

e-mail: <a href="mailto:sales@cart-power.com">sales@cart-power.com</a>
Website: <a href="mailto:cart-power.com">cart-power.com</a>
HelpDesk: <a href="mailto:hd.cart-power.com">hd.cart-power.com</a>
Store: <a href="mailto:store.cart-power.com">store: store.cart-power.com</a>

# Cart-Power: Loyalty Program 2.0

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1.1 Support

1.2 Compatibility

1.3 Buy Now

1.4 Release History

#### 2. Installation

3. Add-on Settings

General tab

Amount of purchases tab

**CRON tab** 

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5. The Loyalty Programs Creation

6. The User Groups Promotions Creation

General tab

**Conditions tab** 

Bonuses tab

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8.1 Manual Status Assignment

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9. CS-Cart Ultimate Features

10. Multi-Vendor Features



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#### 1. Review

With the **Loyalty Program** add-on, you are able to build a flexible loyalty system based on user groups and reward customers with various bonuses (for example, discounts). The more users will buy the bigger discount they will have. The add-on allows you to set different loyalty statuses to user groups and display graphic cards on a separate page.

Statistical information of the client's membership in the loyalty system will be displayed in his personal account.

### 1.1 Support

The add-on was developed by Cart-Power, a CS-Cart official partner and developer. If you need any assistance in installing and configuring the add-on or need its modification, please contact us through the <u>helpdesk</u> customer support system.

### 1.2 Compatibility

This add-on version 2.x is compatible with CS-Cart and Multi-Vendor version 4.10.x - 4.17.x.

For add-on version 1.0 please use this documentation.

### 1.3 Buy Now

The official add-on page:

https://store.cart-power.com/cs-cart-cumulative-discount-add-on.html

### 1.4 Release History

CS-Cart/ Multi-Vendor 4.10.1 - 4.17.2

#### **Version 2.0 from 30 May 2023**

- [+] Compatibily with Add-ons manager v2.2.
- [+] Ability to update the add-on via the CS-Cart Update Center.
- [+] 2 modes for calculating the amount of purchases: for all time and for a certain period.
- [+] CRON is used to update customer statuses in the loyalty program on schedule.
- [+] Ability to fix a certain buyer status in the loyalty program was added.
- [+] The ability to display information about the buyer's status in the "My profile" menu was added.
- [+] A link to the page with the terms of the loyalty program for unauthorized users in the "My profile" menu was added.

CS-Cart/Multi-Vendor 4.2.1 - 4.9.3

**Version 1.0 from 10 Oct 2017** 



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### 2. Installation

To simplify the installation, configuration and upgrade of our add-ons, we have developed a special service add-on - Cart-Power Add-ons Manager. <u>Download the Cart-Power: Add-ons Manager</u> and follow the <u>installation instructions</u>.

Once you install it, you will be able to:

- 1. Check the List of the Add-ons Purchased for Your Domain
- 2. Install Add-ons
- 3. Turn on/off Add-ons
- 4. Find the Add-on Docs
- 5. Set up Add-ons
- 6. Upgrade Add-ons
  - a. Via Add-on Manager
  - b. Via the Upgrade Center
  - c. Manual Upgrade (Add-on Reinstallation).
- 7. Find out Add-on Version Information
- 8. Check the Status of the Upgrade Subscription

If you have any issues installing or activating the add-on, please contact us: <a href="mailto:sales@cart-power.com">sales@cart-power.com</a>

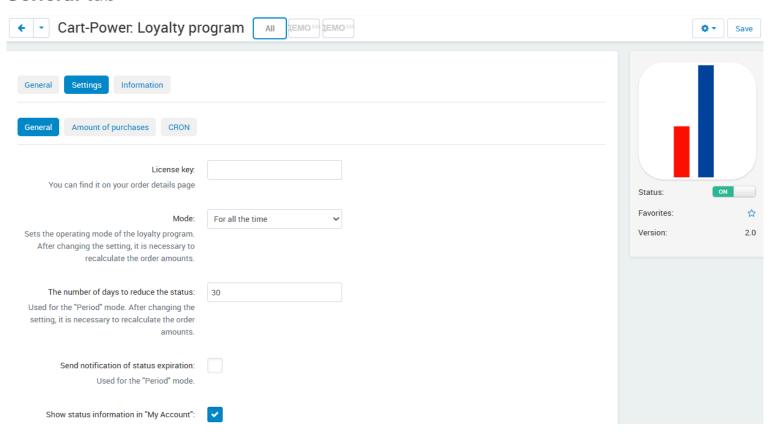


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## 3. Add-on Settings

Navigate to Add-ons > Manage Add-ons > Cart-Power: Loyalty Program > Settings:

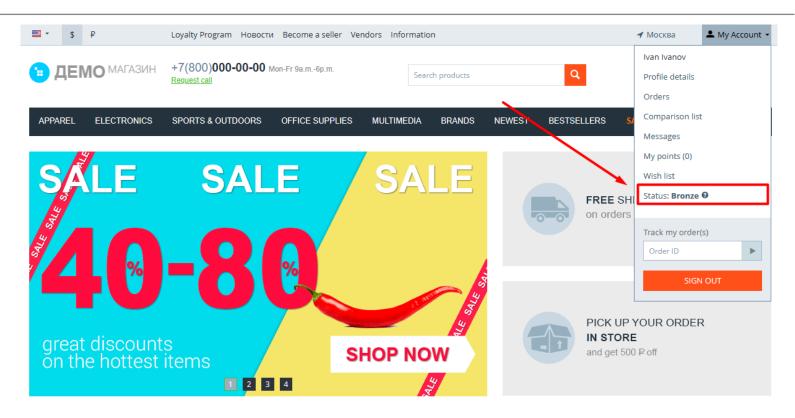
#### **General** tab



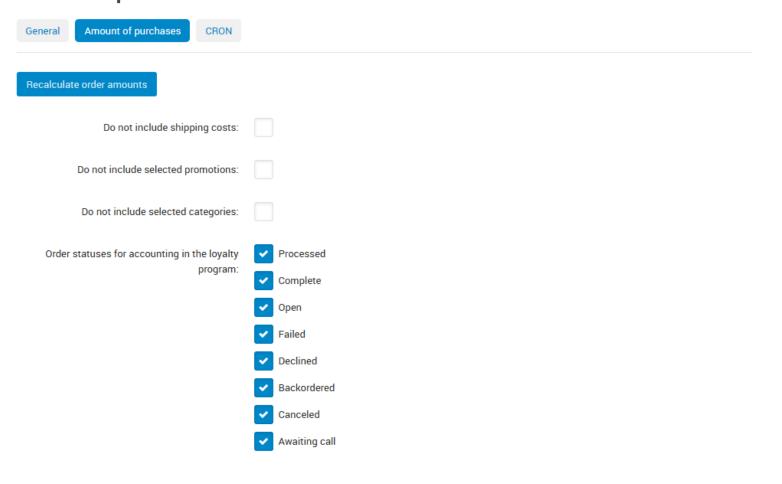
- License key field for the license number, required for the add-on activation.
- **Mode** choose one of the variants:
  - For all the time the total amount of orders is collected for the whole time, taking into account the settings of the Amount of purchases tab;
  - Period the amount of orders is collected for the period specified in the <u>Number of days</u> to reduce the status setting. If this mode is activated, then the accrual counter is reset and a timestamp is set to count the period. After the specified period, the amount of purchases is analyzed and the status of the customer is automatically changed. Automatic checking of the end of the period is performed by the CRON commands (settings in this tab).
- The number of days to reduce the status a period of time to calculate the amount of purchases and determine the status of the customer.
- **Send notification of status expiration** automatic sending of a status change notification to the customer's email.
- Show status information in "My Account" adds information about the customer's status to the "My Account" menu:



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### Amount of purchases tab

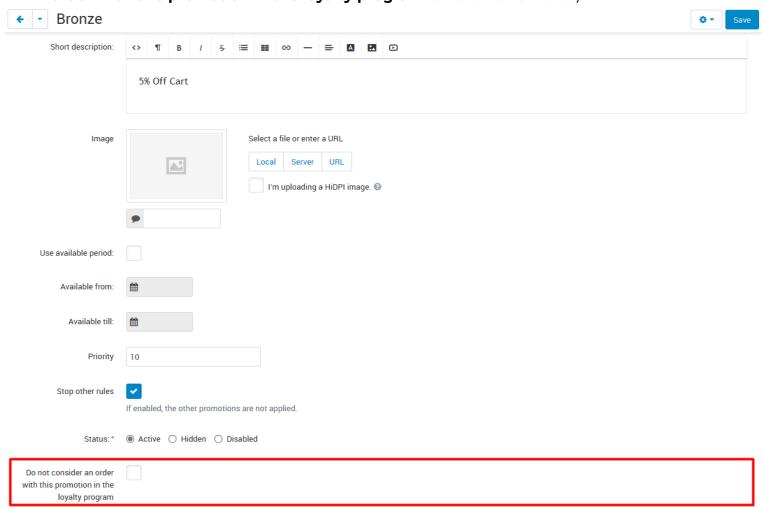




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The **Recalculate order amounts** button activates the recalculation of the amount of customer orders after making changes in the general settings.

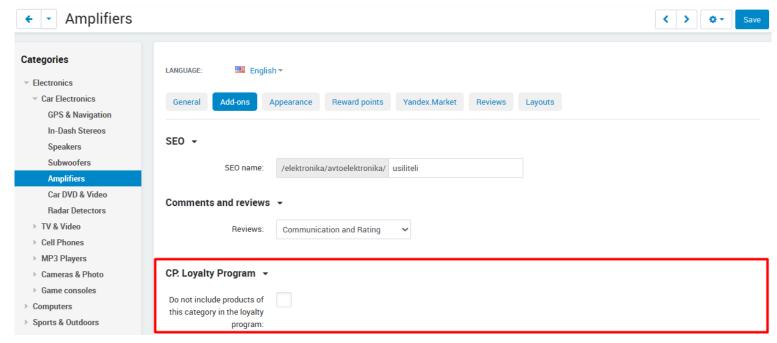
- **Do not include shipping costs** allows you to calculate the total amount of the customer orders without taking into account the shipping costs in these orders.
- **Do not include selected promotions** allows you to calculate the total amount of customer orders without taking into account certain promotions (in their settings, the **Do not consider an order with this promotion in the loyalty program** function is activated):



• **Do not include selected categories** - allows you to calculate the total amount of customer orders without taking into account certain product categories (in their settings, the **Do not include products of this category in the loyalty program** function is activated):

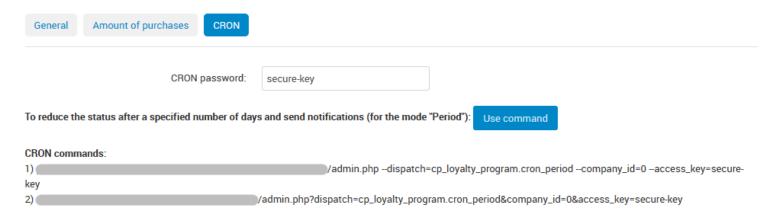


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• Order statuses for accounting in the loyalty program - only orders whose statuses are marked in this setting will be considered in the promotion.

### **CRON** tab



The **Use command** button launches a manual check for the end of the period specified by this setting.

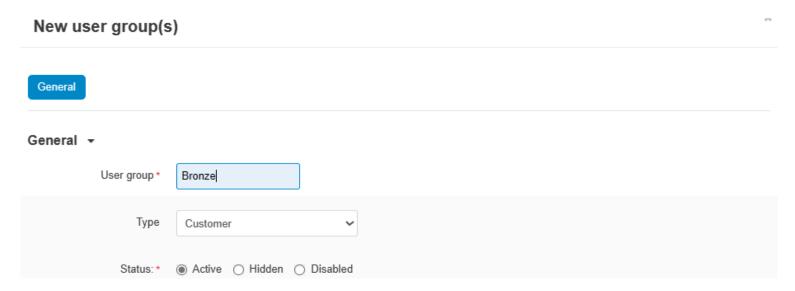
Copy the command from the add-on settings and add it to the CRON on your server (you can read more about CRON <a href="here">here</a>). If you do not know how to do this, please contact your server administrator for help or write to us at sales@cs-cart.com and our specialists will help you.



