

Loyalty Program



Magento Extension User Guide

Official extension page: [Loyalty Program](#)



User Guide: [Loyalty Program](#)

Support: <http://amasty.com/contacts/>

Table of contents:

- 1. Extension settings 3
- 2. Loyalty Program view in Customer account..... 4
- 3. Loyalty Program: Levels and rule creation..... 6
- 4. Loyalty Program: Individual Promotions..... 9
- 5. Loyalty Program: Order Subselection condition..... 10
- 6. Loyalty Program: Conditions..... 11
- 7. Loyalty Program: Membership Days condition..... 12
- 8. Loyalty Program: shopping cart price rule actions.....13
- 9. Loyalty Program: Discounts on particular product.....14
- 10. Loyalty Program: Program name on back and front end 15
- 11. Shopping cart rules grid functionality..... 17



1. Extension Settings

Magento Admin Panel

Dashboard Sales Catalog Mobile Customers Promotions Newsletter CMS Reports **System**

Current Configuration Scope: Default Config [Manage Stores]

Configuration

- GENERAL
 - General
 - Web
 - Design
 - Currency Setup
 - Store Email Addresses
 - Contacts
 - Reports
 - Content Management
- CATALOG
 - Catalog
- AMASTY EXTENSIONS
 - General
 - Loyalty Program**

Loyalty Program

General

Customer Account

Enabled: Yes [STORE VIEW]

Description Header: Loyalty Program Discounts

Description:

<p>Receive discounts when purchasing at our store!</p>

<p>Every spent dollar will come back to you as soon as you participate in our Loyalty Program.
Just start buying from us and you're in!</br></p>

<p>Discounts are based on your purchase history, frequensy of shopping and the item you buy.
You can get into one of 6 Loyalty Program

Stats Header: Your Statistics [STORE VIEW]

Use images and rich html to describe Loyalty Program Terms

Name Loyalty Program Terms and Conditions Header

Name purchase statistics area in Customer account

To manage the extension settings please go to admin panel -> System -> Configuration -> Loyalty Program



2. Loyalty Program view in Customer account

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
- Loyalty Program**

MY CART

There are [4 items](#) in your cart.

Cart Subtotal: **\$1,561.92**


COMPARE PRODUCTS

You have no items to compare.

Loyalty Program

The name of Loyalty Program Terms and Conditions Header

Loyalty Program Discounts



Images and rich html in Loyalty Program Terms description

Receive discounts when purchasing at our store!

Every spent dollar will come back to you as soon as you participate in our Loyalty Program. Just start buying from us and you're in!

Discounts are based on your purchase history, frequency of shopping and the item you buy. You can get into one of 6 Loyalty Program Levels.

Bronze Level
5% off every product in order when Number of Completed Orders equals or greater than 20

Silver Level
Each 3d product with 10% discount when Total Sales Amount is greater than 1000\$

Gold Level
The cheapest product free when Membership Days equals or less than 90 and Cart Subtotal is greater than 500\$

VIP Customers
Fixed discount for the whole cart is 30\$ when Average Order Value equals or greater than 300\$

Individual Loyalty Program
Fixed discount is 70\$ when Email is john.doe@example.com, Tax/VAT number is 00000000 and ID is 1111

Wholesale Loyalty Program
All products after N with fixed 50\$ discount when Average Order Value greater than 5000\$
Save money and spend them at the same time!

Your Statistics






2. Loyalty Program view in Customer account

Loyalty Program

 **MY CART**
There are [4 items](#) in your cart.
Cart Subtotal: **\$1,561.92**

Checkout

Recently added item(s)

-  [Olympus Stylus 750 7.1MP Digital Camera](#)  
1 x \$161.94
-  [HTC Touch Diamond](#)  
1 x \$750.00
-  [BlackBerry 8100 Pearl](#)  
1 x \$349.99

 **COMPARE PRODUCTS**
You have no items to compare.

Your Statistics

The name of purchase statistics area in Customer account

You are with us for 3 days

Total:

Number of completed orders is 5
Average order value is **\$20.00**
Order amount is **\$350.00**

