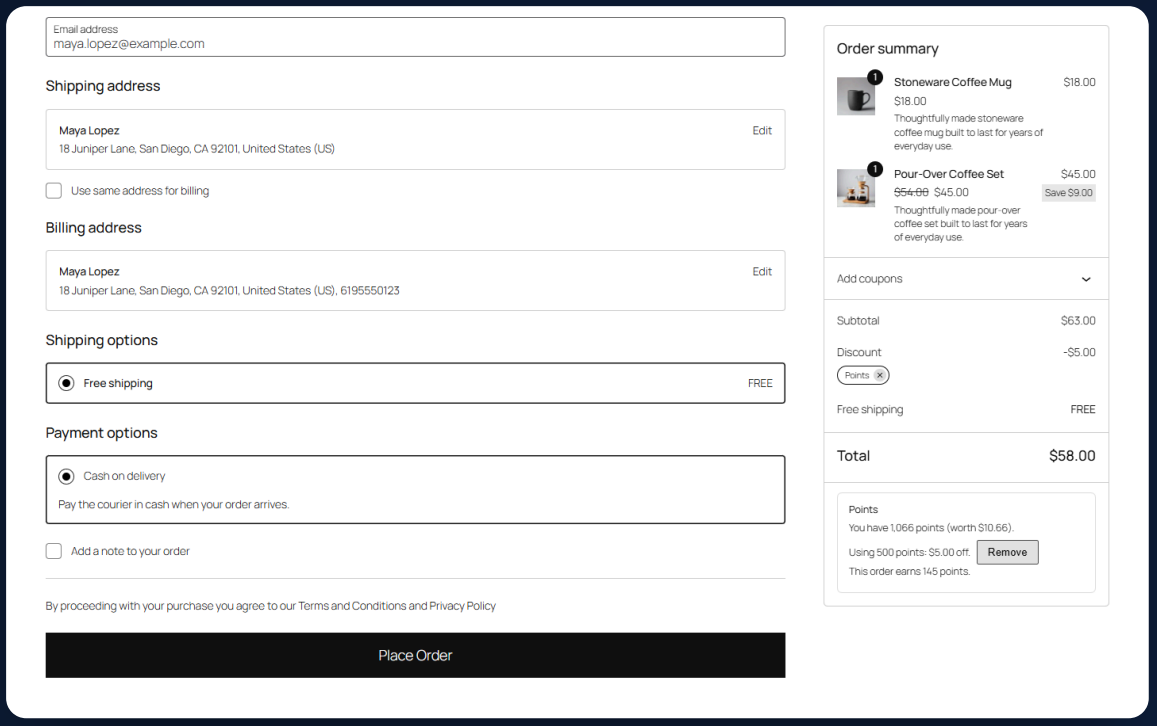
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WOOCOMMERCE PLUGIN · USER GUIDE

Pointsmith — Points & Rewards for WooCommerce

Version 1.0.0 · Installation, licence activation, every setting explained, FAQ and troubleshooting.



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Pointsmith — Points & Rewards for WooCommerce: user guide

Pointsmith adds WooCommerce points and rewards to your store. Customers with an account earn points on their orders, see their balance under My Account, and use their points for money off at checkout.

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1. Requirements

- WordPress 6.4 or newer, PHP 7.4 or newer.
- WooCommerce 8.0 or newer (tested with WooCommerce on WordPress 7.1, block and classic checkout, Twenty Twenty-Five and Twenty Twenty-One themes).
- **Coupons turned on** in WooCommerce → Settings → General → "Enable the use of coupon codes". The points discount is a WooCommerce virtual coupon (code `pppr-points`, shown to shoppers as "Points"). If coupons are off, Pointsmith shows a warning on its screens.
- Customers need an account to earn and use points. Guests see a message inviting them to log in.

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2. Installation

1. Install and activate WooCommerce.
2. Plugins → Add New → Upload Plugin, choose the Pointsmith zip and activate it.
3. A new **Points** menu appears in the admin, with Customers, History, Settings and Licence (Upgrade to Pro in the free version).

Activating Pro

1. Install the Pro zip from your coodecraft.com account. It replaces the free plugin in place; every customer's points, history and settings stay.
2. Go to **Points** → **Licence**, paste your licence key and click **Activate**.
3. Monthly and yearly keys switch the Pro features off when they end and back on when you renew (use "I have paid — check again" on the Licence screen after paying). Lifetime keys never end. While Pro is off, customers keep earning and using points at the normal rate; bonuses, tiers, multipliers and expiry pause, and nothing you set up is deleted.