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## 4. The User Groups Creation

User groups are necessary for the discount programs creation. Open the **Customers > User groups** page, add a new user group with **Customer** type:



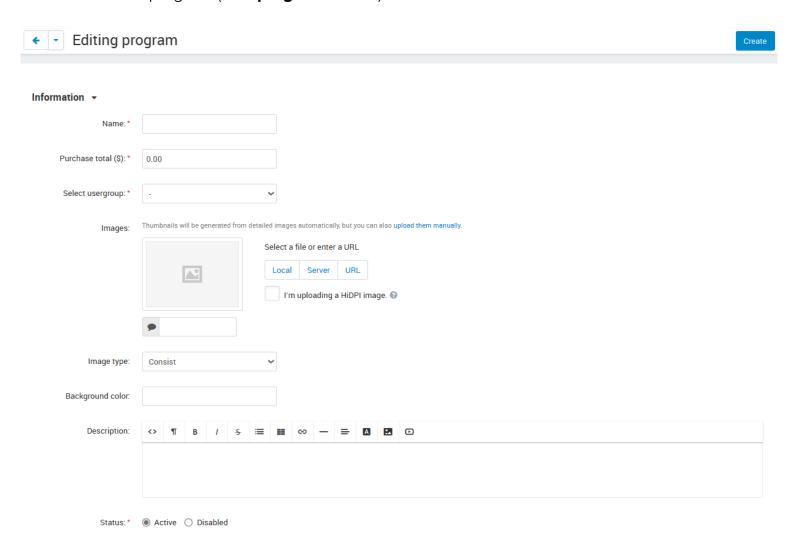
Create a separate user group for each level of the loyalty program. In our example, there will be 3 programs (3 discount levels) and 3 new user groups - **Bronze**, **Silver** and **Gold**.



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## 5. The Loyalty Programs Creation

You can create the new loyalty program on the **Marketing > Loyalty program** page. Open this page and create a new program (**Add program** button).



- Name the title for the loyalty program, will be displayed on the promotion page.
- **Purchase total** the necessary sum, which the user needs to spend. After he spends this sum he can join this loyalty program. This sum will be displayed on the promotion page.
- **Select user group** the user group, for which this discount system works. It's a good idea to set different user groups for different loyalty programs.
- Images graphic file for creating a loyalty card.

We recommend using images of the same size for the correct display of cards on the store page.

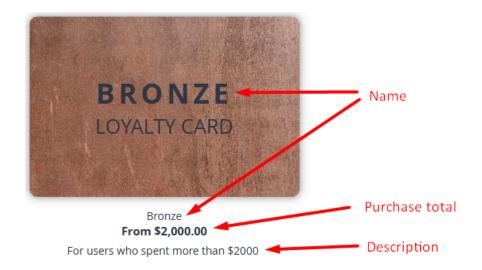
- **Image type** there are two available types:
  - Consist with text applied to image (field Name + "Loyalty Card"), see the example below;



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- o Just image image without text.
- **Background color** the code color in the hex format. Specifies the color of the loaded image (for images with a transparent background).
- **Description** your text info about the loyalty program.
- **Status** you can active or disable the loyalty program.

#### Loyalty card example:



In a similar way, create a loyalty program for each user group (3 user groups - 3 different loyalty programs).



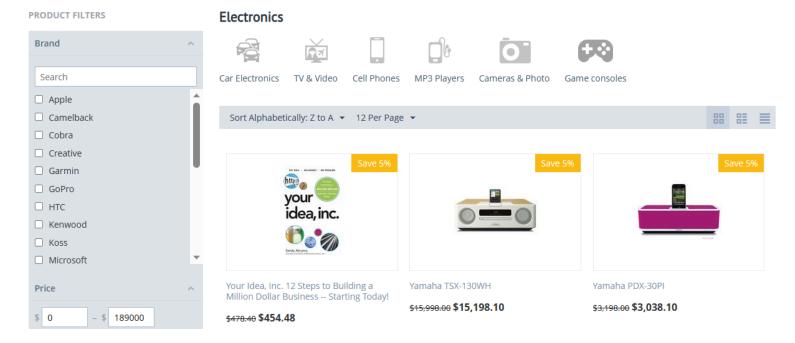
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## 6. The User Groups Promotions Creation

In promotions, you set the conditions under which the customer will receive a particular bonus. After creating user groups and loyalty programs, you need to set up bonuses that will be valid for different user groups.

