

Points And Rewards

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Having hard time finding an answer to your question?
Check out our Knowledge Base.

Extension page: <http://ecommerce.aheadworks.com/magento-extensions/points-and-rewards.html>

This Magento extension offers points & rewards system implemented as well as the referral program. Points can be awarded automatically (and manually by the merchant) for making purchases, reviewing products, inviting friends, or carrying out any other admin-specified action. Later these points can be redeemed for discounts.

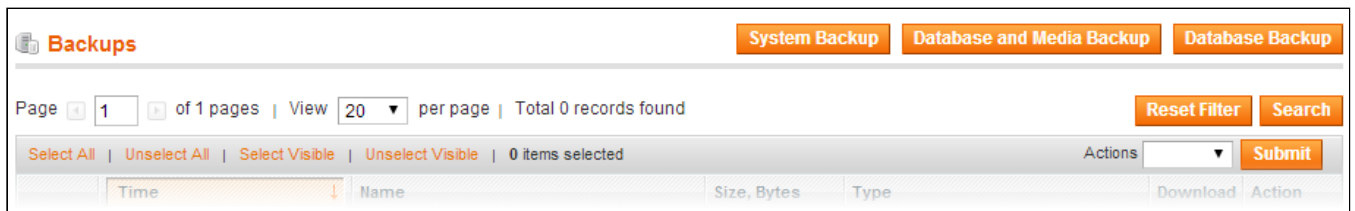
Installation

1. Backup your web directory and store database.

[Click to view details](#)

You can make backup copies with any tool you find appropriate

If you are going to use the native Magento backup function, navigate to **System -> Tools -> Backups** and perform **System** and **Database** backups



2. Log in to the Magento backend

3. Disable compilation

[Click to view details](#)

Navigate to **System -> Tools -> Compilation**.

If Compiler status is Disabled, you can skip to the next step

If Compiler is enabled, disable it.

Compilation Disable Run Compilation Process

Compilation State

Compiler Status	Enabled
Compilation State	Compiled
Collected Files Count	7505
Compiled Scopes Count	4

IMPORTANT: after the extension is installed, you can enable the compilation again; **IT IS CRUCIAL** that you use **"Run Compilation Process"** function, not just "Enable button"

Compilation Enable Run Compilation Process

Compilation State

Compiler Status	Disabled
Compilation State	Compiled
Collected Files Count	7505
Compiled Scopes Count	4

Installing an extension with the Compilation enabled will result in store downtime.

4. Flush store cache

Click to view details

You can flush the store cache in 2 ways:

- **via the backend:**

Navigate to **System -> Cache Management** menu, and click **Flush Magento Cache** button

Cache Storage Management Flush Magento Cache Flush Cache Storage

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected Actions Refresh Submit

Cache Type	Description	Associated Tags	Status
<input type="checkbox"/> Configuration	System(config.xml, local.xml) and modules configuration files(config.xml).	CONFIG	ENABLED
<input type="checkbox"/> Layouts	Layout building instructions.	LAYOUT_GENERAL_CACHE_TAG	ENABLED
<input type="checkbox"/> Blocks HTML output	Page blocks HTML.	BLOCK_HTML	ENABLED

- **via filesystem:**

On your server, navigate to Magento root folder, then proceed to **/var/cache/**; delete all the content there.

5. Download the extension package from your account and extract the downloaded archive

6. Copy the content of **/Step_1/** folder to your store's root directory

If you are using a custom theme,
read the instructions here.

In case you are using a custom theme, it is recommended to copy the design files to your current theme's folders. In case there are several themes in use at the same store, the design files must be copied to each of them.

- Find this folder in the package: `/step_1/app/design/frontend/base/default/`; copy its content to `/app/design/frontend/[your_package]/[your_theme/]`

- Find this folder in the package: `/step_1/skin/frontend/base/default/` ; copy its content to `/skin/frontend/[your_package]/[your_theme]/`

7. Copy the content of **/Step_2/** folder to your store's root directory

8. Flush store cache again; log out from the backend and log in again.

Set up cron

The Rewards & Points extension uses cron for checking points expiration and sending notifications about points expiration. Read the following instructions on setting cron job for your Magento store: [Magento user guide](#). If you have already configured cron jobs for your Magento installation then you can skip this step.

