

# SIMICART USER GUIDE SERIES

## How to Configure SimiCart Extensions

### CONFIGURE REWARD POINTS SYSTEM

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## CONFIGURE REWARD SETTINGS

To configure Reward point settings **Go to Backend > Simiconnector> User experience > Reward Points**, Then you will see 4 tabs to configure: Earning Rates, Spending Rates, Transactions and Settings

### I. Settings

#### a. General Configuration

General Configuration		
Enable Reward Points	Yes	[STORE VIEW]
Label for Point		[STORE VIEW]
▲ If empty, the default label 'Point' will be used.		
Label for Points (plural)		[STORE VIEW]
▲ If empty, the default label 'Points' will be used.		
Reward Points Image	Choose File No file chosen	[STORE VIEW]
▲ Recommended size: 18x18. If empty, the image on template will be used.		

**Go to Backend > Simiconnector> User experience > Reward Points > Settings**

- **Enable Reward Points:** Choose “Yes” if you want to enable Reward Points – Standard Edition.
- **Label for Point:** You can give “point” another name to fit with your store such as Gold, Star, etc. If empty, the default label “Point” will be used.
- **Label for Points (plural):** You can give “points” another name to fit with your store such as Gold, Stars, etc. If empty, the default label “Points” will be used.
- **Reward Points Image:** You can upload any image file you like to represent Points. If empty, the image on the template will be used.

3.2.1.4 Earning Configuration

## b. Mobile App Display Configuration

Mobile App Display Configuration		
Display Collectible Points on Product Detail Page	Yes	[STORE VIEW]
Display Collectible Points on Shopping Cart Page	Yes	[STORE VIEW]

This setting will help display reward points in your mobile app. **Go to Backend > Simiconnector> User experience > Reward Points > Settings**

- **Display Collectible points on Product Detail Page:** Choose yes to enable customers to see collectable points on product detail pages in your mobile app.
- **Display Collectible Points on Shopping Cart Page:** Choose yes to enable customers to see collectable points on their shopping cart page in your mobile app.

## c. Email Configuration

Email Configuration		
Enable notification email	Yes	[STORE VIEW]
Sender	General Contact	[STORE VIEW]
Template of email sent to Customer when point balance is updated	Email template sent to customer when updating	[STORE VIEW]
Template of email sent to Customer before a transaction expires	Email template sent to customer before a transa	[STORE VIEW]
Send reminder email before a transaction expires		[STORE VIEW]
<small>▲ Number of days before a transaction expires. If empty or zero, no reminder email is sent.</small>		

No	Field	If you choose...	Result will be...
1	Enable Email Notification	Yes	System will send notification emails automatically to customers.
2	Sender	Sales Representative	This will be the name of the sender in notification emails.
3	Email Template Sent to Customer When Updating Point Balance	Email Template Sent to Customer When Updating Pint Balance	
4	Email Template Sent to Customer Before a Transaction Expires	Email Template Sent to Customer Before a Transaction Expires	
5	Send Reminder Email Before a Transaction Expires	7	A notification email will automatically be sent to remind customers 7 days before their transaction expires.

## II. Earning Configuration

### a. Settings Configuration

**Go to Backend > Simiconnector> User experience > Reward Points > Settings**

Earning Points Configuration		
Rounding Method	Normal	[STORE VIEW]
▲ E.g: 10.2 points generated from an order can be rounded up to 11 points or down to 10 points. If you edit this field, let's reindex Catalog Earning Rules		
Points expire after		[STORE VIEW]
▲ day(s) since the transaction date.		
Number of points in balance allowed		[WEBSITE]
▲ The maximum number of points allowed in Customer's balance. If empty or zero, there is no limitation.		
Earn points from tax	No	[STORE VIEW]
Earn points from shipping fee	No	[STORE VIEW]
Allow earning points when using points to spend	Yes	[STORE VIEW]
▲ If no, Customers can't receive any points from order when using points to spend.		
<b>Sales Earning Process</b>		
Allow receiving points when invoice is created	Yes	[STORE VIEW]
▲ If no, Customers only receive points when the order is complete.		
Hold point transactions for		[STORE VIEW]
▲ day(s). If empty or zero, transaction is not held.		

