

Customer Balance & Rewards for Magento

User Guide

version 1.0

created by "IToris"

IToris

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1. Introduction

1.1. Purpose

This document is a **User Guide** for **Customer Balance & Rewards module for Magento**. It describes how work with the extension.

Customer Balance & Rewards unites ability to for customers to have a positive balance on the website (via monetary top-ups or transfer of points to money) as well as rewards' system where customers earn points for special actions and can then use these points for future payments

2. Installation and License

2.1. System Requirements

The extension works under Magento from 1.4.x and higher.

The extension works with Apache 1.3.x and higher, PHP 5, Linux or IIS.

The extension's correct work is guaranteed with the following browsers:

- IE7+
- FireFox 4.x+
- Google Chrome 15.x+
- Safari 5.x+

The correct work with other Magento versions, other browsers and Apache/PHP versions is not guaranteed.

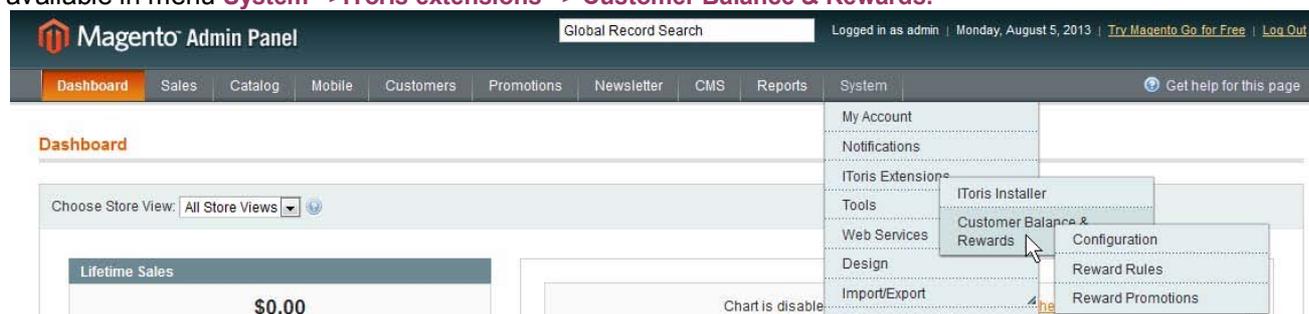
2.2. Installation

All our Magento extensions and templates are installed via **IToris Installer**.

Download **IToris Installer** from here <http://www.itoris.com/itoris-magento-installer.html> and un-pack to the root of your website. It will then appear in menu **System →IToris extensions → IToris Installer**.

Open it and you will see all our Magento Extensions and Templates, both installed and available. You can install, update and un-install them with one click now.

Find **Customer Balance & Rewards** in the list of extensions and press **Install** button. It will ask for the license key that you will receive after the purchase. Enter the key and submit. The extension will be installed. It will be available in menu **System →IToris extensions → Customer Balance & Rewards**.



2.3. License

Customer Balance & Rewards module has 3 types of licenses - regular, premium and multi-host.

Regular license is website-dependent. By 'website' here we understand the website in Magento terms. Under one Magento installation one license key of the extension can activate all stores/storeviews within one website.

Modules with regular license are partially encrypted.

Regular license is installed via IToris Installer.

If your configuration has several Magento websites - a separate license will be required for each.

Premium license provides 100% open-source modules. It allows activating the whole Magento installation, including all its websites, stores/storeviews.

Premium license is recommended when you plan customizations.

Premium license is installed via IToris Installer.

Multi-host license provides ability to install the module to an unlimited number of hosts. It is 100% and is installed as an archive.

You can switch the license from one website to another – login to <http://www.itoris.com> using the credentials you will receive after the purchase. Go to **My Downloads** area, find your key there and reset it from the current website. Then use it again to activate another website.

All licenses also include free life-time updates for the extension.

3. How to Use

3.1. Overview

Customer Balance & Rewards module is a multi-functional Magento extension. There are several ways you will benefit from it:

New purchases are stimulated. Customers purchase products and receive points for the orders, that can be used to partially pay the following orders. As the points can expire (this depends on the settings you select), customers make new orders sooner to redeem their points.

Your store is visited more often. As points can be provided for “purchase-associated” activity - registration, visiting the website, reviews - customers visit your store more often that stimulated purchases as well.

Social activity - points can be provided for referrals, there is ability to share balance with friends - this is a source of new leads for your store from your current customers.

3.2. Configuration

To manage the extension’s configuration select **System -> IToris Extensions -> Customer Balance & Rewards -> Configuration**

There will be 4 main areas:

- **General Configuration** - general settings and configurations: how prices and rewards should be displayed, which payment combinations are available, and so on.
- **Account Balance Configuration** - settings and configurations for customers’ balance, ability to top up balance in advance as well as convert rewards to balance
- **Rewards Configuration** - settings and configurations for reward points
- **Gifting Configuration** - settings and configurations for gifting area, ability for customers to refer friends, to top up other customers’ balance and so on

3.2.1. General Configuration

To manage general configuration select **System -> IToris Extensions -> Customer Balance & Rewards -> Configuration**

There will be a tab **General Configuration** selected by default

The screenshot shows the Magento Admin Panel interface. At the top, there's a navigation bar with 'System' highlighted. Below it, the 'Customer Balance & Rewards Configuration' page is displayed. The left sidebar contains a 'Current Configuration Scope' dropdown set to 'Default Config' and a 'Manage Stores' link. The main content area is titled 'Customer Balance & Rewards Configuration' and includes a 'Save config' button. Under the 'General Configuration' section, several settings are visible: 'Extension Enabled' (Yes), 'Product Default Purchase Mode' (Purchase using Price & Reward Points), 'Catalog Prices Display Mode' (Prices & Points), 'Product Prices Display Mode' (Prices & Points), 'Credit or Point Balance Adjustment Email Template' (Balance & Rewards: Credit or Point Balance Ad), 'Reward Points visible short alias' (RP), 'Reward Points visible long alias' (Reward Points), 'Show detailed calculation on Checkout' (Yes), and 'Refer a Friend Email Template' (Balance & Rewards: Refer a Friend (Default Te)).

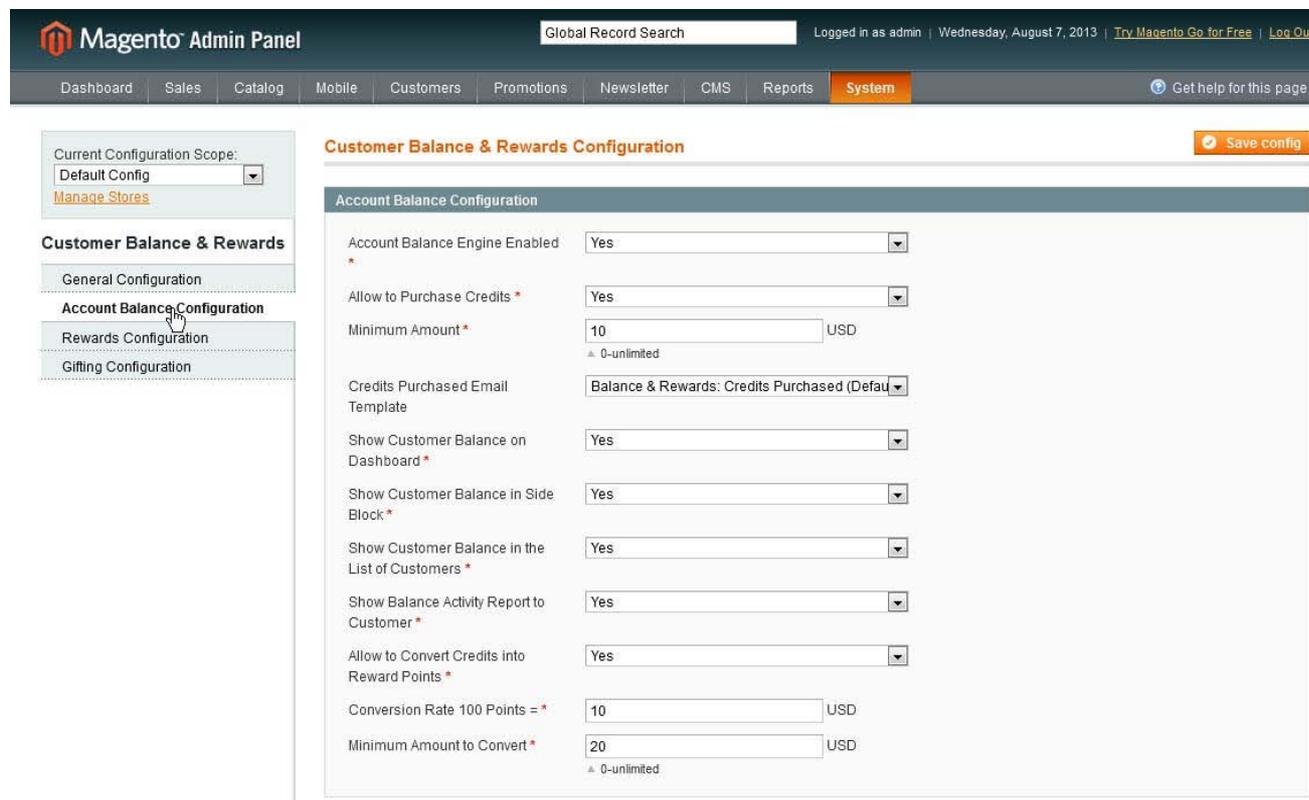
The following configurations and settings are available:

- **Extension Enabled** - when “yes” is selected, the module is enabled
- **Product Default Purchase Mode** - how products can be purchased on the website
 - Purchase using Price Configured Only - standard Magento way, with money only
 - Purchase using Price & Reward Points - with money as well as earned reward points (transferred in money at a special rate)
 - Purchase using Reward Points only - with earned reward points only
- **Catalog Prices Display Mode** - how products prices should be displayed in catalogs of products
 - Prices only - default Magento way, only prices
 - Prices & Points - prices as well as points (at which products can be purchased as an alternative of money)
 - Points only - only points at which products can be purchased
- **Product Prices Display Mode** - how prices should be displayed on product pages
 - Prices only- default Magento way, only prices
 - Prices & Points - prices as well as points (at which products can be purchased as an alternative of money)
 - Points only- only points at which products can be purchased
- **Credit or Point Balance Adjustment Email Template** - which email template should be sent when there is a change in customers’ credit or points
 - Do not sent this email
 - {selection of available email templates}
- **Reward Points visible short alias** - how reward points will be marked on product, catalog pages and so on
- **Reward Points visible long alias**
- **Show detailed calculation on Checkout** - if during the purchase reward points have been used (together with money or alone), there will be detailed calculation shown - at which rate pointst are transferred to money, and so on
- **Refer a Friend Email Template**
 - Do not sent this email
 - {selection of available email templates}