Generally it would be enough to run in SSH console of your server:

```
crontab -e
```

And add the following line:

```
* /3 * * * * wget 'http://your-store/cron.php'
```

Don't forget to confirm saving request when exit.

If you are not sure how to do that or experiencing any troubles with it, contact your server administrator or hosting provider regarding the matter.

Zero Checkout

Providing you want to let your customers to checkout solely with points (paying for the whole order with points) the **Zero Subtotal Checkout** should be enabled.

To enable **Zero Subtotal Checkout** navigate to your Magento backend **System > Configuration > Sales > Payment Methods > Zero Subtotal Checkout** and set 'Enabled' field to 'Yes'.

Now your customer can checkout with points solely.

Zero Subtotal Checkout		
Title	No Payment Information Required	[STORE VIEW]
Enabled	Yes	[WEBSITE]
New Order Status	Pending	[WEBSITE]
Payment from Applicable Countries	All Allowed Countries	[WEBSITE]
Payment from Specific Countries	Afghanistan	[WEBSITE]

Configuration

Configuring the Point And Rewards extension has several obligatory steps:

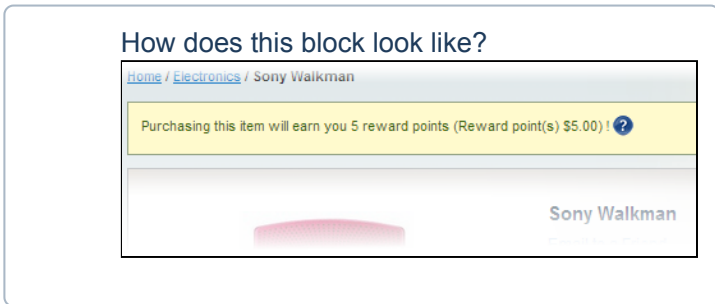
1. Specifying general parameters (see below)
2. Setting up Points Rates

Basic configuration

The extension's general settings can be specified in **System-> Configuration-> aheadWorks Extensions-> Points And Rewards** (or in **Promotions-> Points And Rewards-> Configuration**) backend page.

General

- **Enable** - activates / deactivates extension's functionality
- **Points Unit Name** - this option defines the frontend points unit title
- **Enable rewards history** - shows / hides the Transactions History block in the frontend customer dashboard
- **Enable reward rules functionality** - enables / disables points rules
- **Show points block at product page** - enables/disables the pre-calculated earned points amount block in the product view page



General		
Enable	<input type="checkbox"/> Yes	[STORE VIEW]
Point unit name	<input type="text" value="Reward point(s)"/>	[STORE VIEW]
Enable rewards history	<input type="checkbox"/> No	[STORE VIEW]
Enable reward rules functionality	<input type="checkbox"/> Yes <small>▲ Apply earn rate if rule matched "Promotions/Points and Rewards/Reward Rules"</small>	[STORE VIEW]
Show points block at product page	<input type="checkbox"/> Yes	[STORE VIEW]
Points earning calculation	<input type="text" value="Before Tax"/> ?	[STORE VIEW]
Points spending calculation	<input type="text" value="Before Tax"/> ?	[STORE VIEW]
Cancel earned points after order refunding	<input type="checkbox"/> Yes	[STORE VIEW]
Restore spent points after order refunding	<input type="checkbox"/> No	[STORE VIEW]
Minimum reward points balance to be available to redeem	<input type="text" value=""/> <small>▲ empty or 0 - no limitations</small>	[STORE VIEW]
Maximum available points balance	<input type="text" value=""/> <small>▲ empty or 0 - no limitations</small>	[STORE VIEW]
Reward points expire after, days	<input type="text" value=""/> <small>▲ leave empty to disable</small>	[STORE VIEW]
Amount available for paying at checkout by points, %	<input type="text" value=""/> <small>▲ leave empty to disable this feature</small>	[STORE VIEW]
Info Page	<input type="text" value="Customer Service"/>	[STORE VIEW]
Can use points with Magento coupon	<input type="checkbox"/> Yes	[STORE VIEW]

