

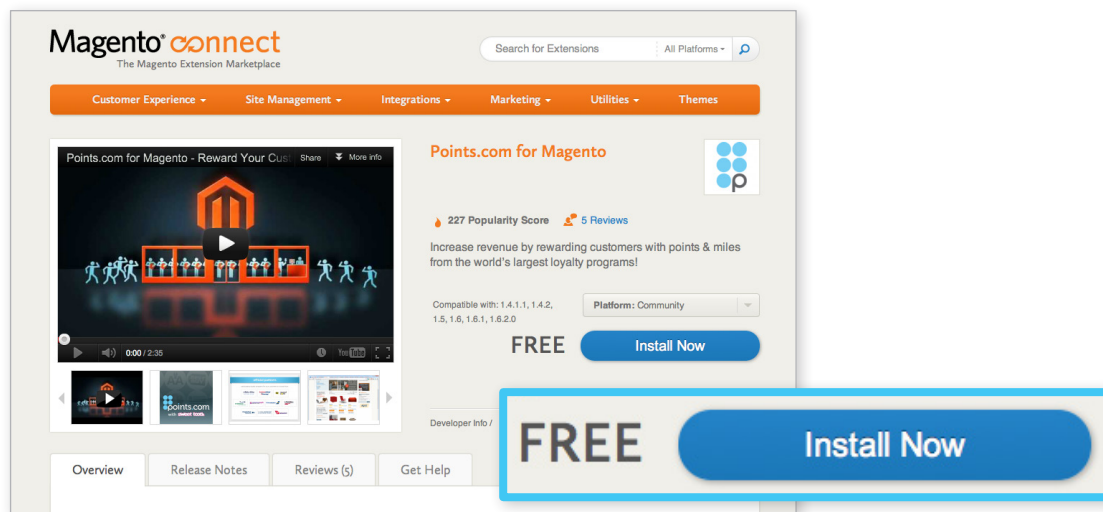


Setting Up Points.com for Magento

Inside are five easy guides to get you started with this innovative new incentive program.

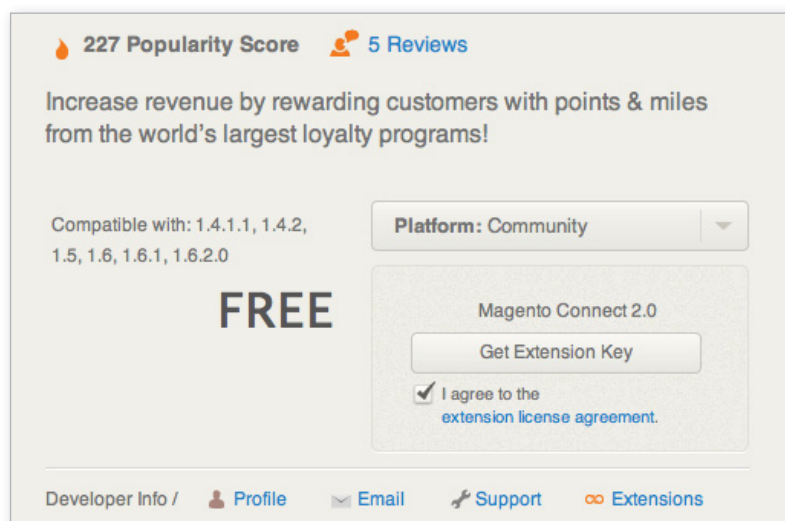
How to install Points.com for Magento

1 Go to <http://www.magentoocommerce.com/magento-connect/points-com-3606.html>



2 Click the “Install Now” button

3 Check off agreement checkbox and click “Get Extension Key”



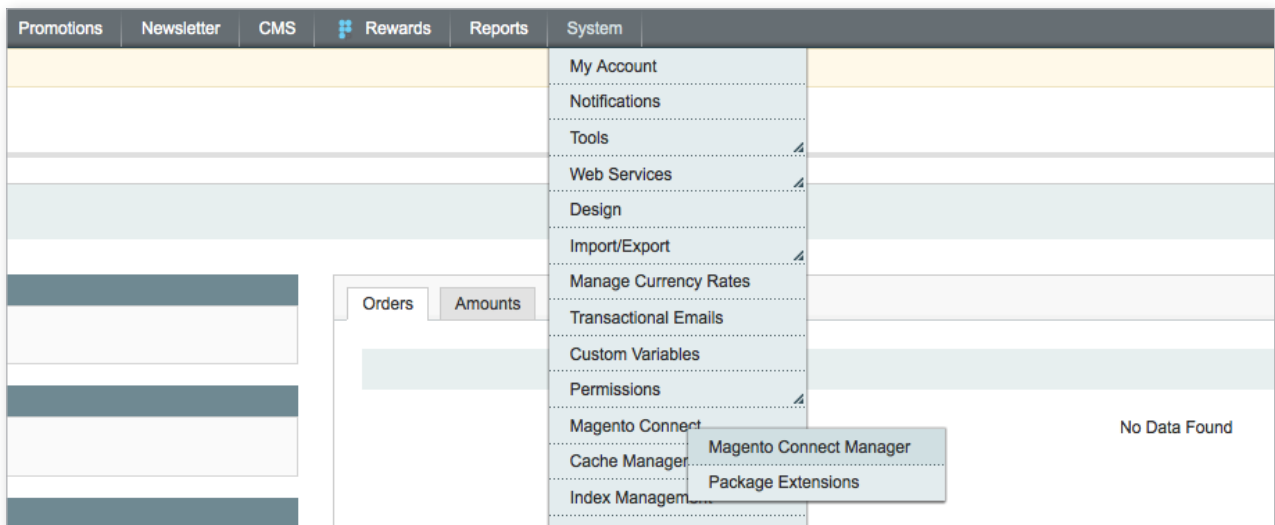
4 Copy the Extension Key and save it for future use



