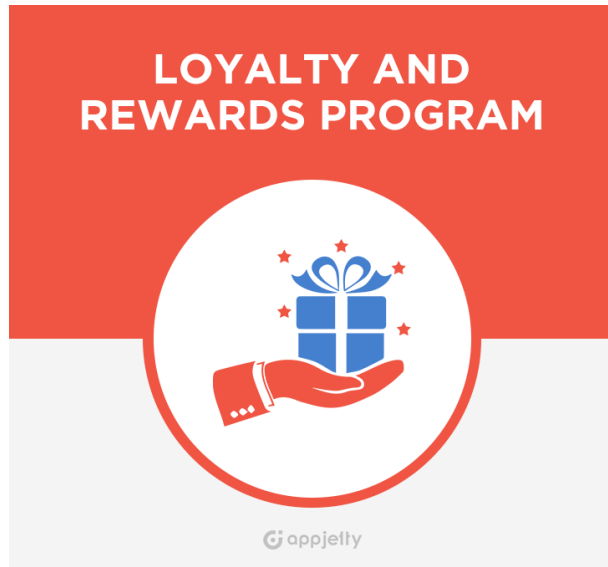


USER MANUAL



Loyalty and Rewards Program

Version: 1.0

Compatibility:

Odoo 10.x

TABLE OF CONTENTS

Introduction	1
Benefits of Loyalty and Rewards Program	1
Prerequisites	1
Installation & Configuration	2
Installation Steps	2
App Configuration	5
Contact Us	16

Introduction

AppJetty's Loyalty and Rewards Program App helps you to reward loyalty points to your valuable customers. Through this app, you can easily manage the rewards and loyalty points to be provided to your customers. Thereafter, the customers can earn or redeem the points as per the rules defined by you. This would lead to better customer satisfaction which will benefit your business in many ways.

Benefits of Loyalty and Rewards Program

- Increase customer satisfaction
- Create new loyalty programs as per your requirement
- Facility of managing loyalty programs
- View earned history of customer loyalty points
- Know the spent history of customer loyalty points
- View customer wise loyalty history
- Know about loyalty points in quotations and sales orders
- View loyalty rewards directly from shopping cart

Prerequisites

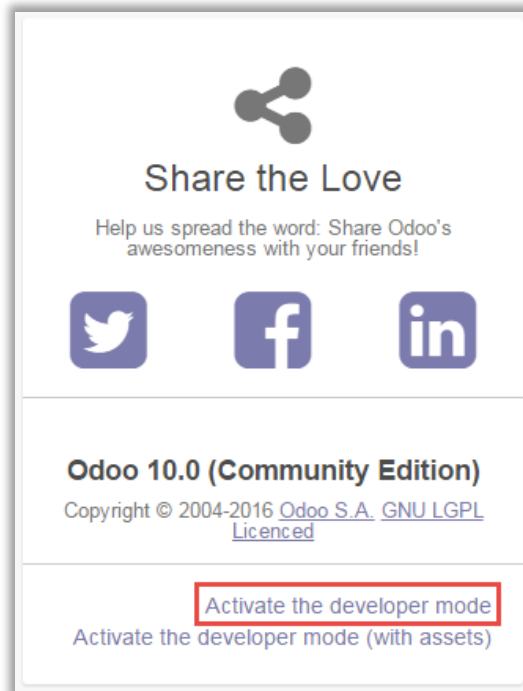
Following points must be followed before starting the plug in installation:

- You should login as an Admin in Odoo.
- Check that your Odoo Instance is compatible for Loyalty and Rewards Program. An e-commerce module should be present in your instance to use this app.