- **Points earning calculation**(Before Tax/ After Tax) and **Points spending calculation**(Before Tax/ After Tax) - these options define how the tax amount is treated in the calculations

How exactly are the amounts calculated?
For Earning

- **Before Tax:** $Points = (Subtotal - Discounts) * Earn Rate$
- **After Tax:** $Points = (Subtotal + Tax - Discounts) * Earn Rate$

For Spending

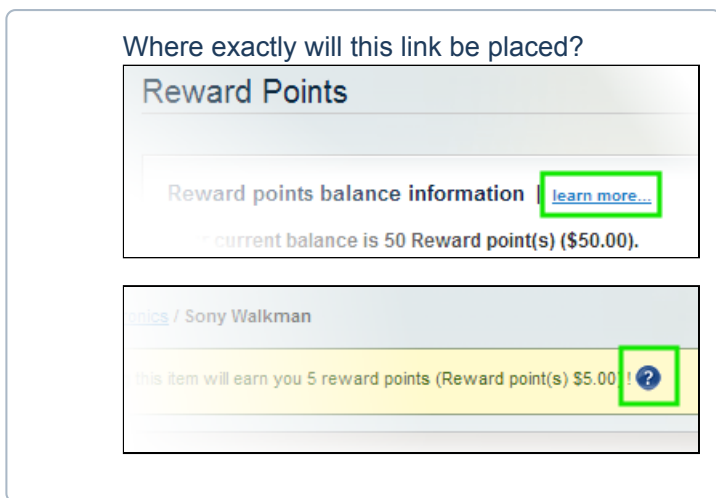
- **Before Tax:** $Grand Total = (Subtotal - Discounts) - Points * Spend Rate + Tax + Shipping Price$
- **After Tax:** $Grand Total = (Subtotal + Tax - Discounts) - Points * Spend Rate + Shipping Price$

NOTE:

- the Shipping amount is neither used for earning calculations, nor can it be paid with the reward points;
- Tax includes all the taxes applied: shipping tax, product tax, etc.

- **Cancel earned points after order refunding** - removes the points earned for an order in case this order gets refunded.
- **Restore spent points after order refunding** - returns the points spent on an order in case it gets refunded.

- **Minimum reward points balance to be available to redeem** - sets the minimum required to apply points. A customer cannot use the points if their current balance is below the value specified in this field
- **Maximum available points balance** - sets the upper limit on the available balance. A customer cannot accumulate more reward points than the value set in this field at a given moment
- **Reward points expire after, days** - sets the points expiration period
- **Amount available for paying at checkout by points, %** - this option restricts the portion (in %) of the order total that can be covered by the points. E.g., if this option is set to 50%, a customer will only be able to pay half of the total with points.
- **Info page** - this selector allows you to select a Static CMS page, where the details on the reward program are explained. The link to the selected page will be included in several blocks



- **Can use points with Magento coupon** - allows / prohibits applying the points together with the native Magento coupons. If this option is disabled, using any discount code at the Shopping Cart will remove the option for using Reward Points during the checkout.

Earning Points

In this tab, you can define the rewards for non order-related activities (sign-up, reviewing products, etc). The rewards setup in this tab are awarded even in case the Earn Rate is not specified.