This Month:

Number of completed orders is 5
Average order value is **\$20.00**
Order amount is **\$350.00**

Last Month:

Number of completed orders was 0
Average order value was **\$0.00**
Order amount was **\$0.00**



3. Levels and rule creation

Magento Admin Panel

Dashboard Sales Catalog Mobile Customers **Promotions** Newsletter CMS Reports System

Shopping Cart Price Rules

Page 1 of 1 pages | View 20 per page | Total 6 records found

| ID | Rule Name |
|----|----------------------------|
| 1 | Bronze Level |
| 2 | Silver Level |
| 3 | Gold Level |
| 4 | VIP Customers |
| 5 | Individual Loyalty Program |
| 6 | Wholesale Loyalty Program |

Create Discount Program levels using shopping cart price rules

Add unlimited number of targeted Loyalty program offers



3. Levels and rule creation

Edit Rule 'Silver Level'

General Information

| | |
|-------------------|---|
| Rule Name * | <input type="text" value="Silver Level"/> |
| Description | <input type="text"/> |
| Status * | <input type="text" value="Active"/> |
| Customer Groups * | <input type="text" value="NOT LOGGED IN"/> <input type="text" value="General"/> <input type="text" value="Wholesale"/> <input type="text" value="Retailer"/> |
| Coupon * | <input type="text" value="Specific Coupon"/> |
| Coupon Code * | <input type="text" value="4VIP20OFF"/> |
| | <input type="checkbox"/> Use Auto Generation <small>▲ If you select and save the rule you will be able to generate multiple coupon codes.</small> |
| Uses per Coupon | <input type="text"/> |
| Uses per Customer | <input type="text" value="0"/> |

Name the offer, Activate it and specify Customer groups and store views for which it should be applied

Use coupons for rewarding loyal customers



3. Levels and rule creation

Shopping Cart Price Rule

Rule Information

Conditions

Actions

Labels

Manage Coupon Codes

You can now add a time condition for the shopping cart price rule. Set an appropriate time, when you want the rule to be activated.

You may as well enable 'Weekdays Condition' and specify the activation time of the rule by the days of week.

| | |
|------------------------|--|
| Use Time Condition | Yes |
| From time | 00 : 00 : 00 |
| To time | 00 : 00 : 00 |
| Use Weekdays Condition | Yes |
| Day(s) of week | Sunday Monday Tuesday Wednesday Thursday Friday Saturday |
| Priority | 0 |
| Public In RSS Feed | Yes |



4. Individual promotions

The screenshot displays the Magento Admin Panel interface. The top navigation bar includes 'Dashboard', 'Sales', 'Catalog', 'Mobile', 'Customers', 'Promotions', 'Newsletter', 'CMS', 'Reports', and 'System'. The 'Promotions' tab is active. On the left, a sidebar shows 'Shopping Cart Price Rule' with sub-sections: 'Rule Information', 'Conditions', 'Actions', 'Labels', and 'Manage Coupon Codes'. The main content area is titled 'Edit Rule 'Individual Loyalty Program''. Below the title, a grey bar states: 'Apply the rule only if the following conditions are met (leave blank for all products)'. The conditions are listed as: 'If ALL of these conditions are TRUE:'. The conditions are: 'Email is john.doe@example.com', 'Tax/VAT number is 00000000', 'ID is 1111', and 'Last Name is doe'. Each condition has a red 'X' icon to its right. Below the conditions is a dropdown menu with the text 'Please choose a condition to add...'. The dropdown is open, showing a list of 'Customer attributes' including: 'Associate to Website', 'Create In', 'Created At', 'Created From', 'Customer Group', 'Date Of Birth', 'Default Billing Address', 'Default Shipping Address', 'Disable Automatic Group Change Based on VAT ID', 'Email', 'First Name', 'Gender', 'ID', 'Is confirmed', 'Last Name', 'Membership Days', 'Middle Name/Initial', 'Prefix', and 'Suffix'. An orange callout bubble points to the conditions list with the text: 'Create Individual Promotions based on such Customer Attributes as email, TAX/VAT number, ID or Last Name'.