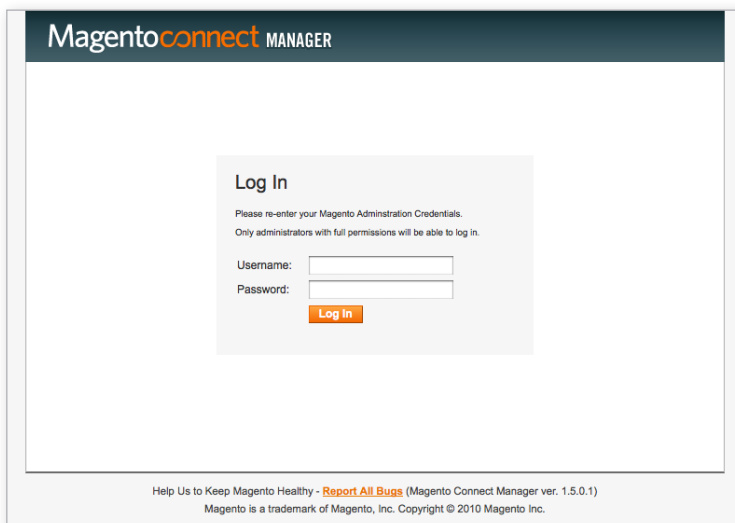
5 Log in to your Magento Admin site



6 Go to the Systems tab > Magento Connect > Magento Connect Manager



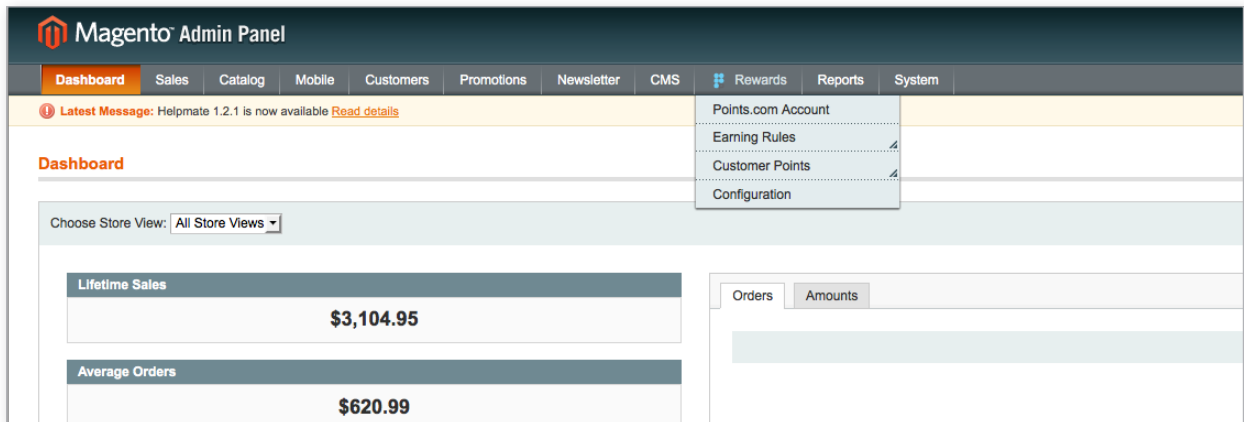
7 Log in to the Magento Connect Manager site



8 Paste the Extension Key where you're told to and click "Install"

9 Click “Process” when the “Extension Dependencies” section appears

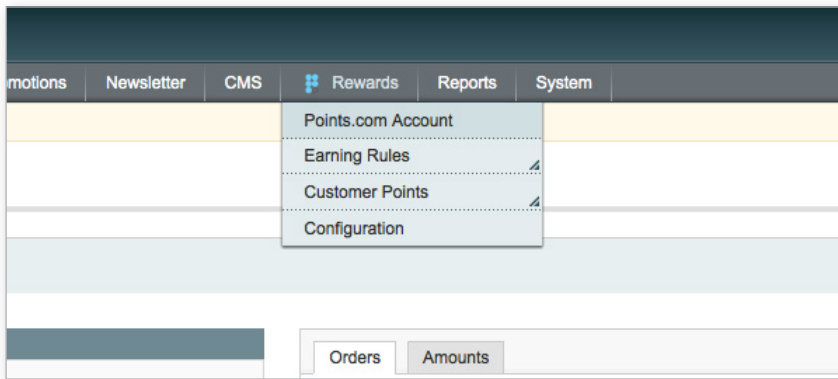
10 If installation is successful, you should see a new tab called “Rewards” after you click on “Return to Admin” at the top right of the page





How to sign up for a Points.com merchant account

1 Go to Rewards > Points.com Account



2 You'll need to register a merchant account with Points.com in order to complete the application process

3 Click on "Points.com Merchant Application" to go to the form

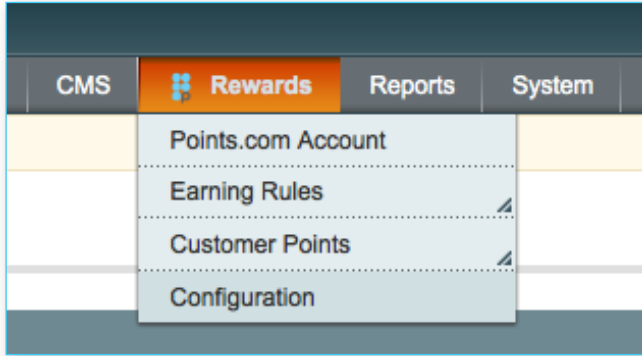
4 Follow the three-step process to fill out the application form

Points.com is required to review every application on behalf of our loyalty partners before approval is granted. This process usually happens within 1-2 business days.

5 Once approved, you'll receive an email with your API and Secret Key

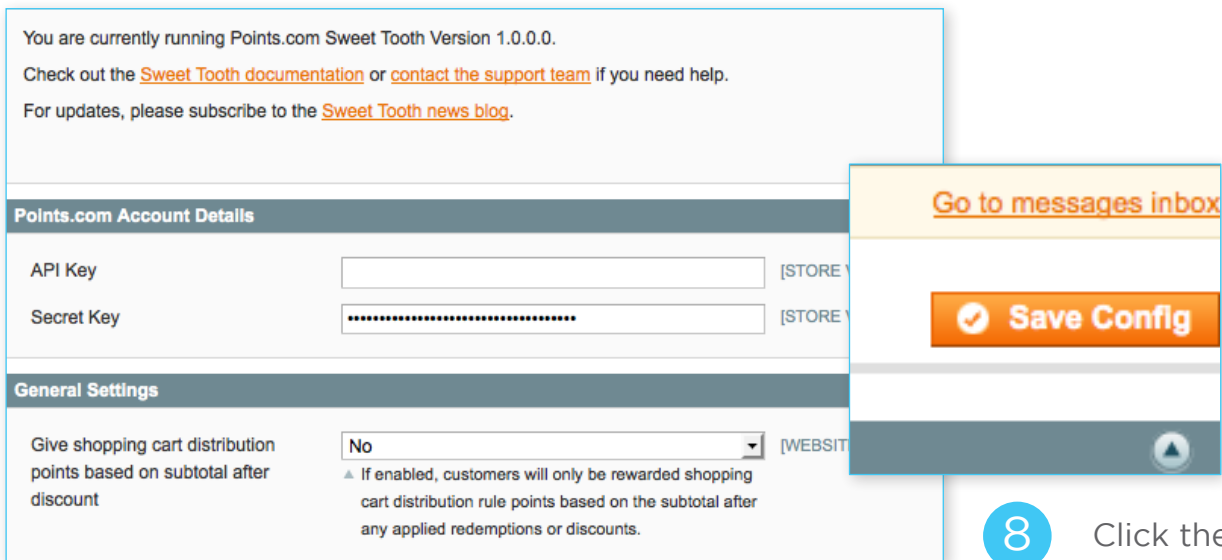
6

Log back in to your Magento Admin site and go to Rewards > Configuration



7

Under “Points.com Account Details,” paste in the API and Secret Key into their corresponding fields

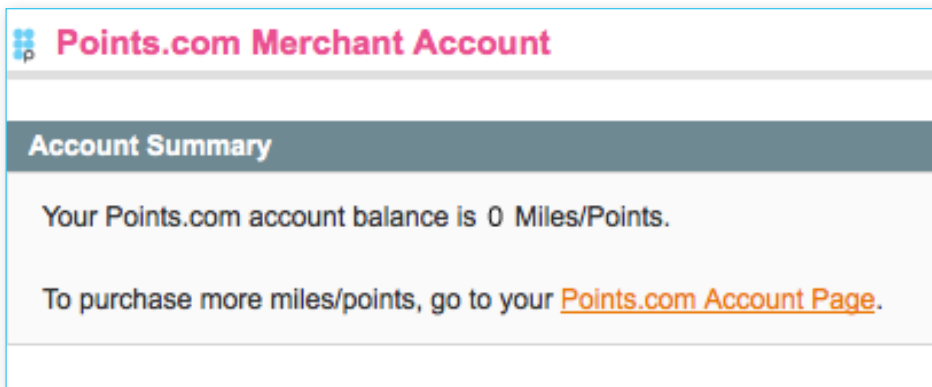


8

Click the “Save Config” button

9

Go to Rewards > Points.com Account to see your current balance, which should display 0 points/miles