- **Registration** - here, you can specify the reward for creating a new customer account
- **Newsletter signup** - reward for subscribing to NL
- **Consider newsletter subscription by admin** - defines whether the reward will be granted if the store admin subscribes a customer
- **Reviewing product** and **Reviewing product points/day limit** - these options set the reward for a product review and the daily limit* for earned points respectively.
- **Minimum number of words in the review** - defines the minimal review length that qualifies for

the reward

- **For Video Testimonials and For Video Testimonials points/day limit** (require Video Testimonials extension) - set the reward for a submitted testimonial and the daily limit* for earned points.
- **Only those who purchased product can gain points** - limits points earning to the customers who have actually purchased the reviewed product.
- **Tagging product and Tagging product points/day limit** - set the reward and the daily limit* for tagging an item.
- **Participating in poll and Participating in poll points/day limit** - set the reward and the daily limit* for voting in a poll.
- **Customer birthday** - sets the reward granted when the specified customer birthday date arrives. If the Birth Date is not specified in the account settings, no bonus will be granted.

Earning Points		
Registration	<input type="text" value="10"/>	[STORE VIEW]
Newsletter signup	<input type="text" value="5"/>	[STORE VIEW]
Consider newsletter signup by admin	<input type="text" value="No"/> <small>▲ Points won't be earned if a customer is subscribed by admin</small>	[STORE VIEW]
Reviewing product	<input type="text" value="5"/>	[STORE VIEW]
Reviewing product points/day limit	<input type="text" value="15"/>	[STORE VIEW]
Minimum number of words in the review	<input type="text"/> <small>▲ Leave empty to avoid the limitation</small>	[STORE VIEW]
For Video Testimonials	<input type="text" value="5"/>	[STORE VIEW]
For Video Testimonials points/day limit	<input type="text" value="20"/>	[STORE VIEW]
Only those who purchased product can gain points	<input type="text" value="Yes"/>	[STORE VIEW]
Tagging product	<input type="text" value="3"/>	[STORE VIEW]
Tagging product points/day limit	<input type="text" value="15"/>	[STORE VIEW]
Participating in poll	<input type="text" value="3"/>	[STORE VIEW]
Participating in poll points/day limit	<input type="text" value="15"/>	[STORE VIEW]
Customer's birthday	<input type="text" value="20"/>	[STORE VIEW]

**Daily limit restricts the total amount of points a customer can earn for the correspondent activity a day. Once the limit is reached, the customer can still take the same actions, but no extra rewards will be granted.*

For Product Questions 2 users
 If you have **Points And Rewards** version **1.7.3+** and the Product Questions 2 extension installed, an extra option will become available in the **Earning Points** tab:

Points for answering Product Question	<input type="text" value="5"/>	[STORE VIEW]
	<small>▲ Leave empty to disable</small>	

This option allows rewarding customers for answering product questions.

Referral System

The Points And Rewards extension features referral system. It is possible for a customer to earn the points for inviting friends, and for their referral's orders. The personal Invitations can be sent from the special area in a customer account dashboard. Referring people is also possible via special broadcast link, which can be posted in public sources.

All referral bonuses are awarded only for the registered users' activity. I.e., if an invited person makes any purchases at the store *without* creating an account, their referrer *will not* receive any rewards.

- **Enable referral system** - activates / deactivates the referral bonuses
- **Points for inviting a friend** - sets the amount of points for inviting a friend (the points are added after a referral navigates to the store and creates an account)

- **Day limit for points for inviting a friend** - this option restricts the total amount of points a customer can earn for invitations a day. After the limit is reached, the customer will still be able to send invitations, but they will not get the rewards for the "extra" invitations
- **Points awarded to customer for their referrals' purchases** (Each Order / First Order) - defines whether a referrer will earn bonus for their referral's initial order only, or for each of their subsequent orders as well. The points are granted when a referral's order reaches "**Complete**" state.
Note, this limit is per-referral
- **Points awarded to customer for their referral's purchases (fixed and % amounts)** - sets the actual amount of referral bonus.
*Note, the 2 amount stack, so if you specify both kinds of bonus, a referrer will earn **fixed + %**.*

Referral system		
Enable referral system	<input type="text" value="Yes"/>	[STORE VIEW]
Points for inviting a friend	<input type="text" value="3"/>	[STORE VIEW]
Day limit for points for inviting a friend	<input type="text" value="15"/>	[STORE VIEW]
Points awarded to customers for their referral's purchases	<input type="text" value="Each order"/>	[STORE VIEW]
Points awarded to customers for their referral's purchases (fixed points amount)	<input type="text" value="5"/>	[STORE VIEW]
Points awarded to customers for their referral's purchases (% from purchase sum)	<input type="text" value="10"/>	[STORE VIEW]

Notifications

The extension's notifications can be configured in **System-> Configuration-> aheadWorks Extensions-> Points And Rewards-> Notifications**.