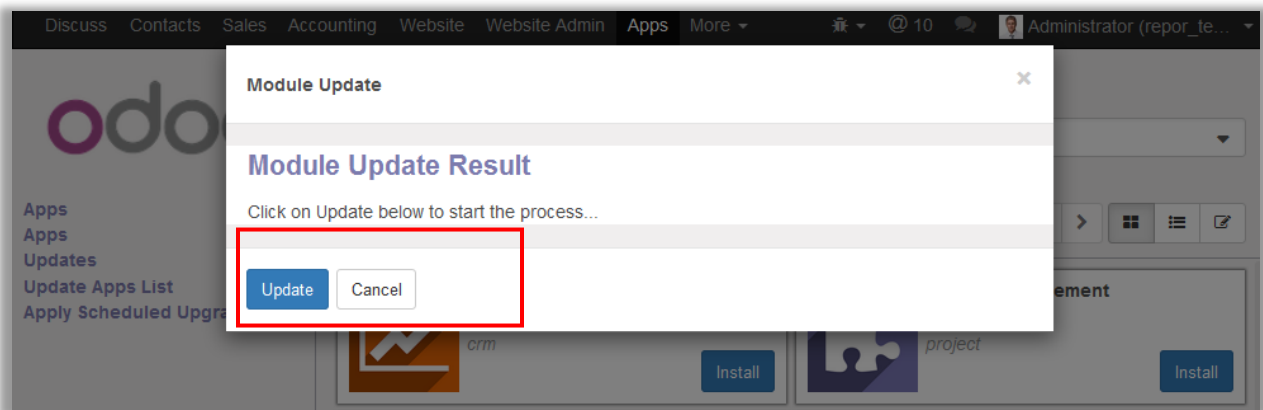
Installation& Configuration

Installation Steps

- Download & Unzip Loyalty and Rewards Program App Folder
- Move Loyalty and Rewards Program folder to your Odoo 10 setup path
Ex. /home/detail/odoo_demo/odoo/addons
- Open your Odoo 10 copy in any browser.
- Database selection:
 - **For New database**
 - Click on manage databases
 - Click on **‘Create’** database (new database)
 - Enter database name, email & password for new database.
 - Click on **‘Continue’** button
 - **For existing database**
 - Select existing database. Use default created db: “test_db_theme”
- Login with the admin credentials.
- To activate Developer Mode Go To **Settings -> Activate the developer mode**. Click on **‘Activate the developer mode’** and developer mode will be activated.

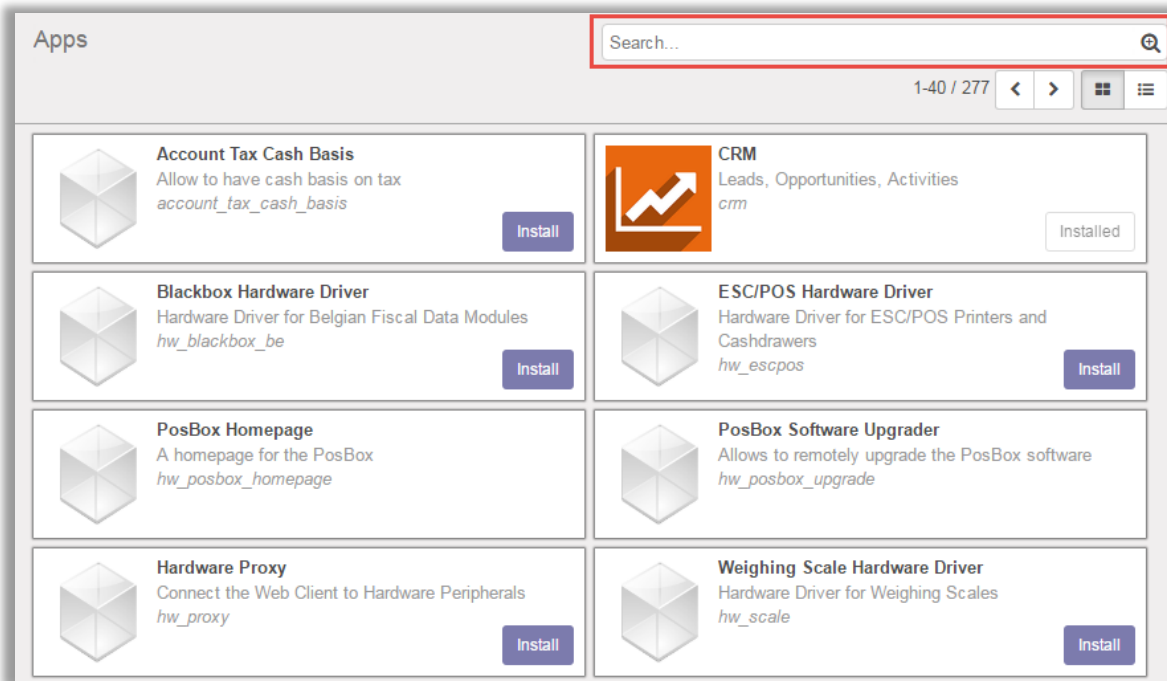


- Go to Apps/Update Module List.
 - Click on 'Update' button.