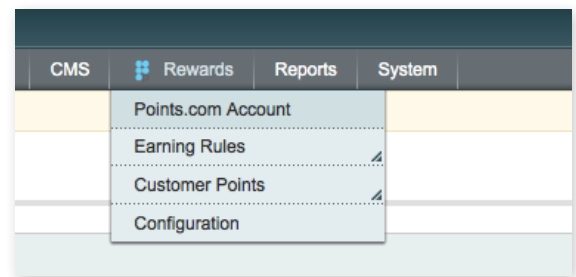


How to purchase miles/points

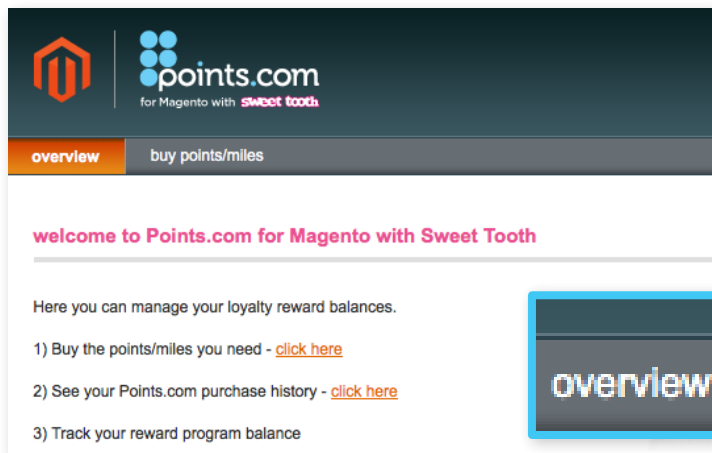
1 Log in to your Magento Admin site



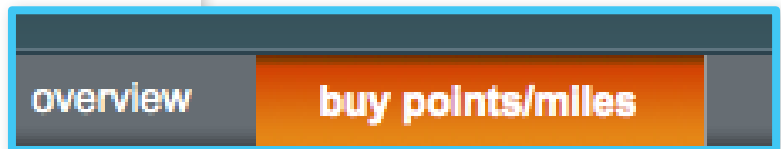
2 Go to Rewards > Points.com Account



3 Click on “Points.com Account Page” and a new window will open with the Points.com Admin page



4 Go to the “Buy Points/Miles” tab at the top of the screen



- 5 Enter the number of points/miles you would like to purchase (*minimum is 1000*) and click “Calculate Cost” to see your total spend

Geoff's 151 Test Store
merchant resource center | your account

overview **buy points/miles**

Merchant Actions

- [Buy points/miles](#)
- [Purchase History](#)

Buy points/miles

Purchase points/miles to incent your customers.

1. Enter the Number of Rewards you wish to Purchase

Enter the number of points/miles you would like to purchase - click calculate cost to update the purchase price.

Number of points/miles:*

calculate cost

Cost per Miles/Points:	\$0.0415
Total Cost of points/miles:	\$41.50
Harmonized Sales Tax - Ontario:	\$5.40
Total Cost:	\$46.90

- 6 Click “Continue to Next Step” to proceed to payment details page



Payment Method:*

Credit Card Details

Credit Card Type:*

Card Number:*

Security Code:* [\(what's this?\)](#)

Expiration Date:* Month: Year:

Cardholder Name:*
(as shown on card)

Credit Card Billing Information

Address Line 1:*

Address Line 2:*

City:*

Country:*

State/Province:

Postal/Zip Code:*

[Return To Previous Step](#) [Continue to Next Step](#)

3. Final Confirmation

[Terms and Conditions](#) | [Contact Us](#) | [FAQ](#) | [Help](#)

©2012 Points.com [Points.com](#)

- 7 Fill out credit card details and click “Continue to Next Step”

- 8 Fill out credit card details and click “Continue to Next Step”

9

Review your order and read the terms and conditions

Purchase points/miles to incent your customers.

1. Enter the Number of Rewards you wish to Purchase
2. Payment Details
3. Final Confirmation

Confirm your purchase details, read and accept the Terms and Conditions, and submit your purchase for processing.

Purchase Summary Make Changes

Total Number of points/miles:	1,000
Cost per Miles/Points:	\$0.0415
Total Cost of points/miles:	\$41.50
Harmonized Sales Tax - Ontario:	\$5.40
Total Cost:	\$46.90

Purchase Information Make Changes

Payment Method:	Credit Card
Credit Card Type:	VISA
Card Number:	**** * 7267
Name on Card:	Test t est
Postal/Zip Code:	M5V4A1
Country:	Canada

Before accepting the terms and conditions you must first scroll down to the very end of the terms and conditions.

Terms and Conditions The loyalty currency you choose on redemption of your Code will not be posted to your loyalty program account until the end of the merchant's refund period. If you return the purchased goods, the merchant may choose to cancel the redemption of your Code. 1. All Codes expire 12 months from the date of issuance. 2. Codes have no cash value and may not be transferred, bartered, traded, distributed or sold under any circumstances. 3. Points.com has no obligation to replace or re-issue any lost or stolen Codes. 4. Codes may only be redeemed for loyalty currency from participating loyalty programs who have authorized Code redemptions with the merchant whose goods or services you purchased to receive the Code. 5. Your chosen loyalty currency will not be posted to your loyalty program account until the end of the merchant's refund period. If you return purchased goods, the merchant may cancel the redemption of your Code. 6. The participating loyalty programs may change from time to time without notice. 7. The participating loyalty

I confirm that I have read and understand the terms and conditions.

[purchase points/miles now](#)

10

Review your order and read the terms and conditions

11

Once the credit card payment has been processed, you will see your newly purchased points/miles in your account balance

Magento Admin Panel

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

Latest Message: Helpmate 1.2.1 is now available [Read details](#)

Points.com Merchant Account

Account Summary

Your Points.com account balance is 2,822 Miles/Points.

To purchase more miles/points, go to your [Points.com Account Page](#).