In this tab, you can **Enable** the emails, select their **Sender** and the templates for each of the supported message types:

Balance Update, Points Expiration, Customer Birthday and Invitation email

Subscribe customers by default (Yes / No) option defines whether the customers will be automatically subscribed to module's notifications.

Email sending before points expiring (in days) option sets the period before the expiration when the expiration warning will be sent.

Notifications		
Enable notifications	<input type="text" value="Yes"/>	[STORE VIEW]
Sender	<input type="text" value="Sales Representative"/>	[STORE VIEW]
Balance update email	<input type="text" value="Points and Rewards Balance Update (Default)"/>	[STORE VIEW]
Points expiration email	<input type="text" value="Points and Rewards Expiration Warning (Default)"/>	[STORE VIEW]
Points for customer's birthday email	<input type="text" value="Points and Rewards Customer Birthday (Default)"/>	[STORE VIEW]
Invitation e-mail	<input type="text" value="Points and Rewards Invitation (Default Template)"/>	[STORE VIEW]
Subscribe customers by default	<input type="text" value="Yes"/>	[STORE VIEW]
Email sending before points expiring (in days)	<input type="text" value="7"/> days	[STORE VIEW]

Advanced

Reset all transactions option is meant for moving a store from staging to live. Clicking this button will set balance to "0" for all the customers, transactions history will be cleared up as well.

The extension's settings, rules and rates *will not* be deleted.

Advanced		
Reset all transactions	<input type="button" value="Reset all transactions"/>	[GLOBAL]
▲ This action is unrecoverable and will set all customers' points balance to 0		

Points Rates

The **Earn** and **Spend rates** define the conversion rates of point units.

The rates can be set in **Promotions-> Points And**

Rewards-> Points Rates-> Earn / Spend Rate.

- **Spend Rate** defines how points are treated when applied to an order. Setting **Spend Rate** is **obligatory**, no points earned for any kind of store activities can be applied unless the spend rates are set.
- **Earn Rate** defines what percentage of the customers spendings will be converted to points. If no Earn Rates are created, a customer will only be able to receive points for general store activities, for referring friends and via the special points rules.

The screenshot shows a form titled "Reward Exchange Rate Information". It has three main sections:

- Website ***: A dropdown menu with "Main Website" selected and "webs" listed below it. A "Select All" link is to the right.
- Customer Group ***: A dropdown menu with "General", "Wholesale", and "Retailer" listed. A "Select All" link is to the right.
- Rate**: Two input fields. The first contains "10" and the second contains "1". Between them is "\$* >>". To the right of the second field is the text "Reward point(s)*".

A rate setup is pretty straightforward: you can choose the website and customer group (s) the specific rate will apply to.

The rate itself is set like **X \$ >> Y Reward Point(s)** for earning and **X Reward Point(s) >> Y \$** for spending

*NOTE: Do not use decimal values in rates. If you need to set up 10% rebate rate, set it like this: **10\$ >> 1 point** . If you need 1 point to equal \$0.1 on the checkout, set it up like **10 points >> \$1***

Points rules

Along with the regular rewards for store activities and the % of spendings, the Points And Rewards extension allows providing special fixed-amount points bonuses if an order meets certain conditions.

This option is implemented via rule system, similar to the standard Shopping Cart Price Rules. The points rules can be created and managed in **Promotions-> Points And Rewards-> Reward Rules** grid.