5. Order Subselection condition

Shopping Cart Price Rule

- Rule Information
- Conditions**
- Actions
- Labels
- Manage Coupon Codes

Edit Rule 'Wholesale Loyalty Program'

Apply the rule only if the following conditions are met (leave blank for all products)

If **ANY** of these conditions are **TRUE** :

If **Average Order Value** **greater than** **500** for a subselection of orders matching **ALL** of these conditions:

If **Average Order Value** **is ...** for a subselection of orders matching **ALL** of these conditions:

- Average Order Value
- Total Sales Amount**
- Number of Placed Orders

Use Order Subselection to consider discount amount based on customer purchase history



Shopping Cart Price Rule

- Rule Information
- Conditions
- Actions
- Labels
- Manage Coupon Codes

Edit Rule 'Silver Level'

Apply the rule only if the following conditions are met (leave blank for all products)

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

- Number of Completed Orders **equals or greater than 20**
- Total Sales Amount **greater than 5000**

Please choose a condition to add...

- Product attribute combination
- Products subselection
- Conditions combination
- Cart Attribute**
 - Subtotal
 - Total Items Quantity
 - Total Weight
 - Payment Method
 - Shipping Method
 - Shipping Postcode
 - Shipping Region
 - Shipping State/Province
 - Shipping Country
- Customer attributes**
 - Associate to Website
 - Create In
 - Created At
 - Created From
 - Customer Group
 - Date Of Birth

Combine conditions using Product attribute combination, Products subselection, Conditions combination

Create Loyalty Program offers based on Purchase History, Order Subselection, Cart and Customer Attributes



7. Membership Days condition

Magento Admin Panel

Dashboard | Sales | Catalog | Mobile | Customers | **Promotions** | Newsletter | CMS | Reports | System

Shopping Cart Price Rule

- Rule Information
- Conditions**
- Actions
- Labels
- Manage Coupon Codes

Edit Rule 'Gold Level'

Apply the rule only if the following conditions are met (leave blank for all products)

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

Membership Days **equals or greater than 90** ❌

Please choose a condition to add...

- Customer Group
- Date Of Birth
- Default Billing Address
- Default Shipping Address
- Disable Automatic Group Change Based on VAT ID
- Email
- First Name
- Gender
- ID
- Is confirmed
- Last Name
- Membership Days
- Middle Name/Initial
- Prefix
- Suffix
- Tax/VAT number
- Purchases history**
- Number of Completed Orders
- Total Sales Amount
- Orders Subselection

Use Membership Days customer attribute to limit access to discounts for guest customers



8. Shopping cart price rule actions

Shopping Cart Price Rule

- Rule Information
- Conditions
- Actions**
- Labels

New Rule [Back] [Reset] [Save] [Save and Continue Edit]

Update prices using the following information

Apply

Discount Amount *

Maximum Qty Discount is Applied To

Discount Qty Step (Buy X)

Apply to Shipping Amount

Free Shipping

Stop Further Rules Processing

Apply the rule only to cart items match

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

- Percent of product price discount
- Default**
 - Percent of product price discount
 - Fixed amount discount
 - Fixed amount discount for whole cart
 - Buy X qty, pay for Y qty of the same product.
- Popular**
 - The Cheapest, also for Buy 1 get 1 free**
 - The Most Expensive
 - Get \$Y for each \$X spent
- Buy X Get Y (X and Y are different products)**
 - Percent Discount: Buy X get Y Free
 - Fixed Discount: Buy X get Y with \$10 Off .
 - Fixed Price: Buy X get Y for \$9.99
- Each N-th**
 - Percent Discount: each 2-d, 4-th, 6-th with 15% Off
 - Fixed Discount: each 3-d, 6-th, 9-th with \$15 Off
 - Fixed Price: each 5th, 10th, 15th for \$49
- Each Group of N**
 - Fixed Price: Each 5 items for \$50
 - Percent Discount: Each 5 items with 10% off

Use shopping cart price rules to create any Loyalty Program offer you want.