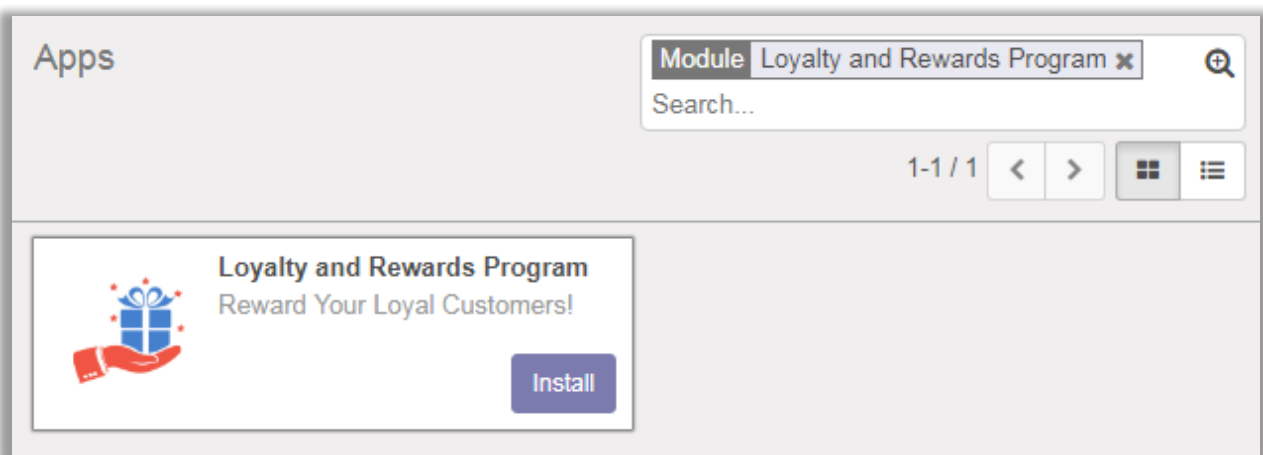


USER MANUAL –Loyalty and Rewards Program

- Go to Apps/Apps Modules
 - Remove search filter



- Enter module name in the search box provided in the top right corner of the page. For e.g. here write “Loyalty and Rewards Program”.
- Click on ‘Install’ button.



- You are ready to go with Loyalty and Rewards Program App Module.

App Configuration

Loyalty Programs

- Go to **Administration -> Sales -> Loyalty Program Management** and click on **‘Loyalty Programs’** link.
- By clicking on **‘Loyalty Programs’** link you will be presented with a list of Loyalty Programs along with its related details.

The screenshot shows the Odoo web interface for managing loyalty programs. On the left is a sidebar with the Odoo logo and a navigation menu. The menu is organized into sections: 'Dashboard', 'Sales' (with sub-items: Customers, Quotations, Sales Orders, Products), 'Invoicing' (with sub-items: Sales to Invoice, Orders to Upsell), and 'Loyalty Program Management' (with sub-items: Loyalty Programs, Earn History, Spent History). The 'Loyalty Programs' item is currently selected and highlighted in blue.

The main content area is titled 'Loyalty Programs'. At the top right of this area, there is a filter dropdown set to 'All Records', a search bar, and a magnifying glass icon. Below this, there are two buttons: 'Create' and 'Import'. To the right of these buttons, it shows '1-2 / 2' with left and right arrow icons for pagination.

Below the buttons is a table with the following columns: 'Name', 'Start Date', 'End Date', 'Active', and 'Loyalty Program Description'. There are two data rows:

<input type="checkbox"/>	Name	Start Date	End Date	Active	Loyalty Program Description
<input type="checkbox"/>	LP for 2017-2018	07/01/2017	07/06/2017	<input type="checkbox"/>	Loyalty Program for Weekly Sale
<input type="checkbox"/>	LP for 2017-2018 2	07/06/2017	07/25/2017	<input checked="" type="checkbox"/>	Loyalty Program for Monthly Sale

Below the table, there are several empty rows, indicating that the table can hold more records than are currently displayed.

Create Loyalty Program

- To create a new loyalty program click on 'Create' button and by clicking on it you will be redirected to the Create New Loyalty Program Page.