The rule configuration is mostly identical to any other Magento rules. In **General Information** tab, you are to specify the basic rule parameters (*Name, Description, Status, From-To Dates, etc*). In **Conditions** tab, you can define the actual criteria for triggering the rule (Available conditions are based on Shopping Cart contents).

The point rule conditions are similar to that of native Magento Shopping Cart Price rules. Meaning that for the reward rules only the **Subtotal** value will be available.

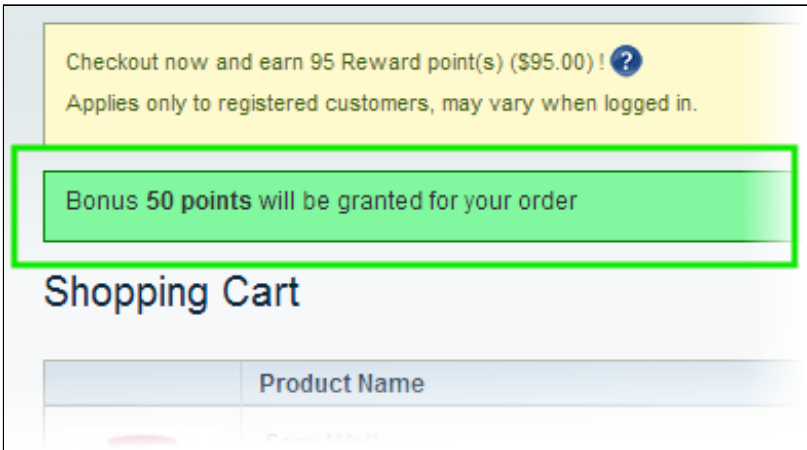
In **Actions** tab, you can specify the actual rule reward.

*Note, that the module only supports **fixed amount** actions. No % or other values types are allowed.*

The screenshot shows a form titled "Actions". It has one input field labeled "Add Reward Points" with the value "50" entered.

In **Related Blocks** tab, you can choose the info block to be displayed in the Shopping Cart page if rule is triggered. *You can select any of the existent CMS blocks.*

Where will this block appear?



Coupons

The Points And Rewards extension allows issuing coupons (or vouchers) - special codes that can be applied in the customer account dashboard. Applying a coupon immediately updates the reward points balance, the target points bonus is instantly granted.

Applying a coupon is a one-time operation, and a given coupon can be used only once per account. The general number of uses can be specified in the coupon settings - see below.

The coupons can be setup in **Promotions-> Points And Rewards-> Coupons** grid.

The standard options include **Coupon Name** , **Description**, **Websites** and **Customer Groups** selectors, **From-To Dates** and coupon **Status**.

- **Coupon Code** - in this field, you should specify the actual voucher code that your customers will need to submit to gain the bonus. You can use any text here. The extension **does not** generate any codes automatically.
- **Uses per Coupon** - limits the total number of voucher uses
- **Activation Count** - this counter will show the total number of coupon activations.

General Information	
Coupon Name *	<input type="text" value="Sample coupon"/>
Description	<input type="text" value="sample description"/>
Coupon Code *	<input type="text" value="ONEHUNDREDPOINTS"/>
Websites *	<input type="text" value="Main Website webs"/>
Customer Groups *	<input type="text" value="General Wholesale Retailer"/>
From Date	<input type="text" value="02/2/2014"/>
To Date	<input type="text"/>
Status	<input type="text" value="Active"/>
Points Amount *	<input type="text" value="100"/>
Uses per Coupon *	<input type="text" value="10"/>
Activation Count	

How can customers apply a coupon?

