J2T Points & Rewards Magento Extension

Documentation for v. 1.7.x

Summary

How to install....2
How to configure....3
- Description of configuration fields....3
  - Default configuration....3
  - Custom point values....5
  - Registration/Referral points configuration....6
  - Other Point allocation....8
  - Advanced Referral Points....8
  - Email point status notification....8
  - Design and Graphics....9
  - Product Point Information....9
- Statistics page....10
- Client points....10
- Referrals....10
- Catalog point rules & Cart point rules....10

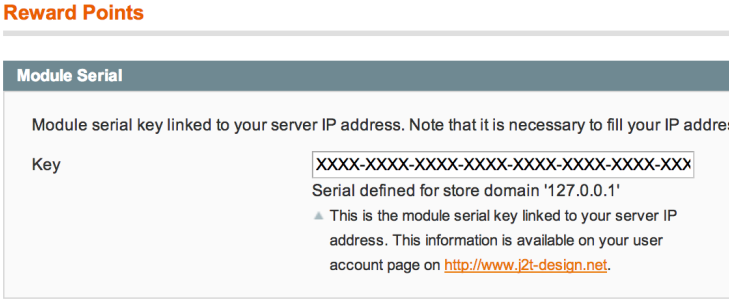
Disable discount on product(s) when using points....10
Add points to customers....11
Points history from customer admin page....12
Importing points into the system....12
- Preparing the file to be imported....12
- csv file format type....12
- Import process....13
  - 1. Fields configuration....13
  - 2. Select website scope....13
  - 3. Choose csv file & click on save config....14

Export process....14
Customer Point Notifications....14
Event Observers....15
Orders / Invoices summary....16
Upgrade instructions....16
- Upgrading from v1.6.x to 1.7.x....16

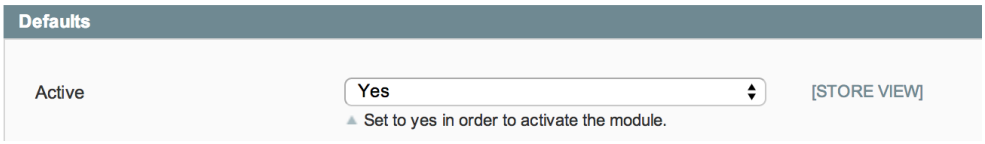
How to install

1. Deactivate any Magento cache and compiler
2. Make sure that you have an attribute set called 'Default'
3. Unzip all files at the root directory of your Magento installation
4. Log out & Log back to your Magento administration

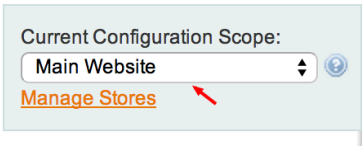
In order to be able to configure the module, it is necessary to add a valid serial within the module configuration. Note that serial can be generated from your dashboard account on http://www.j2t-design.net/j2tmoduleintegrity/customer/serials/ :



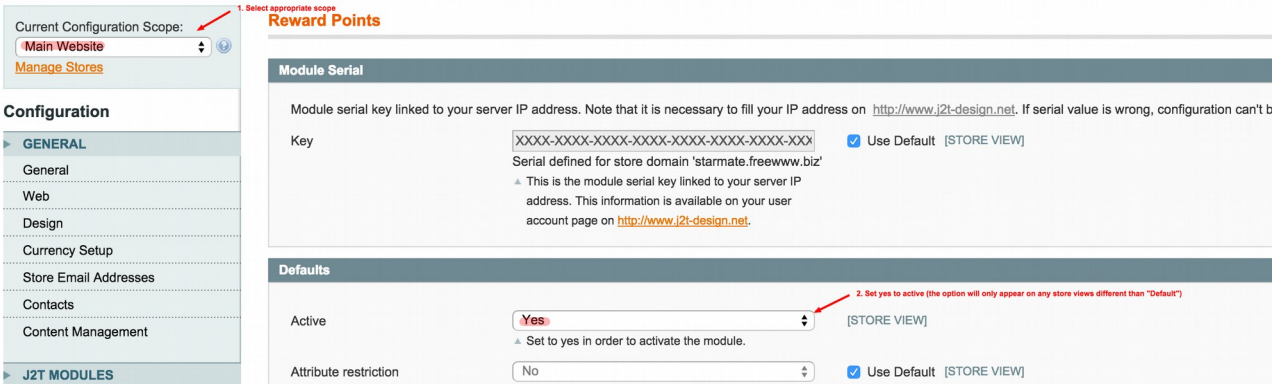
Important: Since v1.7.3, it is necessary to activate the module for specific store views, where the module would operate:



This configuration is not accessible from "default config" scope. It is only accessible for websites' scopes and all available children:
e.g.:



If you don't set "yes" to active, you will not be able to see/use the module on front area of your store. This is what you should have:

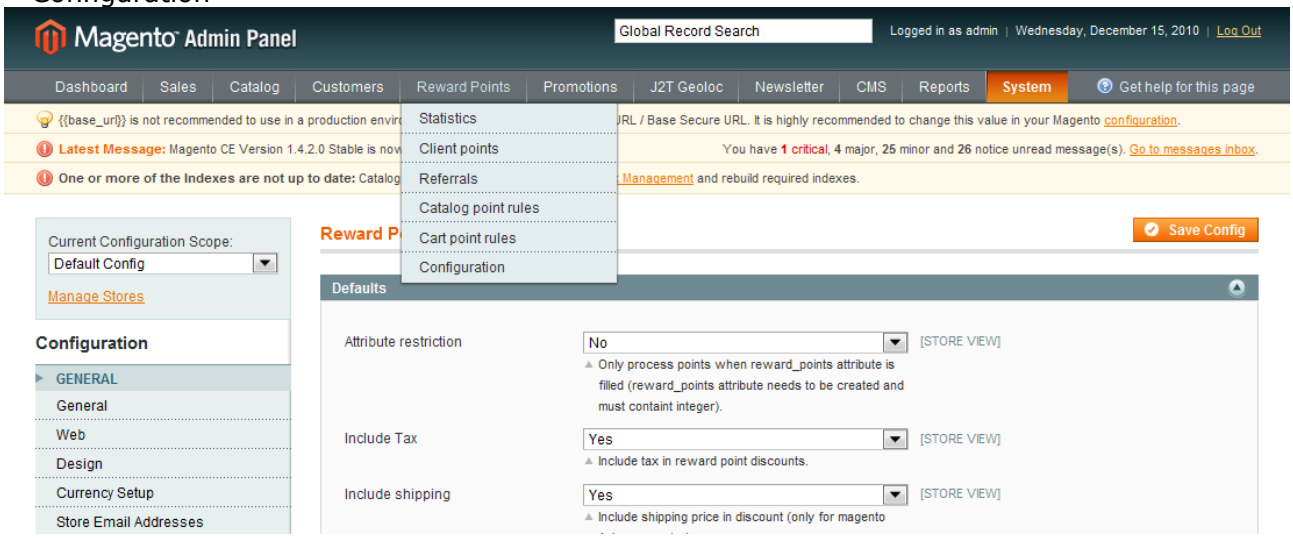


Steps:

1. Select appropriate scope (top left select) – must be different from "Default"
2. Set "yes" to "Active" configuration field