3.2.2. Account Balance Configuration

To manage account balance configuration select **System -> IToris Extensions -> Customer Balance & Rewards -> Configuration**

There will be a tab **Account Balance Configuration**



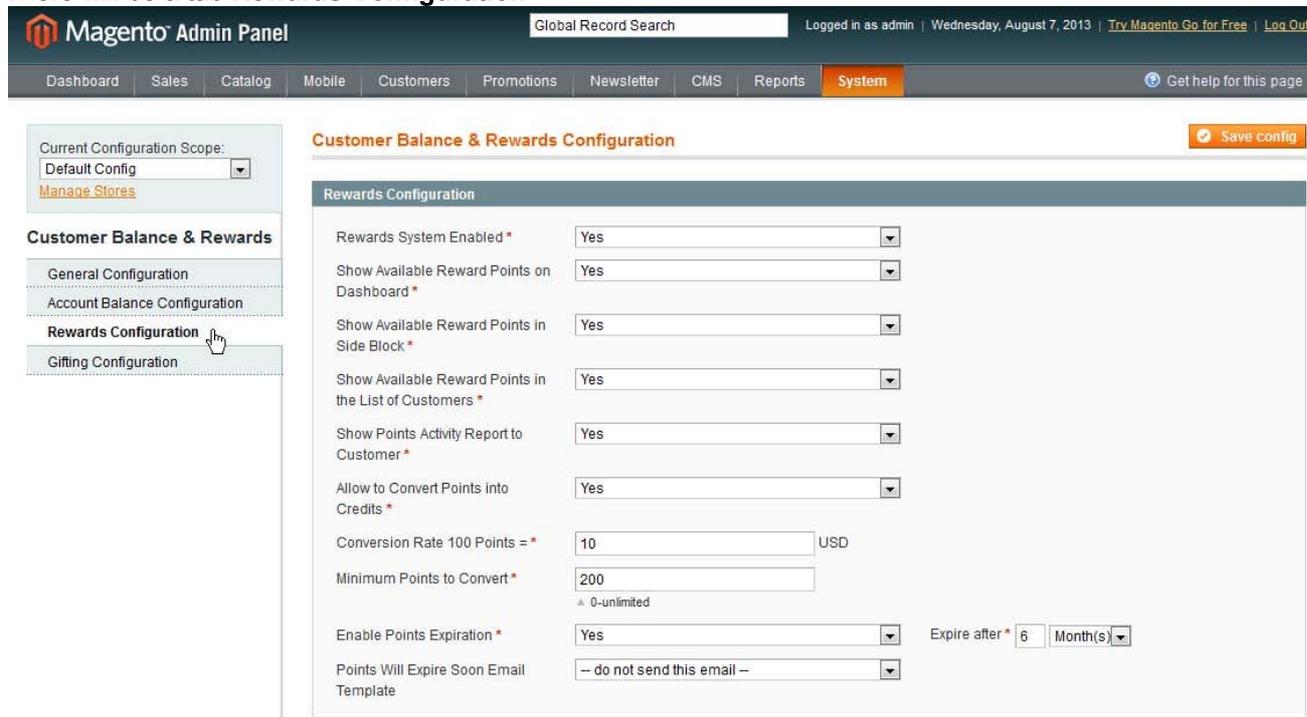
The following configurations and settings are available:

- **Account Balance Engine Enabled** - when “yes” is selected, customers’ balance functionality is activated
- **Allow to Purchase Credits** - ability for customers to top up balance with money and keep it positive
- **Minimum Amount** - the minimal sum of payment’s top up. 10 [main currency] set by default, 10 USD on the screenshot above
- **Credits Purchased Email Template** - which email template should be sent to the customer when balance is topped up
 - Do not sent this email
 - {selection of available email templates}
- **Show Customer Balance on Dashboard** - when customers open up their profile they will see their balance in dashboard
- **Show Customer Balance in Side Block** - there will be a special side block added, where customers will see their balance
- **Show Customer Balance in the List of Customers** - from the back-end there will be a new column in Customers -> Manage Customers table, that will show customers’ balance
- **Show Balance Activity Report to Customer** - customers will see how much they have topped up, earned (transferred from points) and spent
- **Allow to Convert Credits into Reward Points** - in case there are products/services that can be purchased using reward points only, customers may want to convert their monetary balance into reward points
- **Conversion Rate 100 Points =**
- **Minimum Amount to Convert**

3.2.3. Rewards Configuration

To manage rewards configuration select **System -> IToris Extensions -> Customer Balance & Rewards -> Configuration**

There will be a tab **Rewards Configuration**



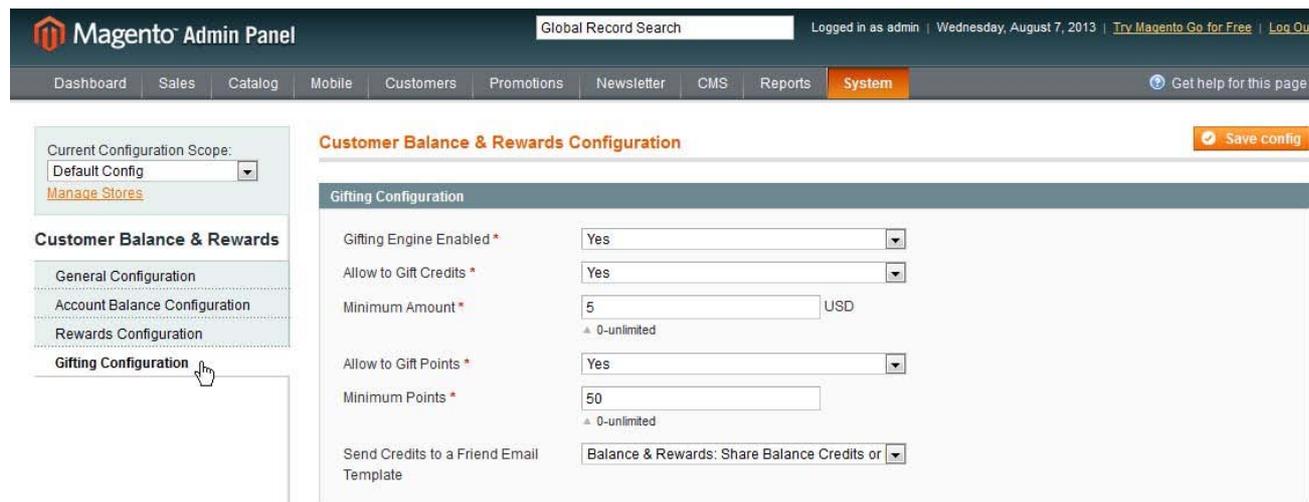
The following configurations and settings are available:

- **Rewards System Enabled** - when yes is selected, customers' rewards system is activated
- **Show Available Reward Points on Dashboard** - when customers open up their profile they will see their reward points in dashboard
- **Show Available Reward Points in Side Block** - there will be a special side block added, where customers will see their reward points
- **Show Available Reward Points in the List of Customers** - from the back-end there will be a new column in Customers -> Manage Customers table, that will show customers' reward points
- **Show Points Activity Report to Customer** - customers will see how many points they have earned, transferred from balance and spent
- **Allow to Convert Points into Credits** - ability for customers to exchange their points with money at the set conversion rate
- **Conversion Rate 100 Points =**
- **Minimum Points to Convert**
- **Enable Points Expiration** - if this setting is enabled, points will have "shelf life" period after which they become invalid
 - **Expire after** - expiration period
- **Points Will Expire Soon Email Template** - email notification for the customers to war that their points will expire soon
 - Do not sent this email
 - {selection of available email templates}

3.2.4. Gifting Configuration

To manage gifting configuration select **System -> IToris Extensions -> Customer Balance & Rewards -> Configuration**

There will be a tab **Gifting Configuration**



- **Gifting Engine Enabled** - when “yes” is selected, gifting functionality is enabled
- **Allow to Gift Credits** - if customers can present money to other customers (transfer money to their balance)
- **Minimum Amount** - the minimal amount to be gifted
- **Allow to Gift Points** - if customers can present reward points to other customers (transfer points to their balance)
- **Minimum Points** - the minimal amount to be gifted
- **Send Credits to a Friend Email Template** - email notification to be sent when points/money is gifted
 - Do not sent this email
 - {selection of available email templates}

3.2.5. Email Templates

There are pre-created email templates integrated as part of Magento’s email functionality. If you need to edit an email or create a new one - use the standard Magento functionality:

Select **System -> Transactional Emails**. Create a new email template there and select one of the pre-created templates.

Load the template and edit it the way you need. The new email template will be available in the extension’s settings.

The following email templates are available:

- **Credit or Point Balance Adjustment Email Template**
When a balance has been changed - customer will receive this email
- **Refer a Friend Email Template**
This is an invitational email to the referred friend(s)
- **Credits Purchased Email Template**
This email is sent to the customer when credits have been purchased
- **Points Will Expire Soon Email Template**
If points have expiration date - this is a reminder to customers when it is close
- **Send Credits to a Friend Email Template**
This email is received by customers who have achieved credits/points that have been shared with them by their friends

Also 2 standard email templates are changed - a new block with reward points is added:

- **New Order**
- **Invoice**

If you do not want an email to be sent - you can switch it off directly in the settings by choosing “do not send this email” option.

3.3. Customers Balance

3.3.1. Overview

Balance reflects mutual settlements between customers and website. There are two currencies that are used and can be converted to each other (depending on selected settings) - money and reward points.

If all extension’s areas are activated - customers can top up their balance with money (buy credits). This means that they have a positive monetary amount on the website, which can be used to purchase goods/services later on.

Balance also shows all earned reward points. Depending on settings reward points are assigned to customers for certain actions (friends’ referrals, reviews writing, other general activity) as well as for purchasing products.

Credits (money) and reward points are exchangeable. Rates and exchange rules can be set in the configurations.

Depending on settings customer can use either credits or reward points or both in combination for future purchases.

Customers as well as administrators (from the back-end) can view the balance history.

3.3.2. Settings

To select or change balance settings and configurations please [see this chapter](#).

3.3.3. Back-end

3.3.3.1. View Customer’s Balance

From the back-end administrators can see the customers’ balance in the list of customers, as well as detailed information in a customer’s profile.