For detailed description of each rule, please, visit [Special Promotions rule description](#)



9. Discounts on particular product

Shopping Cart Price Rule

- Rule Information
- Conditions
- Actions**
- Labels

New Rule

[Back](#) [Reset](#) [Save](#) [Save and Continue Edit](#)

Update prices using the following information

| | |
|------------------------------------|--|
| Apply | Percent Discount: each 2-d, 4-th, 6-th with 15% <input type="text"/> |
| | <small>▲ Please see usage example.</small> |
| Discount Amount * | <input type="text" value="30"/> |
| Maximum Qty Discount is Applied To | <input type="text" value="0"/> |
| Discount Qty Step (Buy X) | <input type="text"/> |
| Apply to Shipping Amount | <input type="text" value="No"/> |
| Free Shipping | <input type="text" value="No"/> |
| Stop Further Rules Processing | <input type="text" value="No"/> |

Apply the rule only to cart items matching the following conditions (leave blank for all items)

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

- Brand **is Apple**
- Color **is Black**
- Category **is one of 13, 8**
-

Apply Loyalty Program deals to particular products



10. Loyalty Program name on backend and frontend







The screenshot shows the Magento Admin Panel interface. The top navigation bar includes 'Dashboard', 'Sales', 'Catalog', 'Mobile', 'Customers', 'Promotions', 'Newsletter', 'CMS', 'Reports', and 'System'. The 'Promotions' tab is active. On the left, the 'Shopping Cart Price Rule' sidebar is visible with options for 'Rule Information', 'Conditions', 'Actions', 'Labels', and 'Manage Coupon Codes'. The main content area is titled 'Edit Rule 'Individual Loyalty Program''. Under the 'Default Label' section, there is a text input field for 'Default Rule Label for All Store Views' containing the text 'VIP Membership discount'. An orange callout box with a pointer to this field contains the text: 'Give the name to discount, which will appear at the checkout'. Below this, the 'Store View Specific Labels' section is visible, showing a tree view for 'Main Website' and 'Main Store' with input fields for 'English', 'French', and 'German'.



10. Loyalty Program name on backend and frontend

Furniture Electronics Apparel

Shopping Cart Proceed to Checkout

| | Product Name | | Move to Wishlist | Unit Price | Qty | Subtotal | |
|---|---|----------------------|----------------------|------------|--------------------------------|----------|---|
|  | BlackBerry 8100 Pearl | Edit | Move | \$349.99 | <input type="text" value="1"/> | \$349.99 |  |
|  | HTC Touch Diamond | Edit | Move | \$750.00 | <input type="text" value="1"/> | \$750.00 |  |
|  | Olympus Stylus 750 7.1MP Digital Camera | Edit | Move | \$161.94 | <input type="text" value="1"/> | \$161.94 |  |

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

Default rule label name on the front end – specify the reason why customers get discounts

| | |
|-------------------------|-------------------|
| Subtotal | \$1,261.93 |
| VIP Membership Discount | -\$100.00 |
| Discount | -\$100.00 |
| Grand Total | \$1,161.93 |

[Proceed to Checkout](#)



11. Shopping cart rules grid functionality

With the extension you get several new columns at the shopping cart price rules grid (admin panel -> Promotions -> Shopping Cart Price Rules): Action (shows the action chosen for the rule), Discount (shows the discount amount for the rule), Stop (whether to stop rules processing after this rule).

Shopping Cart Price Rules

[Add New Rule](#)