How to configure

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

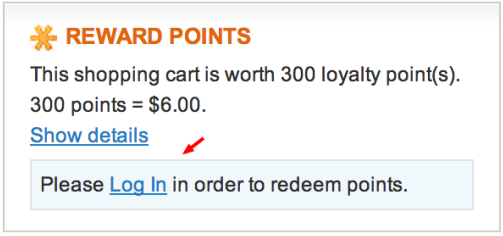


Description of configuration fields

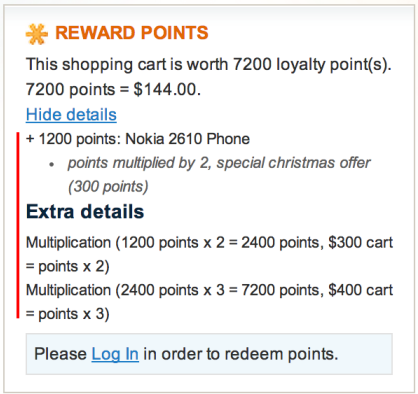
Default configuration

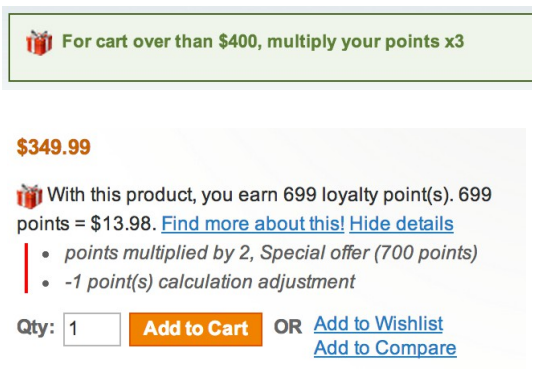
- Attribute restriction: Only process reward_points attribute. You can set a magento attribute to products, allowing you to specify product points per product.
- Include Tax: Include tax in reward points discount
- Exclude Tax: Exclude tax on gathered points.
- Include shipping: Include shipping price 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 availability delay: Delaying the points availability (use 0 for no-delay).
- Points validity duration: Points validity duration in days (use 0 for unlimited).
- Minimum point balance to apply: The minimum amount of points a customer must have to be able to use at checkout (use 0 for no-limit).
- 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).
- Percent usage per order: Order total amount percent value of maximum point usage (e.g. for a total cart amount of $400, if this value is set to 50, maximum point discount will not be higher than $200).
- 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.
- Validity status field: Only for magento 1.4.x or greater. Order status database field used when checking points validity (modify this only if you know what you are doing).
- Valid statuses: Order statuses used to validate points (modify this only if you know what you are doing).
- Show onepage checkout summary: Show summary of point usage within onepage checkout review (compatible with magento 1.4.x or greater).
- Show money point equivalence: Show to the customer point value in unit of money as well as amout of points.
- Show remove link: Show link from cart totals area.
- Always recalculate: Always recalculate points when order is modified. Note that points allocated to an order may vary according to rules and points configuration.
- Always recalculate referral: Always recalculate referral points when order is modified. Note that points allocated to an order may vary according to rules, points configuration and referral program configuration.
- Remove cancelled orders: Remove points linked to cancel orders - automated task (Magento cron needs to be active).
- Show Log In: Show Log In url on cart review page, within reward point area.



- Show Details: Show point gathering details on cart review page, within reward point area. Information shown on product pages, cart review page (top & reward form area).





- Show Top Points: Show customer points next to my account (works with default top.links theme).

Custom point values

This area allow you to add custom values according to minimum/maximum cart values, customer groups and date interval.

The following example changes the point ratio to 2 for any shopping cart over 100 to 200 and wholesale group:

If no min/max cart value, 0 must be used. Note that dates are optional values.

Custom point values are working the same way. Instead of ratio value, you define divider value as point value. For instance, if you set 100, your customer will require 100 points to get 1 unit of money discount.

Registration/Referral points configuration

- Registration points: Points earned upon customer registration
- Newsletter points: Newsletter points. Give points when user registers to newsletter (unsubscribing doesn't remove points).
- Show referral link: Show refer a friend link in user account.
- Calculation type (referral points): Calculation type used. "Cart summary Ratio points" multiplies cart subtotal by inserted value, "Ratio points" uses inserted value to calculate points and "static value" uses configuration value without any calculation. Note that any configured rules or points on product page will override Ratio points calculation.
- Referral points or ratio: Points earned when referred friend orders.
- Calculation type (child points): Calculation type used. "Cart summary Ratio points" multiplies cart subtotal by inserted value, "Ratio points" uses inserted value to calculate points and "static value" uses configuration value without any calculation. Note that any configured rules or points on product page will override Ratio points calculation.
- Referral child points or ratio: Points earned by referred friend for first order.
- Referral min. order: Referral minimum order amount (base subtotal amount without shipping fees) in order to process referral actions (0 for no minimum amount).
- 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 to create an account.
  - addthis account profile id