To see current balance (both credits and reward points) administrator can open up the list of customers. There will be 2 new columns there (depending on settings) - **Balance** and **Reward Points**:

The screenshot shows the Magento Admin Panel interface. At the top, there's a navigation bar with 'Customers' selected. Below it, the 'Manage Customers' section is visible. A table lists customer records. The 'Balance' and 'Reward Points' columns are highlighted with a red box. The table data is as follows:

ID	Name	Email	Balance	Reward Points	Group	Telephone	ZIP	Country	State/Province	Customer Since	Website	Action
2	John Smith	john@smith.com	20.00 [USD]	100	General	647-234-9745	T6R1S4	Canada	Ontario	Aug 7, 2013 4:50:54 PM	Main Website	Edit
1	John Doe	john.doe@example.com	0.00 [USD]	0	General					Aug 30, 2007 4:23:13 PM	Main Website	Edit

On customer’s details page there is both short and detailed information about the balance available. Short Information is displayed in Customer View tab:

Customer Information

Customer View

- Customer Balance & Rewards
- Account Information
- Addresses
- Orders
- Billing Agreements
- Recurring Profiles (beta)
- Shopping Cart
- Wishlist
- Newsletter
- Product Reviews
- Product Tags

John Smith [Back] [Reset] [Create Order] [Delete Customer] [Save Customer] [Save and Continue Edit]

Personal Information

Last Logged In:	(Offline)	Default Billing Address
Last Logged In (America/Los_Angeles):	Aug 8, 2013 9:49:35 AM (Offline)	John Smith
Confirmed email:	Confirmed	304 Fairview Street
Account Created on:		Toronto, Ontario, T6R1S4
Account Created on (America/Los_Angeles):	Aug 7, 2013 4:50:54 PM	Canada
Account Created in:	English	T: 647-234-9745
Customer Group:	General	

Account Balance & Reward Points

Credit Balance: \$ 20.00 [Manage](#) **Reward Points: 100** [Manage](#)

Sales Statistics

Website	Store	Store View	Lifetime Sales	Average Sale
Main Website	Main Store	English	\$20.00	\$20.00
All Store Views			\$0.00	\$0.00

For the balance history open up **Customer Balance and Rewards** tab:

Customer Information

Customer View

- Customer Balance & Rewards
- Account Information
- Addresses
- Orders
- Billing Agreements
- Recurring Profiles (beta)
- Shopping Cart
- Wishlist
- Newsletter
- Product Reviews
- Product Tags

John Smith [Back] [Reset] [Create Order] [Delete Customer] [Save Customer] [Save and Continue Edit]

Manage Credit Balance

Manage Reward Points

Gift Codes

Balance & Rewards History

Date & Time	Credits Added	RP Added	Credit Balance	RP Balance	Comment	Store
Aug 8, 2013 3:30:44 AM	-\$9.00	-100	11	0	Spent for order 100000002	Main Website Main Store English
Aug 8, 2013 2:48:42 AM		+100	20	100	contest winner	English
Aug 7, 2013 9:55:31 AM	+\$20.00	0	20	0	Top Up Balance	Main Website Main Store English

Here administrator can view how many rewards and credits have been received as well as spent.

3.3.3.2. Manage Customer's Balance

Administrators from the back-end can manage customers' balance (add/remove credits as well as reward points).

To do this administrator needs to open a customer's profile and either press Manage link in **Customer View** tab, or select **Customer Balance and Rewards** tab:

Customer Information

Customer View

- Customer Balance & Rewards
- Account Information
- Addresses
- Orders
- Billing Agreements
- Recurring Profiles (beta)
- Shopping Cart
- Wishlist
- Newsletter
- Product Reviews
- Product Tags

John Smith

Personal Information

Last Logged In:	(Offline)	Default Billing Address
Last Logged In (America/Los_Angeles):	Aug 8, 2013 9:49:35 AM (Offline)	John Smith
Confirmed email:	Confirmed	304 Fairview Street
Account Created on:	Aug 7, 2013 4:50:54 PM	Toronto, Ontario, T6R1S4
Account Created in:	English	Canada
Customer Group:	General	T: 647-234-9745

Account Balance & Reward Points

Credit Balance: \$ 11.00 [Manage](#) Reward Points: 0 [Manage](#)

Sales Statistics

Website	Store	Store View	Lifetime Sales	Average Sale
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Administrators have the following options:

Convert credits into reward points

To do this admin enters the amount of money (credits) to be converted. By default the full available amount is entered in the conversion field.

Administrator cannot enter a larger credit that the customer has available now.

John Smith

Manage Credit Balance

Current Balance: 180 \$ Convert Credits into RP: 180 USD = 1800 Reward Points [Convert](#)

Add Credits to Balance: USD (Negative value will subtract the amount from the balance)

Comment to Balance Change: [Add Credits](#)

Manage Reward Points

Reward Points: 360 Convert RP into Credits: 360 = \$ 36.00 [Convert](#)

Add Reward Points: (Negative value will subtract RP from Rewards)

Comment to Rewards Change: [Add RP](#)

When **Convert** button is pressed - the credit is withdrawn from the customer's balance and the reward points are added to it (the conversion rate is set in the configuration, administrator will see it before the conversion).

Add credits to balance

To add money (credits) to the customer's balance administrator enters the amount, adds a comment and presses **Add Credits** button. The money is added to the customer's balance.

John Smith Back Reset Create Order Delete Customer Save Customer Save and Continue Edit

Manage Credit Balance

Current Balance: 180 \$ Convert Credits into RP: 180 USD = 1800 Reward Points **Convert**

Add Credits to Balance: USD (Negative value will subtract the amount from the balance)

Comment to Balance Change: **Add Credits**

Manage Reward Points

Reward Points: 360 Convert RP into Credits: 360 = \$ 36.00 **Convert**

Add Reward Points: (Negative value will subtract RP from Rewards)

Comment to Rewards Change: **Add RP**

Subtract credits from balance

Administrator can subtract money from the customer’s balance the same way as adding credits there. Only the value should be negative (-30).

Convert reward points into credits

To convert points into credits administrator enters the number of points to be converted (by default all available points are entered in the field) and presses **Convert** button that converts the points at the set exchange rate.

John Smith Back Reset Create Order Delete Customer Save Customer Save and Continue Edit

Manage Credit Balance

Current Balance: 180 \$ Convert Credits into RP: 180 USD = 1800 Reward Points **Convert**

Add Credits to Balance: USD (Negative value will subtract the amount from the balance)

Comment to Balance Change: **Add Credits**

Manage Reward Points

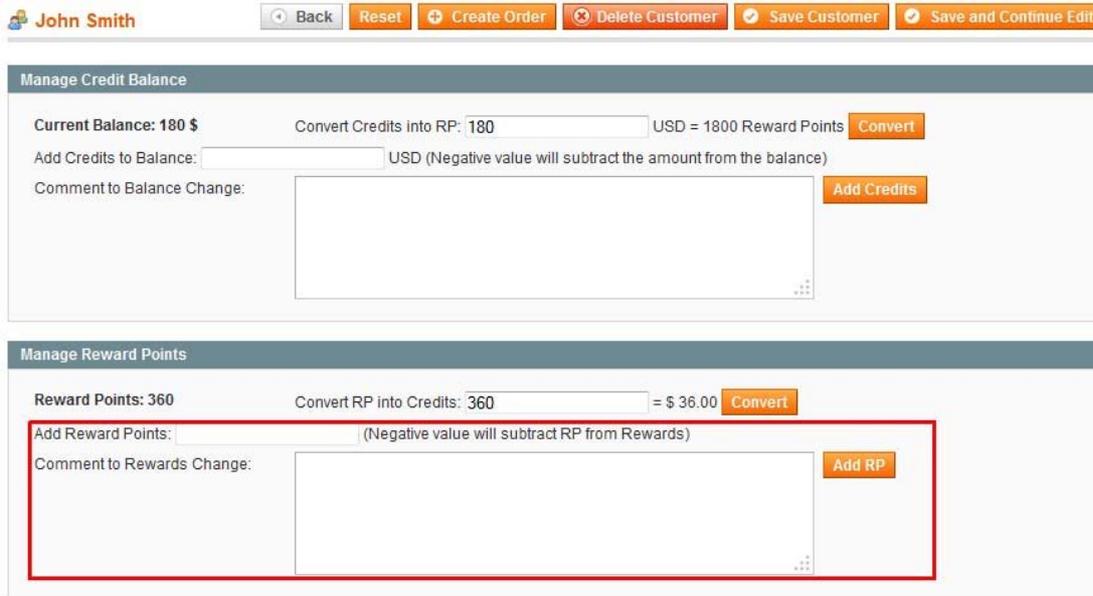
Reward Points: 360 Convert RP into Credits: 360 = \$ 36.00 **Convert**

Add Reward Points: (Negative value will subtract RP from Rewards)

Comment to Rewards Change: **Add RP**

Add reward points to balance

To add reward points to the customer’s balance administrator enters the quantity, adds a comment and presses **Add PR** button. The points is added to the customer’s balance.



Subtract reward points from balance

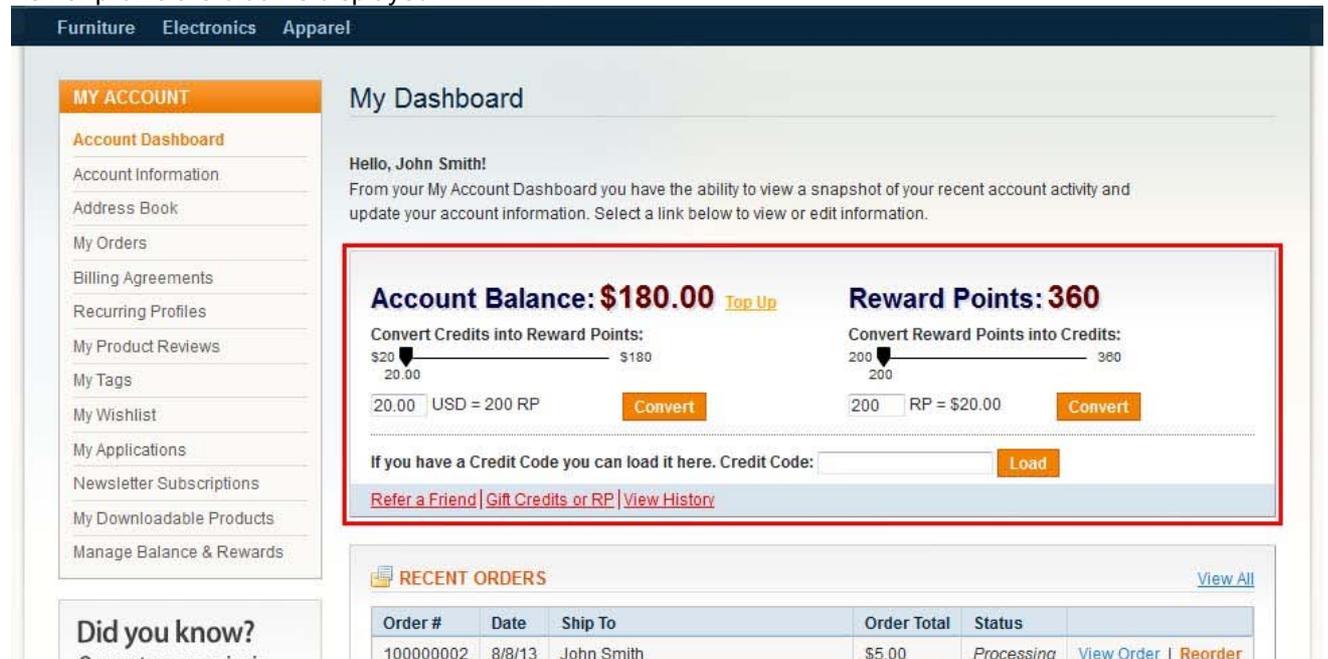
Administrator can subtract points from the customer’s balance the same way as adding them there. Only the value should be negative (-30).

