



User Manual

For

Loyalty Plus Cartridge



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1. Summary

The objective of the Loyalty Plus platform is to revolutionize the way businesses engage with customers, drive repeat purchases, and provide businesses with a distinct competitive edge in the dynamic e-commerce landscape. With features like seamless integration and convenient point redemption, Loyalty Plus empowers businesses to create personalized loyalty programs tailored to their unique needs. The platform enables shoppers to easily track their points, rewards, and membership status through a user-friendly dashboard.

2. Overview

2.1 Functional Overview

The "Loyalty Plus" functionality enables users to earn and track loyalty points for various actions such as purchases and engagement activities. A "Join Now" button is prominently displayed across the platform, allowing customers to enroll in the loyalty program and start earning rewards. Upon clicking the button, users can sign up and start accumulating points based on their interactions with the brand.

Promotional messages are shown on PDP having points information. Users can redeem points while doing the checkout.

As customers engage with the platform and make qualifying purchases or perform eligible actions, the "Loyalty Plus" system automatically updates their points balance in real time. When customers reach a certain points threshold or achieve specific milestones, they are notified within their loyalty dashboard about available points and their tier information.

Behind the scenes, the "Update Point Status" job runs periodically to process points accumulation, redemption requests, and other loyalty-related transactions. Customers can review their points balance, transaction history, and available rewards in their personalized loyalty dashboard.

NOTE: The "Update Point Status" job will process only those orders whose status is COMPLETED

The job "Update Tier Status" is used to refresh the tier based on the amount spent in a particular refresh period which is configurable.

2.2 Compatibility

This cartridge is compatible with the latest SFRA. The cartridge has been tested against code compatibility version 22.7.

3. Implementation Guide

3.1.Setup

3.1.1.Setting Workspace

This repository contains the **plugin_loyaltyplus** cartridge inside the top-level folder. Add the plugin_loyaltyplus to the site cartridge path after uploading.

1. Clone this repository. (The name of the top-level folder is plugin_loyaltyplus).
2. Upload using UX studio.
3. Navigate to the plugin_loyaltyplus folder where package.json is present.
4. In the plugin_loyaltyplus folder, run *npm install* to all the package dependencies required.
5. Run *npm run build* to compile js & css
6. Update the file dw.json under the plugin_loyaltyplus folder with the contents:

```
{
    "hostname": "your-sandbox-hostname.demandware.net",
    "username": "your login",
    "password": "your password",
    "code-version": "version_to_upload_to",
}
```

7. In the plugin_loyaltyplus folder, enter the following command:
npm run uploadCartridge, this will upload the cartridge to the server.
8. Use *npm run lint* to check any linting error

3.1.2 Install Site Meta-Data

The site metadata consists of Job definition and site preference. These must be installed to support the cartridge code. To do this, perform the following:

- ZIP up the **metadata** directory
- Upload the ZIP file via Administration > Site Development > Site Import and Export.
- Select the file and click **Import**.

3.1.3 Cartridge Path

- Add **plugin_loyaltyplus** to the site cartridge path. To do this go to Administration > Sites > Manage Sites > <Site ID> - Settings

3.1.4. Jobs Configuration

All scheduled jobs provided as part of the cartridge must be configured as required. As implementer requirements will vary, this configuration has been omitted from the cartridge meta-data. Specifically, the following must be configured for each Job:

- Enabled/Disabled
 - All jobs are disabled by default
- Schedule
 - Job schedule and interval to be defined

3.2 Configuration

3.2.1 Site Preferences

ID	Name	Description	Default Value
enableLoyaltyPlus	Enable Loyalty Plus	Enable Loyalty Plus functionality	Yes
loyaltyTier	Loyalty Tier Details	Details of the tiers	{ "bronze":{"label":"Bronze","min":0,"max":499,"pointsPerDollar":10,"speedoMeterAngle":13}, "silver":{"label":"Silver","min":500,"max":999,"pointsPerDollar":12,"speedoMeterAngle":50}, "gold":{"label":"Gold","min":1000,"pointsPerDollar":13,"speedoMeterAngle":87} }
redemptionLimitPercentage	Redemption Limit Percentage	Will be used for providing maximum discount through points on cart and checkout	10

PointsToDollarsConversionRate	Points to Dollar Conversion Rate	The points will be converted to 1 dollar	100
tierResetPeriod	Tier Reset Period	The days will be considered as reset period for refreshing tiers	365
loyaltyPointsEventList	Points Event List	Events for which points will be rewarded by the system	{ "enroll": 50 }
loyaltyRedemptionPromo	Loyalty Redemption Promo Name	The promo will be used on the cart page while redeeming points	LOYALTY_PLUS
loyaltyPlusFromEmail	Loyalty Plus From Email ID	Loyalty Plus From Email ID	no-reply@salesforce.com

4. User Guide

4.1 Roles, Responsibilities

The error email address defined in the JOB's Notification setting should be monitored proactively to address any issues with the jobs.

4.2 Business Manager

- After importing the metadata, schedule the JOBS as per the requirement. Set the email address for notification on JOB failure.
- Configure the required jobs
- Update the site preferences if needed

4.2.1 Custom Log Settings

- Make sure to create a log category with the name **LoyaltyPlus** with log level ERROR to log errors

4.3 Testing

4.3.1 Loyalty Plus

- Navigate to the product page of the website. Verify that a promotional message is visible for the product.
- Promotional messages will be visible whether or not you are a loyalty member
- Add product to the cart. Go to the cart and verify that the Redeem Rewards checkbox is visible to all the Loyalty members.
- Check that checkbox to redeem points.
- Place the order and verify that redemption information is coming on the order confirmation and order history page.
- Run the job "Update points Status" to process the order for updating points and tiers.
- Go to the Loyalty Dashboard and verify the details to ensure the successful completion of the process.

5. Known Issues

NA

6. Release History

Version	Date	Changes
1.1.0	3/27/2024	Initial release