Profile Name	Profile ID
My Profile	ra-xxxxxxxxxxxxxxxx

  - addthis code: Addthis buttons code without javascript element.
- Custom social share code: This allows to add any type of code such as code available on social network sharing site. It is important to make sure that sharing url is correcly defined with usage of the following variable: {{referral_url}}. For example, you can add the following code which would add JiaThis within customer referral url area:

```
<!-- JiaThis Button BEGIN -->
   <div class="jiathis_style_32x32">
      <a class="jiathis_button_qzone"></a>
      <a class="jiathis_button_tsina"></a>
      <a class="jiathis_button_tqq"></a>
      <a class="jiathis_button_weixin"></a>
      <a class="jiathis_button_renren"></a>
      <a href="http://www.jiathis.com/share" class="jiathis jiathis_txt jtico
jtico_jiathis" target="_blank"></a>
      <a class="jiathis_counter_style"></a>
   </div>
<script "text/javascript"> var jiathis_config = { url: "{{referral_url}}" } </script>
<script type="text/javascript" src="http://v3.jiathis.com/code/jia.js" charset="utf-
8"></script>
```

- Referrer Registration points: Extra points earned by referrer customer upon referred friend registration (points are allocated when customer logs into the system for the first time).
- Referred Registration points: Extra points earned by referred customer upon registration (points are allocated when customer logs into the system for the first time).

- 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
- Unable guest orders: Unable guest orders when customer orders from referral url/email.
- Show Extra box: Show referral boxes on side areas of your store. Allow to show permanent link and custom code but excludes addthis. If the customer is logged in, sign-in url will be shown.

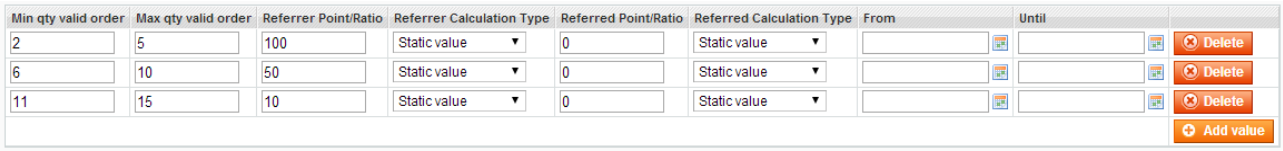
Other Point allocation

- Points per validated review: Points the customer get while sending a valid review.
- Show review point sentence: If set to yes, review point sentence is shown under review urls on product view pages.
- Newsletter points: Give points when user registers to newsletter (unsubscribing doesn't remove points).
- Show newsletter sentence (account creation): If set to yes, newsletter point sentence is shown on top of account creation form (detault magento theme).
- Poll points: Allow your customers to collect points when participating to polls
- Show poll point sentence: If set to yes, poll point sentence is shown within poll sideboxes.
- Tag points: For every new valid tags, your customer collect points
- Show tag point sentence: If set to yes, tag point sentence is shown within tag form (product.tag.list.list.before block alias must be loaded within your layout.).

Advanced Referral Points

This area allow you to define points your customer will collect for referral program. Unlike referral configuration area, you can define multiple values here.

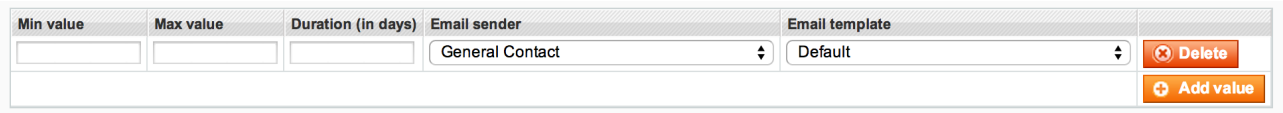
The following example will give 100 points to referrer for 2nd to 5th friend order, 50 points for 6th to 10th order and 10 points for 11th to 15th order.



