



J2T Points & Rewards Extension for Magento 2

Documentation for v. 2.0.x

Summary

How to install.....	2
How to configure.....	4
Description of configuration fields.....	5
Statistics page.....	9
Client points.....	9
Referrals.....	9
Catalog point rules & Cart point rules.....	9
View customer points' history and add/remove points.....	10
Admin Dashboard Points.....	11
Imports & Exports.....	12
Exports.....	12
Imports.....	14

How to install

1. unzip de module in `app/code/J2t/Rewardpoints`
2. enable module: `bin/magento module:enable --clear-static-content J2t_Rewardpoints`
3. upgrade database: `bin/magento setup:upgrade`
4. re-run compile command: `bin/magento setup:di:compile`

Optional

- In order to deactivate the module `bin/magento module:disable --clear-static-content J2t_Rewardpoints`
- In order to update static files: `bin/magento setup:static-content:deploy`

- *Activation Not necessary purchased through Magento Connect* - 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/>:

Module Serial

Key

Serial defined for store domain '127.0.0.1'

This is the module serial key linked to your server IP address. This information is available on your user account page on <http://www.j2t-design.net>.

Important: It is necessary to activate the module for specific store views, where the module would operate:

Store View: ?

GENERAL	Module Serial
J2T MODULES	Enabled <input type="text" value="Yes"/>
Reward Points	Key <input type="text" value="XXXX-XXXX-XXXX-XXXX-XXXX-XXXX-XXXX-XXXX-XXXX-XXXXXX"/> Serial define This is the module serial key linked to your server IP address. This information is available on your user account page on http://www.j2t-design.net .
CATALOG	

This configuration is not accessible from "default config" store view. It is only accessible for websites' scopes and all available children.

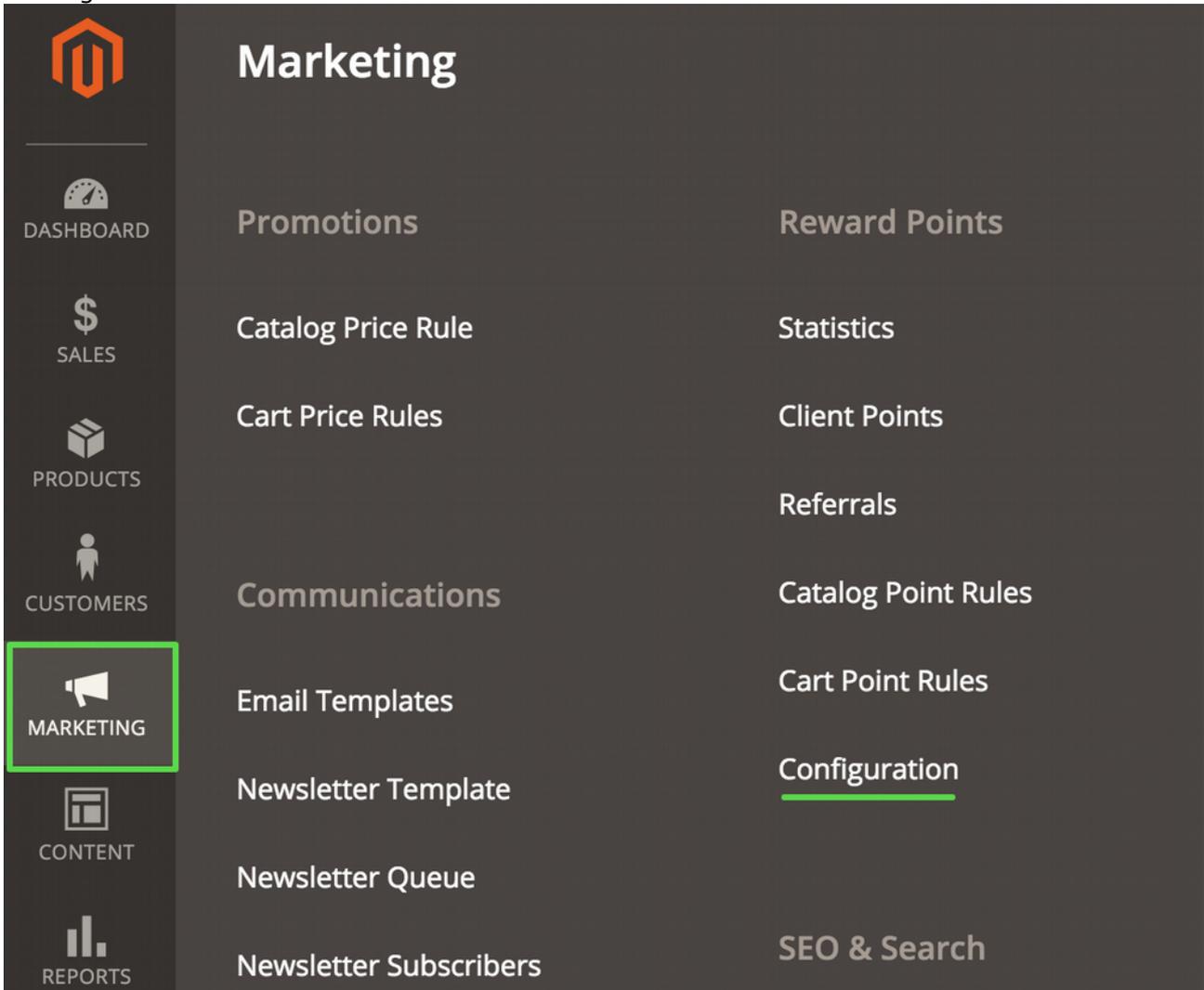
If you don't set "yes" to active, you will not be able to see/use the module on front area of your store.