3.3.4. Front-end

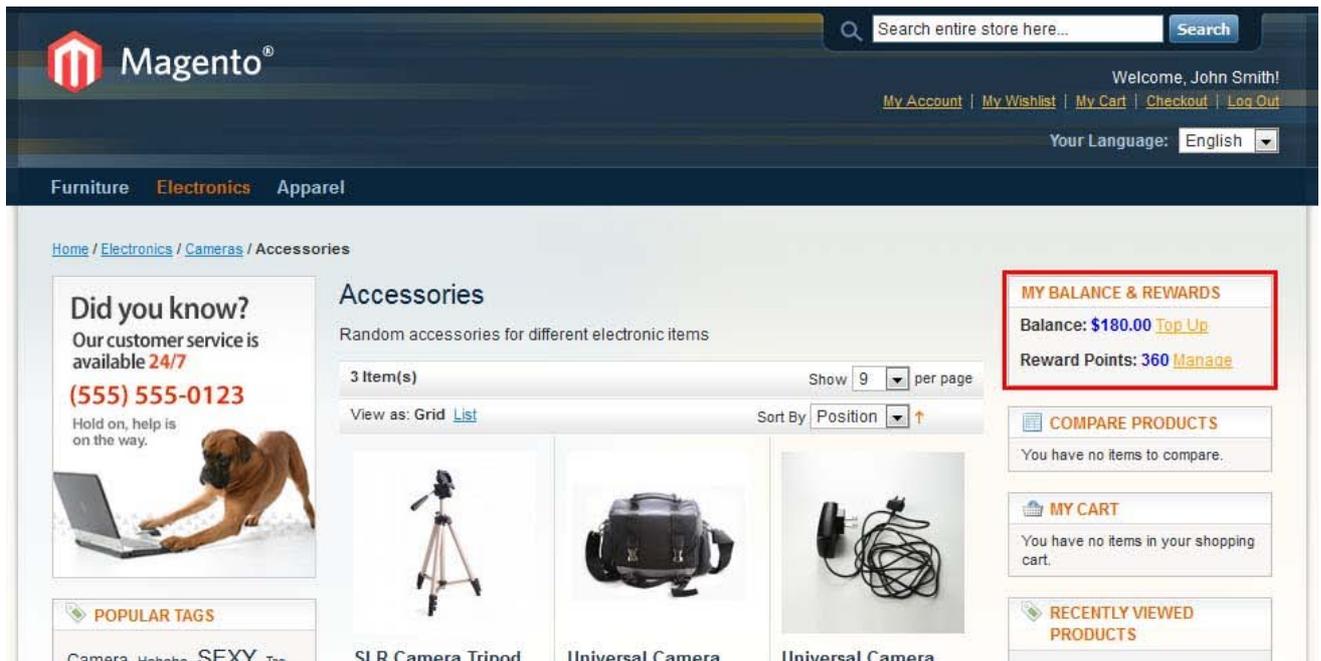
3.3.4.1. Balance Display

There are several areas where customers can view their balance (this depends on the settings).

There is a block with short balance information on **customers’ dashboard**. When a customer opens up his/her profile the block is displayed:



There can also be a **side block** on the website’s pages with the short balance information:



Detailed **balance history** is displayed in customers' account in Manage Balance and Rewards tab. Here customer will see all earned as well as spent points, as well as credit movements in his/her balance, with dates and comments:

MY ACCOUNT

- Account Dashboard
- Account Information
- Address Book
- My Orders
- Billing Agreements
- Recurring Profiles
- My Product Reviews
- My Tags
- My Wishlist
- My Applications
- Newsletter Subscriptions
- My Downloadable Products
- Manage Balance & Rewards**

Did you know?
 Our customer service is available 24/7
(555) 555-0123
 Hold on, help is on the way.



MY CART

You have no items in your shopping cart.

COMPARE PRODUCTS

You have no items to compare.

MY ORDERS

Last Ordered Items

- Universal Camera Charger

[View All](#) [Add to Cart](#)

Manage Balance & Reward Points [Refer a Friend](#)

Account Balance: \$180.00 [Top Up](#) **Reward Points: 360**

Convert Credits into Reward Points:
 \$20 20.00 \$180

Convert Reward Points into Credits:
 200 200 360

20.00 USD = 200 RP

Gifting

You can share your Balance Credits and Reward Points with your Friends. Create Credit Code here.

\$5 5.00 \$180 5.00 USD 50 50 360 50 RP

Codes:
 No codes

If you received a Credit Code from a Friend you can load it here. Credit Code:
 Credit Code:

Balance History

Date & Time	Credits Added	RP Added	Credit Balance	RP Balance	Comment
Aug 8, 2013 4:05:52 AM		250	\$180.00	360	Invite 4 friends
Aug 8, 2013 4:05:31 AM	\$10.00		\$180.00	110	Top up
Aug 8, 2013 4:05:06 AM	\$120.00		\$170.00	110	Invite 4 friends
Aug 8, 2013 4:04:47 AM	\$50.00		\$50.00	110	Contest
Aug 8, 2013 4:01:30 AM	-\$11.00	110	\$0.00	110	Convert Credits into RP
Aug 8, 2013 3:30:44 AM	-\$9.00	-100	\$11.00	0	Spent for order 100000002
Aug 8, 2013 2:48:42 AM		100	\$20.00	100	contest winner
Aug 7, 2013 9:55:31 AM	\$20.00		\$20.00	0	Top Up Balance

3.3.4.2. Balance Management

There are several ways customers can add/earn credits (money) as well as reward points (depending on the selected settings and configurations):

- Top up (credits only) by customer (please [see detail here](#))
- Convert (from credits to reward points and vs. - available balance only) (please [see detail here](#))
- Get rewards for actions on website (please [see details here](#))
- Get rewards for purchases of some products (please [see details here](#))
- Top up by admin (both credits and rewards - please [see more here](#))

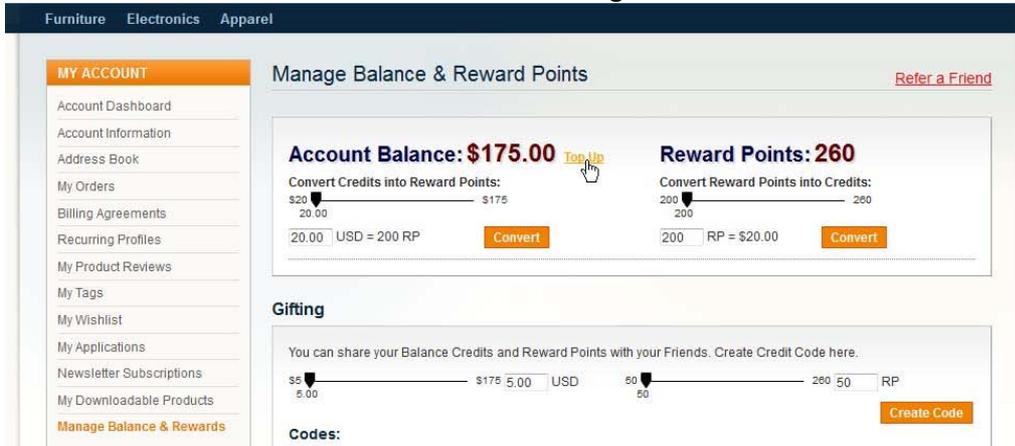
Customer can spend both credits (money) and reward points on purchasing goods and services from the website as well as gifting them to friends (other customers) - depending on selected settings and configurations.

When purchasing products/services, customer can pay using a combination of reward points, credits and regular payments.

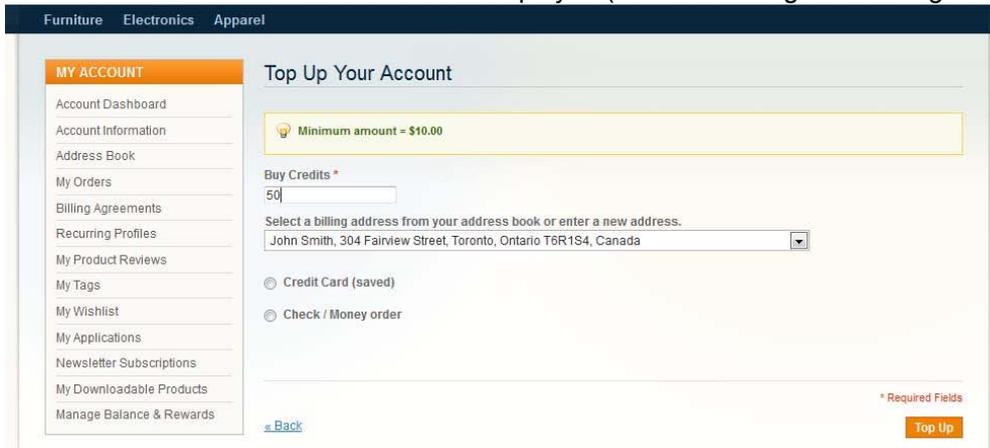
3.3.4.2.1. Top Up

In addition to the ability to earn credits (depending on settings) customers have ability to top up their balance. There is ability to top up credits (money) only, not points. Yet if there is a conversional rate set, customers then can convert credits into points.

Customer can top up his/her balance in the account (they need to be logged in). There is Top Up link near Account Balance in **Dashboard** as well as in **Manage Balance and Rewards** tab.



When it is clicked - there is a special form displayed for topping up. This is a special case of order payment, so all standard Magento fields required for a purchase are populated. There is also minimal amount for credits displayed (from the settings and configurations):



Customer enters the amount he/she wants to add to the balance, selects/populated the required fields and presses Top Up button. The credit is added to the balance.