Loyalty Programs / New

Save

Discard

Earn History

Spent History

Start Date

08/10/2017

End Date

08/15/2017

Name

Independence Day

Active

☒

Loyalty Program Description

Independence Sale

Loyalty Product

Loyalty Reward

Earning Rate

Spending Rate

Sign Up Points

10.00

Amount of money spent

1.00

Earn Stage On

Order Confirm

Earning Point(s)

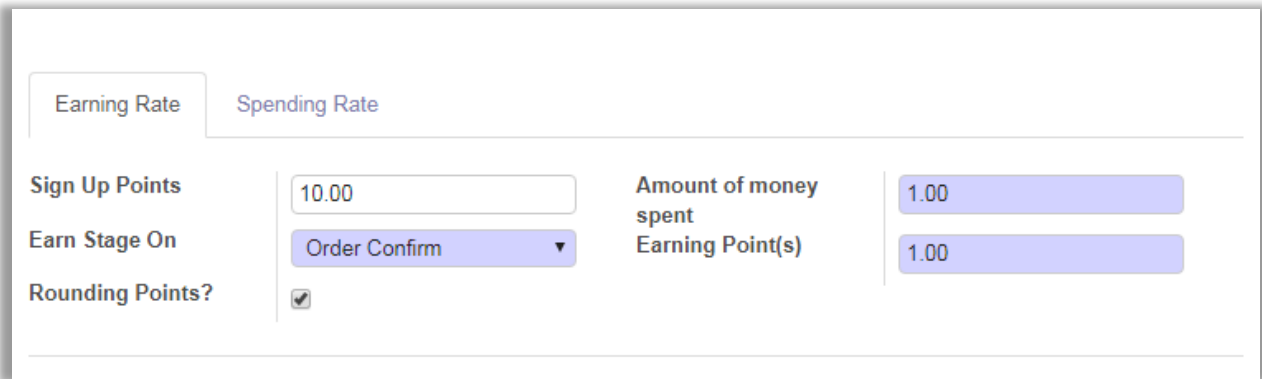
1.00

Rounding Points?

☒

- Now Populate following fields to create the program:
 - Start Date:** Select a start date for the loyalty program
 - End Date:** Select an end date for the loyalty program
 - Name:** Enter a name for the loyalty program
 - Active:** Check the checkbox to apply the loyalty program
 - Loyalty Program Description:** Enter a description for the loyalty program
 - Loyalty Product:** Select a product to be given as a loyalty reward to the customers

- While creating a new loyalty program you can manage the Earning Rate and Spending Rate of the loyalty program as shown below:
 - **Earning Rate:** From Earning Rate you can manage the amount that your new customer will earn by Signing Up. It will contain following fields:



The screenshot shows a form titled 'Earning Rate' (selected) and 'Spending Rate'. The form contains the following fields:

Field	Value
Sign Up Points	10.00
Earn Stage On	Order Confirm
Rounding Points?	<input checked="" type="checkbox"/>
Amount of money spent	1.00
Earning Point(s)	1.00

- **Sign up Points:** Enter the number of points for Signing up.
 - **Rounding Points:** Check the checkbox to Round off the points.
 - **Amount of money spent:** Enter the amount of money to be spent to gain the points.
 - **Earning Point(s):** Enter the amount of points which the customer would earn on spending the amount of money mentioned in Amount of money spent.
 - **Earn Stage On:** Select the Order stage at which the customer will earn points.
- **Spending Rate:** From Spending Rate you can manage the amount that your customers will earn by spending on the shopping orders. It will contain following fields:
 - **Redeem Point Policy:** Select the Redeem Point Policy for the loyalty program. There are two types of policies:
 - One Time Redeem
 - Partial Redeem
 - **Maximum Redeem Points Per Sale Order:** Enter the maximum amount that can be redeemed per sale order.
 - **Minimum Redeem Points Per Sale Order:** Enter the minimum amount that can be redeemed per sale order.

Earning Rate

Spending Rate

Redeem Point Policy

Partial Redeem

Maximum Redeem Points Per Sale Order

1.00

Minimum Purchase Amount

1.00

Spending Rule

Point Start For Redeem

1.00

Point End For Redeem

50.00

1 Reward Points = 1.00 (of Amount) Discount Received.

- **Spending Rule:** You can manage a range for the redeem points along with the value of each point from this section. It will consist of following:
 - **Point Start For Redeem:** Enter lowest value of point to be redeemed
 - **Point End For Redeem:** Enter highest value of point to be redeemed
 - **1 Reward Points:** Enter the value of 1 Reward Point.
- Click on ‘Save’ button to save the loyalty program.

