



Loyalty Booster Magento Extension User Guide

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1. EXTENSION DESCRIPTION

[Magento Loyalty Booster Extension](#) allows customers to make 'free of charge' purchases using Internal Credits (reward points) and helps store admins effectively manage customers credit funds.

Managing Internal Credit - Check customer's internal balance, add/deduct internal credit funds, sort all balances by the available amount, manage permissions for your staff and grant specific customer groups with the permission to use reward points.

Recharge Codes - Allow customers to refill loyalty credits on your Magento store using Recharge Codes. The store admin can create, send and import the codes.

Credit Rules - Create rules based on specific conditions or/and customer's actions (like birthdays, reviewing a product, signing up for a newsletter, etc.).

Expiration Period - Limit a period when customers can use their credits.

Credit Reports - Modify a customer's balance, apply credit rules, use recharge codes, share credits between customers, cancel/ refund orders paid with internal credits and more.

Partial Payment - The extension automatically detects the credit amount and gives the possibility to use credits only OR credits + another payment method.

Share Credits - Customers can create the codes for a specific amount of credits and send these codes to anyone.

2. EXTENSION INSTALLATION

To install the extension, please follow the steps below:

1. Disable the *Compilation Mode* (if enabled)
2. Log out from *Magento Admin Panel* (if logged in)
3. Unpack the contents of the *Extension folder* (depending on your current Magento version) from the package file purchased from Mageworx to your *Magento root folder*
4. Log into *Magento Admin Panel*
5. Go to System – Cache Management section, choose *Refresh* under the *All Cache* drop-down menu and press the *Save Cache Settings* (if Cache Control is enabled in Magento)
6. Enable the *Compilation Mode* back (if necessary)
7. Go to System – Configuration – MageWorx tab – Extensions & Support section. If you see Customer Credit in the list of installed MageWorx extensions, the installation is done.

Installation to a custom template/theme

If you use a custom template/theme you need to copy the extension's layouts, templates and skin files to the folder with your custom template/theme.

Copy the following folders:

```
app/design/frontend/default/default/layout/  
app/design/frontend/default/default/template/  
skin/frontend/default/default/css  
skin/frontend/default/default/images/
```

Copy them to:

```
app/design/frontend/<your-template>/<your-theme>/layout/  
app/design/frontend<your-template>/<your-theme>/template/  
skin/frontend/<your-template>/<your-theme>/css/  
skin/frontend/<your-template>/<your-theme>/images/
```

Note! All these folders already exist in your store and you have to merge them with the folders on your server. Do not overwrite them.

3. GENERAL SETTINGS

To configure the extension, log into Magento Admin panel and go to System – Configuration – MAGEWORX – Customers – Customer Credit (General Settings).

Here is what each of the setting does:

General Settings Section

- Enable Customer Credit – enables/disables internal balance for customers.
- Enable Credits Sharing – enables/disables the ability to share credits between customers.
- *Enable Partial Credit Payment* – enables/disables the possibility to use internal balance along with other payment methods.
- *Share Customer Credit* – allows customers to use their credits in one of two available options: per website and global. If ‘Per Website’ option is selected, customers will have different balance for each website.
- *Invoice Order Paid by Credit* – if enabled, orders fully paid by internal credits will be automatically invoiced.
- *Enable Credit Memo Return in Credits* – allows returning internal credits instead of funds in case of offline refunds.

General Settings	
Enable Customer Credit	Yes
Enable Credits Sharing	Yes
Enable Partial Credit Payment	Yes
Enable Custom Value Credit	Yes
▲ Allows entering a custom value of used credits during the checkout	
Share Customer Credit	Per Website
Affect Grand Total	No
▲ Reduce Grand Total when Paying with Credits	
Invoice Order Paid by Credit	Yes
Enable Credit Memo Return in Credits	Yes

- *Enable Credit Columns in ‘Order View’ Tabs* – enables/disables the ability to add credit columns in ‘Order View’ tabs.

- *Enable Customer Balance Column in Customers Grid* – displays/hides ‘Customer Balance’ column (shows available balance for every customer) in the Customers grid.
- *Display Credit Block at Cart Page* – displays/hides the credit block at the cart page for customers to see their available balance and use credits directly from the cart page.
- *Display ‘My Credit’ Link in Top Menu* – shows ‘My Credit’ Link in the top menu.
- *Static Block for ‘My Credit’ Section* – assigns a selected static block to be shown at ‘My Credit’ page in a customer’s account.
- *Apply Credit to* – allows applying credits to an order’s subtotal and/or shipping & handling and/or tax.
- *Credit Product* – allows selecting any virtual product, which will be used for purchasing credits using other payment methods.

Enable Credit Columns in "Order View" Tabs	Yes
Enable Customer Balance Column in Customers Grid	Yes
Display Credit Block at Cart Page	Yes
Display "My Credit" Link in Top Menu	No
Static Block for "My Credit" Section	–Please Select–
Apply Credit to	<ul style="list-style-type: none"> Subtotal Shipping & Handling Tax
Credit Product	Credit Units

[Edit Product](#)

- *Default Qty of Credit Units* – the number of Credit Units, which customers will see in ‘My Credit’ section by default.
- *Assign to Customer Groups* – assigns customer credit functionality to the selected customer groups. If not selected, customers won’t be able to use internal credits.
- *Minimal Order Amount* – sets the minimum amount accepted by a store owner.
- *Sync Store Credits Balances* – allows you to copy default credits or add Magento credits to the extension balances.

Default Qty of Credit Units	<input type="text" value="100"/>
Credit Exchange Rate	<input type="text" value="2"/> <small>▲ Enter amount of credits equal to 1 base currency</small>
Assign to Customer Groups	<ul style="list-style-type: none"> General Wholesale Retailer QAAAA
Minimal Order Amount	<input type="text" value="0"/>
Sync Store Credits Balances	<input type="text" value="Append"/> ▼
	<input type="button" value="Sync Credits"/> <small>▲ Magento EE only</small>
Product View Notice	<input type="text" value="This product can be purchased by credits"/> <small>▲ This message will be shown on products that can be purchased for credits (if credit rules of the "Apply" type are added)</small>

Expiration Date Settings Section

- *Enable Expiration Date* – enables/disables expiration period for customer credits.
- *Default Expiration Period (days)* – specifies an expiration period in days.
- *Update Current Expiration Dates if Default Expiration Period is Changed* – determines whether current customers’ balances will be updated if the admin changes a default period or not.
- *Notify Customers about Expiration Date* – specifies a period in days when customers should be notified about the expiration date.

Expiration Date Settings

Enable Expiration Date	<input type="text" value="No"/> ▼
Default Expiration Period (days)	<input type="text" value="5"/>
Update Current Expiration Dates if Default Expiration Period is changed	<input type="text" value="Yes"/> ▼
Notify Customers about Expiration Date	<input type="text" value="2"/> <small>▲ Day(s) left</small>

Recharge Code Settings Section

- *Enable Recharge Codes* – enables/disables recharge codes for customer credits.

- *Code Length* – determines a number of characters in a Recharge Code.
- *Character Group Length* – specifies a number of characters in a group of characters separated by the Character Group Separator.
- *Character Group Separator* – determines the symbol for a group separator.
- *Code Format* – characters used to generate Recharge Codes.

Recharge Codes Settings

Enable Recharge Codes: Yes
▲ Customer Credit should be enabled

Code Length: 16
▲ excluding separators, prefix and suffix

Character Group Length: 4
▲ groups not used if empty

Character Group Separator: -
▲ groups not used if empty

Code Format: Numeric

4. RECHARGE CODES

Recharge codes are used to refill customers’ balances. The store admin can create and send the codes to customers, which they can apply in their accounts on the site.

To see the list of codes, go to [Promotions – Recharge Codes](#):

Magento Admin Panel | Logged in as CustomerCredit | Sunday, November 8, 2015 | [Try Magento Go for Free](#) | [Log Out](#)

Dashboard | Sales | Catalog | Customers | **Promotions** | Newsletter | CMS | Reports | System | [Get help for this page](#)

Manage Recharge Codes | [Generate New Recharge Codes](#) | [Import Codes](#) | [Export Codes](#)

Page 1 of 1 pages | View 20 per page | Total 1 records found | [Reset Filter](#) | [Search](#)

ID	Code	Value	Website	Date Start	Date Expire	Last Used	Is Active	Is Onetime	Owner ID
2	6620-5480-6001-2463	100	Main Website	Jul 26, 2013	--	-	Yes	Yes	1

To generate a set of Recharge Codes, go to [Promotions - Recharge Codes](#) section and hit the *Generate New Recharge Codes* button. Under the ‘Settings’ tab you can modify or leave the default settings.

Settings

Enable Recharge Codes	<div style="border: 1px solid #ccc; padding: 2px; background-color: #f0f0f0;">Yes</div> <input checked="" type="checkbox"/> Use Config Settings <small>▲ Customer Credit should be enabled</small>
Code Length	<div style="border: 1px solid #ccc; padding: 2px;">16</div> <input checked="" type="checkbox"/> Use Config Settings <small>▲ excluding separators, prefix and suffix</small>
Character Group Length	<div style="border: 1px solid #ccc; padding: 2px;">4</div> <input checked="" type="checkbox"/> Use Config Settings <small>▲ groups not used if empty</small>
Character Group Separator	<div style="border: 1px solid #ccc; padding: 2px;">-</div> <input checked="" type="checkbox"/> Use Config Settings <small>▲ groups not used if empty</small>
Code Format	<div style="border: 1px solid #ccc; padding: 2px; background-color: #f0f0f0;">Numeric</div> <input checked="" type="checkbox"/> Use Config Settings
Qty *	<div style="border: 1px solid #ccc; padding: 2px;">1</div>

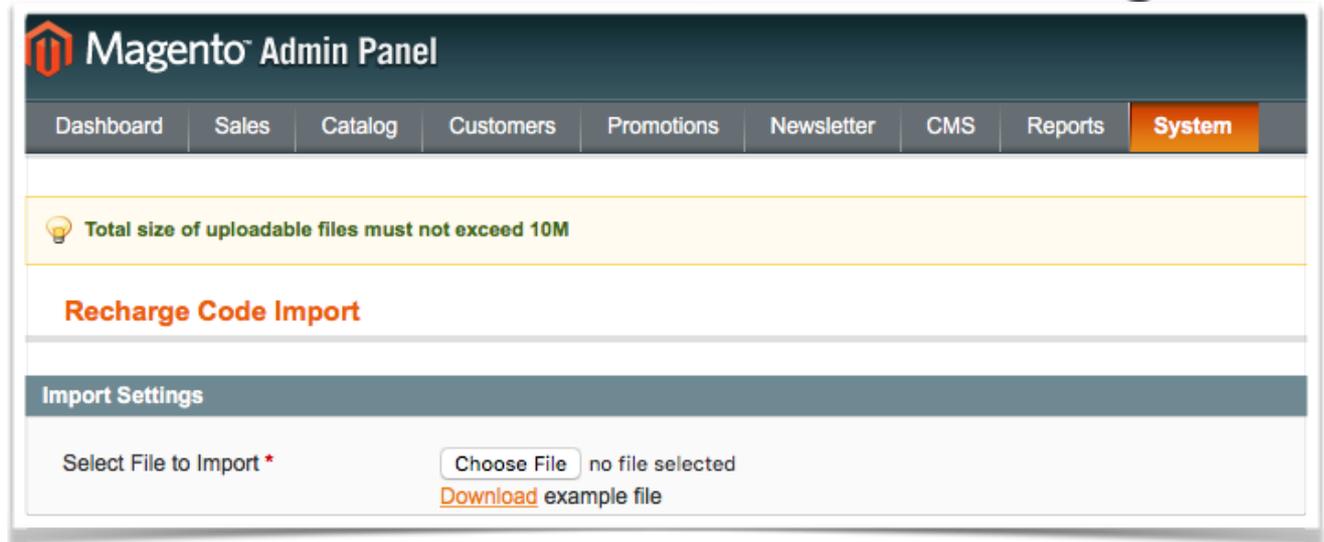
Under the 'Details' tab you can enter the 'Credit Value', choose website, select activity status and period.

Details

Credit Value *	<div style="border: 1px solid #ccc; height: 20px;"></div>
Website *	<div style="border: 1px solid #ccc; padding: 2px; background-color: #f0f0f0;">– Please Select –</div>
Is Onetime *	<div style="border: 1px solid #ccc; padding: 2px; background-color: #f0f0f0;">No</div>
Is Active *	<div style="border: 1px solid #ccc; padding: 2px; background-color: #f0f0f0;">No</div>
From Date	<div style="border: 1px solid #ccc; padding: 2px;"></div>
To Date	<div style="border: 1px solid #ccc; padding: 2px;"></div>

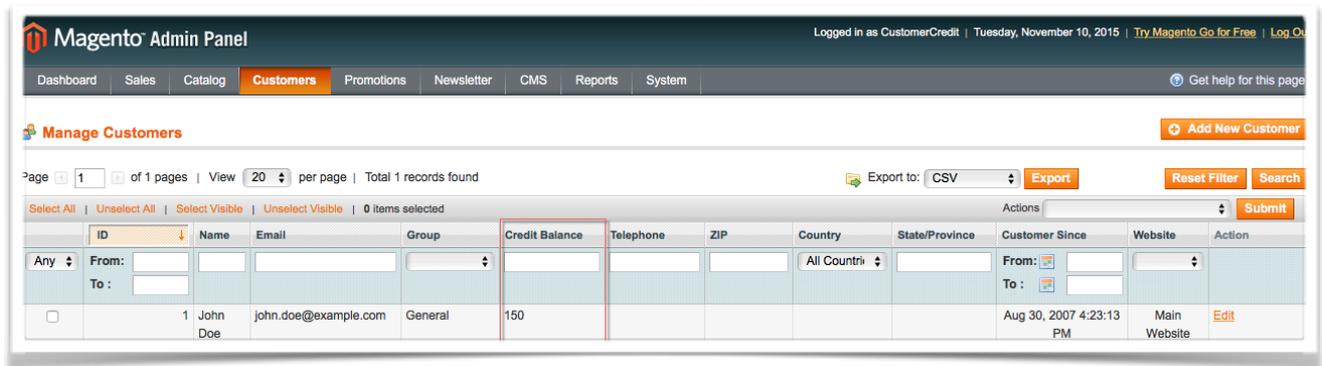
To import recharge codes, go to [Promotions - Recharge Codes](#) and click on the *Import Codes* button to upload .CSV files. If you are not sure how a .CSV file should be formatted, download a sample file on the same page:

Note! You can also import recharge codes from [System – Import/Export – Recharge Codes Import](#) section.



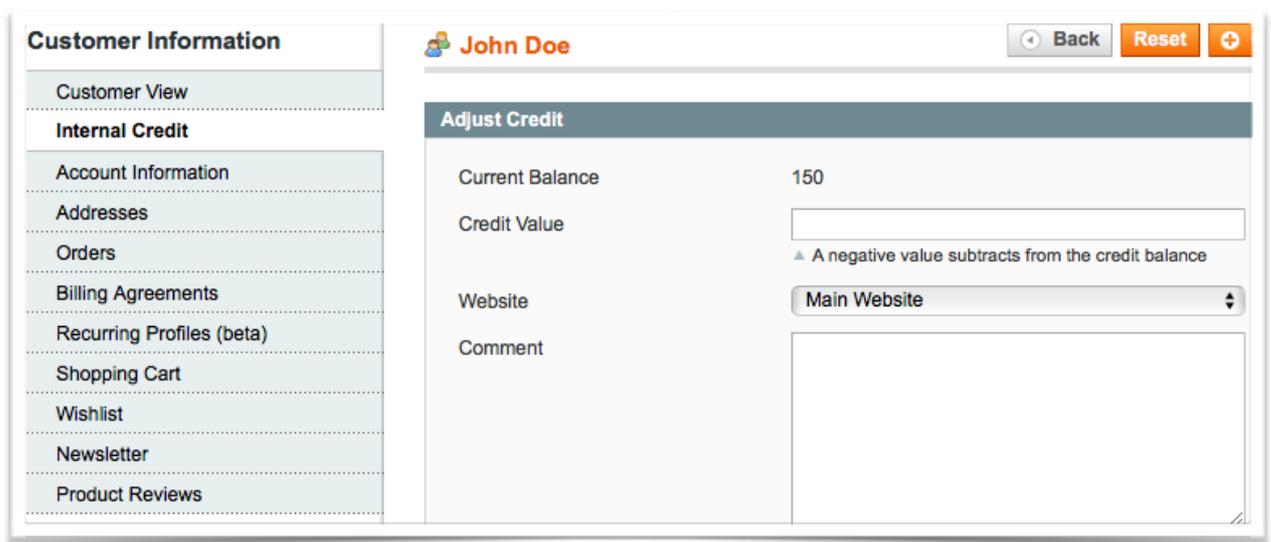
5. MANAGING INTERNAL STORE CREDITS

To check customer’s internal balance, go to Customers - Manage Customers.



Note! The Credit Balance column can be displayed (or hidden) directly in the customers’ grid. Also you can sort all credit balances by the available amount if necessary.

To add/deduct internal credit funds, choose the customer account and open the Internal Credit tab under the Customer Information section.



All the credits actions are logged for every customer in the Activity Log section:

Activity Log					
Page 1 of 2 pages View 20 per page Total 25 records found					
Credit Balance	Added/Deducted	Website	Modified On	Action	Comment
150	+50	Main Website	Nov 10, 2015 2:48:07 AM	Modified	Credit Rule "B-day Credits" In Order #100000011
100	+100	Main Website	Nov 10, 2015 2:37:47 AM	Modified	Credit Code 6620-5480-6001-2463 was removed.
0	-100	Main Website	Nov 10, 2015 2:37:36 AM	Decreased	Credit Code 6104-1289-2098-3407 was created.
100	+100	Main Website	Nov 10, 2015 2:32:04 AM	Modified	
0	-365	Main Website	Jul 22, 2015 2:39:56 AM	Used	In Order #100000010
365	+100	Main Website	Jan 9, 2015 11:20:59 AM	Modified	
265	+200	Main Website	Jan 9, 2015 10:52:27 AM	Modified	
65	+65	Main Website	Jan 9, 2015 10:40:45 AM	Canceled	Order #100000008
0	-130	Main Website	Jan 9, 2015 10:39:12 AM	Used	In Order #100000008 (\$65.00, Exchange rate is 2)
130	+100	Main Website	Sep 3, 2014 3:38:35 AM	Modified by Credit Product	Purchase of Credit Units in Order #100000007

To manage permissions for your staff (eg, forbid specific staff roles to deal with internal store funds), go to [System - Permission - Role - Role Resources](#).

Edit Role 'Customer Credit'

- Pending Reviews
- All Reviews
- Tags
 - Pending Tags
 - All Tags
- Google Sitemap
- Search Terms
- URL Rewrite Management
- Manage Categories
- Manage Products
- Update Attributes
- Attributes
 - Manage Attribute Sets
 - Manage Attributes
- Customers
 - Manage Customers
 - Customer Groups
 - Online Customers
 - Customer Internal Credit

6. ORDER VIEW

Internal Credit amount is deducted from the order total decreasing the Grant Total. Go to [Sales - Orders - choose an order - Order View](#) tab to see the examples of Internal Credits:

Payment Information & Order Total

Payment Information

Internal Credit + Check / Money order
Order was placed using USD

Order Totals

	Subtotal	\$599.98
	Shipping & Handling	\$10.00
	Internal Credit	-\$500.00
	Grand Total	\$109.98
	Total Paid	\$0.00
	Total Refunded	\$0.00
	Total Due	\$109.98

To use credits when processing offline refunds, just specify the amount of credits you need to return (go to Sales - Orders - choose an order and hit the *Credit Memo* button):

Refund Totals

	Subtotal	\$599.98
	Refund Shipping	<input type="text" value="10"/>
	Adjustment Refund	<input type="text" value="0"/>
	Adjustment Fee	<input type="text" value="0"/>
	Credit Memo Return in Credits	<input type="text" value="500"/>
	Grand Total	\$109.98

Append Comments
 Email Copy of Credit Memo
 Refund Offline

7. CREDIT RULES

To create rules based on specific conditions/actions, go to Promotions – Credit Rules page:

Manage Credit Rules [Add New Credit Rule](#)

Page 1 of 1 pages | View 20 per page | Total 1 records found [Reset Filter](#) [Search](#)

ID	Rule Name	Credit Amount	Rule Type	Website(s)	Is Active	Used	Created At
3	Purchase by credits		Apply Credits	Main Website	Yes	0	Jan 9, 2015
2	B-day Credits	50	Give Credits	Main Website	Yes	3 (View)	Jan 23, 2014
1	First Order	100	Give Credits	Main Website	Yes	0	

To create a new rule, hit the *Add new Credit Rule* button. 3 tabs are available under the Customer Credit Rules section. Here is what each tab setting means:

Rule Information tab:

- *Rule Name* – the name of the rule. It will be visible in the back-end and on the front-end in the customer’s log.
- *Description* – the description of the rule. It will be visible only in the back-end.
- *Status* – the status of the rule (active/inactive).
- *Type* – the type of a rule.

Apply Credits setting allows applying internal credits to specific products. For example, you can setup a rule, when customers can purchase products from a specific category and won’t be able to purchase other products for the internal credits.

Give Credits setting allows adding credits to customers based on specific conditions.

- *Websites* – the website where the rule should be applied.
- *Customer Groups* – allows applying the rule to the specific customer groups only.

The screenshot shows a 'General Information' tab with the following fields and values:

- Rule Name ***: [Empty text box]
- Description**: [Empty text area]
- Status ***: Inactive
- Type ***: Apply Credits
- Websites ***: Main Website
- Customer Groups ***: General, Wholesale, Retailer, QAAAA

Conditions tab:

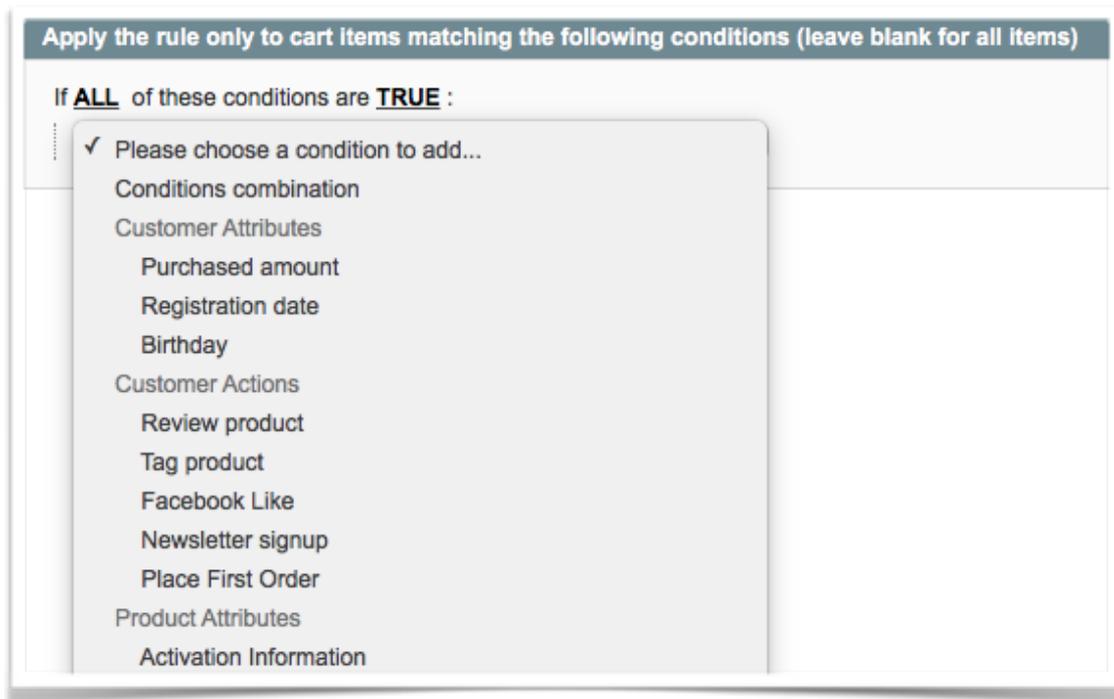
3 types of conditions are available here:

1. *Customer Attributes* (Purchased Amount, Registration Date and Customer’s Birthday)
2. *Customer Actions* (Review product, Tag product, Signup for Newsletter)
3. *Product Attributes* (all available attributes in your Magento store).

For example, *Customer Attributes* conditions allow you to create the rules to give credits to every new customer or when customers get certain amount purchased (it calculates the sum of all customer’s orders).

Customer Actions conditions allow adding credits for specific amount of reviews, tags or when a customer signups for a newsletter. Thus, you will be able to reward customers for their activities.

Product Attributes conditions allow giving credits for purchases of specific products only. Thus, you can motivate your customers to order appropriate products by giving credits for them.



Actions tab:

Note! Actions section is applicable when 'Give Credits' type in the Rule Information section is selected.



- *One-time* - the rule will be applied only once per customer. For example, a customer will receive \$100 in credits only for one purchase.

If *No* option is selected the rule will be applied an unlimited number of times per customer. For example, you create a rule for a Nokia cell phone and choose 'No' for a 'One-time' setting. Every time a customer purchases this product, he will receive the credit.

Note! With enabled One-time option, a customer will receive the credit only after the 1st purchase. All other purchases of this product will be ignored.

Update prices using the following information

One-time	<input type="text" value="No"/>
Qty Dependent	<input type="text" value="No"/>
Credit Amount *	<input type="text"/>

- *Qty dependent* - if you create a rule to reward customers for purchasing a specific product, then bonus credits can be multiplied to the ordered quantity of these products.

For example, you create a rule to give \$100 for a cell phone purchase. If a customer purchases 3 cell phones, he will get \$300 credits. This setting can be enabled or disabled.

- *Credit Amount* - supports the % symbol. To reward customers with a % from an order's total, put the % to the credit amount, e.g. 10%.

The system will calculate 10% from an order and refill a customer's balance with the correct amount once the order is completed.

Note! Customers receive credits once the order is completed.

8. IMPORT/EXPORT CREDITS

To Export customer credits details in a .CSV file, go to System – Import/Export – Dataflow Profiles – Export Customers profile – Run this profile. Open the results in a .CSV file. You will see a “*credit_balance*” column.

To Import customer credits details, create a .CSV file and upload it here:

System – Import/Export – Dataflow Profiles – Import Customers profile – Upload File tab – select a file and upload it – Run profile from the 'Run Profile' tab.

You can fill the “*credit_balance*” column in the following rules:

- *credit_balance* = 100 – it updates the customer's balance with a “100” value;
- *credit_balance* = 100+ - it adds 100 to the current customer's balance;
- *credit_balance* = 100- - it deducts 100 from the current customer's balance.

9. EXPIRATION PERIOD FOR CREDITS

To limit a period when customers can use their credits, go to System – Configuration – MAGEWORX – Customer Credit – Expiration Date and enable the setting 'Enable Expiration Date':

Expiration Date Settings

Enable Expiration Date	<input type="text" value="Yes"/>
Default Expiration Period (days)	<input type="text" value="5"/>
Update Current Expiration Dates if Default Expiration Period is changed	<input type="text" value="Yes"/>
Notify Customers about Expiration Date	<input type="text" value="2"/> <small>▲ Day(s) left</small>

Note!
you

Once

enabled the setting, it won't add the expiration period to all current balances. You need to setup a default expiration period in the *Default Expiration Period* setting.

When the expiration period is set, customers and store admin will see the number of days left for the credits to be expired:

Dashboard
Sales
Catalog
Customers
Promotions
Newsletter
CMS
Reports
System

Customer Information

- Customer View
- Internal Credit**
- Account Information
- Addresses
- Orders
- Billing Agreements
- Recurring Profiles (beta)
- Shopping Cart
- Wishlist
- Newsletter

john doe
Back Reset

Adjust Credit

Current Balance	165 (Expire in 5 day(s))
Expiration Date	<input type="text" value="11/16/15"/> <small>▲ Change date to this customer</small>
Credit Value	<input type="text"/>
Website	<input type="text" value="Main Website"/>
Comment	<input type="text"/>

On the front-end customers will see:

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 Credit

[About Us](#)
[Customer Service](#)
[Privacy Policy](#)

Your current credit balance: **165 credits** (\$82.50) (Expire in 5 day(s))

SHARING CODE

Enter sharing code sent by a friend to topup your store credit. You can use this c process

Submit Code

Specify the number of days (by default it's set to 2 days), when customers receive a reminder about the expiration date.

Note! Email template can be easily edited in the app/locale/ folder.

10. CREDIT REPORTS

To track all actions with internal credits, go to Reports – Customer Credit:

Customer Credit Reports

Total credits in system:	1165
Total credits used:	1570
Customers with credits:	Main Website: 2 (66.67% of all customers)

Page 1 of 2 pages | View 20 per page | Total 27 records found

Export to: CSV | Export | Reset Filter | Search

Log Id	Customer Id	Customer Name	Customer Email	Customer Group	Added/Deducted	Credit Balance	Modified On	Modified By	Website	Comment	Action Type	Action
1	1	John Doe	john.doe@example.com	General	+100	100	Mar 14, 2013 7:21:31 AM				Modified	Edit
2	1	John Doe	john.doe@example.com	General	+50	150	Mar 14, 2013 7:42:32 AM				Modified	Edit
3	1	John Doe	john.doe@example.com	General	-100	50	Jul 26, 2013 1:19:25 AM			Credit Code 6620-5480-6001-2463 was created.	Decreased	Edit
4	2	john doe	john.doe@gmail.com	General	+100	100	Dec 20, 2013 3:29:39 AM	Store Admin	Main Website	Credit Rule "First Order" In Order #100000002	Modified	Edit

The report displays all the details about credit activity:

- Modifying a customer's balance by the store admin;
- Applying credit rules;
- Using of a recharge code;
- Sharing credits between customers;
- Canceling/ refunding orders paid with the internal credits;
- Credits expiring;
- # of credits in the system, total credits used and # of customers with credits.

Customer Credit Reports

Total credits in system:	1165
Total credits used:	1570
Customers with credits:	Main Website: 2 (66.67% of all customers)

Note! The report displays a staff, which modified customers' balances. So you can find all activities of a specific staff, using filter by name setting.

FRONT-END

12. MY CREDIT SECTION

Customers can refill their Credit Balance in the 'My Credit' section under 'My Account' using Recharge Codes or purchase Credit Units using other payment methods.

The following information is available for customers:

- order ID and the rule name (if applied) based on the added credits.
- when the credits were modified or deducted because of order cancellation or refund.

MY CREDIT CODES				
Code Id	Code Balance	Created On	Used On	Action
You didn't create any codes yet.				
RECENT ACTIONS View All				
Credit Balance	Added/Deducted	Modified On	Action	Comment
165	50	2015-11-11 09:30:09	Added	Customer completed rule "B-day Credits" action.
115	10	2014-05-20 09:14:46	Modified	
105	5	2014-05-20 09:14:11	Modified	
100	100	2013-12-20 11:29:39	Modified	Credit Rule "First Order" In Order #10000002

Note! To display a static block on 'My Credit' page, select an appropriate static block in the extension's settings.

My Credit

Here you see your internal balance. You can refill your balance by using recharge codes or purchasing our Credit Units.

13. PAYMENT METHODS

13.1 Cart Page

Customers can apply credits directly on the cart page. The extension adds *Payment with Credit* block with the available balance.

Note! If the customer's balance is not enough to fulfill an order, the customer will see the *Get Credit* button. It will lead to 'My Credit' section in the customer's account, where he will be able to receive credits.

Shopping Cart [Proceed to Checkout](#)

✔ Nokia 2610 Phone was added to your shopping cart.

	Product Name	Move to Wishlist	Unit Price	Qty	Subtotal	
	Nokia 2610 Phone	Edit Move	\$149.99	1	\$149.99	

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

Based on your selection, you may be interested in the following items:

[Acer Ferrari 3200 Notebook Computer PC](#)
\$1,799.99
[Add to Cart](#)
[Add to Wishlist](#)
[Add to Compare](#)

PAYMENT WITH CREDIT

Available credit amount: 165 credits (\$82.50)

[Use Credit](#)

DISCOUNT CODES

Enter your coupon code if you have one.

[Apply Coupon](#)

Subtotal \$149.99

Grand Total \$149.99

[Proceed to Checkout](#)

[Checkout with Multiple Addresses](#)

If the customer uses credits on the cart page, they will be deducted from the order total:

PAYMENT WITH CREDIT

You are using 165 your credits to pay this order.
[Don't use credit.](#) [Change](#)

ESTIMATE SHIPPING AND TAX

Enter your destination to get a shipping estimate.

Country *

Subtotal \$149.99

Internal Credit -\$82.50

Grand Total \$67.49

[Proceed to Checkout](#)

[Checkout with Multiple Addresses](#)

If the customer wants to cancel this action, he should click on the *Don't use credit* link. This will remove the applied credits from the total.

Note! The credits block on the cart page is developed the way to create minimal conflicts with custom templates and 3rd party extensions.

13.2 Checkout

Internal Credits are available as a payment method during the checkout process:

The screenshot shows a checkout form with five steps: 1 Billing Information, 2 Shipping Information, 3 Shipping Method, 4 Payment Information (highlighted), and 5 Order Review. Under the Payment Information step, there are three radio button options: 'Internal Credit (Recharge) Change' (checked), 'Check / Money order', and 'Credit Card (saved)'. The 'Internal Credit' option shows 'Using \$164.99 (329.98 credits) of \$82.50 (165 credits)'. There is a '* Required Fields' label and a 'Continue' button.

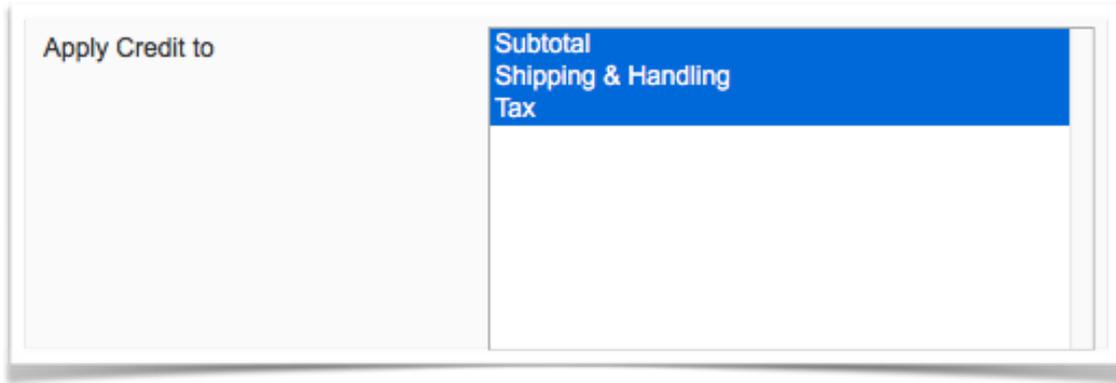
Recharge link leads to 'My Credit' section in the customer's account. If the customer has internal credits and 'Partial payments' setting is enabled, customers can use credits with other payment methods together.

The screenshot shows a configuration box with the label 'Enable Partial Credit Payment' and a dropdown menu set to 'Yes'.

The feature comes useful when the credits are not enough to pay for the whole order. In this case customers can pay the difference between an order's total and the amount of credits with other payment method.

Note! When Partial Payments setting is enabled, the extension automatically detects the credit amount and gives the possibility to use credits only OR credits + another payment method. Thus, we recommend to keep this setting enabled.

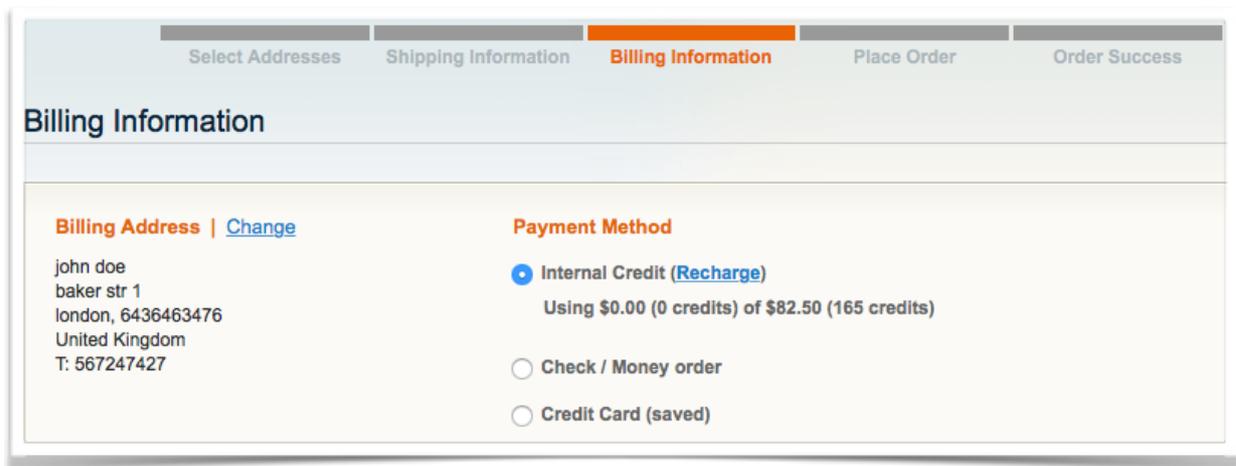
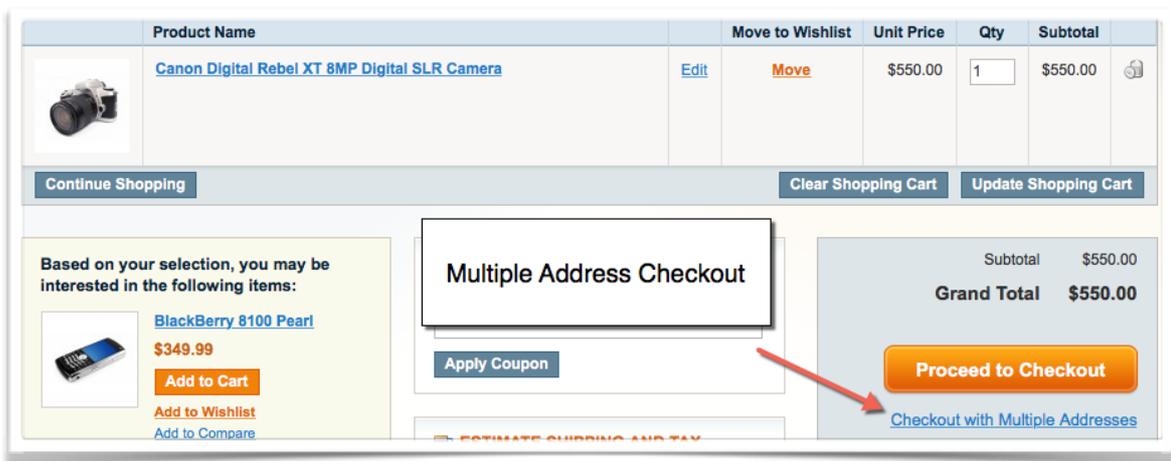
To apply credits to Subtotal/ Shipping & Handling and Tax, go to System - Configuration - MAGEWORX - Customer Credit:



The system analyses this selection and applies credits to what is chosen. For example, if you do not want to allow customers to pay shipping costs using credits, you need to remove the selection 'Shipping & Handling'. Thus, customers will need to pay for shipping using other payment method.

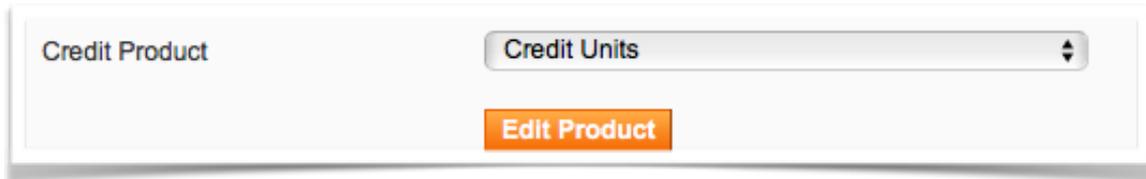
14. MULTIPLE ADDRESS CHECKOUT

Loyalty Booster supports Multiple Address checkout. Thus, customers can pay for the whole order using internal credits or use partial payment if necessary:



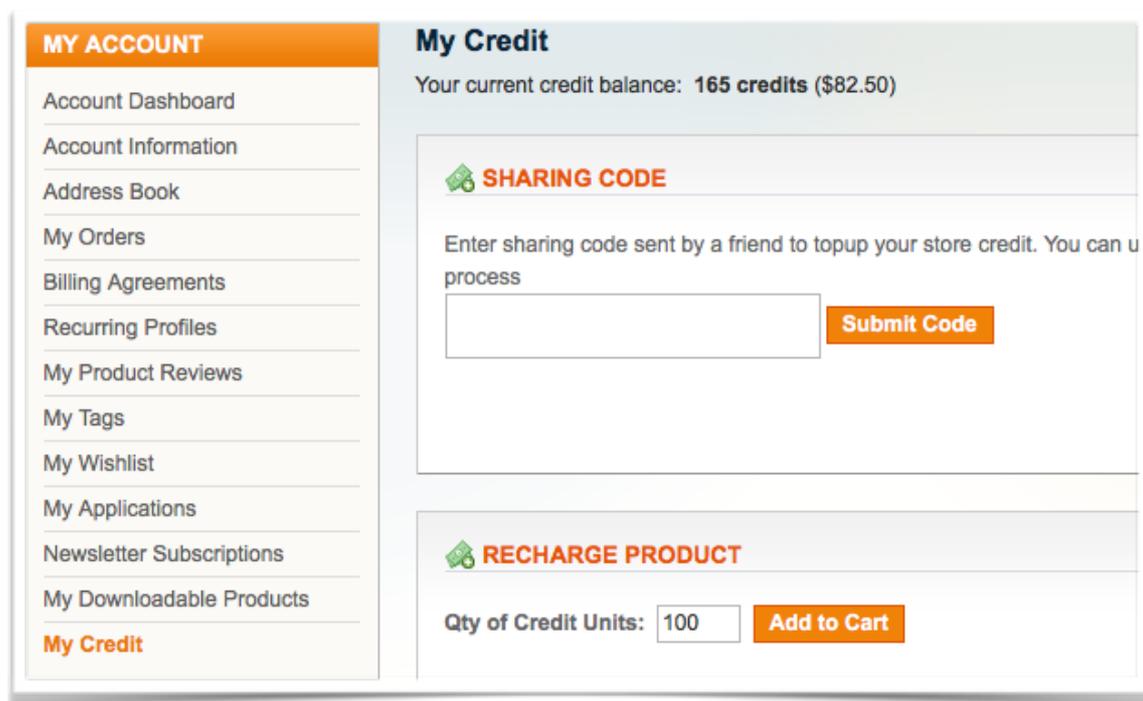
15. CREDIT UNITS

The extension allows creating virtual products that can be used to sell internal credits for real money. To create such products, use the *Credit Product* setting in the extension's settings.



The system creates a virtual product with the default settings and automatically selects it as a credit product. If you want to edit it, go to [Catalog - Manage Products - edit](#) OR hit the 'Edit' button in the extension's settings.

Customers can purchase any amount of internal credits. They should just enter necessary quantity in the 'Qty of Credit Units' field in 'My Credit' section and add this product to cart. Further checkout process will be standard as for all virtual products. Customers will receive the credits once the order is completed.



By default, Credit Unit product is created with the price \$1.00 and visibility "Not Visible Individually". You can turn this product into a promotional product, which will be visible on the front-end.

How to handle conversation between credits and your currency.

Since Credit Unit is created as a standard product, you can change the price of it. This will change the ratio between 1 credit and 1 dollar, for example. By default, the price is \$1, it means that for \$1 a customer receives 1 credit. If you change the price to \$10, a customer will receive 1 credit for \$10. Thus, playing with Credit Unit price, you change the cost of 1 credit for your customers.

16. SHARE CREDITS

To share credits, customers need to create the codes for a specific amount of credits and send these codes to anyone. A user, who received this code, can apply it in the customer's account and receive the credits to the internal balance.

GENERATE MY CODES

Want to share your store credit with friends. Simply nominate an amount to share, generate the code and send this to a friend.

Credit Value *

[Generate code](#)

MY CREDIT CODES

1 Item(s) Show per page

Code Id	Code Balance	Created On	Used On	Action
8610-2138-8969-5753	100	2015-11-12 01:03:41		Remove

1 Item(s) Show per page

RECENT ACTIONS [View All](#)

Credit Balance	Added/Deducted	Modified On	Action	Comment
65	-100	2015-11-12 09:03:41	Decreased	Credit Code 8610-2138-8969-5753 was created.
165	50	2015-11-11 18:25:38	Added	Customer completed rule "B-day Credits" action.
115	10	2014-05-20 09:14:46	Modified	

Customer, who created the code, can remove it only if this code hasn't been used yet. In this case, the credits will be returned back to the customer's account. Creating the codes, applying and removing actions are logged in the customers' logs and in the reports in the back-end.

17. MAGENTO SOAP API

Loyalty Booster supports updating customers' balances via Magento SOAP API and SOAP API v2. It's possible to generate recharge codes via API too.

MageWorx_CustomerCredit_Model_Api is the model responsible for this.

API code example:

Connect to API:

```
url = 'http://'.$_SERVER['HTTP_HOST'].'/api/v2_soap/?wsdl=1';
$client = new SoapClient($url, array('cache_wsdl' => WSDL_CACHE_NONE)); //
array('cache_wsdl' => WSDL_CACHE_NONE) - optional $session = $client->login($login,
$pass);
$client->customerCreditList($session); // getting the complete list of credits out of the base
(return array()) $client->customerCreditGetcredit($session,5); // getting credits for a
customer with ID=5 (return float())
$client->customerCreditSetcredit($session,5,10); // replace the customer's (ID=5) current
credit with value of 10 (return bool())
$client->customerCreditIncrcredit($session,5,123); // increase the customer's (ID=5)
current credit up to 123 (return bool())
$client->customerCreditDecrcredit($session,5,17); // decrease the customer's (ID=5)
current credit to 17 (return bool())
```

GOT QUESTIONS?

MageWorx offers FREE lifetime support and updates for any extension developed for Magento.

If you need support related to MageWorx extension usage, feel free submit a ticket from <http://support.mageworx.com>

GETTING HELP WITH MAGENTO

MageWorx offers outstanding services developing custom tailored solutions for Magento platform to attain your eCommerce objectives. Our professional impassioned team provides profound and custom oriented development of your project in a short timeframe. You are most welcome to contact us at sales@mageworx.com