No	Field	If you choose...	Result will be...
1	Rounding Method	Rounding down	Earned points will be rounded down. For example, 10.2 points generated from an order will be rounded down to 10 points.

2	Points Expire After	100	Earned points will expire 100 days after the created day.
3	Maximum Point Balance Allowed	1000	A Customer can have a maximum of 1,000 points in his balance at any one time.
4	Earn Points from Tax	Yes	Customer can earn points from the tax they pay on products
5	Earn Points from Shipping Fee	Yes	Customer can earn points from the shipping fee they pay
6	Receive points when invoice is created	Yes	Points are recorded in customer's balance when his invoice is created.
7	Hold Point Transactions For	2	Transactions from which customers can earn points are held for <b>2 days</b> before points are actually rewarded to customers.

## b. Earning rates

**Go to Backend > Simiconnector> User experience > Reward Points > Earning Rates.**

**Add Earning Rate**

**Rate Information**

**Amount of money spent \***   
[USD]

**Earning Point(s) \***   
Example: When "Amount of money spent per order" is 10, "Earning Point(s)" is 1. If Customer spends \$30, he will receive 3 points

**Status \***

**Websites \***

**Customer groups \***

**Priority**

Higher priority Rate will be applied first

- To add a new earning rate, click on the **(+) Add Rate** button and fill out all the required data such as **Amount of Money Spent, Point(s) Earned, Websites, Customer Groups, and Priority.**

**NOTE:** With **Priority**, the rate with the highest level of priority will be applied first. In case there are two rates with the same priority, the rate created more recently will be applied. After you finish filling out all the required data, remember to click on the **Save** to save your work.

**- Edit/ Delete** an existing rate by **clicking** on the **Edit**

**Earning Rates** Add Rate

Page 1 of 1 pages | View 20 per page | Total 2 records found Reset Filter Search

ID	Website	Customer Groups	Earn Point(s)	Type	Money	Priority	Action
From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>		
3	Main Website	General, Wholesale, Retailer, QAAAA	1	Earn points for purchasing order	\$30.00	1	<a href="#">Edit</a>
4	Main Website	General, Wholesale, Retailer, QAAAA	1	Earn points for purchasing order	\$20.00	0	<a href="#">Edit</a>



### III. Spending Configuration

#### a. Setting Configuration

**Go to Backend > Simiconnector> User experience > Reward Points > Settings**

Spending Points Configuration		
Minimum redeemable points	<input type="text"/>	[STORE VIEW]
	▲ The minimum number of points in Customer's balance is allowed to redeem. If empty or zero, there is no limitation	
Maximum spending points per order	<input type="text"/>	[STORE VIEW]
	▲ The maximum number of points Customers can redeem in an order. If empty or zero, there is no limitation	
Use maximum points at checkout by default	<input type="text" value="No"/>	[STORE VIEW]
Allow using points for Shipping Fee	<input type="text" value="Yes"/>	[STORE VIEW]

No.	Field	If you choose ...	Result will be ...
1	Minimum Redeemable Points	10	Customers have to redeem at least 10 points.
2	Maximum Spending Points Per Order	100	Customers can spend a maximum of 100 points on an order.
3	Use Maximum points at checkout by default	No	You don't allow the highest amount of points to be automatically added.
4	Allow Using Points for Shipping Fee	Yes	You allow using points for shipping fees.

## b. Spending Rates

**Go to Backend > Simiconnector> User experience > Reward Points > Spending Rates**

**Add Spending Rate**

Rate Information	
Spending Point(s) *	<input type="text"/>
Discount received *	<input type="text"/>
	[USD] ▲ The equivalent value of points
Status *	Inactive
Limit spending points based on	None
	▲ Select the type to limit spending points
Websites *	Main Website
Customer groups *	General Wholesale Retailer QAAAA
Priority	<input type="text"/>
	▲ Higher priority Rate will be applied first

To add a new spending rate, click on the **(+) Add Rate** button: Then, fill out all the required data such as **Spending Point**, **Discount Received**, **Websites**, **Customer Groups** and **Priority**.