Email point status notification

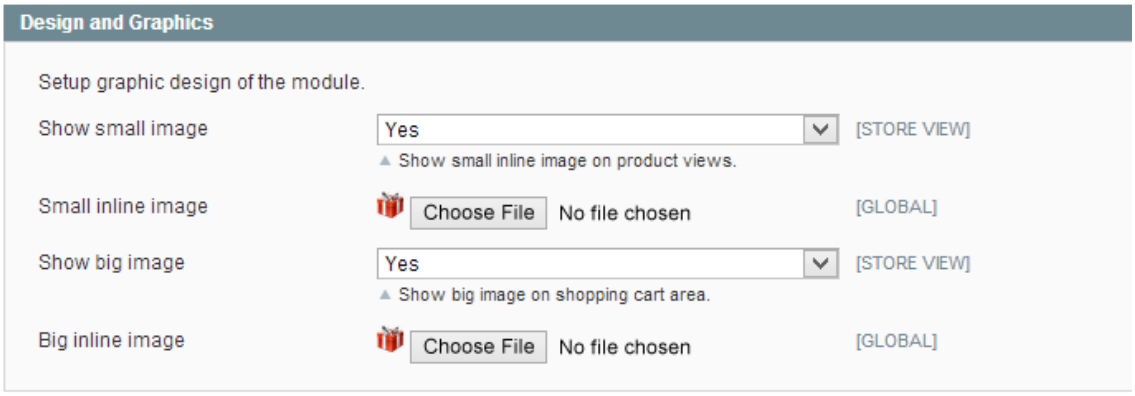
A major feature introduced in J2T Points & Rewards 1.7.0 is the ability to notify clients regarding the points they are currently having.

It is possible to define the point minimum/maximum value that would trigger notification sending, the duration to expect between two notifications and sender/email template to be used.



Design and Graphics

With J2T points and rewards, it is possible to define pictures that will be placed as graphic element on product pages as well as cart review page.



The chosen gaphic element will be automatically resized to:

- 16x16 for reward point text within product pages
- 32x32 for form visual picture within shopping cart

Product Point Information

- Show information: Show point details on product page.
- Duplicate text on top: Duplicate text on top of product page (only when product have options with price on top and price on bottom of the page).
- Default block name: Default layout block name where the point details will be injected (default is: product.info.addtocart).
- Extra block name: Layout block name where duplicated point details will be injected (default is: product.info.configurable).
- Show list points: Show point details on product list page. Depending on your theme, you may need to set this value to no and modify your theme according to explanations available on installation procedures.

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

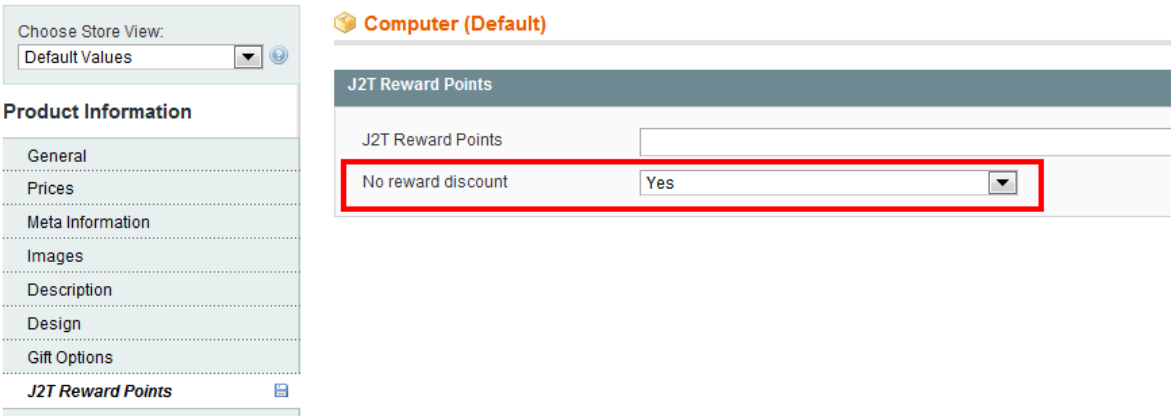
The referral section allow you to check the customers that have referred emails and check if the referres have ordered

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.