Steps in order to activate the module:

1. Select appropriate scope (top left select) – must be different from “Default”
2. Set “yes” to “Active” configuration field, within module serial area.

How to configure

Connect to your administration panel and go to "marketing", "Reward points", then "Configuration"



Description of configuration fields

- Point Values:
 - 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.
 - Maximum Points On Order: Maximum points to be collected per order (use 0 for unlimited).
 - Registration Points: Points earned upon customer registration (points are allocated when customer logs into the system for the first time).
- Custom Point Values:
 - Custom Point Worthing Values: Setup custom point worthing values according to cart **min/max** values (use 0 for no min or max value), **groups** and **date range** (date is optional value). **Value** is point value that will worth 1 unit of money (e.g. if set to 2, \$100 spent will give 200 points - 100×2 - if unit of money is '\$'). **Important:** if always recalculate is set to yes, make sure that the above rules are still available when updating an order.
 - Custom Point Usage Values: Setup custom point usage values according to cart **min/max** values (use 0 for no min or max value), **groups** and **date range** (date is optional value). **Value** is the point required in order to get 1 unit of money discount (e.g. if set to 100, 200 points will give \$2 discount - $200 / 100$ - if unit of money is '\$'). **Important:** if always recalculate is set to yes, make sure that the above rules are still available when updating an order.
- Point Usage Specificities:
 - Step Value: Specify a value greater than 0 in order to show select box or slider.
 - Step Multiplier: Multiplier for the step value. e.g. if the multiplier is 10 and step value 20, the steps will be: 20, 200, 2000, etc. Default value is 1.
 - Use Slider: Use Javascript Slider in order to specify points.
 - Minimum Points Balance: The minimum amount of points a customer must have to be able to use at checkout (use 0 for no-limit).
 - Maximum On Order: Maximum points to be used per order (use 0 for unlimited).
 - Percent On 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).
 - Show Remove Link: Show remove link from cart total's area.
- Calculation Configuration:
 - Include Tax On Discounts: use product prices including tax while applying discount.
 - Exclude Tax When Gathering Points: Calculate gathering points on product prices excluding tax.
 - Remove Discounts When Gathering Points: Calculate gathering points on product prices excluding discount value.
 - Total Gathered Math: Apply math action on total gathered points on current customer cart. Note that no modifications will be done on item point calculation but only on total earning points.
 - Catalog Pages Math: Apply math action on points calculation of catalog pages. Note that this will only affect product catalog view.