12

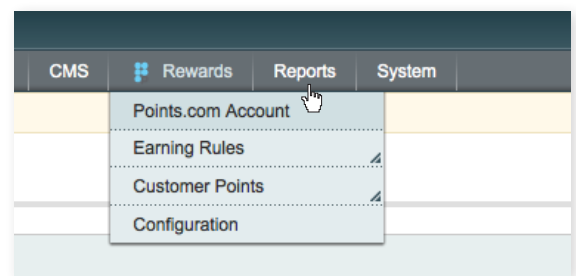
You can close this window and return back to your Magento Admin Site, where you can see your balance by refreshing the page

How to see your points/miles balance

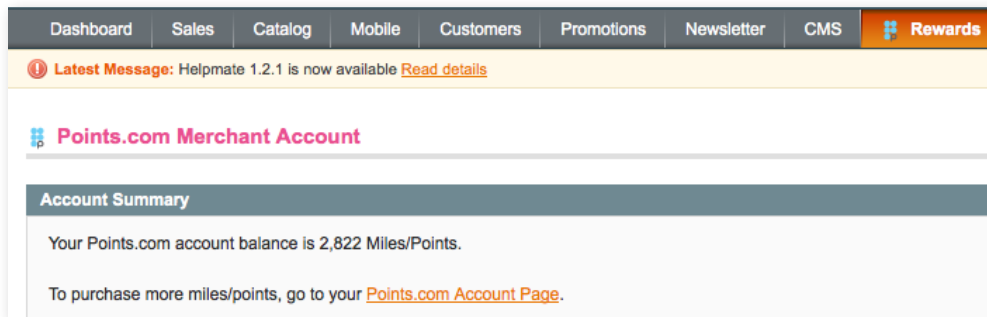
1 Log in to your Magento Admin site



2 Go to Rewards > Points.com Account

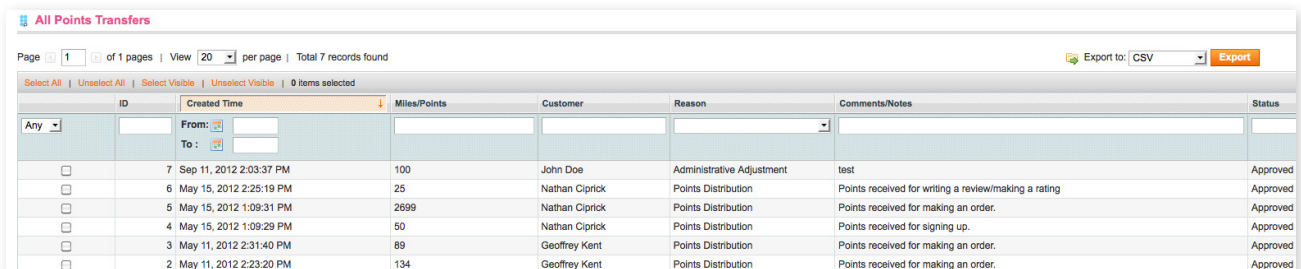


3 You can see the number of points/miles you have available here



4 Click on "Points.com Account Page" for a more detailed breakdown of the final balance

5 If you want to see the number of points/miles awarded to customers individually, you can go to Rewards > Customer Points > View Transfer History



ID	Created Time	Miles/Points	Customer	Reason	Comments/Notes	Status
7	Sep 11, 2012 2:03:37 PM	100	John Doe	Administrative Adjustment	test	Approved
6	May 15, 2012 2:25:19 PM	25	Nathan Ciprick	Points Distribution	Points received for writing a review/making a rating	Approved
5	May 15, 2012 1:09:31 PM	2699	Nathan Ciprick	Points Distribution	Points received for making an order.	Approved
4	May 15, 2012 1:09:29 PM	50	Nathan Ciprick	Points Distribution	Points received for signing up.	Approved
3	May 11, 2012 2:31:40 PM	89	Geoffrey Kent	Points Distribution	Points received for making an order.	Approved
2	May 11, 2012 2:23:20 PM	134	Geoffrey Kent	Points Distribution	Points received for making an order.	Approved

How to set up Earning Rules

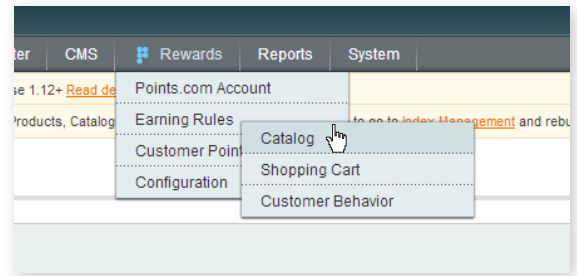
a) Setting Up Catalog Rules

Getting Started:

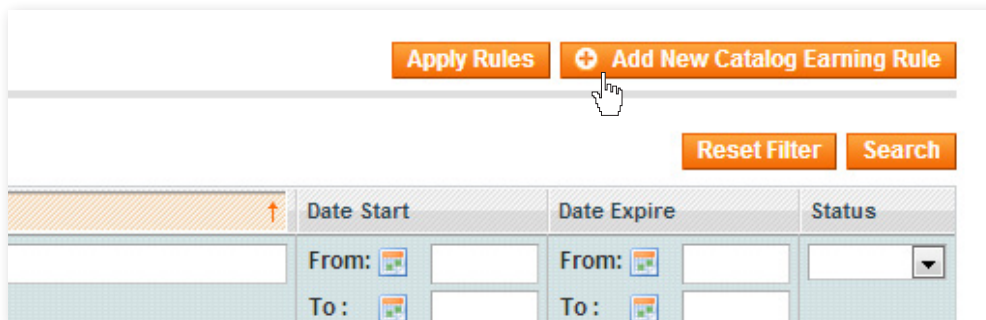
- 1 Log in to your Magento Admin site



- 2 Go to Rewards > Earning Rules > Catalog



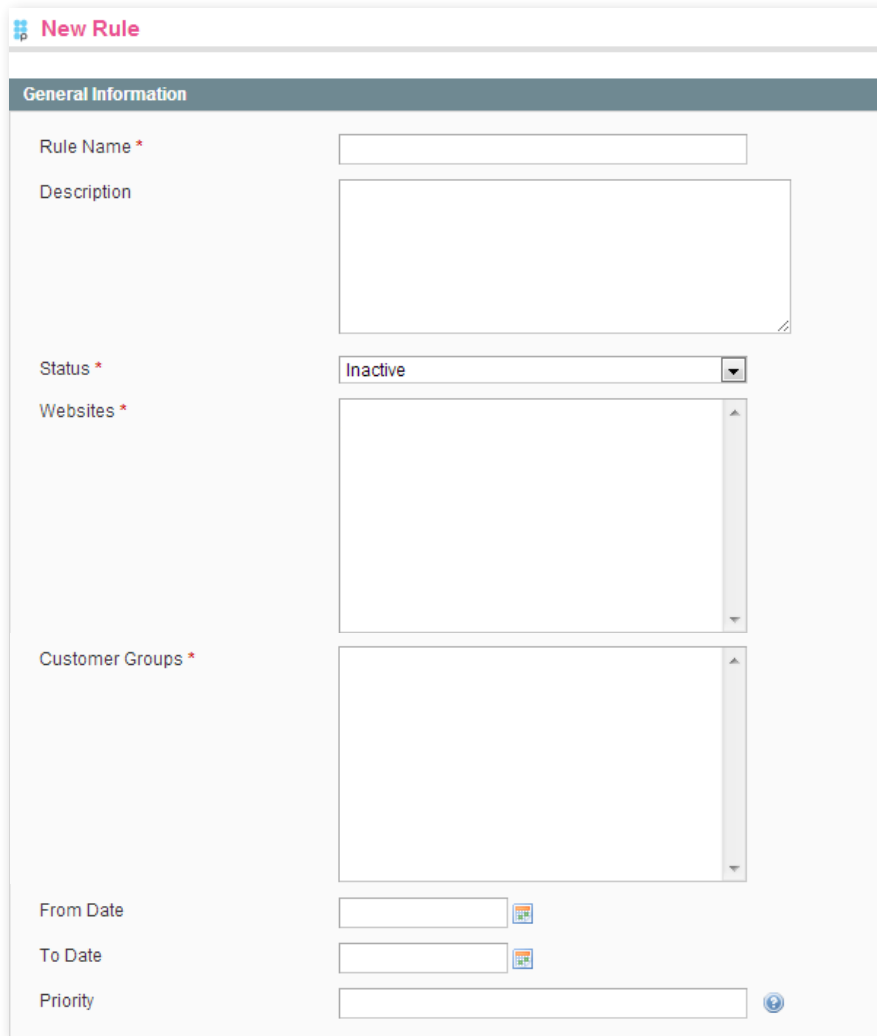
- 3 To create a new rule, click on "Add New Catalog Earning Rule" near the top right of the page