Earn History

- To view a complete list of loyalty points earned by your customers through Sign Up click on **‘Earn History’** link from Loyalty Program Management section.
- From Earn History you will be able to view the details like Date at which the points were Redeemed, Name of the Customers, Sales Order number, Name of the Loyalty Programs, Redeemed Point Policy, Discount Amount, and Points Processed along with the Description of the loyalty program.

Earn History								
<div> <div>Search...</div> <div>1-10 / 10</div> <div>< ></div> </div>								
<input type="checkbox"/>	Redeemed Date	Customer	Sale Order	Loyalty Program	Redeem Point Policy	Discount Amount	Points Processed	Description
<input type="checkbox"/>	07/25/2017	YourCompany, Administrator	SO025	LP for 2017-2018 2	Partial Redeem	0.00	113.00	Sale Order
<input type="checkbox"/>	07/24/2017	Jim Bond	SO028	LP for 2017-2018 2	One Time Redeem	0.00	175.00	Sale Order
<input type="checkbox"/>	07/24/2017	Mark Harvey	SO026	LP for 2017-2018 2	Partial Redeem	0.00	178.00	Sale Order
<input type="checkbox"/>	07/24/2017	Jim Bond		LP for 2017-2018 2	Partial Redeem	0.00	20.00	SignUp
<input type="checkbox"/>	07/04/2017	YourCompany, Administrator	SO018	LP for 2017-2018	One Time Redeem	0.00	87.00	Sale Order
<input type="checkbox"/>	07/04/2017	YourCompany, Administrator	SO016	LP for 2017-2018	One Time Redeem	0.00	180.00	Sale Order
<input type="checkbox"/>	07/04/2017	YourCompany, Administrator	SO015	LP for 2017-2018	Partial Redeem	0.00	180.00	Sale Order
<input type="checkbox"/>	07/04/2017	Jim Bond	SO012	LP for 2017-2018	Partial Redeem	0.00	86.00	Sale Order
<input type="checkbox"/>	07/04/2017	Mark Harvey		LP for 2017-2018	Partial Redeem	0.00	10.00	SignUp
<input type="checkbox"/>	07/04/2017	YourCompany, Administrator	SO010	LP for 2017-2018	Partial Redeem	0.00	180.00	Sale Order

Spent History

- To view a complete list of loyalty points earned by your customers through Shopping or by spending a certain amount on their Orders click on **'Spent History'** link from Loyalty Program Management section.
- From Spent History you can also view the details like Date at which the points were Redeemed, Name of the Customers, Sales Order number, Name of the Loyalty Programs, Name Redeemed Point Policy, Discount Amount, and Points Processed along with the Description of the loyalty program.

Spent History								
<div>Search...</div>								
1-7 / 7 < >								
<input type="checkbox"/>	Redeemed Date	Customer	Sale Order	Loyalty Program	Redeem Point Policy	Discount Amount	Points Processed	Description
<input type="checkbox"/>	07/25/2017	YourCompany, Administrator	SO025	LP for 2017-2018 2	Partial Redeem	-50.00	50.00	Sale Order
<input type="checkbox"/>	07/24/2017	Mark Specter	SO028	LP for 2017-2018 2	One Time Redeem	-50.00	128.00	Sale Order
<input type="checkbox"/>	07/24/2017	Mike Ross	SO027	LP for 2017-2018 2	Partial Redeem	-50.00	50.00	Sale Order
<input type="checkbox"/>	07/24/2017	Jim Frank	SO026	LP for 2017-2018 2	Partial Redeem	-20.00	20.00	Sale Order
<input type="checkbox"/>	07/04/2017	Mary Jane	SO017	LP for 2017-2018	One Time Redeem	-50.00	180.00	Sale Order
<input type="checkbox"/>	07/04/2017	Jess Ria	SO014	LP for 2017-2018	Partial Redeem	-50.00	80.00	Sale Order
<input type="checkbox"/>	07/04/2017	YourCompany, Administrator	SO013	LP for 2017-2018	Partial Redeem	-50.00	50.00	Sale Order

Customer Wise Loyalty History


- To view the complete loyalty histories of customers go to **Sales -> Customers** and select the customer whose loyalty history is to be viewed.
- By clicking on the customer you will be redirected to the detail page of that particular customer.
- Now you can view the total available Loyalty Points in the customer's account from the '**Sale & Purchases**' section.