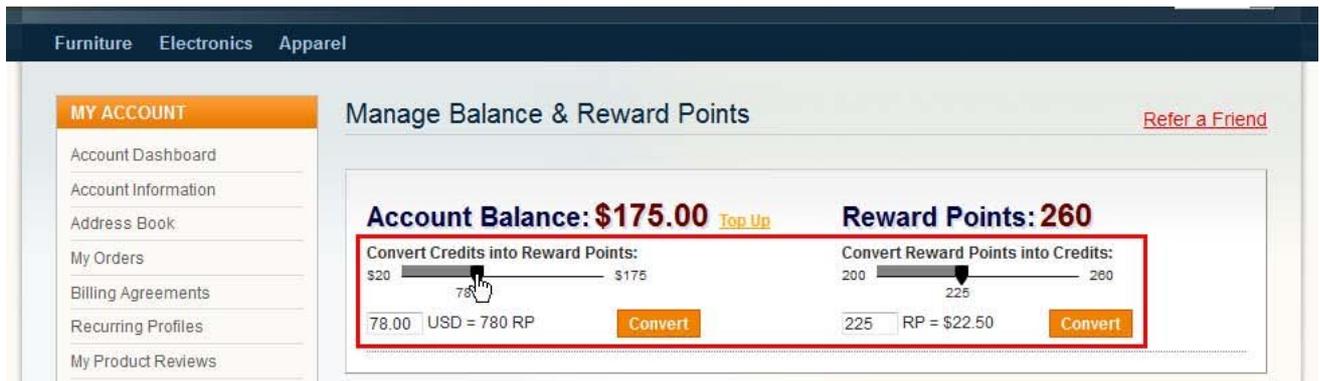
3.3.4.2.2. Conversion

There is ability to convert credits to points and vs. - depending on the settings and configurations. Conversional rate is set there as well.

Customer can convert credits to points or points to credits in the account (they need to be logged in). There is functionality for converting and exchange rates in **Dashboard** as well as in **Manage Balance and Rewards** tab.

There are sliding bars where customers can select how many credits/points to be converted. Minimal value in the sliders is the set minimal amount for conversion. Maximal value - currently available amount the customer has.

As customer changes the values in the sliders - the conversion result is re-calculated in the field below immediately. Customer can also enter a value directly in the field.



After a value has been selected, customer presses Convert button, and the selected credit amount/number of points is converted and added to the balance.

3.4. Rewards System

3.4.1. Overview

Reward system is the functionality that promotes the store and encourages customers to make purchases as well as be active on the website in order to get rewards that can be spent on future purchases.

Rewards can be monetary (credits) as well as points.

Administrator from the back-end create rules and promotions based on which rewards are earned.

These rules can include registration on the website, making a purchase (first, any, larger than a set amount, and so on), participation in reviews, signing for newsletters, referrals.

Promotions deal with purchases of special products. Rules can be based on different attributes of products, their combinations and so on. There is ability to set time limitation for the promotions.

3.4.2. Settings

To select or change rewards' system configuration and settings please [see this chapter](#).

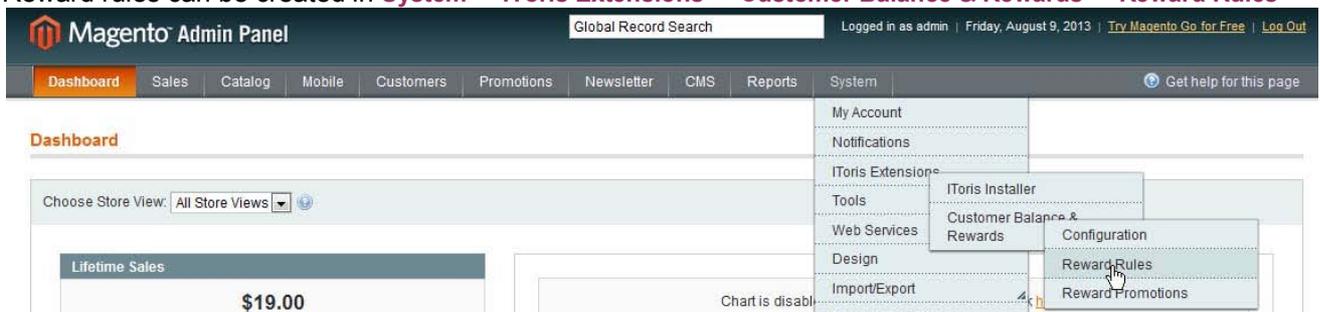
3.4.3. Back-end

Administrators from the back-end can view as well as manage customers' rewards. Please [see this chapter](#) for more information.

Administrators also create reward rules and promotions.

3.4.3.1. Rewards' Rules

Reward rules can be created in **System -> IToris Extensions -> Customer Balance & Rewards -> Reward Rules**



There is an area for creating new rules as well as managing the existing ones.

To create a new rule administrator presses Add New Rule button. This opens up an area for creating a rule. Administrator selects a rule type:

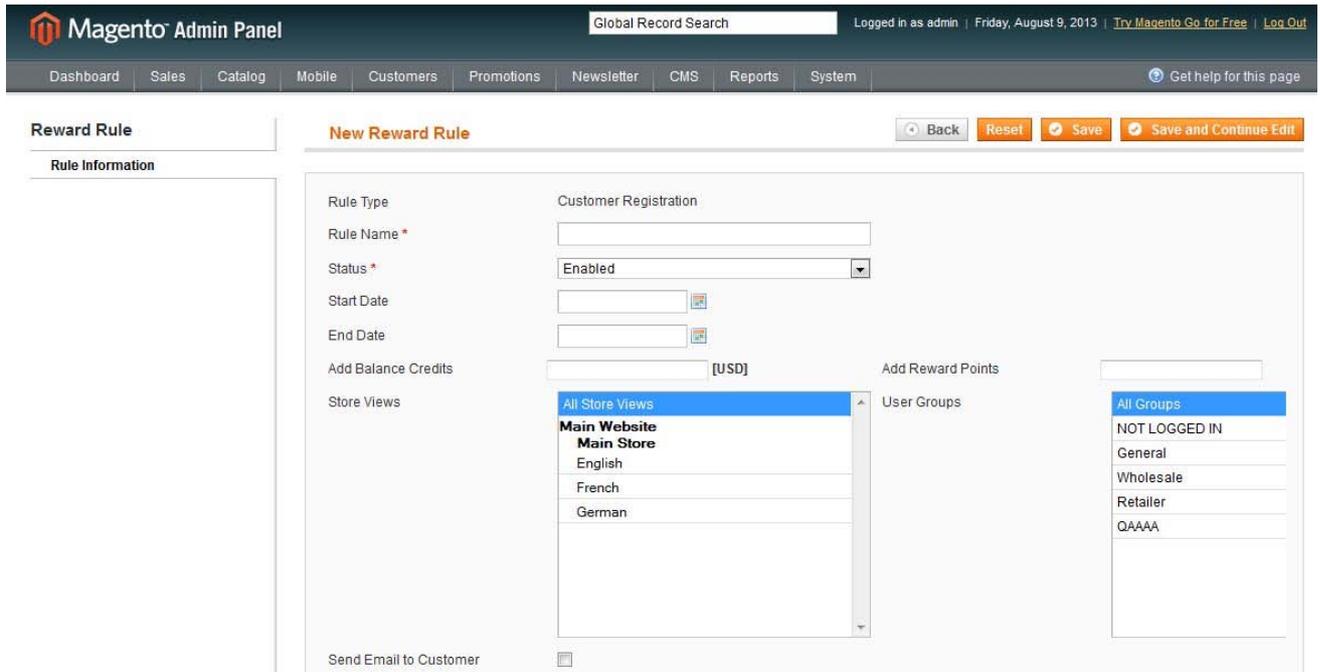
and presses Continue button.

The following rule types are available:

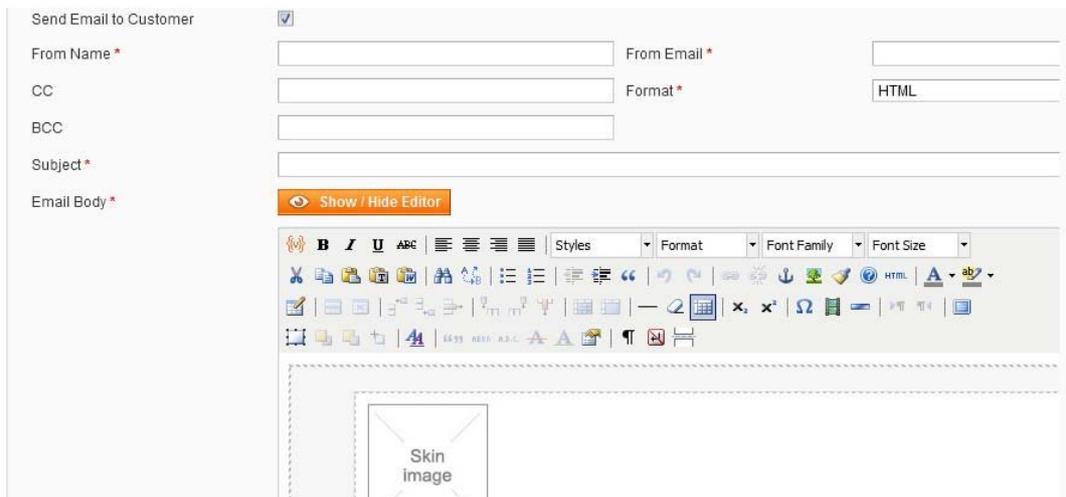
- Customer registration
- Customer made first order
- Customer made any order
- Customer made a large order
- Poll voted
- Product sent to a friend and purchased
- Sign up for a newsletter
- Product tagged
- Product reviews
- Customer birthday occurred
- Referred customer registered
- Referred customer made first order
- Referred customer made any order

Depending on the selected type there can be additional fields (for example, for large orders there is ability to enter the minimal order amount).

There are also general rule's fields common for all types:



- **Rule Name** - how the rule will be displayed in the list of rules and in the rewards history.
- **Status** - only enabled rules will be applied
- **Start Date, End Date** - if you set the date range, rule will be applied only within these dates. Otherwise, it will be applied all the time while it stays enabled.
- **Add Balance Credits, Add Reward Points** - how many credits and/or reward points customers will receive when the rule is performed.
- **Store Views** - you can limit the rule to be applied on selected stores only. By default all stores are selected.
- **User Groups** - you can limit the rule to be applied for selected customer groups only
- **Send email to customer** - when this setting is checked, there are additional fields displayed for the email to be sent.



To edit an existing rule administrator opens the list of rules and clicks edit link. The rule is opened up for editing:

Reward Rules Add New Rule

Page 1 of 1 pages | View 20 per page | Total 4 records found Reset Filter Search

Rule Name	Rule Type	Balance Credits	Reward Points	Start Date	End Date	Status	User Groups	Store Views	Action
Account Creation	Customer Registration		+100			Enabled	All Groups	All Store Views	Edit
Participation in	Poll Voted	+\$5.00	0			Enabled	All Groups	All Store	Edit

3.4.3.2. Rewards' Promotions

Reward rules can be created in **System -> IToris Extensions -> Customer Balance & Rewards -> Reward Promotions**

System menu items: My Account, Notifications, IToris Extension, Tools, Web Services, Design, Import/Export, My Account, Notifications, IToris Extension, Tools, Web Services, Design, Import/Export, Customer Balance & Rewards, Configuration, Reward Rules, Reward Promotions.