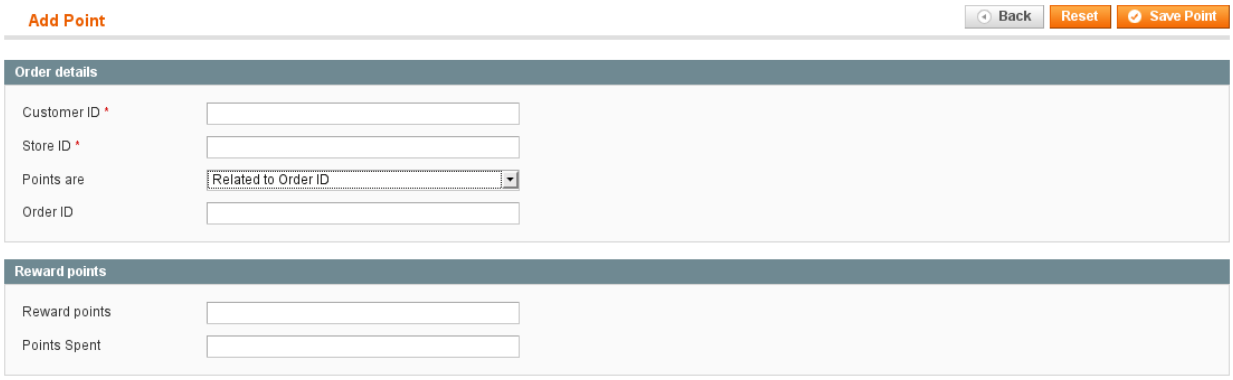
Disable discount on product(s) when using points

In order to disable points' usage while applying discount from loyalty points, it is necessary to configure to "yes" the "No reward discount" attribute from product page edition area.



Add points to customers

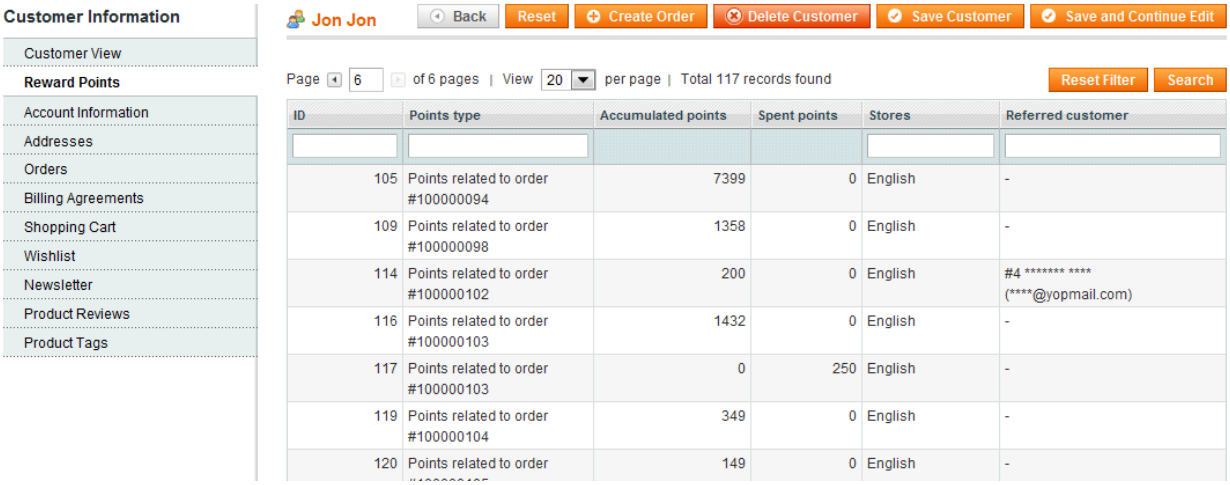
Points can be added to customers by clicking on « Add New » button from statistics.



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.



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:

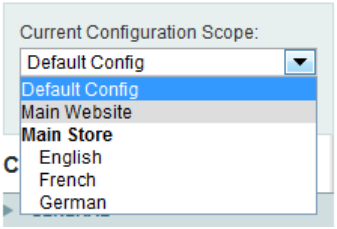
- Order ID (use -1 if gift points)
- Store Ids (point scope within stores)