Customers / Mike Ross

EditCreate

Print▼Action▼

7 / 10<>



Mike Ross

Active

Loyalty History

0.00 Invoiced

\$ 1 Sales

Address
C -330 Manhattan Towers
Ahmedabad Andaman and Nicobar
656
India

Job Position
Senior Manager

Website
http://www.appjetty.com

Phone
+98451218100

Mobile

Fax

Email
mike@appjetty.com

Tags

Title
Doctor

Language
English

Contacts & Addresses

Internal Notes

Sales & Purchases

Accounting

Sale
Is a Customer☒
SalespersonAdministrator

Purchase
Is a Vendor☒

Loyalty Points86.00


- To view the complete Loyalty History click on ‘Loyalty History’ button.

Customers / Mike Ross

Edit Create

Print Action

7 / 10 < >



Mike Ross

Active

Loyalty History

0.00 Invoiced

\$ 1 Sales

Address

C -330 Manhattan Towers
Ahmedabad
Andaman and Nicobar

Job Position

Senior Manager

Phone

+98451218100


Mobile

- By clicking on ‘Loyalty History’ button you will be redirected to the Loyalty History Page of the particular customer.
- From this page you can also view the details like Date at which the points were Redeemed, Name of the Customer, Sales Order number, Name of the Loyalty Programs, Name of Redeemed Point Policy, Discount Amount along with the Total discount amount, and Points Processed along with the Total points processed and Description of the loyalty program.

Customers / Mike Ross / Loyalty History For Mike Ross								
<div> <div>Process</div> <div>Search...</div> </div>								
	<input type="checkbox"/>	Redeemed Date	Customer	Sale Order	Loyalty Program	Redeem Point Policy	Discount Amount	Points Processed
Description								
▼ Points Added (3)							0.00	373.00
<input type="checkbox"/> 07/24/2017	Mike Ross	SO028	LP for 2017-2018 2	One Time Redeem	0.00	175.00	Sale Order	
<input type="checkbox"/> 07/24/2017	Mike Ross	SO026	LP for 2017-2018 2	Partial Redeem	0.00	178.00	Sale Order	
<input type="checkbox"/> 07/24/2017	Mike Ross		LP for 2017-2018 2	Partial Redeem	0.00	20.00	SignUp	
▼ Point Deducted (3)							-120.00	198.00
<input type="checkbox"/> 07/24/2017	Mike Ross	SO028	LP for 2017-2018 2	One Time Redeem	-50.00	128.00	Sale Order	
<input type="checkbox"/> 07/24/2017	Mike Ross	SO027	LP for 2017-2018 2	Partial Redeem	-50.00	50.00	Sale Order	
<input type="checkbox"/> 07/24/2017	Mike Ross	SO026	LP for 2017-2018 2	Partial Redeem	-20.00	20.00	Sale Order	

View Loyalty Points in Sales Order& Quotations

- You can also view the Loyalty Points Information in Sales Orders and Quotations along with the other details.


Great Product for Great People

Your Company
 1725 Slough Ave.
 Scranton 18540
 Pennsylvania
 India

Invoicing and shipping address:
 Mike Ross
 C -330 Manhattan Towers
 Ahmedabad 656
 Andaman and Nicobar
 India
 +98451218100

Mike Ross
 C -330 Manhattan Towers
 Ahmedabad 656
 Andaman and Nicobar
 India

Order # SO012

Date Ordered:
 07/04/2017 09:00:06

Description	Quantity	Unit Price	Taxes	Price
[E-COM08] Apple In-Ear Headphones Frequency: 5Hz to 21kHz Impedance: 23 ohms Sensitivity: 109 dB SPL/mW Drivers: two-way balanced armature Cable length: 1065 mm Weight: 10.2 grams	11.000	79.00		869.00 ₹
Loyalty Reward Enjoy benefits from Loyalty.	1.000	-10.00		-10.00 ₹
Total Without Taxes				859.00 ₹
Total				859.00 ₹

Loyalty Information	Total
Loyalty Points: (Got From this order.)	86.00 ₹
Loyalty Balance:	86.00 ₹

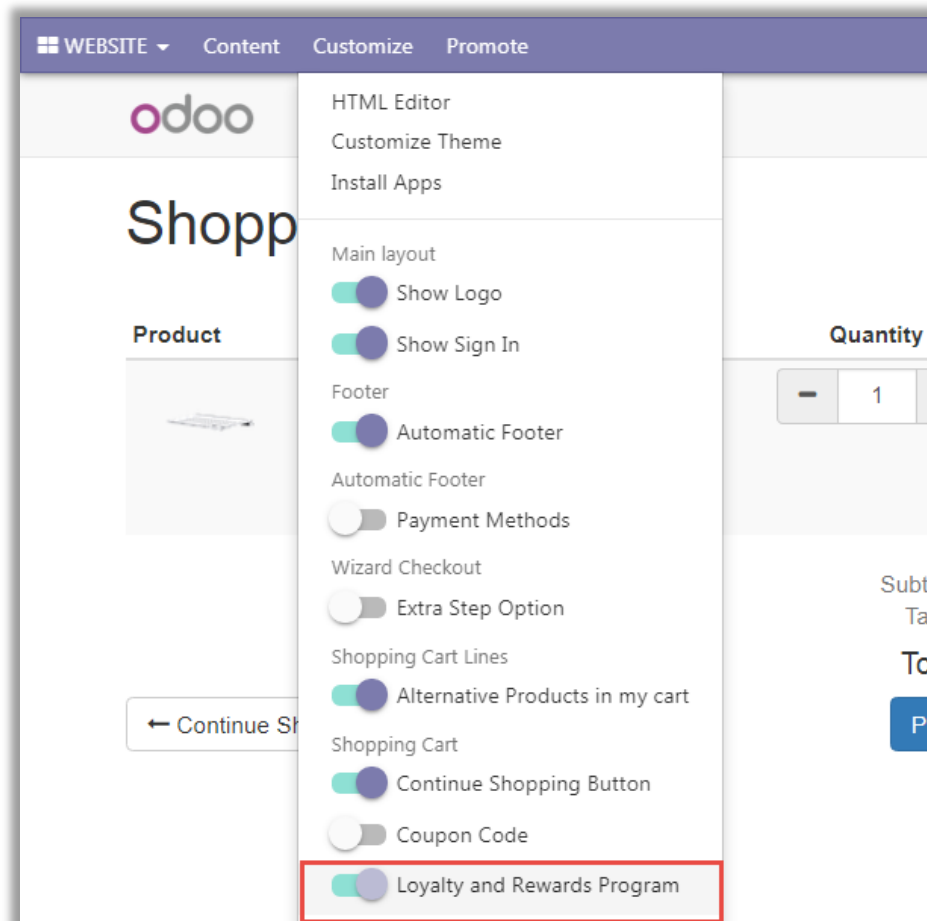
Payment Information	Total
Payment Method: Wire Transfer	859.00 ₹
Payment Status: Pending... The order will be validated after the payment.	

Phone: +1 555 123 8069 • Email: info@yourcompany.example.com • Website: http://www.example.com

Page: 1 / 1

Enable / Disable Loyalty and Rewards Program

- To Enable / Disable the Loyalty and Rewards Program for the store admin should navigate to **Website -> Customize**.
- Thereafter enable the **'Loyalty and Rewards Program'** from Shopping Cart section.




View Loyalty Rewards in Shopping Cart

- You can also view the Loyalty Rewards in your shopping cart along with the rules for redemption of points.

Shopping Cart

[Review Order](#) [Shipping & Billing](#) [Payment](#) [Confirmation](#)

Product	Quantity	Price
 Apple Wireless Keyboard The sleek aluminium Apple Wireless Keyboard. Remove	<div>- 1 +</div>	47.00

[← Continue Shopping](#)

Subtotal: 47.00

Taxes: 0.00

Total: 47.00

[Process Checkout →](#)

Policies

☒ 30-days money-back guarantee

☒ Invoice sent by e-Mail

Secure Payment

☒ 256 bit encryption

☒ Processed by Ogone

Loyalty Rewards

☒ You have **150.0** Reward Points available .

☒ Active **Redemption Policy** :-
Partial Redemption .

☒ You will earn 0.0 points.

[Redeem](#)

[Rules!](#)

Contact Us

We simplify your business, offer unique business solution in digital web and IT landscapes.



Live Chat

- Get instant support with our Live Chat.
- Visit our product page at: <https://www.appjetty.com/odoo-loyalty-rewards-program.htm> and click on the Live Chat button for instant support.



Tickets

- Raise tickets for your specific question!
- Send an email to support@appjetty.com or you can login to your account @ www.appjetty.com and click on My Support Tickets on your account dashboard, to get answers to your specific questions.

Customization:

If you would like to customize or discuss about additional feature for **Loyalty and Rewards Program**, please write to sales@appjetty.com