All existing rules will be shown in the list there. Administrators can create new rules by pressing **Add New Rule** button. This opens up an area for creating a promotion rule:

New Reward Rule Back Reset Save Save and Continue Edit

Rule Information

Rule Name *

Conditions * If **ALL** of these conditions are **TRUE**:

Status * Enabled

Start Date

End Date

Add Balance Credits

Add Reward Points

Store Views: All Store Views, Main Website, Main Store, English, French, German

User Groups: All Groups, NOT LOGGED IN, General, Wholesale, Retailer, QAAAA

Send Email to Customer

The following fields should be populated to create a promotion:

- **Rule Name** - how the rule will be displayed in the list of rules and in the rewards history.
- **Condition** - here administrators set a condition or a combination of conditions that should be fulfilled in order to receive a reward. Please see a screenshot with sample below.
- **Status** - only enabled rules will be applied
- **Start Date, End Date** - if you set the date range, rule will be applied only within these dates. Otherwise, it will be applied all the time while it stays enabled.
- **Add Balance Credits, Add Reward Points** - how many credits and/or reward points customers will receive when the rule is performed.
- **Store Views** - you can limit the rule to be applied on selected stores only. By default all stores are selected.
- **User Groups** - you can limit the rule to be applied for selected customer groups only
- **Send email to customer** - when this setting is checked, there are additional fields displayed for the email to be sent.

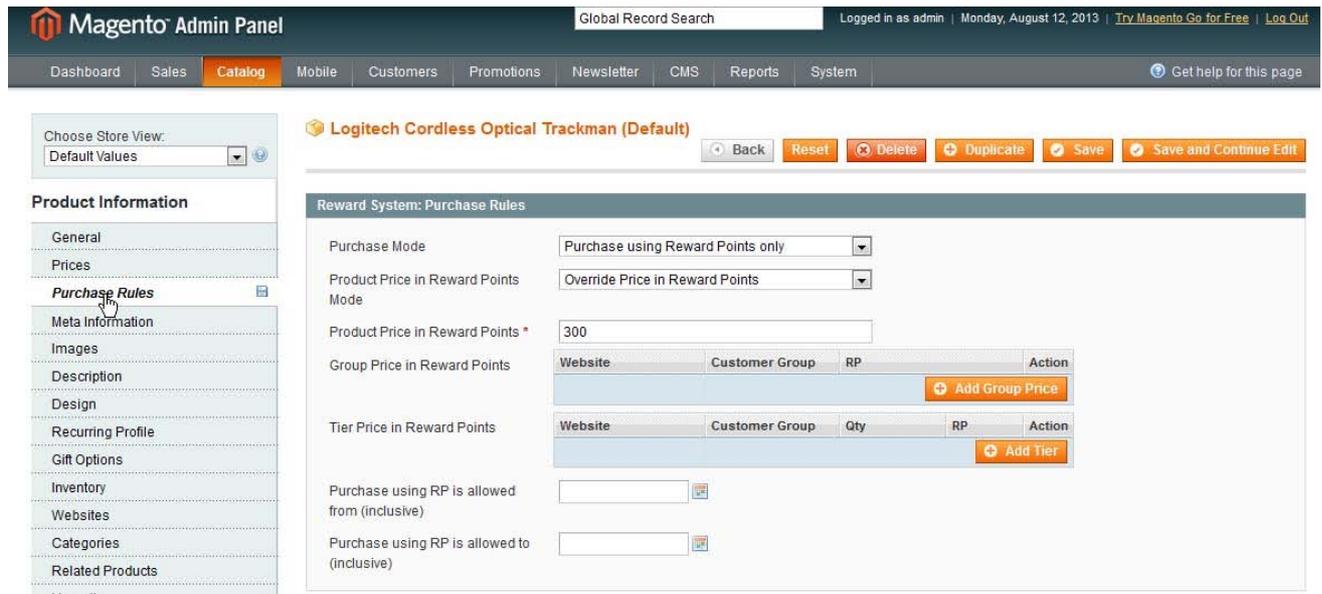
Condition sample - customer who purchase an Apple product that costs more than \$1500 during the period from the 11th to the 25th of April will earn 200 reward points:

Additional fields for email templates are the following:

3.4.3.3. Rules for a Single Product

Settings reward rules and promotions for products usually means they will be applied to a group of product (a category, or a number of products selected by an attribute, and so on).

In addition to this you can set special rules for selected products individually. To do this open up a product, there will be a new tab **Purchase Rules**:



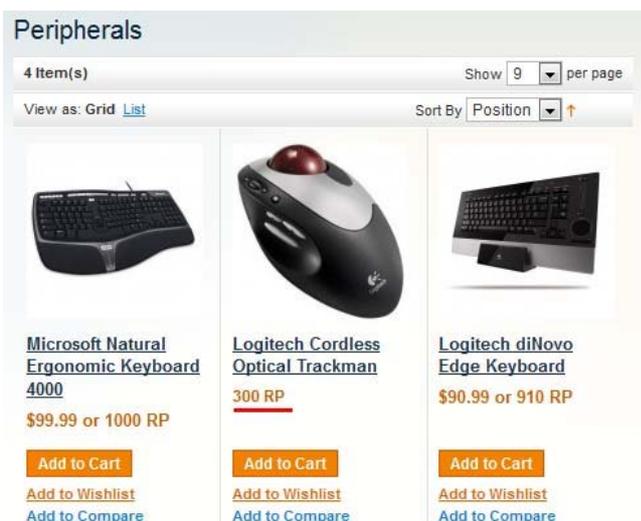
The following settings are available there:

- **Purchase Mode**
How the product can be purchased. The following options are available:
 - Global - will be taken from the global settings and configurations
 - Purchase using price configured - product can be purchased with a regular payment or for a credits only
 - Purchase using price & reward points - product can be purchased with a regular payment or for a credit as well as for reward points
 - Purchase using reward points only - only reward points can be used to purchase this product. If a customer has no (enough) points, he/she will not be able to complete the purchase.

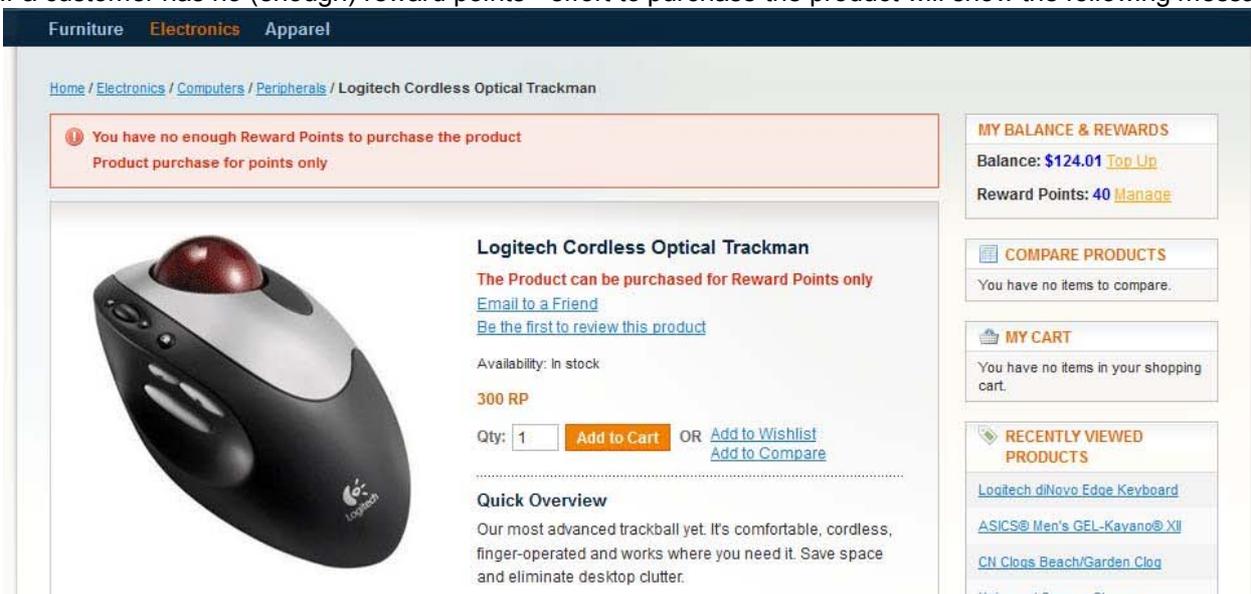
- **Product price in reward points mode**
 - Calculate automatically based on exchange rate - conversion rate from the settings will be taken
 - Override price in reward points - special price will be used for this product. When this setting is selected, there are additional settings:
 - Product Price in Reward Points - set the “cost” of this product in reward points
 - Group Price in Reward Points - ability to set a special points’ price for groups
 - Tier Price in Reward Points - ability to set a special points’ tier price

- **Purchase using RP is allowed from (inclusive)/Purchase using RP is allowed to (inclusive)**
You can limit this rule with a period of time during which it will be applied - or leave it “permanent”

Please see the settings in the screenshot above (the product can be purchased for reward points only, 300 points). Customers will see the following:



If a customer has no (enough) reward points - effort to purchase the product will show the following message:



3.4.4. Front-end

3.4.4.1. Earning Rewards

There are several ways customers can earn rewards. This depends on the settings and configurations in admin area.

Rewards earning can be for special activity on the website (registration, reference, participation in the polls, and so on) as well as for purchasing special products or product combinations.

Apart from earning there are other ways of getting rewards (administrator can provide them manually, customers can top up their balance themselves, there can be gifts from other customers).

For purchasing products

Let us, for example, create a rule that customers, who purchase any shoes during the period from August, 08 to August, 15 get 300 reward points:

Magento Admin Panel Global Record Search Logged in as admin | Monday, August 12, 2013 | [Try Magento Go for Free](#) | [Log Out](#)

Dashboard Sales Catalog Mobile Customers Promotions Newsletter CMS Reports System [Get help for this page](#)

Reward Promotion Rule Buy shoes till August, 15 and get 300 points!!! [Back](#) [Reset](#) [Delete](#) [Save](#) [Save and Continue Edit](#)

Rule Information

Rule Name * Buy shoes till August, 15 and get 300 points!!!

Conditions * If **ALL** of these conditions are **TRUE**:
 Category is **5, 16, 17**

Status * Enabled

Start Date 2013-08-04

End Date 2013-08-15

Add Balance Credits 0

Add Reward Points 300

Store Views: All Store Views, Main Website, Main Store, English, French, German

User Groups: All Groups, NOT LOGGED IN, General, Wholesale, Retailer, QAAAA

Now one of our customers purchases shoes. The promotion will be shown on the products' pages:

Furniture Electronics **Apparel**

[Home](#) / [Apparel](#) / [Shoes](#) / [Mens](#) / ASICS® Men's GEL-Kayano® XII

Buy this product and get 300 Reward Points

ASICS® Men's GEL-Kayano® XII
[Email to a Friend](#)
[Be the first to review this product](#)

Availability: In stock

\$134.99 or 1350 RP

Quick Overview
 The ASICS® GEL-Kayano® XII running shoe delivers the ultimate blend of cushioning and support.