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

[Reset Filter](#) [Search](#)

| | ID | Rule Name | Coupon Code | Action | Discount | Date Start | Date Expire | Stop | Stat | Actions | Action |
|--------------------------|----|--------------|-------------|----------------|----------|--------------|-------------|------|----------|--|------------------------------|
| Any | | | | | | From: To: | From: To: | | | Activate De-activate ----- Top Priority Lowest Priority ----- Delete | |
| <input type="checkbox"/> | 16 | wild3 | fdad | Price Percent | 20.00 | Jul | | | Active | | 0 Duplicate |
| <input type="checkbox"/> | 37 | attributes | | Price Percent | 10.00 | Aug | | | Inactive | | 1 Duplicate |
| <input type="checkbox"/> | 35 | categories | | Product Amount | 10.00 | Aug | | | Active | | 2 Duplicate |
| <input type="checkbox"/> | 36 | categories2 | | Cart Amount | 30.00 | Aug 15, 2011 | -- | No | Active | | 2 Duplicate |
| <input type="checkbox"/> | 19 | wild-special | asieod | Product Amount | 15.00 | Jul 18, 2011 | -- | No | Inactive | | 9 Duplicate |
| <input type="checkbox"/> | 30 | special test | | Price Percent | 10.00 | Aug 11, 2011 | -- | No | Active | | 10 Duplicate |
| <input type="checkbox"/> | 15 | wild2 | Uyeqe | Price Percent | 10.00 | Jul 16, 2011 | -- | No | Active | | 15 Duplicate |

It adds 'Actions' dropdown to the grid. You can apply the actions both to single and to multiple rules right on the grid (explained in more detail further on).

Also there's new 'Duplicate' action, with the help of which you can duplicate individual rules. It can be very useful when you have several similar rules, this way you will use the first rule as a template, which will save you a lot of time with complex rules.



11. Shopping cart rules grid functionality

Shopping Cart Price Rule


Rule Information

Conditions

Actions

Labels

Once you click the 'Duplicate' action link, you will get to the page of the duplicate rule, where you will be able to make the necessary edits and save the new rule.

 The rule has been duplicated. Set a new coupon and activate it if needed.

 **Edit Rule 'attributes'**

 Back

Reset

 Delete Rule

 Save Rule

 Save and Continue Edit

General Information

Rule Name *

attributes

Description

Status *

Inactive

Websites *

Main Website

New



11. Shopping cart rules grid functionality

Shopping Cart Price Rules

+ Add New Rule

Page 1 of 1 pages | View 20 per page | Total 7 records found

Reset Filter Search

'Activate' action lets you activate any number of price rules.

Select All | Unselect All | Select Visible | Unselect Visible | 2 items selected

Actions: Activate Submit

| | ID | Rule Name | Coupon Code | Action | Discount | Date Start | Date Expire | Stop | Status | Priority ↑ | Action |
|-------------------------------------|----|--------------|-------------|----------------|----------|--------------|-------------|------|----------|------------|---------------------------|
| Any | | | | | | From: To: | From: To: | | | | |
| <input type="checkbox"/> | 16 | wild3 | fdad | Price Percent | 20.00 | Jul 16, 2011 | -- | No | Active | 0 | Duplicate |
| <input checked="" type="checkbox"/> | 37 | attributes | | Price Percent | 10.00 | Aug 15, 2011 | -- | No | Inactive | 1 | Duplicate |
| <input type="checkbox"/> | 35 | categories | | Product Amount | 10.00 | Aug 15, 2011 | -- | No | Active | 2 | Duplicate |
| <input type="checkbox"/> | 36 | categories2 | | Cart Amount | 30.00 | Aug 15, 2011 | -- | No | Active | 2 | Duplicate |
| <input checked="" type="checkbox"/> | 19 | wild-special | asieod | Product Amount | 15.00 | Jul 18, 2011 | -- | No | Inactive | 9 | Duplicate |
| <input type="checkbox"/> | 30 | special test | | Price Percent | 10.00 | Aug 11, 2011 | -- | No | Active | 10 | Duplicate |
| <input type="checkbox"/> | 15 | wild2 | Uyeqe | Price Percent | 10.00 | Jul 16, 2011 | -- | No | Active | 15 | Duplicate |

Just pick the rules and click 'Submit' button next to the 'Actions' dropdown.

'Deactivate' action on the opposite enables you to deactivate shopping cart price rule. To make it work please take the same steps as with the 'Activate' action.



11. Shopping cart rules grid functionality

Shopping Cart Price Rules

'Top Priority' action lets you raise priority of any price rule (or a number of rules) to the top. If you had some rules with 0 (zero) priority before applying the action, these rules would get downgraded.

