL]
	▲ Used for import file configuration.	
Reward points	<input type="text" value="Second column"/>	[GLOBAL]
	▲ Used for import file configuration. Negative values may be used for used points.	
Order Reference	<input type="text" value="Not available"/>	[GLOBAL]
	▲ Used for import file configuration. This is the incremented order reference. This field is not a mandatory field (default value will be admin gift). Use -1 for admin gift.	
Store Ids	<input type="text" value="Forth column"/>	[GLOBAL]
	▲ Used for import file configuration. This field is not a mandatory field (store ids of current website scope will be used). For multiple values, separate with comma.	
Import/Export	<input type="button" value="Export CSV"/>	[GLOBAL]

## 2. Select website scope



## 3. Choose csv file & click on save config

		Default	<input checked="" type="checkbox"/> Save Config
Select email template (Referral subscribe)	REWARD POINTS EMAIL SUBSCRIPTION	<input checked="" type="checkbox"/> Use Default	[STORE VIEW]
Select email template (Referral confirm)	J2T Reward points Referral program Confirm:	<input checked="" type="checkbox"/> Use Default	[STORE VIEW]

Import profile		<input type="button" value="Import"/>
Exports are available from 'Default config store' scope and Import is available from website scope. No referral points nor validation dates are imported.		
Import	<input type="button" value="Choisissez un fichier"/> Aucun fi... choisi	[STORE VIEW]

## Export process

In order to be able to export all points, you need to select default config store scope in the admin and click on 'Export CSV' button, in reward points configuration screen.