*Shoe Size * Required Fields
 10

\$134.99 or 1350 RP
 Buy & get 300 RP!
 Qty: 1 [Add to Cart](#)

MY BALANCE & REWARDS
 Balance: **\$175.00** [Top Up](#)
 Reward Points: **260** [Manage](#)

COMPARE PRODUCTS
 You have no items to compare.

MY CART
 There is **1 item** in your cart.
 Cart Subtotal: **\$134.99**
[Checkout](#)

Recently added item(s)
 ASICS® Men's GEL-Kayano® XII
 1 x \$134.99
[Details](#)

RECENTLY VIEWED PRODUCTS
[CN Clogs Beach/Garden Clog](#)
[Universal Camera Charger](#)

After the order has been completed, the customer will see the reward points added to his account and displayed in the balance history. There will also be a special email if this is selected in the rule's settings.



MY CART
You have no items in your shopping cart.

COMPARE PRODUCTS
You have no items to compare.

MY ORDERS

Balance History

Date & Time	Credits Added	RP Added	Credit Balance	RP Balance	Comment
Aug 12, 2013 7:39:21 AM		300	\$175.00	560	1xASICS® Men's GEL-Kayano® XII purchase rewards added
Aug 8, 2013 10:31:40 AM	-\$5.00	-100	\$175.00	260	Created Credit code (b965b2ad41af682d861dc0f794bc6150)
Aug 8, 2013 4:05:52 AM		250	\$180.00	360	Invite 4 friends
Aug 8, 2013 4:05:31 AM	\$10.00		\$180.00	110	Top up
Aug 8, 2013 4:05:06 AM	\$120.00		\$170.00	110	Invite 4 friends
Aug 8, 2013	\$50.00		\$50.00	110	Contest

For special activity

Let us create a rule that customers get 80 reward points for product reviews.

Magento Admin Panel | Global Record Search | Logged in as admin | Monday, August 12, 2013 | [Try Magento Go for Free](#) | [Log Out](#)

Dashboard | Sales | Catalog | Mobile | Customers | Promotions | Newsletter | CMS | Reports | System | [Get help for this page](#)

Reward Rule | **Product Review** | [Back](#) | [Reset](#) | [Delete](#) | [Save](#) | [Save and Continue Edit](#)

Rule Information

Rule Type: Product Reviewed
 Rule Name: Product Review
 Status: Enabled
 Start Date:
 End Date:
 Add Balance Credits: 0 [USD]
 Add Reward Points: 80
 Store Views: All Store Views, Main Website, Main Store, English, French, German
 User Groups: All Groups, NOT LOGGED IN, General, Wholesale, Retailer, QAAAA

One of the customers reviews a product and the review has been approved by admin:

Magento | Welcome, John Smith! | [My Account](#) | [My Wishlist](#) | [My Cart](#) | [Checkout](#) | [Log Out](#) | Your Language: English

Furniture | Electronics | Apparel

MY ACCOUNT

- Account Dashboard
- Account Information
- Address Book
- My Orders
- Billing Agreements
- Recurring Profiles

My Product Reviews

1 Item(s) | Show 10 per page

8/12/13	ASICS® Men's GEL-Kayano® XII	★★★★★	Great cushioning, very comfortable and have pro...	View Details
---------	--	-------	--	------------------------------

1 Item(s) | Show 10 per page

Customer will see points added to the balance now:

Hold on, help is on the way.



Balance History

Items 1 to 10 of 11 total Page: 1 2 ▶ Show 10 per page

Date & Time	Credits Added	RP Added	Credit Balance	RP Balance	Comment
Aug 12, 2013 7:52:34 AM		80	\$175.00	640	Review for ASICS® Men's GEL-Kayano® XII
Aug 12, 2013 7:39:21 AM		300	\$175.00	560	1xASICS® Men's GEL-Kayano® XII purchase rewards added
Aug 8, 2013 10:31:40 AM	-\$5.00	-100	\$175.00	260	Created Credit code (b965b2ad41af682d861dc0f794bc6150)
Aug 8, 2013 4:05:52 AM		250	\$180.00	360	Invite 4 friends
Aug 8, 2013 4:05:31 AM	\$10.00		\$180.00	110	Top up
Aug 8, 2013	\$120.00		\$170.00	110	Invite 4 friends

MY CART

You have no items in your shopping cart.

COMPARE PRODUCTS

You have no items to compare.

MY ORDERS

Last Ordered Items

3.4.4.2. Conversion

For more details about conversions please [see this chapter](#).

3.4.4.3. History

For more information about balance history please [see this chapter](#).

3.4.4.4. Spending Balance and Rewards

Customers can spend their balance (both credits and reward points) on purchasing products/services as well as on gifting them to other customers.

Depending on settings and configurations, there can be products that can be purchased for points only, as well as “regular” products that can be purchased on points and/or money. Monet can be credits from the customers’ balance as well as regular payments.

Furniture
Electronics
Apparel

Home / Electronics / Computers / Peripherals

SHOP BY

SHOPPING OPTIONS

PRICE

[\\$20.00 - \\$29.99 \(1\)](#)

[\\$50.00 - \\$59.99 \(1\)](#)

[\\$90.00 and above \(2\)](#)

MANUFACTURER

[Logitech \(2\)](#)

[Microsoft \(2\)](#)

COLOR

[Black \(1\)](#)

[Brown \(1\)](#)

Did you know?

Our customer service is available **24/7**

Peripherals

4 Item(s) Show 9 per page

View as: [Grid](#) [List](#) Sort By: [Position](#) ↑



Microsoft Natural Ergonomic Keyboard 4000

\$99.99 or 1000 RP

[Add to Cart](#)

[Add to Wishlist](#)



Logitech Cordless Optical Trackman

300 RP

[Add to Cart](#)

[Add to Wishlist](#)



Logitech diNovo Edge Keyboard

\$90.99 or 910 RP

[Add to Cart](#)

[Add to Wishlist](#)

MY BALANCE & REWARDS

Balance: **\$175.00** [Top Up](#)

Reward Points: **640** [Manage](#)

COMPARE PRODUCTS

You have no items to compare.

MY CART

You have no items in your shopping cart.

RECENTLY VIEWED PRODUCTS

[Logitech diNovo Edge Keyboard](#)

[Logitech Cordless Optical Trackman](#)

[ASICS® Men's GEL-Kayano® XII](#)

[CN Clogs Beach/Garden Clog](#)

On the screenshot there is a product (computer mouse) that can be purchased on reward points only. There are also products that can be purchased on money and/or reward points. The second type will allow combination (partially points, partially money) as well.

When customer adds these products to the cart - apart from the price information there is a special block where customers can select how to pay:

Furniture Electronics Apparel

Shopping Cart

[Proceed to Checkout](#)

	Product Name		Move to Wishlist	Unit Price	Qty	Subtotal	
	Logitech Cordless Optical Trackman	Edit	Move	300 RP	<input type="text" value="1"/>	<u>300 RP</u>	
	Logitech diNovo Edge Keyboard	Edit	Move	\$90.99 or 910 RP	<input type="text" value="1"/>	\$90.99 or <u>910 RP</u>	

[Continue Shopping](#)
[Clear Shopping Cart](#)
[Update Shopping Cart](#)

DISCOUNT CODES

Enter your coupon code if you have one.

[Apply Coupon](#)

ESTIMATE SHIPPING AND TAX

Enter your destination to get a shipping estimate.

Country *

State/Province

Zip/Postal Code

Subtotal \$90.99 + 300 RP or 1210 RP

Grand Total \$90.99 or 910 RP

Use my Reward Points: = \$0.00

300 640

Use my Balance: USD

\$0 \$90.99

[Proceed to Checkout](#)

[Checkout with Multiple Addresses](#)

There customers can select how many reward points as well as credits to be used for the purchase. The rest of the amount (should there left any) will be taken in a regular way.

As the mouse can be purchased using reward points only - 300 reward points are set as a minimum. The rest of the amount can be varied.

Let us select 300 more points to be used for the purchase (600 totally now) as well as \$50.99 from the credit. The rest will go as a regular payment.

Subtotal \$90.99 + 300 RP or 1210 RP

Grand Total \$10.00 or 100 RP

Use my Reward Points: = \$30.00

300 640

Use my Balance: USD

\$0 \$90.99

[Proceed to Checkout](#)

[Checkout with Multiple Addresses](#)

As we proceed to checkout - there can be additional payments calculated (taxes, shipping and so on), so there will be ability to adjust the payment there as well. We will leave them unchanged, so totally we will spend 600 points, \$50.99 from the credits and \$20 as a regular payment:

Furniture Electronics Apparel

Checkout

YOUR CHECKOUT PROGRESS

[Billing Address | Change](#)

John Smith
304 Fairview Street
Toronto, Ontario, T6R1S4
Canada
T: 647-234-9745

[Shipping Address | Change](#)

John Smith
304 Fairview Street
Toronto, Ontario, T6R1S4
Canada
T: 647-234-9745

[Shipping Method | Change](#)

Flat Rate - Fixed \$10.00

[Payment Method | Change](#)

Check / Money order

- 1 Billing Information
- 2 Shipping Information
- 3 Shipping Method
- 4 Payment Information
- 5 Order Review

Product Name	Price	Qty	Subtotal
Logitech Cordless Optical Trackman	300 RP	1	300 RP
Logitech diNovo Edge Keyboard	\$90.99 or 910 RP	1	\$90.99 or 910 RP
Use my Reward Points: 600 = \$30.00			Subtotal \$90.99 + 300 RP or 1210 RP
300 <input type="text" value="600"/> 640			Shipping & Handling (Flat Rate - Fixed) \$10.00
Use my Balance: 50.99 USD			Grand Total \$20.00 or 200 RP
\$0 <input type="text" value="50.99"/> \$70.99			

Forgot an Item? [Edit Your Cart](#) [Place Order](#)

As soon as the order has been validated - we will see short rewards' calculation in balance history:



MY CART
You have no items in your shopping cart.

Balance History

Items 1 to 10 of 12 total Page: 1 2 ▶ Show 10 per page

Date & Time	Credits Added	RP Added	Credit Balance	RP Balance	Comment
Aug 12, 2013 8:25:22 AM	-\$50.99	-600	\$124.01	40	Spent for order 100000007
Aug 12, 2013 7:52:34 AM		80	\$175.00	640	Review for ASICS® Men's GEL-Kayano® XII
Aug 12, 2013 7:39:21 AM		300	\$175.00	560	1xASICS® Men's GEL-Kayano® XII purchase rewards added

As well as a detailed one in customers' account in the order details:

Furniture
Electronics
Apparel

MY ACCOUNT

- Account Dashboard
- Account Information
- Address Book
- My Orders
- Billing Agreements
- Recurring Profiles
- My Product Reviews
- My Tags
- My Wishlist
- My Applications
- Newsletter Subscriptions
- My Downloadable Products
- Manage Balance & Rewards

Did you know?
Our customer service is available 24/7
(555) 555-0123
Hold on, help is on the way.