[+ Add New Rule](#)

Page of 1 pages | View per page | Total 7 records found

[Reset Filter](#) [Search](#)

Select All | Unselect All | Select Visible | Unselect Visible | 2 items selected

Actions [Submit](#)

| | ID | Rule Name | Coupon Code | Action | Discount | Date Start | Date Expire | Stop | Status | Priority ↑ | Action |
|-------------------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|--|--|----------------------|----------------------|----------------------|---------------------------|
| Any ▾ | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <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"/> | |
| <input type="checkbox"/> | 16 | wild3 | fdad | Price Percent | 20.00 | Jul 16, 2011 | -- | No | Active | 0 | Duplicate |
| <input type="checkbox"/> | 37 | attributes | | Price Percent | 10.00 | Aug 15, 2011 | -- | No | Inactive | 1 | Duplicate |
| <input type="checkbox"/> | 35 | categories | | Product Amount | 10.00 | Aug 15, 2011 | -- | No | Active | 2 | Duplicate |
| <input type="checkbox"/> | 36 | categories2 | | Cart Amount | 30.00 | Aug 15, 2011 | -- | No | Active | 2 | Duplicate |
| <input checked="" type="checkbox"/> | 19 | wild-special | asieod | Product Amount | 15.00 | Jul 18, 2011 | -- | No | Inactive | 9 | Duplicate |
| <input type="checkbox"/> | 30 | special test | | Price Percent | 10.00 | Aug 11, 2011 | -- | No | Active | 10 | Duplicate |
| <input checked="" type="checkbox"/> | 15 | wild2 | Uyeqe | Price Percent | 10.00 | Jul 16, 2011 | -- | No | Active | 15 | Duplicate |

'Lowest Priority' action vice versa will help you quickly downgrade rules to the lowest priority.



11. Shopping cart rules grid functionality

'Delete' action lets you get rid of unnecessary price rules. It can be used for quick deleting of test/demo rules, rules that were created by mistake or the ones you just don't need anymore.

Shopping Cart Price Rules

[+ Add New Rule](#)

Page of 1 pages | View per page | Total 7 records found

[Reset Filter](#) [Search](#)

Select All | Unselect All | Select Visible | Unselect Visible | 3 items selected

Actions [Submit](#)

| | ID | Rule Name | Coupon Code | Action | Discount | Date Start | Date Expire | Stop | Status | Priority ↑ | Action |
|-------------------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|--|--|----------------------|----------------------|----------------------|---------------------------|
| Any ▾ | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <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"/> | |
| <input type="checkbox"/> | 16 | wild3 | fdad | Price Percent | 20.00 | Jul 16, 2011 | -- | No | Active | 0 | Duplicate |
| <input checked="" type="checkbox"/> | 30 | special test | | Price Percent | 10.00 | Aug 11, 2011 | -- | No | Active | 1 | Duplicate |
| <input type="checkbox"/> | 35 | categories | | Product Amount | 10.00 | Aug 15, 2011 | -- | No | Active | 2 | Duplicate |
| <input type="checkbox"/> | 19 | wild-special | asieod | Product Amount | 15.00 | Jul 18, 2011 | -- | No | Inactive | 3 | Duplicate |
| <input checked="" type="checkbox"/> | 15 | wild2 | Uyeqe | Price Percent | 10.00 | Jul 16, 2011 | -- | No | Active | 4 | Duplicate |
| <input type="checkbox"/> | 37 | attributes | | Price Percent | 10.00 | Aug 15, 2011 | -- | No | Inactive | 7 | Duplicate |
| <input checked="" type="checkbox"/> | 36 | categories2 | | Cart Amount | 30.00 | Aug 15, 2011 | -- | No | Active | 8 | Duplicate |



Thank you!

Should you have any questions or feature suggestions, please contact us at:
<http://amasty.com/contacts/>

Your feedback is absolutely welcome!



User Guide: [Loyalty Program](#)

Support: <http://amasty.com/contacts/>