appjetty
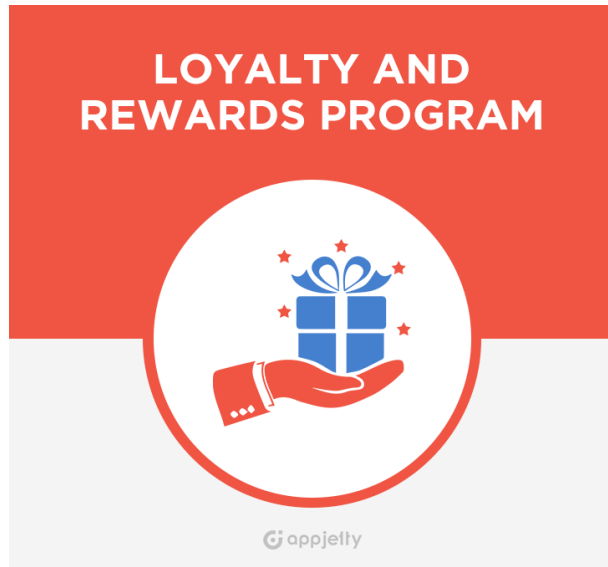
USER MANUAL

LOYALTY AND REWARDS PROGRAM

Loyalty and Rewards Program

Version: 1.0

Compatibility:

Odoo 10.x

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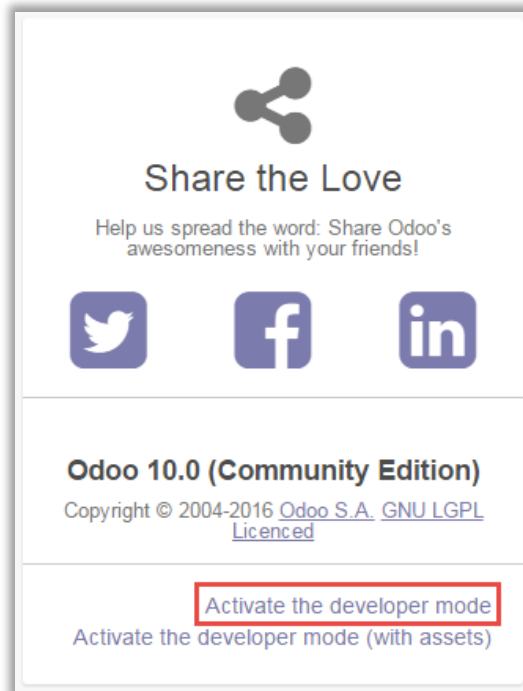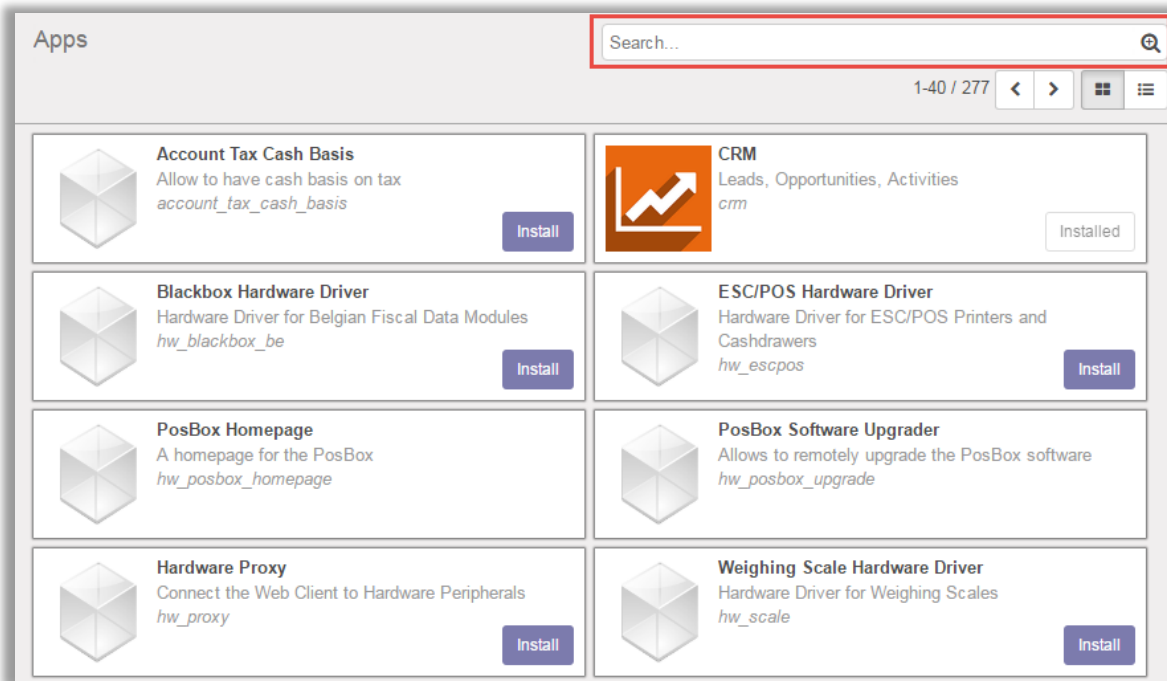
- Go to Apps/Update Module List.
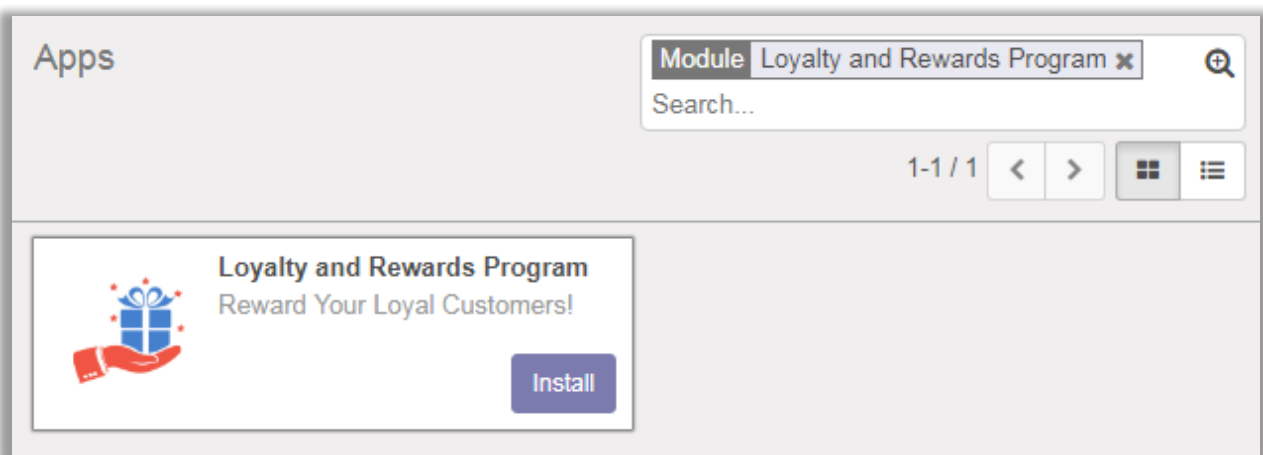
    - Click on **'Update'** button.
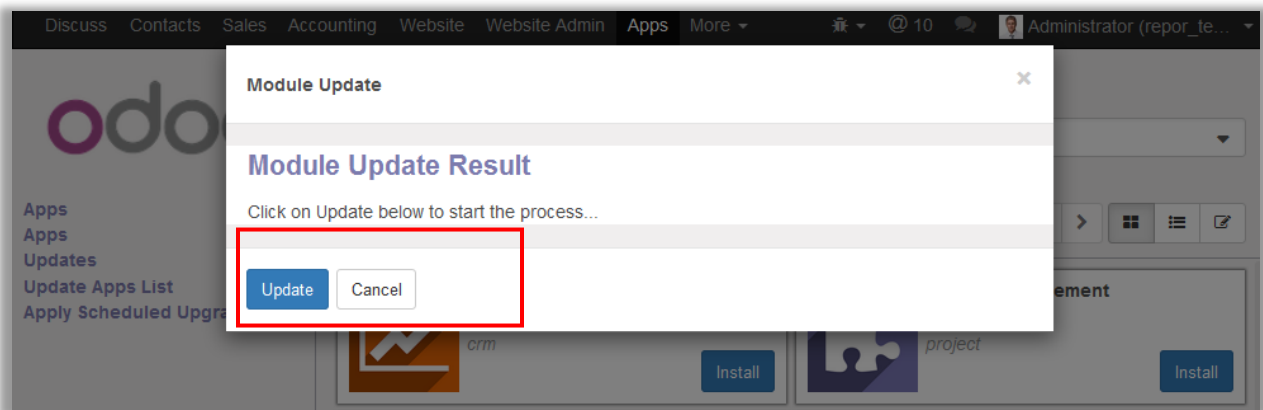
- Go to Apps/Apps Modules

    - 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.

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.

- 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:

    ▪ **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.

    ▪ **Maximum Redeem Points Per Sale Order:** Enter the minimum amount that can be redeemed per sale order.

- **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	Search...
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	Redeemed Date	Customer	Sale Order	Loyalty Program	Redeem Point Policy	Discount Amount	Points Processed	Description
☐	07/25/2017	YourCompany, Administrator	SO025	LP for 2017-2018 2	Partial Redeem	0.00	113.00	Sale Order
☐	07/24/2017	Jim Bond	SO028	LP for 2017-2018 2	One Time Redeem	0.00	175.00	Sale Order
☐	07/24/2017	Mark Harvey	SO026	LP for 2017-2018 2	Partial Redeem	0.00	178.00	Sale Order
☐	07/24/2017	Jim Bond		LP for 2017-2018 2	Partial Redeem	0.00	20.00	SignUp
☐	07/04/2017	YourCompany, Administrator	SO018	LP for 2017-2018	One Time Redeem	0.00	87.00	Sale Order
☐	07/04/2017	YourCompany, Administrator	SO016	LP for 2017-2018	One Time Redeem	0.00	180.00	Sale Order
☐	07/04/2017	YourCompany, Administrator	SO015	LP for 2017-2018	Partial Redeem	0.00	180.00	Sale Order
☐	07/04/2017	Jim Bond	SO012	LP for 2017-2018	Partial Redeem	0.00	86.00	Sale Order
☐	07/04/2017	Mark Harvey		LP for 2017-2018	Partial Redeem	0.00	10.00	SignUp
☐	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.

	Redeemed Date	Customer	Sale Order	Loyalty Program	Redeem Point Policy	Discount Amount	Points Processed	Description
☐	07/25/2017	YourCompany, Administrator	SO025	LP for 2017-2018 2	Partial Redeem	-50.00	50.00	Sale Order
☐	07/24/2017	Mark Specter	SO028	LP for 2017-2018 2	One Time Redeem	-50.00	128.00	Sale Order
☐	07/24/2017	Mike Ross	SO027	LP for 2017-2018 2	Partial Redeem	-50.00	50.00	Sale Order
☐	07/24/2017	Jim Frank	SO026	LP for 2017-2018 2	Partial Redeem	-20.00	20.00	Sale Order
☐	07/04/2017	Mary Jane	SO017	LP for 2017-2018	One Time Redeem	-50.00	180.00	Sale Order
☐	07/04/2017	Jess Ria	SO014	LP for 2017-2018	Partial Redeem	-50.00	80.00	Sale Order
☐	07/04/2017	YourCompany, Administrator	SO013	LP for 2017-2018	Partial Redeem	-50.00	50.00	Sale Order

Spent History   Search...   1-7 / 7

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.

- To view the complete Loyalty History click on **'Loyalty History'** button.

- 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.

		Redeemed Date	Customer	Sale Order	Loyalty Program	Redeem Point Policy	Discount Amount	Points Processed	Description
▼ Points Added (3)							0.00	373.00	
	☐	07/24/2017	Mike Ross	SO028	LP for 2017-2018 2	One Time Redeem	0.00	175.00	Sale Order
	☐	07/24/2017	Mike Ross	SO026	LP for 2017-2018 2	Partial Redeem	0.00	178.00	Sale Order
	☐	07/24/2017	Mike Ross		LP for 2017-2018 2	Partial Redeem	0.00	20.00	SignUp
▼ Point Deducted (3)							-120.00	198.00	
	☐	07/24/2017	Mike Ross	SO028	LP for 2017-2018 2	One Time Redeem	-50.00	128.00	Sale Order
	☐	07/24/2017	Mike Ross	SO027	LP for 2017-2018 2	Partial Redeem	-50.00	50.00	Sale Order
	☐	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.

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.
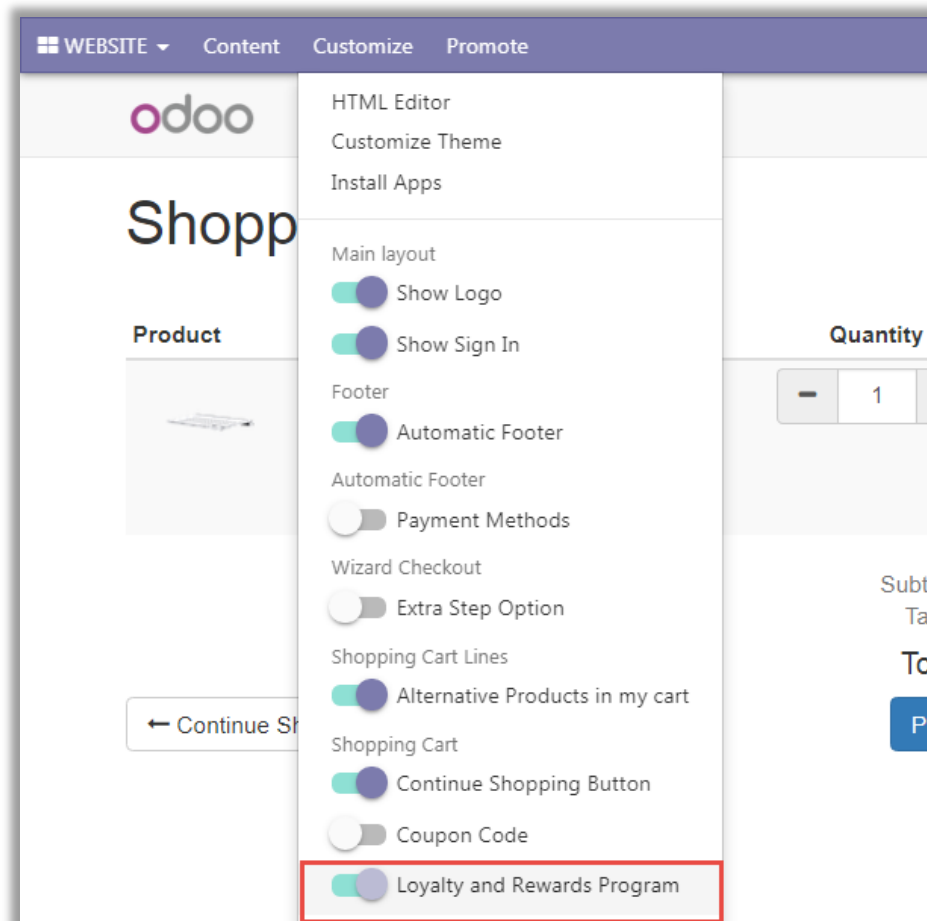
View Loyalty Rewards in Shopping Cart

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

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