- Points Validity:
 - Remove Cancelled Orders: Remove points linked to cancel orders - automated task (Magento cron needs to be active).
 - Valid Gathering Statuses: Order statuses used to validate points (modify this only if you know what you are doing).
 - Valid Used Statuses: Order statuses used to validate used points (modify this only if you know what you are doing). **Important:** It is necessary to select all statuses, except cancelled/closed statuses (or any statuses similar to cancelled or closed).
 - Apply Store Scope: If yes, the points collected will be available only for the store where the points were earned. **Important:** Important. This can't be changed if you've already launched your site and on ongoing loyalty setup, otherwise, some calculation issues may arise.
 - Points availability delay: Delaying the points availability (use 0 for no-delay). **Important:** Important. This can't be changed if you've already launched your site and on ongoing loyalty setup, otherwise, some calculation issues may arise.
 - Points validity duration: Points validity duration in days (use 0 for unlimited). **Important:** Important. This can't be changed if you've already launched your site and on ongoing loyalty setup, otherwise, some calculation issues may arise.
- Referral Program:
 - Show Referral Link: Show refer a friend link in user account.
 - Referral Points Or Ratio: Points earned when referred friend places order on your store.
 - 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 Child Points Or Ratio: Points earned by referred friend for first order.
 - 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 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.
 - Referral Redirection: Redirection path for permanent link, excluding domain name and index.php/ part (e.g. electronics/cell-phones.html). Leave blank to use default redirection.
 - Share With addthis: Allow customers to share permanent link using addthis. Visit addthis.com to create an account.
 - addthis Account Name: This information is to be retrieved from addthis account.

Profile Name	Profile ID
My Profile	ra-xxxxxxxxxxxxxxxxxx

- addthis Code: Addthis buttons code without javascript element.