MY CART

You have no items in your shopping cart.

COMPARE PRODUCTS

You have no items to compare.

Order #100000007 - Complete [Reorder](#) | [Print Order](#)

About This Order: [Order Information](#) [Invoices](#) [Shipments](#)

Order Date: August 12, 2013

Shipping Address

John Smith
304 Fairview Street
Toronto, Ontario, T6R1S4
Canada
T: 647-234-9745

Shipping Method

Flat Rate - Fixed

Billing Address

John Smith
304 Fairview Street
Toronto, Ontario, T6R1S4
Canada
T: 647-234-9745

Payment Method

Check / Money order

Items Ordered

Product Name	SKU	Price	Qty	Subtotal
Logitech Cordless Optical Trackman	logitechcord	\$0.00	Ordered: 1 Shipped: 1	\$0.00
Logitech diNovo Edge Keyboard	logidinovo	\$90.99	Ordered: 1 Shipped: 1	\$90.99
Subtotal				\$90.99
Shipping & Handling				\$10.00
Paid Using Balance Credits				\$50.99
Paid Using Reward Points				300 RP
				(\$30.00)
Grand Total				\$20.00
				+ 300
				RP

3.5. Gifting System

3.5.1. Overview

Gifting system provides ability for customers to preset their reward points and/or credits (depending on settings) to other customers.

When points or credits are gifted - customer initiates generation of a special code that then is sent to the friend. Codes are redeemable in the customers' account.

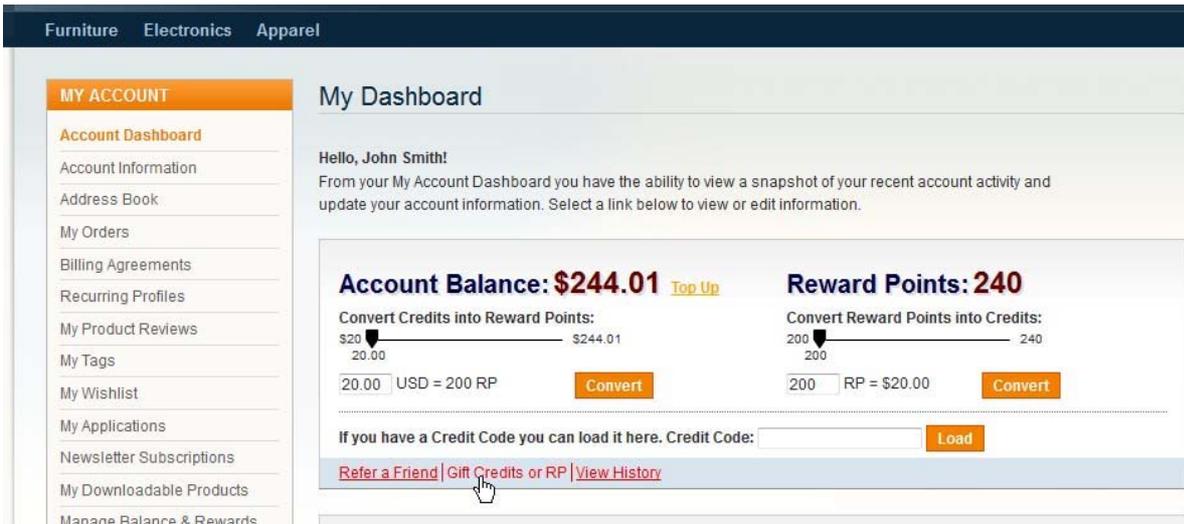
3.5.2. Settings

Please see more details about gifting system's settings [in this chapter](#).

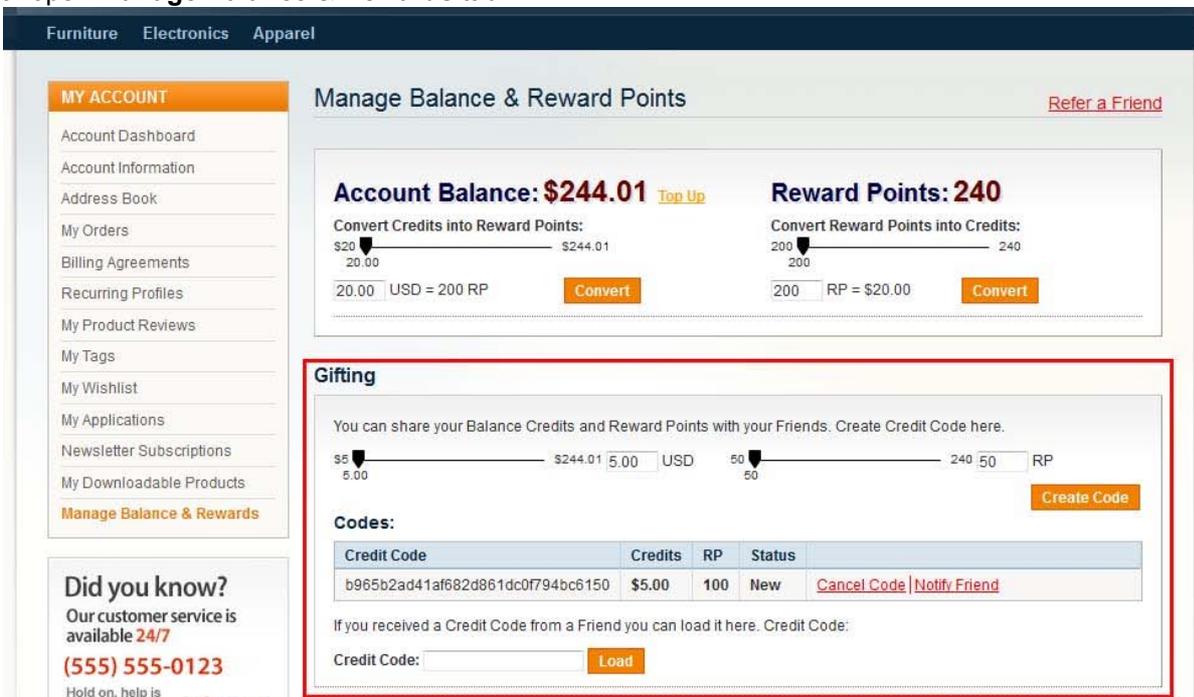
3.5.3. Front-end

3.5.3.1. Gifting Credits and/or Points

Customers can gift credits and/or points to their friends in their account. To do this customer can either click [Gift Credits](#) or [RP](#) link in the **Dashboard**,



or open **Manage Balance & Rewards** tab.



There will be a special area for gifting.

Customer sets the number of points and credits to be gifted using the sliders and presses **Create Code** button. This generates a new code, shows a message that the code has been created and adds the code to the customer's account:

✔ Credit Code (34695ea273a25e9e94dec5d52e551718) has been created

Manage Balance & Reward Points [Refer a Friend](#)

Account Balance: \$239.01 [Top Up](#) **Reward Points: 190**

Convert Credits into Reward Points:
 \$20 \$239.01
 20.00
 20.00 USD = 200 RP [Convert](#)

Gifting

You can share your Balance Credits and Reward Points with your Friends. Create Credit Code here.

\$5 \$239.01 5.00 USD 50 190 50 RP
 5.00 50 [Create Code](#)

Codes:

Credit Code	Credits	RP	Status	
b965b2ad41af682d861dc0f794bc6150	\$5.00	100	New	Cancel Code Notify Friend
34695ea273a25e9e94dec5d52e551718	\$5.00	50	New	Cancel Code Notify Friend

Now the code can be emailed to a friend - there is a link [Notify Friend](#) near each code. Customer populates the details and sends the notification:

Furniture Electronics Apparel

MY ACCOUNT

- Account Dashboard
- Account Information
- Address Book
- My Orders
- Billing Agreements
- Recurring Profiles
- My Product Reviews
- My Tags
- My Wishlist
- My Applications
- Newsletter Subscriptions
- My Downloadable Products
- Manage Balance & Rewards

Notify Friend

From Name: John Smith From Email: john@smith.com

Message *

Recipient's Name *

Recipient's Email *

[Back](#) [Send](#) * Required Fields

Did you know?
 Our customer service is available 24/7
(555) 555-0123

There is also ability to cancel (delete) a generated code by clicking [Cancel Code](#) link. This cancels the code and returns reward points/credits back to the balance:

✔ Credit Code has been canceled

Manage Balance & Reward Points [Refer a Friend](#)

Account Balance: \$244.01 [Top Up](#)

Convert Credits into Reward Points:

\$20 \$244.01

20.00 USD = 200 RP

Reward Points: 290

Convert Reward Points into Credits:

200 290

200 RP = \$20.00

Gifting

You can share your Balance Credits and Reward Points with your Friends. Create Credit Code here.

\$5 \$244.01 USD 50 290 RP

Codes:

Credit Code	Credits	RP	Status	
b965b2ad41af682d861dc0f794bc6150	\$5.00	100	Canceled	
34695ea273a25e9e94dec5d52e551718	\$5.00	50	New	Cancel Code Notify Friend

If you received a Credit Code from a Friend you can load it here. Credit Code:

Credit Code:

3.5.3.2. Redeeming Gifts

To redeem a gift code customer copies it and applies in his/her account.

Manage Balance & Reward Points [Refer a Friend](#)

Account Balance: \$244.01 [Top Up](#)

Convert Credits into Reward Points:

\$20 \$244.01

20.00 USD = 200 RP

Reward Points: 290

Convert Reward Points into Credits:

200 290

200 RP = \$20.00

Gifting

You can share your Balance Credits and Reward Points with your Friends. Create Credit Code here.

\$5 \$244.01 USD 50 290 RP

Codes:

Credit Code	Credits	RP	Status	
b965b2ad41af682d861dc0f794bc6150	\$5.00	100	Canceled	
34695ea273a25e9e94dec5d52e551718	\$5.00	50	Loaded	

If you received a Credit Code from a Friend you can load it here. Credit Code:

Credit Code: 157654466cd306b5d3c

The code is applied:

 **Gift Code has been loaded**

Manage Balance & Reward Points [Refer a Friend](#)

Account Balance: \$249.01 [Top Up](#) **Reward Points: 340**

Convert Credits into Reward Points: **Convert Reward Points into Credits:**

\$20 \$249.01 200 340

USD = 200 RP RP = \$20.00

Gifting

You can share your Balance Credits and Reward Points with your Friends. Create Credit Code here.

\$5 \$249.01 50 340 50 RP

Codes:

Credit Code	Credits	RP	Status
b965b2ad41af682d861dc0f794bc6150	\$5.00	100	Canceled
<u>34695ea273a25e9e94dec5d52e551718</u>	\$5.00	50	Loaded

If you received a Credit Code from a Friend you can load it here. Credit Code:

Credit Code: