

amasty

See the way [Marketing & Sales Suite for Magento 2](#) extension works.

Guide for Marketing & Sales Suite by MageWorx for Magento 2

Equip your store with a set of automated marketing & sales tools. Streamline and personalize your marketing efforts to boost your sales and retention.

- Show customer reviews and social-proof notifications
- Automatically collect feedback with popups and email reminders
- Assign reward points for specific activities
- Give personal discounts to particular customers
- Display products stock status and recent sales
- Configure countdown timers for limited-time offers

If you are installing Marketing & Sales Suite from the package, please mind installing the additional libraries via **Composer** with the following commands:

```
composer require geoplugin/geoplugin ">=2.9 < 3"  
composer require piwik/device-detector "@stable"
```

Configure recent sales notifications display

Social Proof & FOMO (Recent sales notifications) extension is designed to increase social proof to your store by displaying the recent sales and trending products. To enable or disable the functionality globally please go to **Stores → Configuration → Mageworx → Marketing Suite**. By default, it is set to Yes.

Social proof

To add or modify the campaigns for the sales pop-up, go to Marketing - [Social proof](#).

Enable [store view]	<input type="text" value="Yes"/>	▼
------------------------	----------------------------------	---

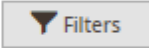
Manage campaigns

In order to add or edit social proof campaigns, go to **Marketing → Marketing Suite → Social Proof**.

Social proof

 demouser ▾

[Add New Campaign](#)

 Filters

 Default View ▾

 Columns ▾

Actions ▾

3 records found

20 ▾


per page

<

1

of 1

>

	ID ↓	Name	Display mode	Event Type	Created At	Modified	Priority	Status	Action
<input type="checkbox"/>	1	Recent Sales - All Products	Pop-up	Recent sales	Feb 3, 2021 10:39:08 AM	Feb 3, 2021 12:16:03 PM	1	Enable	Select ▾
<input type="checkbox"/>	2	Product Views	HTML text	Views (Popularity)	Feb 3, 2021 10:41:17 AM	Feb 3, 2021 12:16:23 PM	2	Enable	Select ▾
<input type="checkbox"/>	3	Jacket Sales	Pop-up	Recent sales	Feb 3, 2021 10:46:46 AM	Feb 3, 2021 12:15:04 PM	3	Enable	Select ▾

Each campaign can be shown as a pop-up or displayed as HTML text on the product page. You can set this using the 'Display Mode' setting.

Display mode = pop-up:

Jackets

Shopping Options



11 Items

Sort By

Position



CLIMATE

COLOR

ECO COLLECTION

ERIN RECOMMENDS

MATERIAL

NEW

PATTERN

PERFORMANCE FABRIC

PRICE

SALE

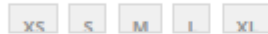
SIZE

STYLE



Proteus Fitness Jackshirt

As low as **\$45.00**



Montana Wind Jacket

★★★★☆ 3 Reviews

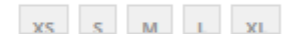
As low as **\$49.00**



Jupiter All-Weather Trainer

★★★★☆ 3 Reviews

As low as **\$56.99**



John in London, United Kingdom purchased

🔥 Overnight Duffel

★★★★★ 1 day ago



Compare Products

Display mode = text:

Fusion Backpack

★★★★☆ 3 Reviews [Add Your Review](#)

\$49.00

Regular
Price
\$59.00

Qty

[Add to Cart](#)

 This product was **viewed 321 times** for last day

 [ADD TO WISH LIST](#)  [ADD TO COMPARE](#)

Each campaign can be one of two types:

- **Recent sales** - these campaigns will display the sales of certain or all products, which were purchased within a certain period from the current date.
- **Views** - these campaigns display the number of views of the products for a certain period.

To add a new campaign click on “Add new campaign”. The adding new campaign flow has 3 steps, where you should choose the display mode (1st step), the event type (2nd step), and set the campaign details. Note both these parameters (display mode and event type) cannot be changed once the campaign is created.

The **General** section of the campaign settings:

New Campaign

demouser ▾

1 — 2 — 3
Display mode Event Type Campaign Information

Back Save

CAMPAIGN INFORMATION

- General ✎
- Display On (Products)
- Display On (Categories)
- Display On (CMS Pages)
- Restrictions
- Design & Position

General

Name *

Status ▾

Store Views *

All Store Views

Main Website

Main Website Store

Default Store View

Customer Groups *

NOT LOGGED IN

General

Wholesale

Retailer

Restrict to current product No

Period

- **Name** - the internal name of the campaign. It is visible in the back-end only.
- **Status** - the status of the campaign.
- **Store View(s)** - you can choose the store views you want to display the campaign on.
- **Customer groups** - you can choose the customer groups you want to display the campaign for.
- **Restrict to current product** - this toggle restricts the statistics, gathered by a campaign, to a certain product, which is viewed by a customer. This setting is always enabled for Views campaigns.
- **Period** - this setting defines a period in days during which the recent sales or views activity should be gathered.

Example

Let's assume you created the pop-up recent sales campaign with 7 days period and enabled the **'Restrict to current product'** toggle. If a customer opens product A in your store, he/she will see the pop-up with the recent sales of this particular product, which were placed within 7 days from the current date. I.e. the previous purchases of this product A made within 7 days will be shown by such campaign. The same behavior for Views campaigns.

Start Delay
A delay in seconds after page loading to display a pop-up or HTML text block.

Auto Close in
Time in seconds, when a pop-up or HTML text block will be closed/hidden automatically.

Max Number of Pop-ups per Page Load *

Display On *

Product Pages
 Category Pages
 CMS Pages

Display On Mobile No

Priority

Remove "Verified by MageWorx" Yes

- **Start Delay** - this setting sets a delay in seconds after page loading to display a pop-up or HTML text block.
- **Auto Close in** - this setting sets the time in seconds, when a pop-up or HTML text block will be closed/hidden automatically. This time is calculated from the time when the pop-up or text block appears.
- **Max Number of Pop-ups per Page Load** - this setting sets the max number of pop-ups displays per each page load. I.e. if the campaign retrieves 10 recent sales and this setting is set to 5, the customer will see 5 pop-ups shown one after another per 1 page load. This setting is applicable to the Recent Sales campaigns only.
- **Display On** - this setting defines the page types, where the campaigns should be shown. You can choose to display the pop-ups on product pages, categories, and/or CMS pages. This setting is applicable to 'Pop-up - Recent Sales' campaigns only. This option appears if the 'Restrict to current product' setting is disabled.
- **Display on Mobile** - this setting allows you to disable the campaigns for mobile traffic.
- **Priority** - this setting defines the priority of each campaign if multiple campaigns have the same conditions. The campaign with higher priority will be executed.
- **Remove "Verified by MageWorx"** - this toggle allows you to hide the "Remove "Verified by

MageWorx” text below the pop-up. You can also edit this message in the design template directly in the back-end. This setting is applicable to 'Pop-up' campaigns only.

The following sections appear only for **Pop-up - Recent Sales** campaigns if the 'Restrict to current product' setting is disabled' and at least one value is selected in the 'Display On' multi-select. These sections allow you to determine the pages, where the campaign will display the pop-ups, i.e. when the customers open these pages, they will see the marketing campaigns.

Recent Sales - All Products

demouser

← Back Delete Campaign Reset Save and Continue Edit **Save Campaign**

CAMPAIGN INFORMATION

- Display mode
- Event Type
- General
- Display On (Products)**
- Display On (Categories)
- Display On (CMS Pages)
- Restrictions
- Design & Position

Display On (Products)

Assign Type

- All products
- All products**
- Specific products
- By conditions

- **Display On (Products)** - this section allows you to choose the products the campaign should be applicable to. You can choose to apply the campaign to all products, manually selected products, or add the dynamic conditions to apply the campaign to all products, which match necessary conditions.

Recent Sales - All Products

demouser ▾

← Back Delete Campaign Reset Save and Continue Edit **Save Campaign**

CAMPAIGN INFORMATION

Display mode

Event Type

General ✎

Display On (Products)

Display On (Categories)

Display On (CMS Pages)

Restrictions

Design & Position

Display On (Categories)

Assign Type

Specific categories ▾

Categories

Gear × Bags ×

Fitness Equipment × Watches ×

Training × Men × Tops ×

Jackets × Hoodies & Sweatshirts ×

Tees × Tanks × Bottoms ×

Pants × Shorts × Women ×

Tops × Jackets ×

Hoodies & Sweatshirts × Tees ×

Bras & Tanks × Bottoms ×

Pants × Shorts × Promotions ×

Sale × What's New × ▾

- **Display On (Categories)** - this section allows you to choose the categories you want to display the campaign on. You can choose all products or manually select the necessary categories.

Recent Sales - All Products

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← Back Delete Campaign Reset Save and Continue Edit **Save Campaign**

CAMPAIGN INFORMATION

- Display mode
- Event Type
- General ✎
- Display On (Products)
- Display On (Categories)
- Display On (CMS Pages)**
- Restrictions
- Design & Position

Display On (CMS Pages)

Assign Type

- All pages ▾
- All pages**
- Specific pages

- **Display On (CMS pages)** - this section allows you to choose the CMS pages you want to display the campaign on. You can choose all pages or manually select the necessary CMS pages.

The **Restrictions** section allows you to exclude specific products to be processed by the Recent Sales campaigns. I.e. the statistics of the items matching these conditions won't be gathered by the campaigns. You can add the dynamic conditions here:

Recent Sales - All Products

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← Back

Delete Campaign

Reset

Save and Continue Edit

Save Campaign

CAMPAIGN INFORMATION

Display mode

Event Type

General

Display On (Products)

Display On (Categories)

Display On (CMS Pages)

Restrictions

Design & Position

Restrictions

Conditions (don't add conditions if campaign can display the activity of any product(s))

If ALL of these conditions are TRUE :

Attribute Set is Downloadable



The **Design** section allows you to choose a position of the pop-up on the screen and select a design of the pop-up or the text block.

Recent Sales - All Products

demouser ▾

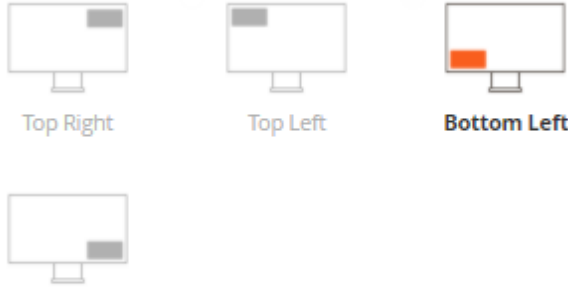
← Back Delete Campaign Reset Save and Continue Edit **Save Campaign**

CAMPAIGN INFORMATION

- Display mode
- Event Type
- General
- Display On (Products)
- Display On (Categories)
- Display On (CMS Pages)
- Restrictions
- Design & Position**

Design & Position

Position ⌵



Top Right Top Left **Bottom Left**

Bottom Right

Templates ⌵

The templates can be chosen in the 'Templates' tab. There are more than 40 ready templates for the pop-up and text campaigns. You can also edit any design template in the text area below or create your own template.

The screenshot displays a 'Templates' selection window. At the top right, there are 'Cancel' and 'Load Template' buttons. Below, eight template options are shown in a 4x2 grid. Each option features a product image, the text 'Michael in New York, United States purchased', a product name 'Mid rise ripped denim shorts', a 5-star rating, and '12 minutes ago'. The templates are numbered #1 through #8 and are marked as 'Verified by mageworx'. The background colors of the templates alternate: #1 (white), #2 (light grey), #3 (dark grey), #4 (white), #5 (light grey), #6 (dark grey), #7 (white), and #8 (light grey).

The following variables are available:

Views campaigns

- [product.name] - outputs a name of a given product.
- [product.image] - outputs an image of a given product.
- [product.url] - outputs URL of a given product.
- [product.rating_summary] - outputs a rating summary of a given product.
- [product.rating_stars] - outputs the rating stars of a given product.
- [period] - outputs a period in days, specified for the current campaign.
- [count_customers]
- [count_times]

Recent sales campaigns

- [product.name] - outputs a name of a given product.
- [product.image] - outputs an image of a given product.

- [product.url] - outputs URL of a given product.
- [product.rating_summary] - outputs a rating summary of a given product.
- [product.rating_stars] - outputs the rating stars of a given product.
- [customer.name] - outputs a customer name (first name and last name).
- [customer.location] - outputs a full customer location (country, city), determined by the GeolP functionality.
- [customer.city] - outputs a customer city, determined by the GeolP functionality.
- [customer.country] - outputs a customer country, determined by the GeolP functionality.
- [customer.region] - outputs a customer region/state, determined by the GeolP functionality.
- [last_purchase] - outputs how many days passed since the date of the last purchase date of a given product.

Configure stock statuses display

To tweak the stock status progress bar display on the front-end, adjust its general settings, and specify follow-up messages to be shown on the storefront. Please go to **Stores → Configuration → Mageworx → Marketing Suite**.

Stock Status

Enable [store view]

This setting enables/disables the stock bars on the front-end.

Display On [store view]

Products

Categories

Search Results

This setting allows you to display the stock status on the chosen pages.

Display "In Stock" message [store view]

If enabled, the "In Stock" message will be shown on the front-end.

"In Stock" message [store view]

This message will be shown on the front-end, when a product stock is more than "Low Stock Level".

Display "Low Stock" message [store view]

If enabled, the "Low Stock" message will be shown on the front-end.

"Low Stock" message [store view]

This message will be shown on the front-end, when a product stock triggers the "Low Stock Level".

"Low Stock" level [store view]

This setting defines whether to use native product setting to set the "Low Stock" value or to specify a custom value. If the option to use Magento 2 setting is selected, the extension will check the stock value specified in the "Notify for Quantity Below" setting in the "Advanced Inventory" window for each product.

Display "Urgent Stock" message [store view]

If enabled, the "Urgent Stock" message will be shown on the front-end.

"Urgent Stock" message [store view]

This message will be shown on the front-end, when a product stock triggers the "Urgent Stock Level".

"Urgent stock" value [store view]

This setting defines a stock level, when the urgency flow should be triggered.

- In the **Enable** field, select **No** to disable stock status display functionality. By default, it is set to **Yes**.
- In the **Display On** box, select one or more pages to display the stock status on. You can press and hold the ctrl key to select multiple options.
- In the **Display "In Stock" message** field, select **No** to disable the in-stock message display on the front-end. By default, it is set to **Yes**.
- In the **"In Stock" message** box, type custom text with the [stock] variable. This message will be displayed on the front-end when the stock level is not low.
- In the **Display "Low Stock" message** field, select **No** to disable the low stock message display on the front-end. By default, it is set to **Yes**.

- In the **“Low Stock” message** box, type custom text with the [stock] variable. This message will be displayed on the front-end when the stock level is low.
- Click the **“Low stock” level** arrow to see more options, and then select one of the following:
 1. Select Custom “Low Stock” value. to use a custom low stock value.
 2. Select Use “Notify for Quantity Below” setting to make the extension check stock value for each product in the Advanced Inventory window.
- In the **Display “Urgent Stock” message** field, select No to disable the display of the urgent stock message on the front-end.
- In the **“Urgent Stock” message** box, type custom text with the [stock] variable. This message will be displayed on the front-end when the product stock value reaches the urgent level.
- In the **“Urgent stock” value** box, specify the stock level value that should trigger the urgency flow. By default, it is set to 5.

Configure product reviews & reminders

The module allows the store admins to expand the default Magento 2 product review functionality by introducing new blocks and brings the possibility to automatically collect customer feedback with the help of popup and email reminders.

Fine-tune review settings

To adjust review settings, you can specify them regarding different products. It allows you to display a customer location for the reviews, to enable different options, to add a reward message, and to let your customers add their images to the reviews. Please, navigate to **Stores → Configuration → Mageworx → Extended Review**.

Review Settings

Display Images <small>[store view]</small>	<input type="text" value="Yes"/>
Allow Images Uploading <small>[store view]</small>	<input type="text" value="Yes"/>
Image Size, px <small>[global]</small>	<input type="text" value="300"/>
Display Location <small>[store view]</small>	<input type="text" value="No"/>
Enable "Helpful" <small>[store view]</small>	<input type="text" value="Yes"/>
Enable Recommend Option <small>[store view]</small>	<input type="text" value="Yes"/>
Enable Pros & Cons <small>[store view]</small>	<input type="text" value="Yes"/>

This setting allows your customers to add their images to the reviews.

This setting sets the width size of the thumbnails related to the review images.

This setting allows you to display a customer location for the reviews.

This setting adds the "Helpful" option for each review.

This setting enables "I recommend this product" feature for the reviews. Your customers will be able to add the "I recommend" option, when submitting a review.

This setting enables the functionality to highlight the main product advantages and disadvantages, when submitting the reviews.

- In the **Display Images** field, select **No** if you do not want to display images. By default, it is set to **Yes**.
- In the **Allow Images Uploading** field, select **No** if you do not want to allow the customers to add their images to the reviews. By default, it is set to **Yes**.
- In the **Image Size, px** field set the width size of the thumbnails related to the review images.
- In the **Display Location** field, select **No** if you do not want to display a customer location for the reviews. By default, it is set to **Yes**.
- In the **Location Template** field, define how the location is shown on the front-end.
- In the **Enable "Helpful"** field, select **No** if you do not want to add the helpful option for each review. By default, it is set to **Yes**.
- In the **Enable Recommend Option** field, select **No** if you do not want to enable "I recommend this product" features for the reviews. By default, it is set to **Yes**.
- In the **Enable Pros & Cons** field, select **No** if you do not want to enable the functionality to highlight the main product advantages and disadvantages. By default, it is set to **Yes**.

Enable "Verified customer" <small>[store view]</small>	<input type="text" value="Yes"/>
	This setting enables the functionality to add "Verified customer" label to the reviews. The verified customer is determined by the purchases of the current product.
Add privacy check-box <small>[store view]</small>	<input type="text" value="No"/>
	This setting allows you to add the required consent check-box to adding new review flow.
Add points message <small>[store view]</small>	<input type="text" value="Yes"/>
	This setting allows you to add a reward message for "add new review" if you have this rule in the "Reward Points" extension (should be installed in your store).
Reward Message <small>[store view]</small>	<input type="text" value="Get [review_points] for review!"/>
	This setting allows you to specify a text, which should appear near the "Add review" button.
Characters limit in reviews <small>[store view]</small>	<input type="text" value="300"/>
	This setting limits the number of characters of the text in the review on the product page visible by default. If the number of characters of the review exceeds this value, 'Show more' / 'Show less' links will appear.
Characters limit in reviews widget <small>[store view]</small>	<input type="text" value="200"/>
	This setting limits the number of characters of the review visible in the widget by default.

- In the **Enable "Verified customer"** field, select **No** if you do not want to enable the functionality to add the verified customer label to the reviews. By default, it is set to **Yes**.
- In the **Add privacy check-box** field, select **No** if you do not want to add the required consent check box to add a new review flow. By default, it is set to **Yes**.
- In the **Message** field, specify a text, which should appear near the consent check box.
- In the **Add points message field**, select **No** if you do not want to add a reward message. By default, it is set to **Yes**.
- In the **Reward Message field**, specify a text, which should appear near the Add review button.
- In the upper-right corner, click **Save Config**.

Change filter settings

To adapt toolbar settings, you can choose the available filters and sorting for your customers. Please, navigate to **Stores → Configuration → Mageworx → Extended Review**.

⏪ **Toolbar Settings**

Filter Options
[store view]

Your Country

With images

Verified customers

This setting allows you to choose the available filters for your customers. Please note that the "Allow images" setting should be enabled to use the "With images" option.

Sorting Options
[store view]

Date

Rating

This setting allows you to choose the available sorting for your customers.

Default Sort By
[store view]

Default Sort Direction
[store view]

Reviews per Page
[store view]

- Under **Toolbar Settings**, in the **Filter Options** field, select the available filters for your customers.
- In the **Sorting Options** field, select the available sorting for your customers.
- In the **Default Sort By** field, specify the default sort. By default, it is set to Date.
- In the **Default Sort Direction** field, specify sort direction. By default, it is set to Sort Ascending.
- In the **Reviews per Page** field, enter the number of reviews that will be displayed per page. By default, it is set to 10.
- In the upper-right corner, click **Save Config**.

Manage reviews

To view the reviews list please go to **Marketing → User Content → All Reviews**.

Reviews

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New Review

Search [Reset Filter](#)

Actions 347 records found 20 per page 1 of 18


<input type="checkbox"/>	ID	Created ↑	Status	Title	Nickname	Review	Visibility	Type	Product	SKU	Answer	Is Recommend	Is Verified	Action
<input type="checkbox"/>	347	Feb 2, 2021, 6:43:39 PM	Approved	Love this watch	Veronica	I really love this watch. It is very stylish. W...	Main Website Main Website Store Default Store View	Customer	Luma Analog Watch	24-WG09	Hi Veronica! Thank you for your review! Keep in touch with us, the seasonal sale is soon!	Yes	Yes	Edit
<input type="checkbox"/>	339	Sep 16, 2020, 11:49:32 AM	Approved	A regular for me	Pearl	This is in regular rotation at the gym. Its col...	Main Website Main Website Store Default Store View	Guest	Antonia Racer Tank	WT08	Hi Pearl, thank you very much for your feedback	Yes	Yes	Edit
<input type="checkbox"/>	340	Sep 16, 2020, 11:49:32 AM	Approved	Great fit - love the v-neck design!	Thalia	Great fit - love the v-neck design!	Main Website Main Website Store Default Store View	Guest	Breathe-Easy Tank	WT09	Hi Thalia, thank you so much for your feedback. You can try our Leah Yoga Top, which is made of denser material. Please, let us know in case of any questions.	Yes	Yes	Edit

Here right from the grid, you can **Edit, Approve/Disapprove** or **Answer** any review.

Create an email reminder

To automatically send emails with a request to review an offering, set up email reminders. You can configure email templates and adjust creatives as you wish. Please go to **Marketing → Review Reminders → Manage Reminders**.

Reminders


 demouser ▾

[New Popup Reminder](#)

[New Email Reminder](#)

 Filters

 Default View ▾

 Columns ▾

Actions ▾

4 records found

20 ▾

per page

<

1

of 1

>

<input type="checkbox"/>	ID ↓	Name	Type	Period	Priority	Store View	Created	Modified	Status	Action
<input type="checkbox"/>	1	1 day pop-up reminder	Popup	1	1	All Store Views	Feb 2, 2021 5:31:53 PM	Feb 2, 2021 5:34:02 PM	Enabled	Select ▾
<input type="checkbox"/>	2	3 days pop-up reminder	Popup	3	1	All Store Views	Feb 2, 2021 5:33:42 PM	Feb 2, 2021 5:33:42 PM	Enabled	Select ▾
<input type="checkbox"/>	3	1 day email reminder	Email	1	1	All Store Views	Feb 2, 2021 5:35:00 PM	Feb 2, 2021 5:35:00 PM	Enabled	Select ▾
<input type="checkbox"/>	4	5 days email reminder	Email	5	2	All Store Views	Feb 3, 2021 12:40:26 PM	Feb 3, 2021 12:40:26 PM	Disabled	Select ▾

In the upper-right corner of the Reminders grid, click the **New Email Reminder** button to create a new email reminder. The Reminders grid is empty during the initial setup.

Email reminder: 5 days email reminder

demouser ▾

← Back

Delete Reminder

Reset

Save and Continue Edit

Save Reminder

Reminder Information

Name * 5 days email reminder

Internal name of the reminder. Visible in the back-end only.

Store Views *
All Store Views
Main Website
Main Website Store
Default Store View

This setting defines the store views, for which the reviews reminder should be sent.

Customer Groups *
NOT LOGGED IN
General
Wholesale
Retailer

This setting defines the customer groups, for which the reviews reminder should be sent.

Sent In, days * 5

Personal Email Template We want to hear YOU! (Default)

This email template will be used for the review reminder email.

Priority * 2

The reminder with higher priority will be executed if several reminders match at least one same condition (reminder type, customer groups, store views, period).

Status
Enable
Disable
Enable

Under Reminder Information, do the following:

- In the **Name** field, enter the email reminder name. It is visible in the backend only.
- In the **Store Views** box, specify one or more store views to send email reminders to. You can

press and hold the ctrl key to select multiple options. Select All Store Views to enable the functionality for all store views.

- In the **Customer Groups** box, specify one or more customers to send the email reminder to. You can press and hold the ctrl key to select multiple options.
- In the **Sent In, days** field, specify the number of days after the order creation when the email reminder should be sent.
- In the **Personal Email Template** box, click the Use config arrow to select a specific popup email reminder template. By default, the We want to hear YOU! template is selected.
- In the **Priority** field, specify email reminders priority. If several email reminders match the same condition, the one with higher priority gets sent.
- In the **Status** box, click the Disable arrow to enable or disable the popup reminder. By default, it is set to Disable.

In the upper-right corner, click the **Save Reminder** button.

Manage email reminder settings

If you want to make any changes in email reminders, you can make it by adjusting settings. It allows you to specify email senders and to set an email template. Please, navigate to **Stores → Configuration → MageWorx → Review Reminder**.

Email Reminder Settings

Enable [store view]

Email Sender [store view]

Review Reminder Email Template [store view]

The email template is chosen based on the theme fallback when the "Default" option is selected.

- In the **Enable** field, select **No** if you want to disable email reminder. By default, it is set to **Yes**.
- In the **Email Sender** field, select the email sender from the list.
- In the **Review Reminder Email Template** field, choose the email template. By default, it is set to "We want to hear YOU!".

In the upper-right corner, click **Save Config**.

Create and design a popup reminder

To collect customer feedback on the storefront, set up pop-up reminders. You can adjust popup creatives as you wish. You can select one of the pre-defined templates or create a design of your choice. Please go to **Marketing → Review Reminders → Manage Reminders**. In the upper-right corner of the Reminders grid, click the **New Popup Reminder** button.

Popup reminder: 1 day pop-up reminder

demouser

← Back

Delete Reminder

Reset

Save and Continue Edit

Save Reminder

Reminder Information

Name * 1 day pop-up reminder
Internal name of the reminder. Visible in the back-end only.

Store Views *
All Store Views
Main Website
Main Website Store
Default Store View

This setting defines the store views, for which the reviews reminder should be sent.

Customer Groups *
NOT LOGGED IN
General
Wholesale
Retailer

This setting defines the customer groups, for which the reviews reminder should be sent.

Displayed After, days * 1
This setting defines the number of days after the order creation, when the review reminder can be display.

Display On Mobile No
This setting allows you to enable or disable the reminder, when the customers open your store on mobile devices.

Priority * 1
The reminder with higher priority will be executed if several reminders match the same conditions.

Status Enable

Design

Templates

- In the **Name** field, enter the popup reminder name. It is visible in the backend only.
- In the **Store Views** box, specify one or more store views to display the popup in. You can press and hold the ctrl key to select multiple options. Select All Store Views to display popup reminders in all store views.

- In the **Customer Groups** box, specify one or more customers to display the popup to. You can press and hold the ctrl key to select multiple options.
- In the **Display After, days** field, specify the number of days after the order creation when the popup reminder should be displayed.
- In the **Display On Mobile** field, use the toggle to enable popup reminders on mobile devices. By default, it is set to No.
- In the **Priority** field, specify the display priority of popup reminders. If several popup reminders match the same condition, the one with higher priority gets displayed.
- In the **Status** box, click the Disable arrow to enable or disable the popup reminder. By default, it is set to Disable.

Design

Templates

Content Show / Hide Editor

```

<div class="mwrv-modal mwrv-modal--layout-2 mwrv-modal--
layout-2-color-4 mwrv-modal--open" tabindex="-1"
role="dialog">
  <div class="mwrv-modal_dialog" role="document">
    <div class="mwrv-modal_content">
      <div class="mwrv-modal_header">
        <button class="mwrv-modal_close" type="button">
          <svg width="18" height="18" viewBox="0 0 18 18"
xmlns="http://www.w3.org/2000/svg">
            <path d="M17 1L1 17M1 1L17 17"
stroke="currentColor" stroke-width="2"></path>
          </svg>
        </button>
      </div>
      <div class="mwrv-modal_body">
        <h2 class="mwrv-modal_title">We want to hear
YOU!</h2>
        <div class="mwrv-modal_banner">
          <div class="mwrv-modal_banner-icon">
            <svg fill="none" height="56" viewBox="0 0 68 56"

```

In the **Design** tab, please do one of the following:

- In the **Content** box, click the **Show / Hide Editor** button, and then insert the HTML code of your own popup reminder design.
- Or on the right, click the **Templates** button to select one of the pre-built templates.

am Templates ✕


Pop Cancel Load Template


We want to hear YOU!


Leave a review and receive up to **30% OFF** your next purchase

Hi Vitally!

I was indecisive on what size to get and I went through all of the questions and reviews to see if anyone who was similar to me provided any helpful info.

 Samsung Galaxy A51
★★★★★
[Write a review](#)

 Samsung Galaxy S10 5G
★★★★★
[Write a review](#)

 Samsung Galaxy A51
★★★★★
[Write a review](#)


#1


We want to hear YOU!


Leave a review and receive up to **10% OFF** your next purchase

Hi Vitally!

I was indecisive on what size to get and I went through all of the questions and reviews to see if anyone who was similar to me provided any helpful info.

 Samsung Galaxy A51
★★★★★
[Write a review](#)

 Samsung Galaxy S10 5G
★★★★★
[Write a review](#)

 Samsung Galaxy A51
★★★★★
[Write a review](#)


#2


We want to hear YOU!


Leave a review and receive up to **10% OFF** your next purchase

Hi Vitally!

I was indecisive on what size to get and I went through all of the questions and reviews to see if anyone who was similar to me provided any helpful info.

 Samsung Galaxy A51
★★★★★
[Write a review](#)

 Samsung Galaxy S10 5G
★★★★★
[Write a review](#)

 Samsung Galaxy A51
★★★★★
[Write a review](#)


#3


We want to hear YOU!


Leave a review and receive up to **10% OFF** your next purchase

Hi Vitally!

I was indecisive on what size to get and I went through all of the questions and reviews to see if anyone who was similar to me provided any helpful info.

 Samsung Galaxy A51
★★★★★
[Write a review](#)

 Samsung Galaxy S10 5G
★★★★★
[Write a review](#)

 Samsung Galaxy A51
★★★★★
[Write a review](#)


#4


We want to hear YOU!


Leave a review and receive up to **10% OFF** your next purchase

Hi Vitally!

I was indecisive on what size to get and I went through all of the questions and reviews to see if anyone who was similar to me provided any helpful info.

 Samsung Galaxy A51
★★★★★
[Write a review](#)

 Samsung Galaxy S10 5G
★★★★★
[Write a review](#)

 Samsung Galaxy A51
★★★★★
[Write a review](#)


#5


We want to hear YOU!


Leave a review and receive up to **10% OFF** your next purchase

Hi Vitally!

I was indecisive on what size to get and I went through all of the questions and reviews to see if anyone who was similar to me provided any helpful info.

 Samsung Galaxy A51
★★★★★
[Write a review](#)

 Samsung Galaxy S10 5G
★★★★★
[Write a review](#)

 Samsung Galaxy A51
★★★★★
[Write a review](#)

#6

- Click the option button of your choice, and then click the **Load Template** button to edit the template. You can click **Cancel** to return to the Design settings.
- In the **Content** box, edit the content of the popup reminder as you wish. You can use the

standard editor or click the **Show / Hide Editor** button to edit the HTML tags.

In the upper-right corner, click the Save Reminder button.

Manage popup reminder settings

If you want to make any changes in popup reminders, you can make it by adjusting settings. It allows you to set product count for a popup. Please, go to **Stores → Configuration → MageWorx → Review Reminder**.

Popup Reminder Settings

Enable <small>[store view]</small>	<input type="text" value="Yes"/>
Max Products Count for Popup <small>[store view]</small>	<input type="text" value="6"/>

- In the **Enable** field, select **No** if you want to disable popup reminder. By default, it is set to **Yes**.
- In the **Max Products Count for Popup** field, define the number of products count for a popup. By default, it is set to 6.

In the upper-right corner, click **Save Config**.

Set UTM parameters

To track customers' engagement, you can add UTM parameters to links and change them. Please, go to **Stores → Configuration → MageWorx → Review Reminder**.

UTM Params

Add UTM Params <small>[store view]</small>	<input type="text" value="Yes"/>
UTM Source <small>[store view]</small>	<input type="text"/>
UTM Medium <small>[store view]</small>	<input type="text"/>
UTM Campaign <small>[store view]</small>	<input type="text"/>
UTM Term <small>[store view]</small>	<input type="text"/>
UTM Content <small>[store view]</small>	<input type="text"/>

- In the **Add UTM Params** field, click **Yes** if you want to add UTM parameters. By default, it is

set to **No**.

- Fill in the **UTM Source, UTM Medium, UTM Campaign, UTM Term, and UTM Content** fields.

UTM Source is the variable that allows you to track where the traffic originated from.

UTM Medium is the variable for tracking the type of traffic the visitor originated from.

UTM Campaign is the variable that allows you to track the performance of a specific campaign.

UTM Term is the variable for tracking which keyword term a website visitor came from.


UTM Content is the variable that helps you track which link was clicked if you have multiple links pointing to the same URL.

In the upper-right corner, click **Save Config**.


Manage unsubscribed customers

To track customers who opt to unsubscribe from review reminders, overview the unsubscribed customers list. You can manually add customers to the list when required or following a request. To view and manage unsubscribed customers please navigate **Marketing → Review Reminders → Unsubscribed Clients**.


Unsubscribed Clients

 demouser ▾

[New Unsubscribed](#)

 Filters

 Default View ▾

 Columns ▾

Actions ▾

3 records found

20


per page

<

1

of 1

>

	ID	Email	Unsubscribed At	Action
<input type="checkbox"/>	1	joe@example.com	Feb 2, 2021 5:37:59 PM	Delete
<input type="checkbox"/>	2	mark@example.com	Feb 2, 2021 5:38:09 PM	Delete
<input type="checkbox"/>	3	antony@example.com	Feb 2, 2021 5:38:19 PM	Delete

Manage action logs

To overview any interactions of the customers with email and/or popup reminders, use the Log grid here: **Marketing → Review Reminders → Logs**. It allows you to apply filters and quickly overview

time-stamped information about all the set reminders, i.e., actions, customer emails, back-end reminders names, email templates used, and more.

Configure reward points

This functionality allows you to build a powerful loyalty system and reward your customers for activity in your store.

Reward points can be added to the customer account balance (i.e. for completing such actions as placing an order, leaving a review, or subscribing for newsletters), as well as assigned to it on special occasions (i.e. birthdays). Additional conditions can be applied so that the customer gains a reward only if they are met.

The extension supports different methods of assigning the reward points, such as:

- fixed number of points;
- number of points for a specific amount spent;
- number of points for a specific qty of items;
- number of points for a specific amount/qty of items starting with a certain amount/qty.

The customers can check their reward points balance in the special tab of their customer account. These points can be easily applied or canceled during the checkout.

General configuration

To configure the rewards functionality general settings, please go to **STORES → Configuration → MAGEWORX → Reward Points**.

Under the **Main Settings** tab you can adjust the following:

Main Settings

Enable <small>[store view]</small>	<input type="text" value="Yes"/>
Static Block for "My Reward Points" Section <small>[store view]</small>	<input type="text" value="Please select a static block"/>
Cover with the points <small>[website]</small>	<div style="border: 1px solid #ccc; padding: 5px;"><p>Subtotal</p><p>Shipping</p><p>Tax</p></div>
Points Exchange Rate <small>[website]</small>	<input type="text" value="1"/> <small>The cost of one Reward Point in the Website Base Currency. Use the dot symbol for a fractional number.</small>
Assign to Customer Groups <small>[website]</small>	<div style="border: 1px solid #ccc; padding: 5px;"><p>NOT LOGGED IN</p><p>General</p><p>Wholesale</p><p>Retailer</p></div>
Allow Custom Points Amount <small>[website]</small>	<input type="text" value="No"/> <small>If enabled, your customers will be able to change amount of points they want to use in the orders.</small>
Annul the Received Points upon the Full Order Refund <small>[store view]</small>	<input type="text" value="Yes"/> ? <small>This setting allows to return the points the customers receive for the orders in case of full order refund.</small>
Return Spent Points in Case of Order Cancellation <small>[store view]</small>	<input type="text" value="No"/> <small>If enabled, the points used by the customers to place an order will be credited back in case of order cancellation.</small>
Time of Day for Birthday Greetings <small>[global]</small>	<input type="text" value="08"/> : <input type="text" value="00"/> : <input type="text" value="00"/>

The **Enable** setting provides the possibility to temporarily disable/re-enable the extension functionality from the backend.

Static Block for "My Reward Points" Section sets a selected static block to be shown at **My Reward Points** tab in the customer's account. It supports all the blocks that are shown on the **CONTENT → Elements → Blocks** grid.

Cover with the points allows applying credits to an order's subtotal and/or shipping and/or tax. The system analyses this selection and applies credits to what is chosen. For example, if the store owner doesn't 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 methods.

Points Exchange Rate provides the possibility to change the cost of 1 Reward Point in the Website Base Currency.

Assign to Customer Groups sets customer credit functionality to the selected customer groups. If not selected, the customers won't be able to use internal credits.

Allow Custom Points Amount - specify whether to allow or disallow customers to change amount of points they want to use in the orders.







If the **Annul the received points upon the full order refund** is enabled, the reward points will be removed from the customer account in case they were applied to the order that was refunded afterward.

The **Return Spent Points in Case of Order Cancellation** configuration makes it possible to return the points the customers received for the orders if the order has been canceled.

The **Time of Day for Birthday Greetings** specifies the time when the reward points will be added on the customer's birthday.

Under the **Marketing** tab you can adjust the following:

Marketing

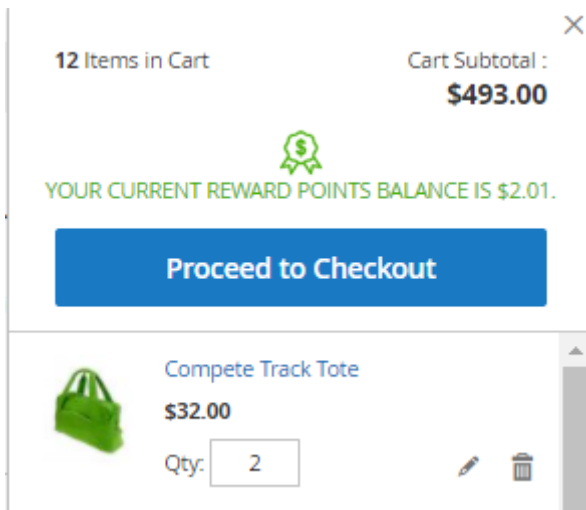
- Display Header Message** [store view] 
If enabled, the customers will see the message with a number of points they will get if complete the order.
- Header Message** [store view]
The message will be shown in the header. The following variables are available: [p] - it will display the number of points the customer will receive if completing an order; [c] - it will display the reward value expressed in the store currency.
- Display Mini-cart Points Balance Message** [store view] 
If enabled, the customer's current points balance will be shown in the mini-cart (if supported by a theme).
- Mini-cart Balance Message** [store view]
The message will be shown in the min-cart. The following variables are available: [p] - it will display the customer's current balance expressed in the points; [c] - it will display the customer's current balance expressed in the store currency.
- "Zero Balance" Message for Mini-cart** [store view]
The message will be shown in the min-cart if nothing is added to the cart yet.
- Display Cart Message** [store view] 
If enabled, the customers will see the message with a number of points they will get if complete the order.
- Cart Message** [store view]
The message will be shown in the notice on checkout pages. The following variables are available: [p] - it will display the number of points the customer will receive if completing an order; [c] - it will display the reward value expressed in the store currency.
- Display Checkout Message** [store view] 
If enabled, the customers will see the message with a number of points they will get if complete the order.
- Checkout Message** [store view]
The message will be shown in the notice on checkout pages. The following variables are available: [p] - it will display the number of points the customer will receive if completing an order; [c] - it will display the reward value expressed in the store currency.
- Add to RSS Feeds** [store view] 
- Show Wrapper for Messages** [store view] 
Add "Updated By" wrapper for manual update transactions' messages.

Display Header Message - if enabled, the customers will see the message with a number of points they will get if complete the order.

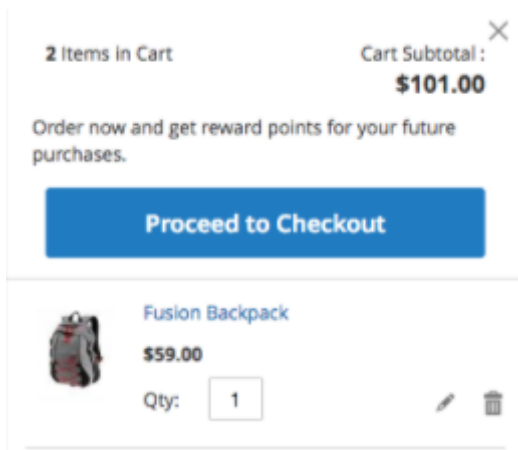
Header Message - here you can specify the message, that will be shown in the header. The following variables are available: [p] - it will display the number of points the customer will receive if completing an order; [c] - it will display the reward value expressed in the store currency.

Display Mini-cart Points Balance Message adds the message to the mini cart popup.

This message is shown if the customer has the reward points in the account. The text can be changed in the **Mini-cart Balance Message** field. The same variables can be used here as well.



This message is shown if the customer doesn't have the reward points in the account. The text can be changed in the **"Zero Balance" Message for Mini-cart** field:



Display Checkout Message - If enabled, the customers will see the message with a number of points they will get if complete the order.

Checkout message will be shown in the notice on checkout pages. The following variables are available: [p] - it will display the number of points the customer will receive if completing an order; [c] - it will display the reward value expressed in the store currency.

Add to RSS Feeds - indicate whether to add or not the message to the RSS feed.

Show Wrapper for Messages - set to **Yes** if you want to enable wrapper for messages.

Under the **Email Settings** tab you can adjust the following:

Email Settings

Email Sender <small>[store view]</small>	General Contact	▼
Default Email Template for Balance Change by Rules <small>[store view]</small>	Use the rule to update reward points balance (Default)	▼
<small>The email template is chosen based on the theme fallback when the "Default" option is selected.</small>		
Email Template for Balance Change by Admin <small>[store view]</small>	Update Reward Points Balance By Admin (Default)	▼
<small>The email template is chosen based on the theme fallback when the "Default" option is selected.</small>		
Expiration Date Email Template <small>[store view]</small>	Your Reward Points Balance will be expired soon (Default)	▼
<small>The email template is chosen based on the theme fallback when the "Default" option is selected.</small>		

Here you can specify the **Email Sender**, and choose the **Templates** for the following email types:

- Balance Change by Rules
- Balance Change by Admin
- Expiration Date Email

Under the **Expiration Date Settings** tab you can adjust the following:

Expiration Date Settings

Enable Expiration Date <small>[website]</small>	Yes	▼
Default Expiration Period (days) <small>[website]</small>	15	
Update Existing Expiration Dates <small>[website]</small>	No	▼
<small>Update the existing reward points expiration dates if the "Default Expiration Period" is changed. Works only if the expiration dates functionality is enabled.</small>		
Send Expiration Date Email <small>[website]</small>	No	▼

If **Enabled**, these settings provide the possibility to give the rewards points the expiration period. The store owner may change this time interval by giving the number of days for the rewards points in the **Default Expiration Period** configuration block.

The situation when the store owner decides to change or enable the expiration date settings is quite possible. The logic of such store points management is configured in the **Update Existing Expiration Dates** setting.

- If *No* is selected, the customers with both expired and not expired balances the new expiration period won't change. It will be changed for them only in case some new reward points will be added to their account.
- If *For balances if expiration date exists* setting is selected, this new expiration period will be changed only for those customers who have some points available with the expiration date set in their customer account. All of them will be able to use their points during the time interval that was defined in the **Default Expiration Period** setting.
- If *For all balances* setting is selected, this new expiration period will be changed for all the customers, even for those that don't have the expiration date set in future in their customer account.

The **Send Expiration Date Email** setting allows sending the emails about the approaching expiration date. The number of days to send the messages before the actual expiration can be set up in the **Notify Customers about Expiration Date** configuration.

Reward points rules

To add, delete or modify the Reward Points rules, go to **Marketing → MageWorx Reward Points → Rules**.


Reward Points Rules

 demouser ▾

[Add New Rule](#)

 Filters  Default View ▾  Columns ▾

Actions ▾ 5 records found 20 ▾ per page < 1 of 1 >

	ID ↓	Name	Event	Times Used	Points Generated	Priority	Stop Rules Processing	Status	Action
<input type="checkbox"/>	1	Extra bonus for each \$100 spent	Placed order	8	150.0000	0	No	Enabled	Select ▾
<input type="checkbox"/>	2	Thank you for leaving a review!	Customer review	1	5.0000	1	No	Enabled	Select ▾
<input type="checkbox"/>	3	Happy Birthday!	Customer birthday	0	0.0000	2	No	Enabled	Select ▾
<input type="checkbox"/>	4	Thank you for registration!	Customer registration	0	0.0000	1	No	Enabled	Select ▾
<input type="checkbox"/>	5	Thank you for placing the order!	Placed order	1	15.0000	3	No	Enabled	Select ▾

Please note that during the initial setup this grid will be empty. To create a new reward points rule click the **Add New Rule** button. The rule configuration consists of 4 sections.

Rule Information

Rule Information

Rule Name *

Description

Active * Yes

Websites *

Customer Groups *

From

To

Priority

Allow Notification Yes

Personal Email Template

Public In RSS Feed Yes

Rule Name allows you to assign a unique name to the created rule.

The **Description** field provides the possibility to add the rule description. It will be visible only in the back-end.

The store owner can temporarily disable or re-enable the rule using the **Active** toggle.

The **Websites** setting specifies the website where the rule should be applied to.

The **Customer Groups** configuration allows applying the rule to the specific customer groups only.

The store owner can restrict the usage of the rule by date intervals using the **From** and **To** date pickers.

If several rules can be applied and their priority needs to be handled, it can be managed by the **Priority** setting. The bigger the value, the higher the rule will be in the order of priority.

If **Allow Notification** is enabled, then the email will be sent to the customer when the reward points are credited to the balance.

Personal Email Template adds the possibility to use the template that meets exactly this particular rule. If the Use Config setting is selected, the one in the extension configuration will be picked.

Actions

The extension supports the following events to reward your customers:

- Place order
- Customer birthday
- Customer registration
- Product review
- Newsletter subscription

For all events you can set the amount of points you want to reward your customers with if the rule is triggered:

Actions

Event

Points Amount (Get X Points) *

Stop Rules Processing No

The order placing configuration is more complicated and needs to be explained.

Actions

Event ▼

Give Points ▼

Calculation Type ▼

Points Amount (Get X Points) *

Y spent

It regulates the amount a customer must spend to get "X points". "X points" are assigned each time the customer spends the set amount.

Stop Rules Processing No

Placed Order

Event ▼

Give Points

- ✓ Get X Points
- Get X Points for every Y spent
- Get X Points for every Y spent starting from Z spend
- Get X Points for every Y quantity
- Get X Points for every Y quantity starting from Z quantity

If the "Placed Order" event is selected, the "Give Points" setting shows. It can be further configured depending on the desired condition.

1. The **Get X Points** setting allows crediting the specific (X) number of reward points to any order.
2. The **Get X Points for every Y spent** credits the specific (X) number of reward points to the order that is bigger than Y threshold. So, for instance, the **X = 10** and **Y = 50**.

Grand Total	Reward Points
\$49	0
\$52	10
\$99	10
\$101	20

If the grand total is \$49, then the customer doesn't receive any reward points, for the grand total \$52 the customer receives 10 reward points. The customer gets 10 points as well if the grand total is \$99. For \$101, the customer receives 20 reward points, and so on.

3. The **Get X Points for every Y spent starting from Z spent** credits the specific (X) number of reward points to the order that is bigger than Z threshold for every Y sum. So, for instance, the **X = 10**, **Y = 20** and **Z = 100**.

Grand Total	Reward Points
\$99	0
\$119	0
\$139	10
\$141	20

If the grand total is \$99, then the customer won't receive the reward points as it is smaller than Z (\$100). If the total is \$119, then the customer won't receive the reward points as well, because 10 points are credited for every \$20 starting from \$100 and \$119 is less than \$120. If the total is \$139, then 10 reward points will be credited to the account. 20 reward points will be added for the \$141 grand total, and so on.

4. The **Get X Points for every Y quantity** credits the specific (X) number of reward points to the order that has more than Y products in sum. So, for instance, the **X = 10** and **Y = 5**.

T-shirts Quantity	Bags Quantity	Pencils Quantity	Total Quantity	Reward Points
3	1	0	3+1=4	0
5	4	0	5+4=9	10
7	3	1	7+3+1=11	20

If the customer buys 3 T-shirts and 1 bag, then no reward points will be added as the total quantity 4 is less than Y. If the customer buys 5 T-shirts and 4 bags, then 10 reward points will be added (total quantity is 9). For the order with 7 T-shirts, 3 bags and one pencil 20 points will be added (total quantity is 11).

5. The **Get X Points for every Y quantity** starting from Z quantity credits the specific (X) number of reward points to the order that has more products than Z threshold for every Y products. So, for instance, the **X = 10, Y = 5** and **Z = 10**.

T-shirts Quantity	Bags Quantity	Pencils Quantity	Total Quantity	Reward Points
4	5	0	4+5=9	0
4	5	5	4+5+5=14	0
4	4	8	4+4+8=16	10
7	9	5	7+9+5=21	20

If the customer buys 4 T-shirts and 5 bags, then no reward points will be added as the total quantity 9 is less than Z (10). If the customer buys 4 T-shirts, 5 bags and 5 pencils, then the customer won't receive the reward points as well, because 10 points are added for every 5 products starting from 10 and the total quantity (14) is less than 15. If the customer purchases 16 products in total, then 10 reward points will be added to the account. 20 reward points will be added for the 21 products in total, and so on.

The "Placed order" event shows the additional field, the **Calculation Type** so that the quantity of reward points can be calculated as the fixed value or as the percent of the grand total.

The last, **"Stop Rules Processing"** configuration stops any other reward points rules from being processed in case several rules conditions are met.

Apply the rule only to cart items matching the following conditions (leave blank for all items).

i If the action conditions are empty - the price will be calculated from the cart subtotal with discount. If the action conditions exist and include the valid items - the amount will be calculated using the valid items' price and qty. If the action conditions exist and don't include the valid items - the rule will be ignored.

If ALL of these conditions are TRUE :

Category is ⊞ ✓ ✗

+

This section limits the products from the whole cart that should be counted. If you have several products in the cart, and only one meets these conditions, it will be handled as if it had been the only one in the cart. If the action conditions are empty, the price will be calculated from the grand total (no rules = no limitations). If the action conditions exist and don't include the valid items, the rule will be ignored and not shown at all.

Conditions

This workspace has the same structure and logic as the previously described Actions section. The difference is that these condition limits **the whole cart** so that if the condition is true, the reward point rule will be met. After that, the extension will check **the valid products** (if any) from the Actions tab. Otherwise, the rule will be ignored and not shown at all.

Leave conditions empty to reward your customers for purchasing all products.

Labels

Labels ✎

Default Rule Label for All Store Views

Store View Specific Labels ?

Main Website

Main Website Store

Default Store View

The **Labels Section** is designed for different frontend names of the reward points rule on different store views. Some rules may need to be translated and, for this matter, this section allows specifying the appropriate name. Please note that if the string is empty, the **Default Rule Label for All Store Views** will be used.

Customer Information

Please, go to **Customers** → **All Customers**. The extension adds a special tab that shows the current reward points balance directly on the grid:

Customers demouser ▾

[Add New Customer](#)

Search by keyword Filters | Default View ▾ | Columns ▾ | Export ▾

Actions ▾ 5 records found 20 ▾ per page | < | 1 of 1 | >

<input type="checkbox"/>	ID ↓	Name	Email	Group	Phone	ZIP	Country	Customer Since	Confirmed email	Customer Points	Action
<input type="checkbox"/>	1	Veronica Costello	roni_cost@example.com	General	(555) 229-3326	49628-7978	United States	Sep 16, 2020 11:49:41 AM	Confirmation Not Required	2.0100	Edit
<input type="checkbox"/>	2	John White	white@example.com	General	+3589252462	12324	Turkey	Feb 2, 2021 5:52:42 PM	Confirmation Not Required	0.0000	Edit
<input type="checkbox"/>	3	Anna Bond	anna@example.com	General	+3589252462	12324	Turkey	Feb 2, 2021 7:06:32 PM	Confirmation Not Required	95.0000	Edit
<input type="checkbox"/>	4	Jim Newcastle	jim@example.com	General	+3589252462	12324	Turkey	Feb 3, 2021 10:57:34 AM	Confirmation Not Required	20.0000	Edit
<input type="checkbox"/>	5	John Doe	doe@example.com	General	+35458252462	AB1C 2DF	United Kingdom	Feb 3, 2021 12:30:01 PM	Confirmation Not Required	10.0000	Edit

Select the customer whose balance you need to edit. The customer reward points are shown on the special **Reward Points** tab.

Veronica Costello

demouser

[← Back](#)
[Delete Customer](#)
[Reset](#)
[Create Order](#)
[Save and Continue Edit](#)
[Save Customer](#)

- CUSTOMER INFORMATION
- Customer View
- Account Information
- Addresses
- Orders
- Newsletter
- Billing Agreements
- Product Reviews
- Wish List
- Reward Points**

Reward Points Balance

Website	Balance	Currency Amount	Expiration Date
Main Website	2.0100	\$2.01	2021-02-17 (12 days left)

Update Reward Points Balance

Store

Update Points
It is possible to use a negative variable when subtracting points.

New Expiration Period
0 - remains unchanged. Leave empty for the set unlimited expiration date. For reference: The "Default Expiration Period" is 15 days.

Send Notification
Notifications are sent only in case of the points balance changes.

Comment for Customer

Reward Points Transactions

[Reset Filter](#)
5 records found
 per page
 [<](#)
 of 1
 [>](#)

Balance	Points	Website	Event Message	Created
		<input type="text" value="Main Website"/>		<input type="text" value="From"/> <input type="text" value="To"/>
2.01	-10.41	Main Website	Points were used for the order 000000009	Feb 2, 2021, 6:59:08 PM
12.42	-12.58	Main Website	Points were used for the order 000000008	Feb 2, 2021, 6:57:55 PM
25	+10	Main Website	The reward points were added for the completed order 000000007	Feb 2, 2021, 6:56:06 PM
15	+5	Main Website	For submitting of the review	Feb 2, 2021, 6:45:33 PM

The **Reward Points Balance** tab shows the grid with the customer's reward point balance on any website within one Magento installation. If the expiration period has been enabled, it will be shown here as well.

The **Reward Points Transaction** tab shows the grid with the customer's reward points transactions history.

Update Reward Points Balance

Store	<input type="text" value="Default Store View"/>
Update Points	<input type="text" value="Main Website"/> <input type="text" value="Main Website Store"/> <input type="text" value="Default Store View"/>
New Expiration Period	<input type="text" value="28"/>
Send Notification	<input type="text" value="Yes"/>
Comment for Customer	<input type="text" value="Received"/>

It is possible to use a negative variable when subtracting points.

0 - remains unchanged. Leave empty for the set unlimited expiration date.
For reference: The "Default Expiration Period" is 15 days.

Notifications are sent only in case of the points balance changes.

The **Update Reward Points Balance** tab provides the possibility to manually credit or deduct the reward points.

The **Store** configuration provides the possibility to add the points to the customer in the specific store view.

The **Update Points** supports both positive (to credit) and negative (to deduct) values.

The store owner can specify the **New Expiration Period**. Please note that in case the customer already has some available reward points (both without and with the expiration date set), the new period will be applied to them as well.

If the **Send Notification** is set to Yes, the customer receives the email with the default email template.

The **Comment for Customer** allows the store owner to write some particular text for the customer to be visible in the customer account.

Point transactions

To observe the full log of the transactions made by your customers, go to **Marketing → MageWorx Reward Points → Point Transactions**.

Points Transactions

 demouser ▾

Reload

 Filters |  Default View ▾ |  Columns ▾ |  Export ▾

14 records found


20 ▾ per page | < | 1 | of 1 | >

<input type="checkbox"/>	ID ↓	Customer Email	Points Delta	Points Balance	Event Code	Comment	Web Site	Created At
<input type="checkbox"/>	1	roni_cost@example.com	+10.0000	10.0000	order_placed_earn		Main Website	Feb 2, 2021 15:40:20
<input type="checkbox"/>	2	roni_cost@example.com	+5.0000	15.0000	customer_review		Main Website	Feb 2, 2021 15:45:33
<input type="checkbox"/>	3	roni_cost@example.com	+10.0000	25.0000	order_placed_earn		Main Website	Feb 2, 2021 15:56:06
<input type="checkbox"/>	4	roni_cost@example.com	-12.5800	12.4200	order_placed_spend		Main Website	Feb 2, 2021 15:57:55
<input type="checkbox"/>	5	roni_cost@example.com	-10.4100	2.0100	order_placed_spend		Main Website	Feb 2, 2021 15:59:08
<input type="checkbox"/>	6	anna@example.com	+10.0000	10.0000	order_placed_earn		Main Website	Feb 2, 2021 16:09:07
<input type="checkbox"/>	7	anna@example.com	+10.0000	20.0000	order_placed_earn		Main Website	Feb 2, 2021 16:11:19
<input type="checkbox"/>	8	anna@example.com	-17.0000	3.0000	order_placed_spend		Main Website	Feb 2, 2021 16:11:42

Import/Export reward points

To import or export reward points, please, go to **System** → **Data Transfer** → **Import/Export Reward Points**.

Import and Export Reward Points Balance

 Make sure your file isn't more than 10M.

Import Reward Points Balance

Choose File No file chosen

Import Reward Points Balance

Export Reward Points Balance

Export Reward Points Balance

Download example CSV file

Download

To check the structure of the reward points, click the **Export Reward Points Balance** button or the **Download Example CSV**. The CSV structure is as follows:

```
"Website Code","Customer Email","Points","Action","Comment for Customer (not required)"
"base","rewrite_balance@example.com","20","replace","Hello! Your balance now is 20 points"
"base","add_to_balance@example.com","10","add","Hello! 10 points were added to your balance"
"base","deduct_from_balance@example.com","5","deduct","Hello! 5 points were deducted from your balance"
```

The **action** column manages the balance change. For instance, assume that the original balance is 100 and the value of the number points is 25.

- The **replace** value changes the customer's balance to the exact value of points (25)
- The **add** sums the number of points to the original one (100+25=125)
- The **deduct** subtracts it (100-25)=75.

If the deduct value is bigger than the original one, the final value will stay 0.

Customer account

The customer reward points are shown on the special **Reward Points** tab on the customer information page.

Reward Points

Reward Points Balance

You have 2.01 Reward Points (\$2.01). Expiration date is 17-02-2021.

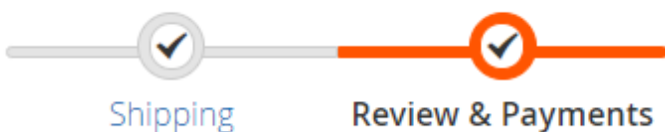
Reward Points Transactions

5 Item(s) Show per page

Balance	Points	Message	Date
2.0100	-10.4100	Points were used for the order 000000009	2/2/21, 6:59 PM
12.4200	-12.5800	Points were used for the order 000000008	2/2/21, 6:57 PM
25.0000	+10.0000	The reward points were added for the completed order 000000007	2/2/21, 6:56 PM
15.0000	+5.0000	For submitting of the review	2/2/21, 6:45 PM
10.0000	+10.0000	The reward points were added for the completed order 000000006	2/2/21, 6:40 PM

5 Item(s) Show per page

Here, the customer can observe the exact quantity of the reward points and the reward point transactions history. The expiration date, if enabled, is shown here as well. The comment for customer from the backend is shown in the *Message* column.



Complete the purchase and earn 40 points for a discount on your future purchases.

Payment Method

Check / Money order

- My billing and shipping address are the same

Veronica Costello
6146 Honey Bluff Parkway
Calder, Michigan 49628-7978
United States
(555) 229-3326

Place Order

Apply Discount Code

Reward points

You have 2.01 Reward Points (\$2.01)

Apply My Reward Points

Order Summary

Cart Subtotal	\$493.00
Discount	-\$92.00
Shipping Best Way - Table Rate	\$0.00
Tax	\$33.08

Order Total \$434.08


12 Items in Cart

Ship To:

Veronica Costello
6146 Honey Bluff Parkway
Calder, Michigan 49628-7978
United States
(555) 229-3326

The extension shows the Reward Points block on the checkout with the possibility to apply them to get the discount.

Reward points

 The reward points have been successfully applied.

You have 2.01 Reward Points (\$2.01)

Cancel Reward Points

The customer can cancel the usage of the reward points usage if necessary.

If the customer doesn't have any reward points at all, this block will be hidden.

Configure personal customer discounts

Backend setup

Please, go to **Stores** → **Configuration** → **MageWorx** → **Personal Customer Discount**.

MageWorx Personal Promotion

Enable Personal Promotions
In Cart Price Rules
[store view]

Yes

The **Enable Personal Customer Discount in Cart Price Rules** setting provides the possibility to temporarily disable/re-enable the extension functionality directly from the backend.

Personal customer discount configuration

The extension extends the default cart price rules configuration.

To edit the cart price rule, the store owner should go to **Marketing** → **Promotions** → **Cart Price Rules**.

Cart Price Rules

[Add New Rule](#)

Search

[Reset Filter](#)

4 records found

20







per page



1

of 1



ID	Rule	Coupon Code	Start	End	Status	Web Site	Priority	↓
<input type="text"/>	<input type="text"/>	<input type="text"/>	From  To 	From  To 	<input type="text"/>	<input type="text"/>	<input type="text"/>	
4	\$4 Luma water bottle (save 70%)	H20	Feb 24, 2021	Feb 25, 2021	Active	Main Website	0	
2	Spend \$50 or more - shipping is free!	FreeShipping	Feb 10, 2021	Feb 16, 2021	Active	Main Website	0	
3	20% OFF Ever \$200-plus purchase!*		Jan 21, 2021	Feb 17, 2021	Active	Main Website	0	
1	Buy 3 tee shirts and get the 4th free	3Shirts_Coupon	Feb 5, 2021	Feb 27, 2021	Active	Main Website	1	

From here, the store owner can either *Add New Rule* or *Edit* the rules that have been created before. Please note that during the initial setup this grid may be empty.

Our extension adds the special **Customers** tab.

\$4 Luma water bottle (save 70%) [← Back](#) [Delete](#) [Reset](#) [Save and Continue Edit](#) [Save](#)

Conditions ⌵

Actions ⌵

Labels ⌵

Manage Coupon Codes ⌵

Customers ⌵

Search [Reset Filter](#) 6 records found 20 per page [<](#) 1 of 1 [>](#)

<input type="checkbox"/>	Customer ID ↑	Name	Customer Email	Country	Website
<input type="checkbox"/>	6	Sergey	s.uchuhlebov@mageworx.com	United States	MageWorx
<input type="checkbox"/>	5	Vitaly	v.gonkov@mageworx.com		MageWorx
<input type="checkbox"/>	4	azalescky	a.zalescky@mageworx.com		MageWorx
<input type="checkbox"/>	3	vitali	vitali@mageworx.com		MageWorx
<input type="checkbox"/>	2	test	artemzalescky@gmail.com		MageWorx
<input type="checkbox"/>	1	Veronica	roni_cost@example.com	United States	MageWorx

This tab shows the customers grid with the default possibility to sort out the values and reset the filters. The customer grid supports the multiselect possibility to choose several customers simultaneously. Once the customer(-s) are selected and the configuration is saved, the cart price rule will be triggered **only for the targeted shopper(-s)**.

Note: if no customers are selected, the cart price rule will work for anyone

Personal customer discount features in Magento 2 Enterprise

Magento 2 Enterprise edition provides the possibility to add scheduled updates. Cart price rules can be applied on schedule as part of some campaign.

\$4 Luma water bottle (save 70%)

Scheduled Changes Schedule New Update

← Back Delete Reset Save and Continue Edit Save

Currently Active

Rule Information

Rule Name * \$4 Luma water bottle (save 70%)

Description Use promo code H20 at checkout

Active * Yes



To add the new schedule update, click the **Schedule New Update** button.

Once the schedule update has been created, the store owner should click the Save button.

The upcoming update will be shown in the scheduler.

\$4 Luma water bottle (save 70%)

Scheduled Changes Schedule New Update

	Jul 4, 2018	6:00 AM	Start	New Schedule	View/Edit Preview
	Aug 25, 2018	3:53 AM	End		

Configure product countdown timers

Product Countdown Timers module is designed to add the urgency and scarcity for your customers to motivate them to purchase

Backend Setup

Go to **Stores** → **Configuration** → **Mageworx** → **Marketing Suite** → **Countdown Timers**.
Currently, there is only one setting here for now:

Countdown Timers

This setting allows you to enable or disable the countdown timers globally on the front-end. To add or modify the timers, go to Marketing - [Countdown Timers](#).

Enable [store view]

Enable - it enables/disables the entire functionality on the front-end.

Manage timers

In order to add or edit countdown timers, navigate to **Marketing** → **Marketing Suite** → **Countdown Timers**.

Countdown Timers

MarketingSuite ▾

Add New Timer

Filters | Default View ▾ | Columns ▾

Actions ▾ 4 records found 20 ▾ per page < 1 of 1 >

<input type="checkbox"/>	ID	Name	Store View	Start	End	Status	Priority	Action
<input type="checkbox"/>	1	Fusion Backpack	All Store Views	Feb 3, 2021	Feb 26, 2021	Enable	1	Select ▾
<input type="checkbox"/>	2	Push It Messenger Bag	All Store Views			Enable	2	Select ▾
<input type="checkbox"/>	3	Overnight Duffle	All Store Views	Jan 19, 2021	Jan 21, 2021	Enable	0	Select ▾
<input type="checkbox"/>	4	Watches (by condition)	All Store Views	Feb 17, 2021	Feb 27, 2021	Enable	0	Select ▾

- **Name** - the internal name of a campaign. Visible in the back-end only.
- **Store Views** - the store views, a campaign is assigned to.
- **Start/End** - these dates determine the start and end dates when a certain timer should be shown and hidden. The timer will show the remaining period from start to end dates.
- **Status** - the current status of a campaign.
- **Priority** - the priority for each campaign. The campaign with higher priority will be shown first if multiple timers match the same conditions.

To add a new timer click on the **Add new timer** button.

Fusion Backpack

← Back

Delete Timer

Save and Continue Edit

Save

COUNTDOWN TIMER INFORMATION

General

Products

Design

General

Name * Fusion Backpack

Status Enable

Store Views *
All Store Views
Main Website
Main Website Store
Default Store View

Customer Groups *
NOT LOGGED IN
General
Wholesale
Retailer

Display mode Specific products

Display on Categories Yes

Use discount dates No

Start * 02/3/2021

End * 02/26/2021

Priority 1

The **General** section of the timer:

- **Name** - the internal name of the timer. It is visible in the back-end only.
- **Status** - the status of the timer.

- **Store View(s)** - you can choose the store views you want to display the timer on.
- **Customer Groups** - you can choose the customer groups you want to display the timer for.
- **Display Mode** - this setting defines the products, the timer should be shown for. You can choose to display the timer on all products, specific products or to use custom mode. If you select the 'custom' mode, such timers can be used in Magento 2 widgets to display the timers in any custom place of your store.
- **Use discount dates** - this toggle defines whether the timer should use the start/end dates of the product special price or matching catalog price rule (if applicable).

Example

Let's assume you created the timer with the enabled 'Use discount dates' toggle and applied it to the productA. This product has a special price valid within 3 days and it matches the conditions of one of the catalog price rules valid within 7 days. In this case, the timer will use the start/end dates of the special price first. When the current date passes the end date of the special price (i.e. when the special price expires), the timer automatically will start using the matching catalog price rule.

The product special price has higher priority than the catalog price rule if both discounts are applied.

- **Start/End dates** - these dates are enabled if the 'Use discount rates' is disabled. These settings set the date when the timer should be activated, and the date when it should be hidden. The timer will display the remaining period from the start to the end date.
- **Priority** - this setting defines the priority of each timer if multiple timers have the same conditions. The timer with higher priority will be executed.

If **Specific products** is chosen in the **Display mode**, the **Products** tab appears to choose the products you need to apply the timer to.

Bags Sale

demouser ▾

← Back Delete Timer Save and Continue Edit **Save**

COUNTDOWN TIMER INFORMATION

General

Products

Design



Products

Assign Type ▾

Specific products

Add Products

20 ▾ per page < 1 of 1 >

ID	Thumbnail	Name	Status	Attribute Set	SKU	Price	Actions
6		Fusion Backpack	Enabled	Bag	24-MB02		Remove
9		Compete Track Tote	Enabled	Bag	24-WB02		Remove

The **Design** tab allows you to choose a design template for the timer.

Bags Sale

demouser ▾

← Back Delete Timer Save and Continue Edit **Save**

COUNTDOWN TIMER INFORMATION

General

Products

Design

Design

Before timer text

After timer text

Templates

The sale will end in

Preview: **1 2 : 1 2 : 1 2 : 1 2**

day hrs min sec

- **Before timer text** - this field allows you to specify a text, which will appear above the timer on the front-end.
- **After timer text** - this field allows you to specify a text, which will appear below the timer on the front-end.

The **Templates** button opens the gallery of ready designs for your timers:

Templates

Cancel Load Template

The sale will end in

#1

The sale will end in

#2

The sale will end in

#3

The sale will end in

#4

The sale will end in

#5

The sale will end in

#6

The sale will end in

#7

The sale will end in

#8

The sale will end in

#9

The sale will end in

#10

The **Custom** value in the **Display mode** setting allows you to add a timer to a widget. The widgets can be added to any custom page in your store and to any custom position within the page. To add and manage widgets, please navigate to **Content → Widgets → Add new widget**.

Countdown timers frontend examples

www.amasty.com



Fusion Backpack

★★★★☆ 3 Reviews [Add Your Review](#)

\$49.00

IN STOCK
SKU#: 24-MB02

Regular
Price
\$59.00

The sale will end in

00 : 20 : 53 : 45

days hrs min sec
Hurry up!

Qty

[Add to Cart](#)

This product was **viewed 322 times** for last day

[ADD TO WISH LIST](#) [ADD TO COMPARE](#)



Didi Sport Watch

★★★★☆ 2 Reviews [Add Your Review](#)

\$73.60

IN STOCK
SKU#: 24-WG02

Regular
Price
\$92.00

Sale will end in

01 : 20 : 52 : 13

days hrs min sec
Hurry up!

Qty

[Add to Cart](#)

This product was **viewed 1 time** for last day

[ADD TO WISH LIST](#) [ADD TO COMPARE](#)

Find out how to install the **Marketing & Sales Suite** extension for Magento 2 via [Composer](#).

From:

<https://stg.amasty.net/docs/> - **Amasty Extensions FAQ**

Permanent link:

https://stg.amasty.net/docs/doku.php?id=magento_2:marketing_automation



Last update: **2021/02/09 15:51**