In **Marketing > Promotions** create a new catalog or cart promotion.

**Catalog promotion** bonuses will only be seen by authorized customers belonging to the user group participating in the loyalty program:



**Cart promotion** bonuses will only be visible when adding the product to the cart (pop-up notification + display of bonuses in the cart):



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НДС 20% (20% included)

**Total cost** 

\$1,820.78

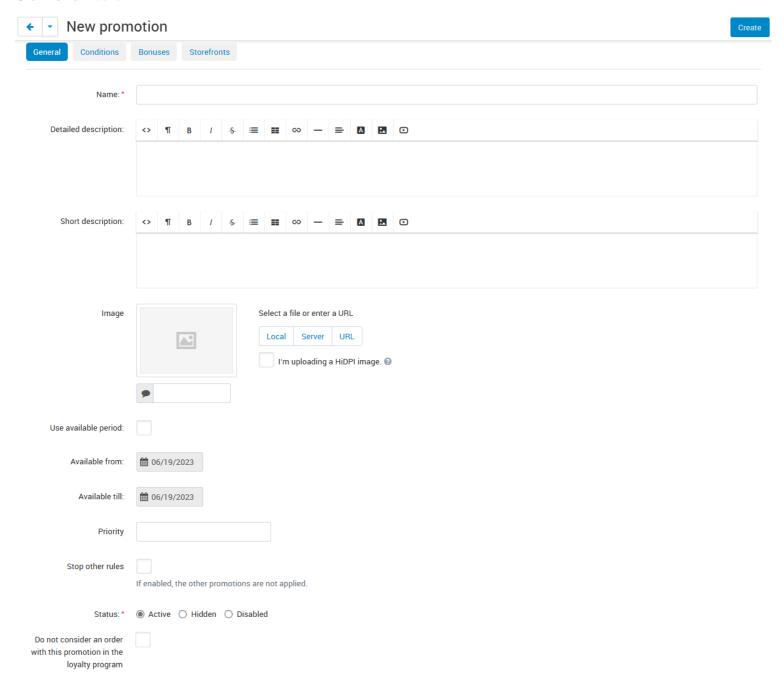
\$10,924.67

APPAREL **ELECTRONICS** SPORTS & OUTDOORS OFFICE SUPPLIES MULTIMEDIA BRANDS NEWEST **BESTSELLERS** Home / Cart contents **Cart contents** Product **Unit price** Quantity Total price Women's Bloom Complete Set 🔞 \$11,499.65 1 + \$11,499.65 CODE: A0181ZSJSS Vendor: Мир спорта Price in points: 10925 points \$11,499.65 Gift certificate or promo code Apply Subtotal International mail ( > CHANGE) \$0.00 **Applied promotions** Order discount -\$574.98 Bronze for cart Taxes



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#### **General** tab



- Name the name of the promotion.
- **Detailed description** detailed description of the promotion, displayed on the store page with active promotions.
- **Short description** displayed on the order page in the customer's personal account.
- **Image** graphic file for displaying this promotion on the store page.
- Use available period this setting allows you to limit the period of the promotion.
- **Priority** determines the order in which the promotions will work. The highest priority is 0 or 1. If there are several promotions and their simultaneous use is impossible, then the one whose priority is higher (the numerical value is lower), will work.
- Stop other rules cancels all promotions of a lower priority.



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- Status Active (the promotion is working), Hidden (the promotion is not displayed on the store's promotions page, but is active) or **Disabled** (the promotion is temporarily not active).
- Do not consider an order with this promotion in the loyalty program the setting is needed to calculate the amount spent by the customer in the store (to take into account or not to take into account the amount of the order that took part in this promotion).

#### **Conditions** tab

Add the **Condition** (you can add the few conditions but the necessary one is the user group):



In this example, the condition defines the user group participating in this promotion (Bronze).

#### **Bonuses** tab



In this example, we will provide a 5% discount on the cost of each item.



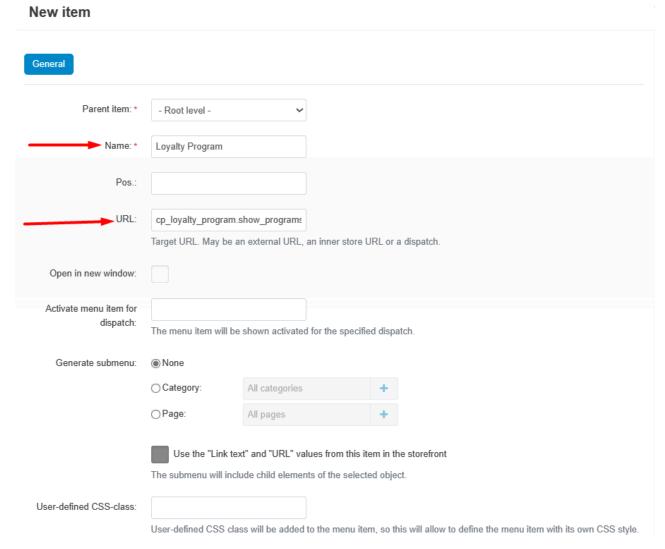
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## 7. Display Settings

### 7.1 Special Page in the Store

For accessibility of information, create a separate store page and place a link to this page in the appropriate place. In our example, a link will be added to the **Quick links** (you can choose any option that is convenient for you).

Open the **Design > Menus > Quick links**, click **Add Item** and create a new item:

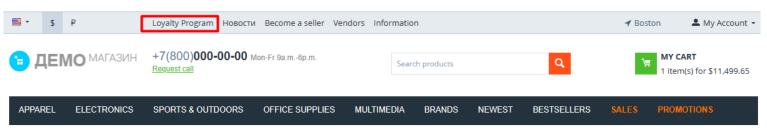


You need to know the page dispatch value or the SEO-rule. The **dispatch value** by default is **cp\_loyalty\_program.show\_programs**. The dispatch value or the SEO-rule located on the **Website > SEO page**.



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A new link has appeared on the storefront, clicking on which takes us to a page with information about the loyalty program:



Home / Loyalty program



Bronze
From \$2,000.00
For users who spent more than \$2000.



Silver
From \$5,000.00
For users who spent more than \$5000



From \$10,000.00
For users who spent more than \$10000

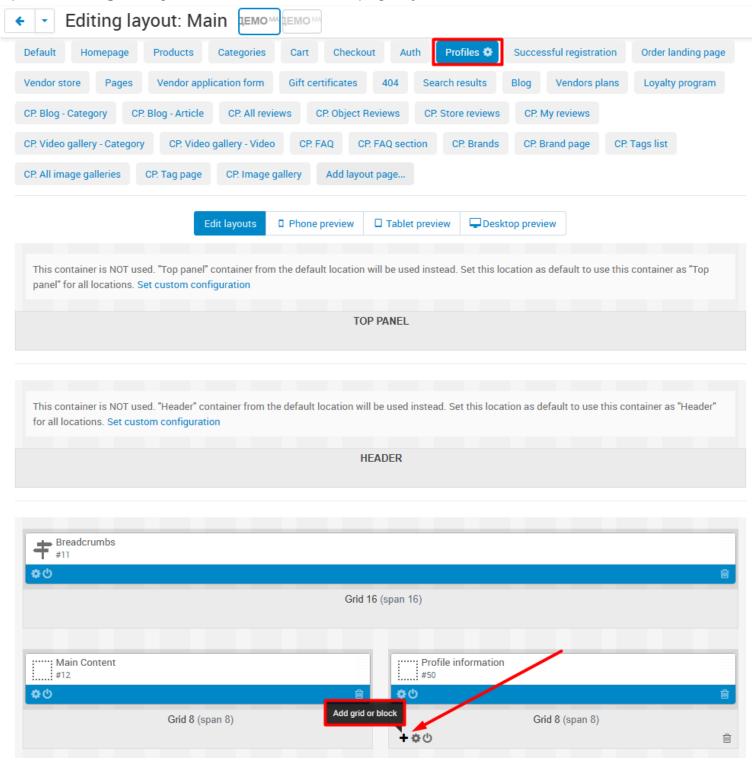


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#### 7.2 New Block with Statistics in the User Profile

The add-on allows you to add the new block on the layouts page. This block will display the customer status in the loyalty program.

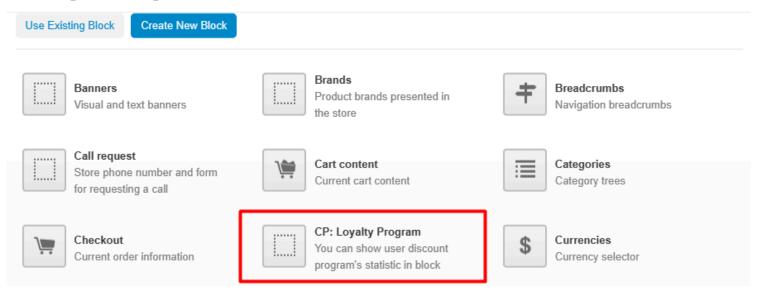
Open the **Design > Layouts** and choose **Profiles** page layout, add a new block:





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### Adding block to grid



The customer can find information about his loyalty program status on his profile page:

Home / Editing profile

#### Profile details

Russian Federation

				Profile de	e
General	User groups	Loyalty program			_
				On this page during future	
User acco	unt informati	on		To keep your use:	a
test@test.co	ım			Dictionary	/ V
Password *				Words spe	2
				Sequence	
				adjacent l	et
Confirm pass	sword *			Personal i     or similar	
First name		Last nar	ne		
	formation				
Ivan		Ivanov			
Phone *					
+7(777)777-7	77-77				
Shipping a	address				
Address					_
Sovetskaya	str., 56-118				
City				Current status: B	rc
Moscow				Count of orders: 1	
Country		State/pr	ovince		

Moscow

#### tails

ou can modify your login credentials and personal data to be used

account secure we recommend to avoid creating passwords that

- words in any language.
- led backwards, common misspellings, and abbreviations.
- or repeated characters. Examples: 12345678, 222222, abcdefg, or tters on your keyboard (qwerty).
- formation. Your name, birthday, driver's license, passport number, formation.



	Ivan Ivanov
	IVAII IVAIIOV
Current status:	Bronze
Count of orders:	1
Total:	\$3,998.00

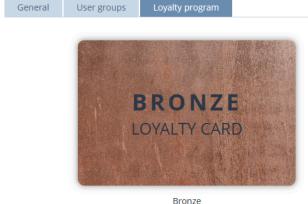


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In addition, a new tab with statistical information and a link to the store page from the <u>previous</u> <u>paragraph</u> will automatically appear in the user's personal account:

Home / Editing profile

#### Profile details



From \$2,000.00

For users who spent more than \$2000.



Order ID	Date	Total	Added
#144	06/19/2023, 13:16	\$3,998.00	\$3,998.00

#### **Profile details**

Total:

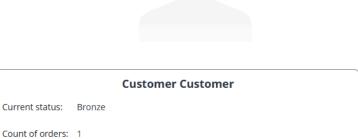
On this page you can modify your login credentials and personal data to be used during future purchases.

To keep your account secure we recommend to avoid creating passwords that use:

· Dictionary words in any language.

\$3,998.00

- Words spelled backwards, common misspellings, and abbreviations.
- Sequences or repeated characters. Examples: 12345678, 222222, abcdefg, or adjacent letters on your keyboard (qwerty).
- Personal information. Your name, birthday, driver's license, passport number, or similar information.





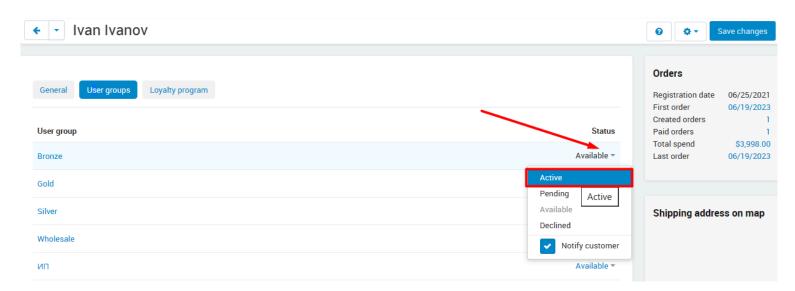
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### 8. Add-on Features

### 8.1 Manual Status Assignment

Automatic calculation of the amount of Customer orders for participation in the Loyalty Program starts from the moment the add-on is installed and configured. Purchases made before this time will not be taken into account in the program. But you can manually assign the required status to the Customer.

In the **Customers > Customers > [Customer\_name] > User Groups** tab, change the status of the required user group to **Active**:



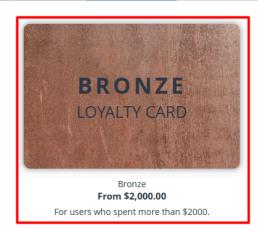
This information will also be displayed in the Customer's personal account:



Home / Editing profile

#### Profile details

General User groups Loyalty program



#### Added: \$0.00 Until the next status is left: \$2,000.00 Learn more about the loyalty program

Order ID	Date	Total	Added
#144	06/19/2023, 13:16	\$3,998.00	\$3,998.00

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#### **Profile details**

On this page you can modify your login credentials and personal data to be used during future purchases.

To keep your account secure we recommend to avoid creating passwords that use:

- · Dictionary words in any language.
- · Words spelled backwards, common misspellings, and abbreviations.
- Sequences or repeated characters. Examples: 12345678, 222222, abcdefg, or adjacent letters on your keyboard (qwerty).
- Personal information. Your name, birthday, driver's license, passport number, or similar information.

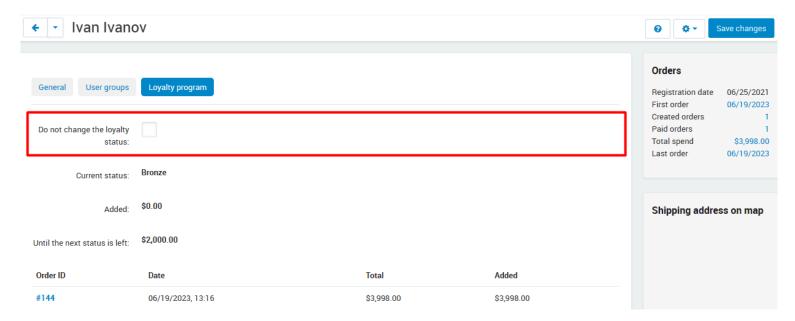




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### 8.2 Fixing the Customer's Loyalty Status

If you need to fix the current customer loyalty status (avoid automatic upgrade or downgrade), you can fix it using a special setting in the **Customers > Customers > [Customer\_name] > Loyalty Program** tab:





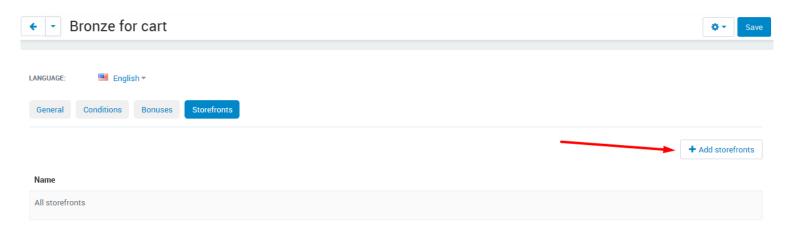
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HelpDesk: <a href="mailto:hd.cart-power.com">hd.cart-power.com</a>
Store: <a href="mailto:store.cart-power.com">store: store.cart-power.com</a>

### 9. CS-Cart Ultimate Features

You can change the general settings of this add-on separately for each storefront or for all storefronts at once - click a special button to enter a new field value to update in all stores when saving an item.

Loyalty programs are created for all storefronts at once.

Promotions of one storefront can be made common to other storefronts - in the settings of a specific promotion **(Show all storefronts** mode), in the **Storefronts** tab, find the **Add storefronts** button and select the required option:



### 10. Multi-Vendor Features

Add-on settings are available only to the main administrator.

Only the main administrator can create Loyalty Programs. These programs will be active for all vendors. There is no way to create the Loyalty program for only one vendor.

The add-on configuring is unavailable for vendor's admins. Vendors can't create or edit the discount programs for their own stores.