csv file format type

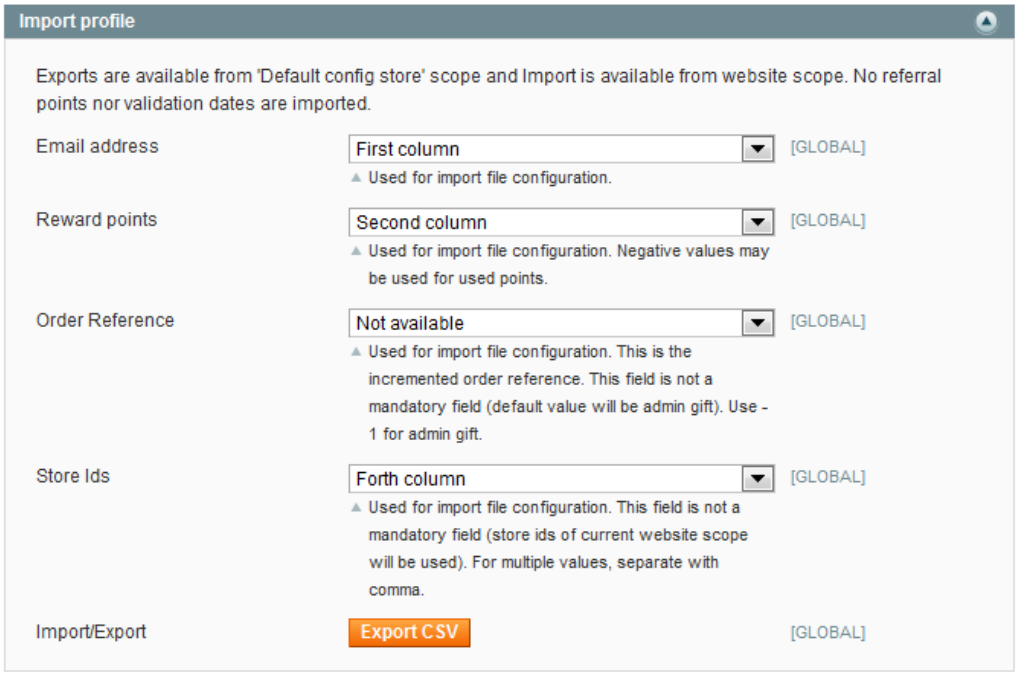
The file to be imported must use UTF-8 encoding and the following configuration:

Import process

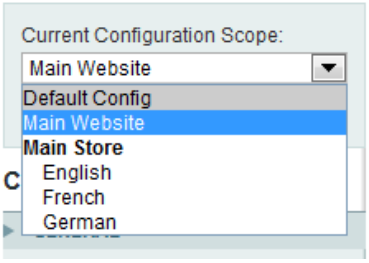
1. Fields configuration



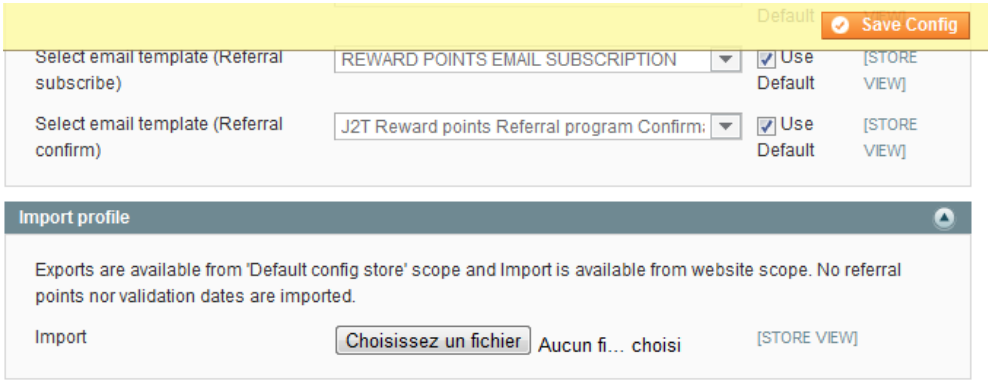
In default configuration scope, specify the fields that will be imported and click on save.



2. Select website scope



3. Choose csv file & click on save config



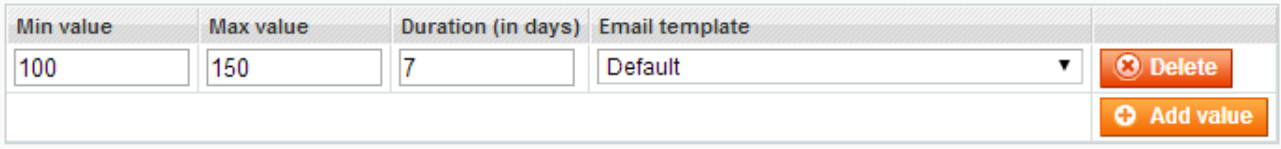
Export process

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.

Customer Point Notifications

Customer Point Notifications is part of email notification area. It defines some basic rules which would allow you to notify customers according to the following elements:

- Min value & Max value, which defines the minimum and maximum point value a customer must have
- Duration, defines the duration to be observed between two notifications
- Email template will be the email template used when notifiying the customers



The following example will send notification email every 7 days to customers having gathered between 100 and 150 points:

For this to operate, make sure that Magento cron is schedule in your crontab, everyday at midnight (00:00).

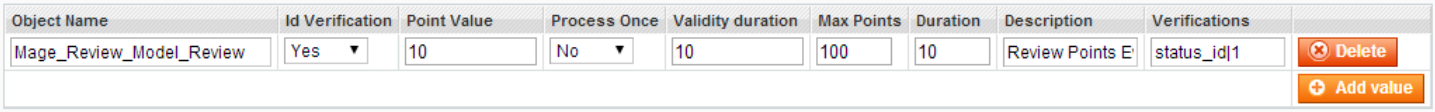
Event Observers

Event observers allow you to allocate points on any actions triggered by any Magento classes or any custom Magento classes save actions. It is important to make sure that customer_id and object value must be defined.

Event observer is comprise of the following elements:

- Class Name: this is the class name of the triggered class save action. E.g.: Mage_Review_Model_Review
- Id Verification: verifies if the model saved id is already inserted
- Point Value: defines the current point value to be added to the customers
- Process Once: only add points once
- Validity duration: set expiry dates of points
- Max Points: set the maximum amount of points a customer can gather for a specific event
- Duration: defines the gap in days between two insertions for same event
- Description: this is the text that will be seen onto user's points' history
- Verifications: you can specify object variable to be verified. It needs to be defined as object_name|object_value. In case of multiple verifications, you'll need to separate each verifications by semicolon (';'). E.g.: status_id|1

Consider the following example as working explanation of even on valid review saving point triggering action:

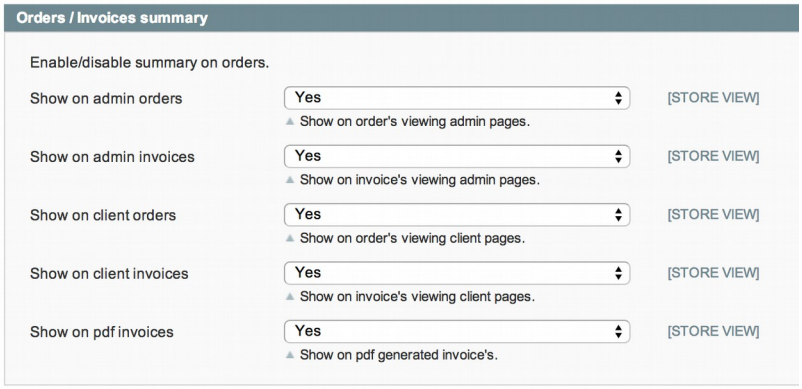


In this example:

- Mage_Review_Model_Review class object is observed
- Id verification is done, so when points related to the object is inserted, it is not possible to insert it twice.
- Point value is set to 10
- Process once is set to "no". This means that the customer will be able to gather points on more than one review
- Validity duration is 10, which means that the points related to it will expire in 10 days after insertion
- Max points is set to 100, which means that the customer will not be able to gather more than 100 points for the same event
- Duration is 10, which means that a customer will only be able to collect points once every 10 days
- Description is defined as "Review Points" and this is what the customer will see on his points' history page
- Verification is defined as "status_id|1" which means that only reviews having status id as 1 will be processed.

Orders / Invoices summary

In order to show point gathering and usage on admin/client placed orders and invoices, the module can be configured.



Upgrade instructions

Upgrading from v1.6.x to 1.7.x

Major modifications have been introduced in branch 1.7.x of J2T Points & Rewards. It is important to install the module in staging environment first, in order to verify that the upgrade is properly going through all necessary installation steps and update all tables.

As we have modified notification emails' configuration areas, it is necessary to check and eventually modify transactional email and sender for these areas.

Important: When upgrading from any versions to 1.7.2, please make sure to reconfigure the following values:

- Points for Reviews
- Points for Newsletter
- Points for Tags
- Points for Polls