Creating Rule Information:

4

First you'll have to fill in general Rule Information fields. Start by creating a Rule Name so you can easily recognize it when you come back and adding a description if you like

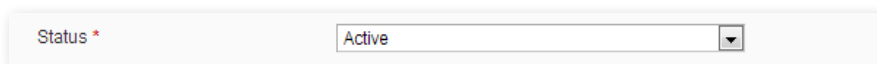


The screenshot shows a web form titled "New Rule" with a sub-section "General Information". The form contains the following fields:

- Rule Name ***: A text input field.
- Description**: A large text area for entering a description.
- Status ***: A dropdown menu currently set to "Inactive".
- Websites ***: A scrollable list box for selecting websites.
- Customer Groups ***: A scrollable list box for selecting customer groups.
- From Date**: A date input field with a calendar icon.
- To Date**: A date input field with a calendar icon.
- Priority**: A text input field with a help icon.

5

Next select the Status. "Active" means that the rule you're creating will be applied to the relevant customer actions



A close-up of the "Status *" dropdown menu, which is currently set to "Active".

6

In the Websites field, choose the sites to which you'd like to assign the Earn Rule you're setting up



A close-up of the "Websites *" scrollable list box, which is currently empty.

7

The next step is to select the Customer Groups that the rule you're setting up will apply to



A screenshot of a form field labeled "Customer Groups *". The field is currently empty and has a vertical scrollbar on the right side, indicating a list of options that is not fully visible.

8

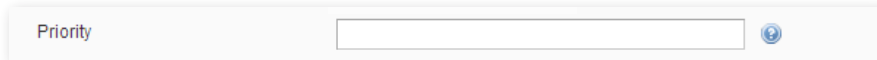
If you like, you can choose the dates that you'd like the Earning Rule to run



A screenshot of two date selection fields. The first is labeled "From Date" and the second is labeled "To Date". Each field has a small calendar icon to its right.

9

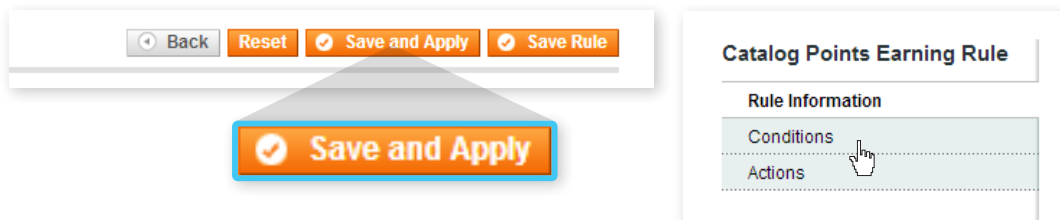
You can also set the Priority, which changes the order that the system processes the rule actions. Higher priority rules run first and the lower priority rules run after that



A screenshot of a form field labeled "Priority". The field is empty and has a small blue circular icon with a downward arrow to its right.

10

Hit "Save and Apply" at the top of the page and then click on "Conditions" in the left navigation to continue



A screenshot showing the "Save and Apply" button at the top of the page, which is highlighted with a blue border and a white arrow pointing to it. To the right, the "Catalog Points Earning Rule" sidebar is visible, with the "Conditions" link highlighted and a mouse cursor pointing to it.

Specifying Conditions:

- 11 Here you can select the restrictions for the rule you're creating. Click on the green "+" button to select a condition

Catalog Points Earning Rule

Rule Information

Conditions

Actions

New Rule

Conditions (leave blank for all products)

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

- 12 You can then specify how these conditions are executed by choosing "All" or "Any" and "True" or "False"

Conditions (leave blank for all products)

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

- 13 Once you've chosen your conditions, click "Save and Apply" at the top and then select "Actions" on the left of the page to go to the final step

Back Reset Save and Apply Save Rule

Save and Apply

Catalog Points Earning Rule

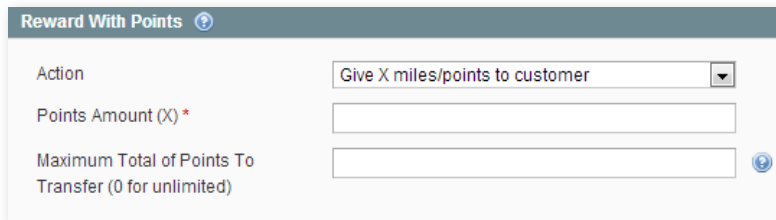
Rule Information

Conditions

Actions

Choosing Actions:

- 14 This section allows you to choose what happens when the conditions you've set up are met



Reward With Points ⓘ

Action

Points Amount (X) *

Maximum Total of Points To Transfer (0 for unlimited) ⓘ

First, choose the way you want to reward your customers. Selecting "Give X Points to Customer" in the dropdown will award the customer points when they satisfy your conditions



Reward With Points ⓘ

Action

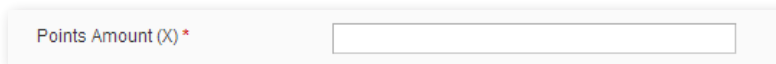
Points Amount (X) *

Monetary Step (Y)

Maximum Total of Points To Transfer (0 for unlimited) ⓘ

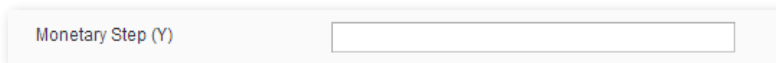
"For Every Y Dollar Amount in Price, Give X Points" will result in a variable amount of points, depending on the price of the product

- 15 Select the number of points you want to reward for this Earning Rule – the "X" in the Action you've selected



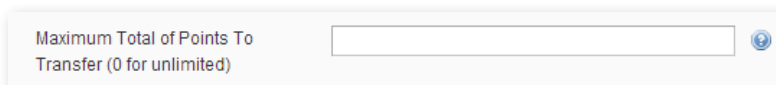
Points Amount (X) *

- 16 If you've chosen an Action that involves a "Y dollar amount," the next thing you'll have to do is fill in the "Monetary Step (Y)"



Monetary Step (Y)

- 17 Finally, you can restrict the amount of points given by inputting the Maximum Total of Points to Transfer