A points coupon can be activated in the Reward Points tab in frontend customer account dashboard, there is a special field for applying the coupon

Coupon Activation

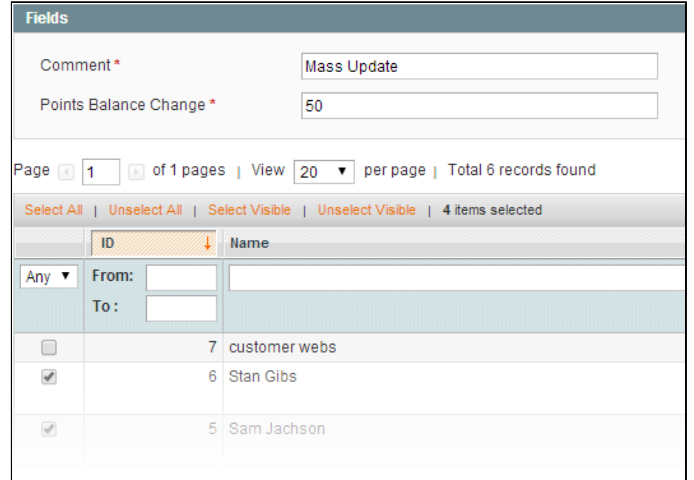
Enter coupon code here:

Transactions

The extension keeps record of every points-related transactions. You can view them on per-customer basis (in the Reward Points tab of the backend Customer View screen), or for the entire store in **Promotions-> Points And Rewards-> Transactions**.

From the **Transactions** grid, you can also perform **mass balance updates**. You should just click **Add New** button, select the customers (if **Market Segmentation Suite** is installed, you can use its rules to filter the customers), and specify the transaction comment and amount*.

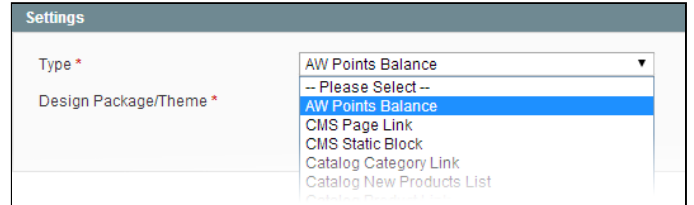
**Negative values are also allowed, in this case, saving the transaction will subtract the target amount from customers' current balance.*



Current Balance widget

The Points And Rewards extension adds a new widget type: **AW Points Balance**

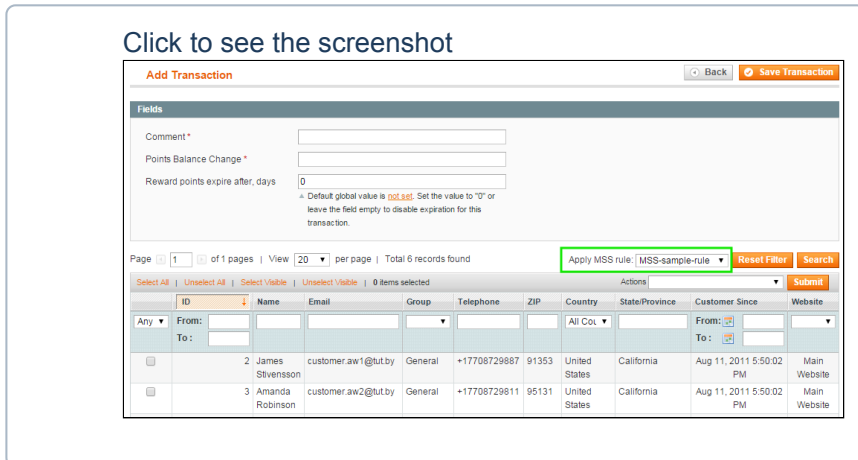
This widget is displayed for logged in users, and show the current points balance of their accounts. The usage is identical to any standard Magento widgets



Integration with other aheadWorks modules

The Points And Rewards extension features integration with the following aW products:

- [Market Segmentation Suite](#) - the MSS rules can be applied to customer list when adding mass transaction.



- [Video Testimonials](#) - if this module is installed, you can reward your customers for submitting product videos.

- [Product Questions 2](#) - if this module is installed, you can reward your customer for answering Product Questions. New option appears in the [Earning Points](#) tab of the modules' s config.