- Custom Social Share Code: Custom social share code. You can integrate any other social network sharing tool (such as jiathis, sharethis, addinto, etc.) in order to share referral url. Referral url must be integrated to the code with the following: `{{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>

```
- Referred Registration Points: Extra points earned by referred customer upon registration (points are allocated when customer logs into the system for the first time).
- Disable guest orders: Disable guest orders when customer orders from referral url/email.
- Subscription Email Sender: Email identity used when sending subscription emails.
- Subscription Email Template: Email template used when sending subscription emails.
- Confirmation Email Sender: Email identity used when sending confirmation emails.
- Confirmation Email Template: Email template used when sending subscription emails.
- Display Settings:
 - Show Product Page Points: Show points on product view pages.
 - Show Product List Points: Show points on product lists.
 - Show Details: Show point gathering details on cart review page, within reward point area.
 - Show Money Point Equivalence: Show to the customer point value in unit of money as well as amount of points.
- Graphic Elements:
 - Show Small Image: Allow/Disallow images to be shown on product area.
 - Small Inline Image: Select the image to be shown. If not image, default image will be used.
 - Small Inline Image Size: Define the small inline image size. The value inserted will be used as: value x value.
 - Show Big Image: Allow/Disallow images to be shown on cart area.
 - Big Inline Image: Select the image to be shown. If not image, default image will be used.
 - Big Inline Image Size: Define the big inline image size. The value inserted will be used as: value x value.

- Point Expiry Notification Through Email:
 - Enabled: Allow/Disallow point expiry email system
 - Number of Days Before Points Expiring: This value will be used to define how many days would be observed before point expiry in order to send notification email.
 - Email Sender: Email identity used when sending notification's emails.
 - Email Template: Email template used when sending notification's emails.
- Point Status Notification Through Email:
 - Customer Point Status: Setup point value used to notify customers of their accumulated point value. Min and Max value must be defined. Duration is the gap in days between two same customer's notifications.
 - Email Sent For Customer Notifications: Email template used when sending customers' notification emails.
- Admin Email notifications:
 - Email Sender: Email identity used when sending admin's notification emails.
 - Email Template: Email template used when sending admin's notification emails.

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 referred friends 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.

View customer points' history and add/remove points

In order to add points to a customer, it is necessary to access to customer edition page, then under "Reward Points" tab, a form is accessible as well as own client's point's history.

CUSTOMER INFORMATION

- Customer View
- Account Information
- Addresses
- Orders
- Billing Agreements
- Newsletter
- Product Reviews
- Reward Points
- Wish List

User Points (178 points available)

Points

Use negative value in order to remove po

Description

Description will be shown within user acc email.

From Date

To Date

Send Notification Email

Search [Reset Filter](#) 8 records found

ID	Point Type	Accumulated Points	Spent Points
<input type="text"/>			
37	Points related to order #00000016 (processing)	2	

Admin Dashboard Points

In order to be able to see admin dashboard points, it is necessary to activate Magento Admin Dashboard as well as Reward Points Admin Dashboard:

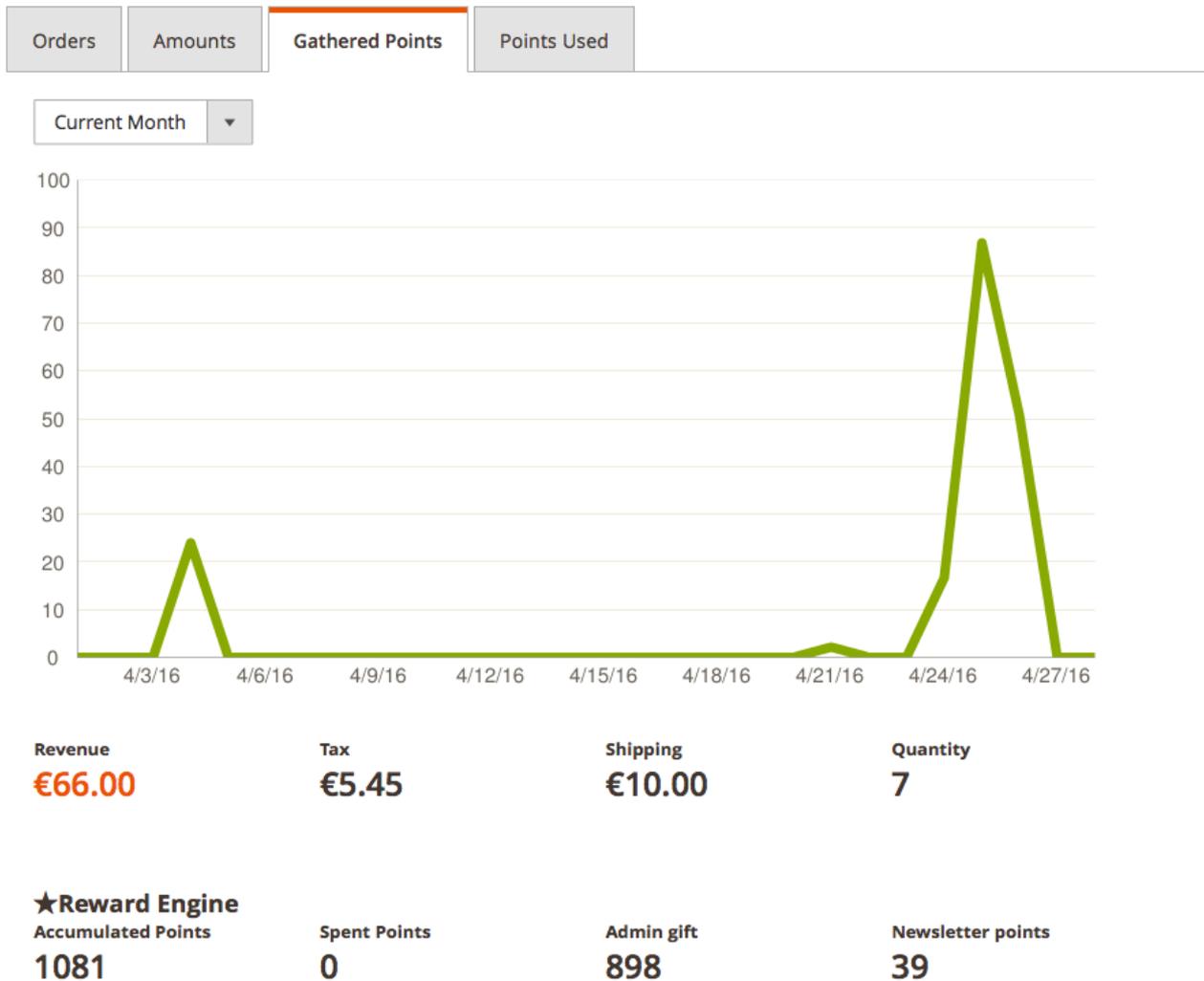
of points.

Show Admin Dashboard

Show Point Information on Admin Dashboard.

Please note that this is under "Display Settings" of the module configuration page.

When activating dashboard, the following information will appear:

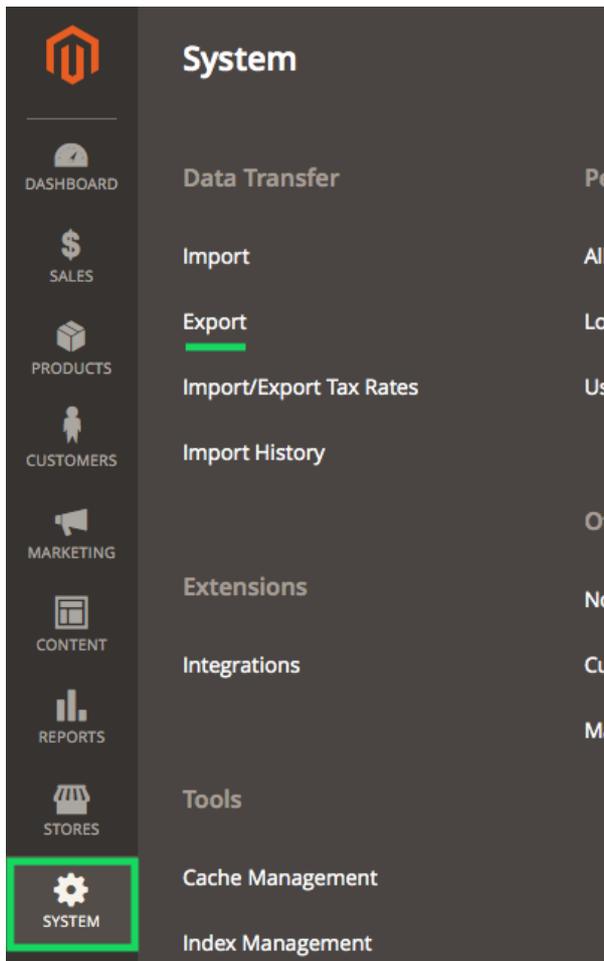


Imports & Exports

It is possible to Import and Exports customers points directly through default Magento 2 Import / Export area.

Exports

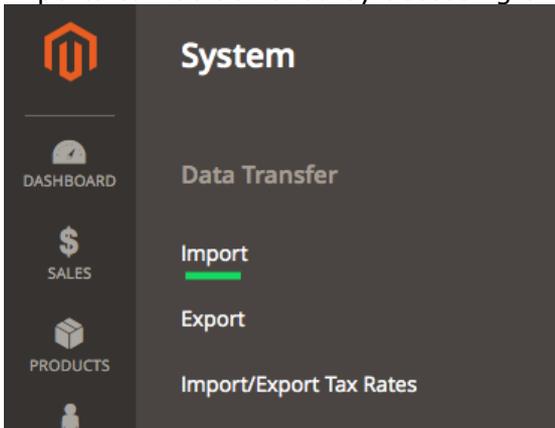
Exports can be achieved by accessing export area through the following:



Points values can be exported through "Customer main file" and the attribute which would be of our interest is "Email", "Total Accumulated Points" and "Associate to Website".

Imports

Exports can be achieved by accessing export area through default Magento 2 Import area:



“Entity Type” must be “Reward Points”:

Import Settings

Entity Type * [Download Sample File](#)

Import Behavior

Import Behavior *

Please note that csv file must contain the following information:

points	order_id	email	website_id
101	-1	roni_cost@example.com	1