Here you can also configure **Priority** for rates. The rate with the highest priority will be applied first. In case there are two rates with the same priority, the one created more recently will be applied. After you finish filling out all the required data, remember to click on the **Save** button to save your work.

**- Edit an existing rate** To edit a rate, please click on its **Edit** link in the **Action** column

Type	Discount received	Priority	Action
<input type="text"/>	From: <input type="text"/> To: <input type="text"/>	<input type="text"/>	
Get discount for spending points	\$1.00		<a href="#">Edit</a>

Then you will be redirected to the **Edit Spending Rate** page. Please fill out all the required data such as **Points Spent**, **Discount Received**, **Customer Groups**, **Priority**. After you

have finished editing, remember to click on the **Save**

#### IV. Manage Transactions

Go to **Backend > Simiconnector> User Experience> Reward Points> Transactions.**

All the transactions related to reward points will be shown as below:

Dashboard Sales Catalog Customers Promotions Newsletter CMS SimiConnector Request/Quote Reports System Mobile Assistant Connector [Get help for this page](#)

Latest Message: Reminder: Change Magento's default phone numbers and callouts before site launch.

Warning tax configuration can result in rounding errors. Please see [warning](#) for more details. Click here.

Connector Settings

Payment

Themes

Rich Content

User Experience

Reward Points

Manage QR & E

You have 15 critical, 6 major, 19 minor and 357 notice unread message(s). [Go to notifications](#)

Change your settings.

[Ignore this notification](#)

Transaction Manager

Add Transaction

Page 1 of 1 pages | View 20 per page | Total 19 records found

Select All | Unselect All | Selected Values | Unselected Values | 8 items selected

ID

Title

Customer

Action

Points

From

To

Expires On

Status

Store View

View

Any 1

From:

To:

From:

To:

From:

To:

Expires On

Status

Store View

View

19

Earn points for purchasing order #149000140

simi.com

Earn points for purchasing order

15

0

Oct 10, 2016 8:07:16 PM

Complete

English

View

18

Earn points for purchasing order #149000123

test@simicart.com

Earn points for purchasing order

29

0

Oct 9, 2016 8:58:42 PM

Complete

English

View

17

Earn points for purchasing order #149000067

simi.com

Earn points for purchasing order

30

0

Oct 8, 2016 1:21:06 AM

Complete

English

View

On this Transaction Manager page, you can view a list of all point transactions together with general information including Customer, Transaction Type, Points Used, etc. Moreover, you can filter and search for the information you want as well as export this table to CSV/XML/Excel files.

Point Used	Created On	Expires On	Status	Store View	View
From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
0	Feb 26, 2015 11:30:05 PM		Complete	English	View

You can Complete, Cancel or make transactions Expire by choosing the status in the Actions dropdown list and checking the boxes of those transactions you like before clicking on the Submit button.

Export to: CSV Export Reset Filter Search Submit

Created On	Expires On	Status	View	View
0 Feb 26, 2015 11:30:05 PM		Complete	English	<a href="#">View</a>

To view details of each transaction, you can click on the corresponding row. Below is Transaction #15:

### Transaction #15

Transaction Information	
Transaction Title	Changed by Admin
Customer Email	<a href="mailto:davidnquyen@gmail.com">davidnquyen@gmail.com</a>
Action	Changed by Admin
Status	<b>Complete</b>
Points	<b>2 Points</b>
Point Used	2 Points
Time Created	Feb 12, 2015 7:58:32 PM
Updated At	Feb 12, 2015 7:58:32 PM
Store View	Admin

To add a new transaction, you can click on the **Add Transaction** button, fill out all the required data and then click on the **Save Transaction** button.

**Add Transaction**

[Back](#) [Reset](#) [Save Transaction](#) [Save And Continue View](#)

**Transaction Information**

Customer *	<input type="text"/>	<a href="#">Select</a>
Points *	<input type="text"/>	
Transaction Title	<input type="text"/>	
Points Expire After	<input type="text"/>	

\* day(s) since the transaction date. If empty or zero, there is no limitation.