Important notes

- Points section is located at the Payment Section at the Checkout page (4th step), so if payment method with its own checkout (e.g. PayPal) is used and it is selected on the Shopping Cart page (e.g. the Check out with PayPal button is clicked) , points can not be applied as discounts. The best solution here is to disable this payment button for the Shopping Cart page (Example for PayPal Express at Magento 1.5: go to **System > Configuration > Express Checkout Settings > Shortcut on Shopping Cart** and set 'No')
- For Magento 1.3 only: the extension is NOT compatible with PayPal.
- Please, note that different Payment Gateways process the order payments in different ways, some of them do not accept the zero-subtotal orders.

If you allow your customers to fully pay the order amount with the reward points, please, make sure that your payment methods accept such orders.

In case your payment provider turns out not to allow it, you can consider the following scenarios:

- allow **Zero Checkout** payment method at your store;
- specify the point usage limit via the "**Amount available for paying at checkout by points, %**" option in **System-> Configuration-> aheadWorks Extensions-> Points And Rewards-> General** backend menu;
- try switching the "**Points spending calculation**" option between "**Before Tax**" and "**After Tax**" to see whether the payment method starts accepting the orders.

- The points block at product page will only be displayed for *Simple*, *Virtual*, *Downloadable* and *Configurable* products. For the *Grouped* and *Bundle* items, this block will not be shown.

Uninstallation

If you just need to temporary disable the extension, you can just do the steps 1-5, without deleting the files of the extension.

- Disable compilation, in case it is enabled.
- Login to your FTP, navigate to **app/etc/modules/**
- Open the file AW_Points.xml and change the following line:

```
<active>true</active>
```

to

```
<active>false</active>
```

Now your Magento is unaware of the existence of this module.

- Clear the cache under var/cache
- Make sure that the site is working properly, otherwise roll back the changes and apply to our [technical support](#).
- If everything works fine, it is safe to delete the files of the extension.
- In case you need to clean the database, **backup your database** and then run the following queries in MySQL:

```
DROP TABLE IF EXISTS `aw_points_coupon`;
```

```
DROP TABLE IF EXISTS `aw_points_coupon_transaction`;  
DROP TABLE IF EXISTS `aw_points_transaction_orderspend`;  
DROP TABLE IF EXISTS `aw_points_transaction`;  
DROP TABLE IF EXISTS `aw_points_invitation`;  
DROP TABLE IF EXISTS `aw_points_rate`;  
DROP TABLE IF EXISTS `aw_points_rule`;  
DROP TABLE IF EXISTS `aw_points_summary`;
```

```
delete from core_resource where code ='points_setup';
```

Note, if you are using the table with prefixes, you must specify them in all table names.

If you are not sure how to do that or expect any troubles with it, please contact your server administrator regarding the matter.

If you remove the tables as it is described above, you will need to create all rules again after the extension is reinstalled. All transactions history will be lost as well.

Troubleshooting

After the extension installation the store gives an error, or blank page, or suggests to start Magento installation procedure.

Change the owner of the extracted extension files to the web server user and set 775 permissions on them. Clear the store cache and try again.

After the extension installation I receive 404 error in System->Configuration->Points & Rewards.

Logout from backend and login back again.

There is no aheadWorks extensions under my configuration section, or having the extension tab clicked I get a blank page, or Access Denied error.

Clear the store cache, browser cookies, logout and login again.

I've set up everything correctly, inserted the HTML code but there is nothing on that page.

Clear the store cache, clear your browser cache and domain cookies and refresh the page.

My configuration changes do not appear on the store.

Clear the store cache, clear your browser cache and domain cookies and refresh the page.

I have enabled and configured the extension, but the Apply Points option does not appear in the checkout.

Make sure that you have setup Points Spend Rate.

You can always find the latest version of the software, full documentation, demos, screenshots and reviews at <http://ecommerce.aheadworks.com>

License agreement: <http://ecommerce.aheadworks.com/LICENSE-M1.txt>

Contact us: <http://ecommerce.aheadworks.com/contacts/>

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Нравится Badeev, Vitaly likes this

Ни одной