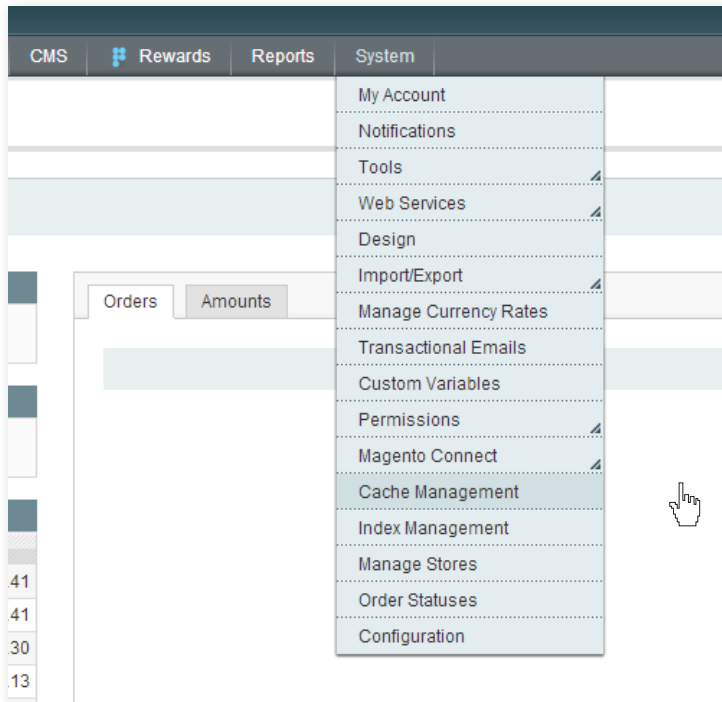
Maximum Total of Points To Transfer (0 for unlimited) ⓘ

- 18 Hit "Save and Apply." If you've missed any fields along the way, you'll be prompted to fill them in at this point



19

To finish setting up your Earning Rule, go to System > Cache Management and click on “Flush Magento Cache” in the top right of the page.



How to set up Earning Rules

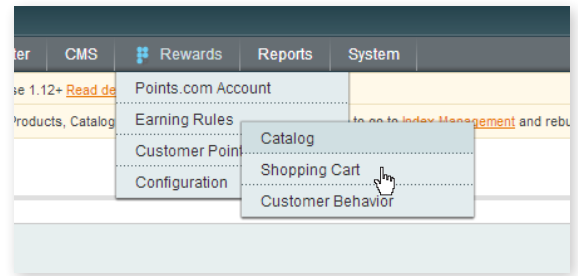
b) Setting Up Shopping Cart Rules

Getting Started:

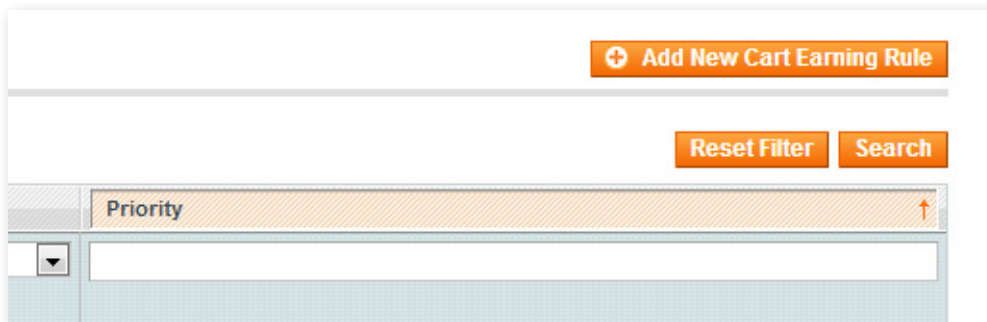
1 Log in to your Magento Admin site



2 Go to Rewards > Earning Rules > Shopping Cart



3 To create a new rule, click on "Add New Cart Earning Rule" near the top right of the page



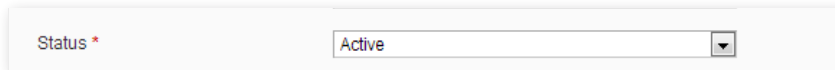
Specifying Conditions:

- 4 You'll first have to fill in general Rule Information fields. Start by creating a Rule Name so you can easily recognize it when you come back and if you'd like, you can add a description



The screenshot shows a form titled "General Information" with two input fields. The first field is labeled "Rule Name *" and is a single-line text box. The second field is labeled "Description" and is a larger multi-line text box with a small icon in the bottom right corner.

- 5 Next select the Status. "Active" means that the rule you're creating will be applied to the relevant customer actions



The screenshot shows a dropdown menu labeled "Status *". The selected option is "Active".

- 6 In the Websites field, select the site to which you'd like to assign the Earn Rule you're setting up



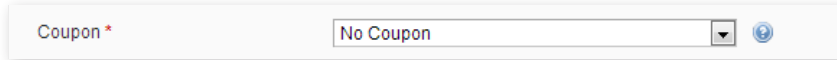
The screenshot shows a selection field labeled "Websites *". It is an empty list box with a vertical scrollbar on the right side.

- 7 The next step is to select the Customer Groups that the rule you're setting up will apply to



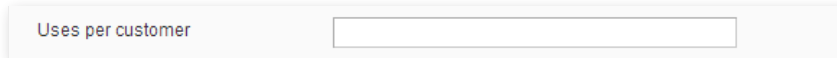
The screenshot shows a selection field labeled "Customer Groups *". It is an empty list box with a vertical scrollbar on the right side.

- 8 You can input a coupon code for Shopping Cart Rules. When a coupon code is required, the rule no longer activates until the customer specifies the coupon code in their shopping cart or checkout



A screenshot of a form field labeled "Coupon *". To its right is a dropdown menu with "No Coupon" selected. A small blue help icon is located to the right of the dropdown.

- 9 If you choose to use a coupon, the next step is to specify the number of times a customer can use it



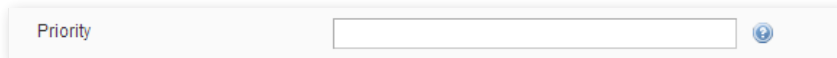
A screenshot of a form field labeled "Uses per customer" with an empty text input box to its right.

- 10 If you like, you're able to set up the dates that you'd like the Earning Rule to run



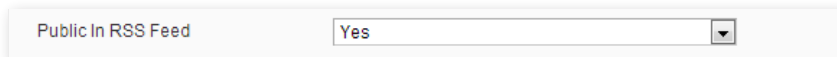
A screenshot of two form fields: "From Date" and "To Date". Each field has a text input box and a small calendar icon to its right.

- 11 You can also set the Priority, which changes the order that the system processes the rule actions. Higher priority rules run first and the lower priority rules run after that



A screenshot of a form field labeled "Priority" with an empty text input box to its right. A small blue help icon is located to the right of the input box.

- 12 The Public in RSS Feed option means that by selecting "Yes," your customers who subscribe to your RSS feed will be alerted of this new Shopping Cart Rule



A screenshot of a form field labeled "Public In RSS Feed" with a dropdown menu set to "Yes". A small blue help icon is located to the right of the dropdown.

- 13 Hit "Save and Apply" at the top of the page and then click on "Conditions" in the left navigation to continue



A screenshot of a horizontal bar containing four buttons: "Back" (with a left arrow), "Reset", "Save and Apply" (with a checkmark), and "Save Rule" (with a checkmark). A callout box with a blue border and a checkmark icon points to the "Save and Apply" button.

Creating Rule Information:

- 14 Here you can select the restrictions for the rule you're creating. Click on the green "+" button to select a condition

The screenshot shows a sidebar on the left with three tabs: 'Rule Information', 'Conditions', and 'Actions'. The 'Conditions' tab is selected. The main content area is titled 'New Rule' and contains a section 'Conditions (leave blank for all products)'. Below this, it says 'If ALL of these conditions are TRUE:'. A green '+' button is visible in the list area, with a callout bubble pointing to it.

- 15 You can then specify how these conditions are executed by choosing "All" or "Any" and "True" or "False"

This is a close-up of the 'Conditions (leave blank for all products)' section. It shows the text 'If ALL of these conditions are TRUE:' where 'ALL' and 'TRUE' are underlined, indicating they are selectable options.

- 16 Once you've chosen your conditions, click "Save and Apply" at the top and then select "Actions" on the left of the page to go to the final step

The screenshot shows a top navigation bar with four buttons: 'Back', 'Reset', 'Save and Apply', and 'Save Rule'. A callout bubble points to the 'Save and Apply' button. To the right, the sidebar is shown with the 'Actions' tab selected, and a mouse cursor is hovering over it.

Choosing Actions:

- 17 Shopping cart distribution actions allow you to distribute points in a variety of ways

Reward With Points ⓘ

Action

Points Amount (X)*

Maximum Total of Points To Transfer (0 for unlimited) ⓘ

“Give X Points to customer” is a straightforward point distribution method

Reward With Points ⓘ

Customer Earning Style

Points Amount (X)

Monetary Step (Y) (in base currency)

Maximum Distributed Points (0 for unlimited) ⓘ

With “For every Y amount spent give X points,” customers are rewarded variably, based on how much they spend

Reward With Points ⓘ

Customer Earning Style

Points Amount (X)

Quantity Step (Z)

Maximum Distributed Points (0 for unlimited) ⓘ

By selecting “For every Z qty purchased, give X points,” you can reward your customers based on the quantity of items in their cart

- 18 Select the number of points you want to reward for this Earning Rule – the “X” in the Action you’ve selected

Points Amount (X)*

- 19 If you’ve chosen an Action that involves a “Y dollar amount,” the next thing you’ll have to do is fill in the “Monetary Step (Y)”

Quantity Step (Z)

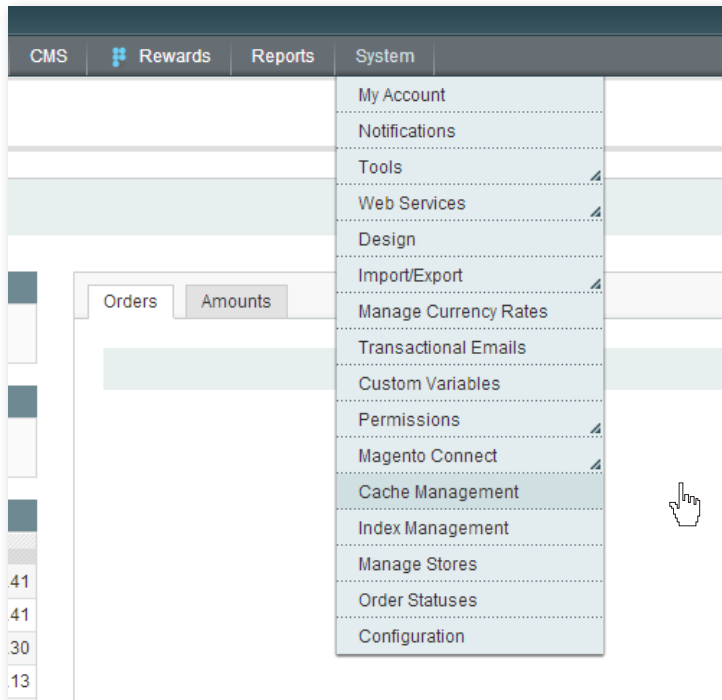
- 20 Finally, you can restrict the amount of points given by inputting the Maximum Total of Points to Transfer

Maximum Total of Points To Transfer (0 for unlimited) ⓘ

- 21 Hit “Save and Apply.” If you’ve missed any fields along the way, you’ll be prompted to fill them in at this point

22

To finish setting up your Earning Rule, go to System > Cache Management and click on “Flush Magento Cache” in the top right of the page



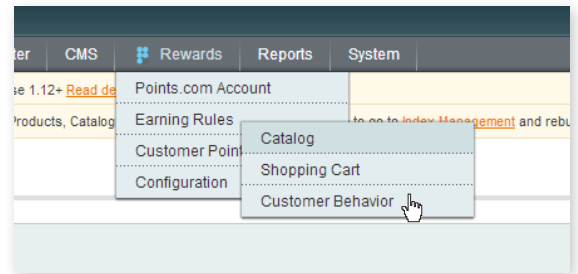
Setting Up Customer Behaviour Rules

Getting Started:

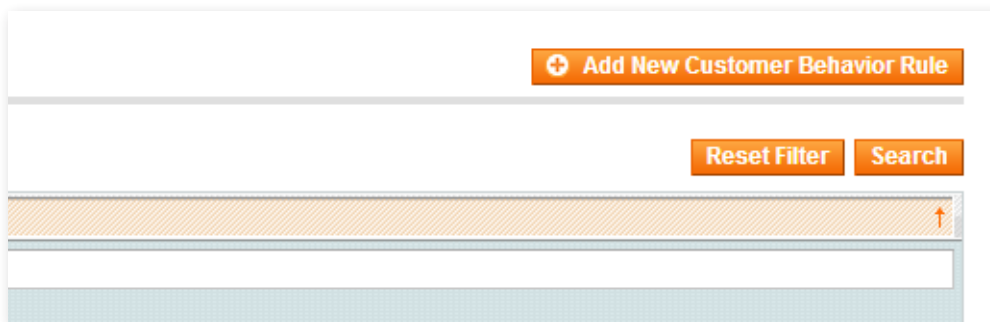
- 1 Log in to your Magento Admin site



- 2 Go to Rewards > Earning Rules > Customer Behavior

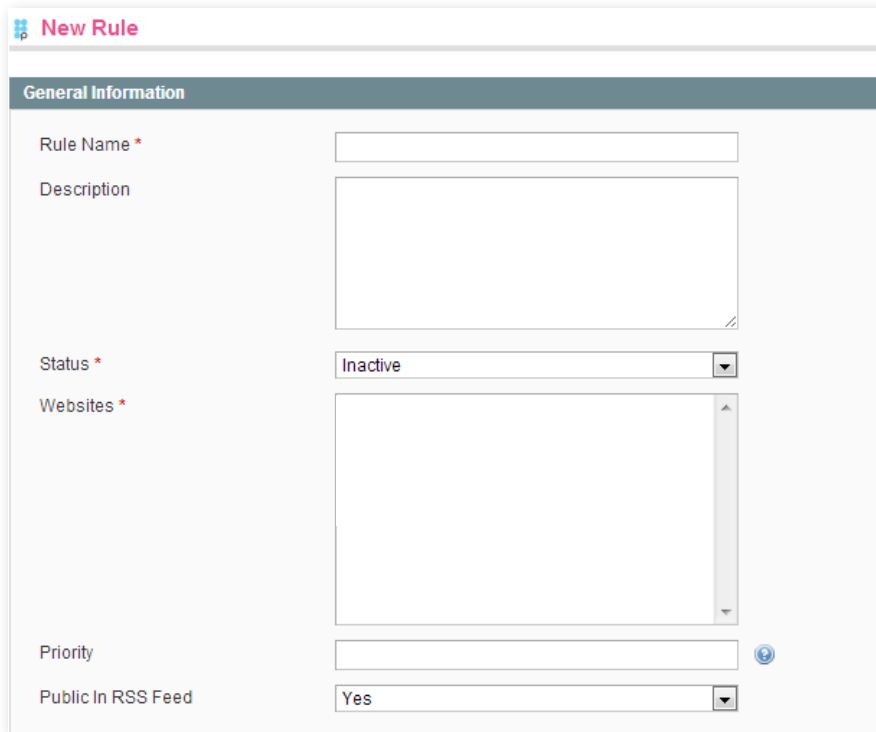


- 3 To create a new rule, click on "Add New Customer Behavior Earning Rule" near the top right of the page



Creating Rule Information:

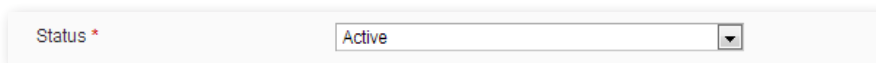
- 4 You'll first have to fill in general Rule Information fields. Start by creating a Rule Name so you can easily recognize it when you come back and add a description if you like



The screenshot shows a web form titled "New Rule" with a sub-section "General Information". The form contains the following fields:

- Rule Name ***: A text input field.
- Description**: A large text area for entering a description.
- Status ***: A dropdown menu currently set to "Inactive".
- Websites ***: A large empty list box for selecting websites.
- Priority**: A text input field with a help icon to its right.
- Public In RSS Feed**: A dropdown menu currently set to "Yes".

- 5 Next select the Status. "Active" means that the rule you're creating will be applied to the relevant customer actions



A close-up of the "Status *" dropdown menu, which is now set to "Active".

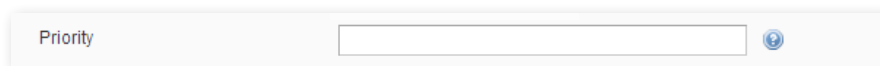
- 6 In the Websites field, select the site to which you'd like to assign the Earn Rule you're setting up



A close-up of the "Websites *" list box, which is currently empty.

7

You can also set the Priority, which changes the order that the system processes the rule actions. Higher priority rules run first and the lower priority rules run after that



A horizontal input field with the label "Priority" on the left, an empty text box in the center, and a blue circular icon with a right-pointing arrow on the right.

8

Hit "Save and Continue Edit" at the top of the page and then click on "Triggers & Conditions" in the left navigation to continue



A screenshot of a web interface. At the top, there is a navigation bar with four buttons: "Back" (grey), "Reset" (orange), "Save Rule" (orange), and "Save And Continue Edit" (orange). Below this, a large orange button with a checkmark icon and the text "Save And Continue Edit" is highlighted with a blue border. To the right, a panel titled "Customer Behavior Rule" contains a "Rule Information" section with two sub-sections: "Triggers & Conditions" (highlighted with a mouse cursor) and "Actions".

9

A trigger is the customer action or event that you'd like to reward. They can include liking something on Facebook, writing a review, signing up for a newsletter and more

Specifying Triggers & Conditions:

- 10 The next step is to select the Customer Groups that the rule you're setting up will apply to



A screenshot of a form field labeled "Customer Groups *". The field is currently empty and has a vertical scrollbar on the right side, indicating a list of options that is not visible.

- 11 If you like, you can limit the dates of the Earn Rule you're setting up, either by entering a date in the "Date is on or After" or "Date is Before" fields



A screenshot of two date selection fields. The first is labeled "Date is on or After" and the second is labeled "Date is Before". Each field has a text input box and a small calendar icon to its right.

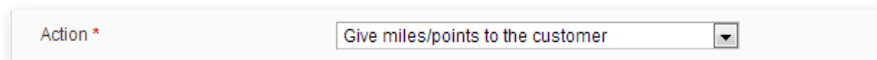
- 12 Hit "Save and Continue Edit" at the top of the page and then click on "Triggers & Conditions" in the left navigation to continue



A screenshot showing a navigation bar with four buttons: "Back", "Reset", "Save Rule", and "Save And Continue Edit". The "Save And Continue Edit" button is highlighted with a callout box. To the right is a sidebar menu titled "Customer Behavior Rule" with three items: "Rule Information", "Triggers & Conditions", and "Actions". A mouse cursor is pointing at the "Triggers & Conditions" item.

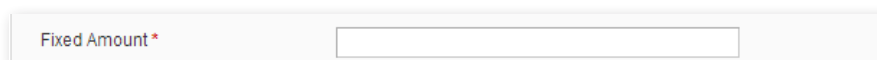
Specifying Triggers & Conditions:

- 13 Decide on how you want to reward your customer in the Action dropdown



A screenshot of a form field labeled "Action *". The dropdown menu is open, showing the selected option "Give miles/points to the customer".

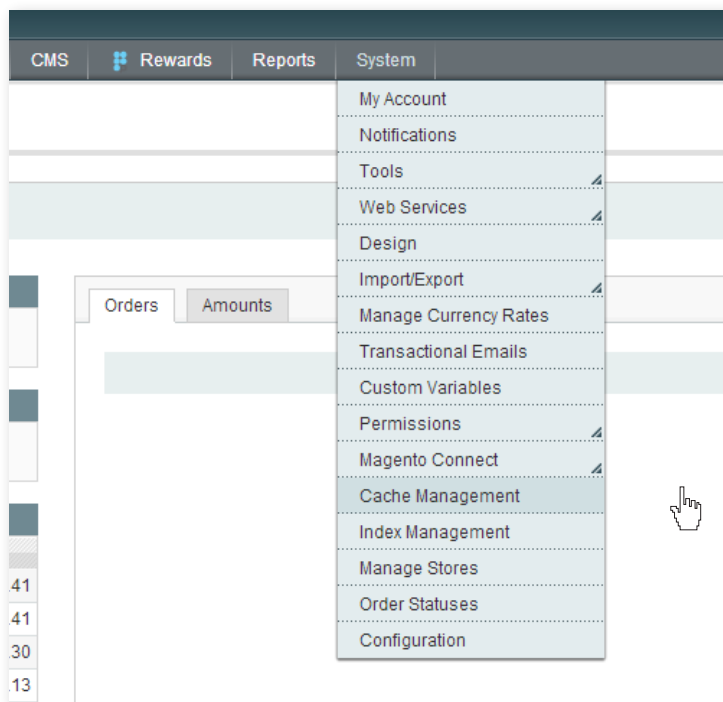
- 14 Put in a points/miles amount in the Fixed Amount field, hit "Save and Continue Edit"



A screenshot of a form field labeled "Fixed Amount *". The field is currently empty.

15

To finish setting up your Earning Rule, go to System > Cache Management and click on “Flush Magento Cache” in the top right of the page.





If you have any questions, we're always here to help. You can check out our FAQs or contact us 24/7.

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