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3. Settings (Points → Settings)

Screens: `settings`, `settings-pro`.

Earning points

- *Points per $1 spent* (default 1). Counted on the products in the order after discounts (including a points discount), before tax and shipping, rounded down.
- *Add points when an order is*: **Completed** (default) or **Processing or completed** (as soon as it is paid). Points are taken back if the order is later cancelled, refunded or fails.
- *Product pages*: shows "Earn 45 points with this purchase." above the add-to-cart button. For a logged-in customer the number includes their tier and the product's multiplier (Pro).

Using points

- *Points for $1 off* (default 100): with 1,250 points a customer can take $12.50 off.
- *Fewest points per order* (default 100).
- *Most of an order paid with points* (default 50%): the share of the products total points may pay for. Shipping is never paid with points.
- *Name of your points*: for example "Points" or "Stars".

Pro sections (shown but locked in the free version): bonus points, tiers, expiry and reminder emails, multipliers — see section 7.

Uninstall: "Delete all plugin data when the plugin is deleted" is off by default. Only when it is ticked does deleting the plugin remove the settings, the points history table and the points stored on customers, products, categories and orders.

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4. Customers and manual adjustments (Points → Customers)

Screens: `customers`, `customers-tiers`.

- The table lists every customer with points: balance, what it is worth, lifetime points and (Pro) tier. Search by name, email or username.
- **Add or remove points**: enter the customer's email address, username or user ID, a number of points (use a minus sign to remove, for example -100) and a reason. The reason is shown to the customer in their history. Removing points never takes a balance below zero.

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5. What shoppers see

Screens: `product-message`, `my-account-points`, `block-checkout`, `classic-checkout`.

- **Product pages**: "Earn N points with this purchase."
- **My Account → Points**: balance, what it is worth, how points work, and the latest activity (10 rows in the free version, 50 in Pro). The account dashboard also shows the balance.
- **Block checkout** (the WooCommerce default): a Points box in the order summary shows the balance and what this order earns. The shopper types how many points to use (the field suggests the most they can use) and clicks **Use points**; the discount and total update at once and the totals show a "Points" line. **Remove** takes the points off again.
- **Classic checkout** (`[woocommerce_checkout]`): the same box above the checkout form.

- The cart page shows the points discount once it has been chosen at checkout (and the coupon remove link), but has no box of its own.

The discount is always worked out again on the server from the customer's current balance, the minimum and the maximum share: asking for more points than the customer has (also directly through the Store API) only uses the points they really have.

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6. Orders, cancellations and refunds

Screen: `order-notes`.

- When an order with points is placed, the points are taken from the balance immediately and an order note says how many were used for what discount.
- When the order reaches the earn status, its points are added and an order note says how many (and, in Pro, at which tier).
- **Cancelled, refunded (in full) or failed**: the points the order earned are taken back and the points used on it are returned, each with an order note. If an order is reopened, the used points are taken again.
- A **partial refund** does not change points by itself; use Points → Customers to adjust.

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7. Pro features

Bonus points (Points → Settings → Bonus points)

- **Account sign-up**: given once when a customer account is created (My Account registration, checkout account creation, or an admin creating a customer).
- **Product review**: given when a logged-in customer's product review is approved, once per product per customer. Replies do not count.
- **Referral**: each customer gets a personal link under My Account → Points (`?pppr_ref=…`). A visit through it is remembered for 30 days in a cookie. When the new shopper's first paid order (the first order for that email address) reaches the earn status, the referrer gets the bonus; it is taken back if that order is cancelled or refunded. A customer cannot refer themselves.
- **Birthday**: customers add their birthday (month and day) under My Account → Account details (screen `birthday-field`). The daily task gives the bonus on the day, at most once a year.

Tiers (Points → Settings → Tiers)

Up to three tiers (default Silver from 500 and Gold from 2,000 lifetime points), each with an earn multiplier (×1.25, ×1.5). Lifetime points are every point earned or added, minus points taken back. Customers see their tier and how far the next one is under My Account → Points.

Multipliers

- **Category**: Products → Categories → edit a category → *Points multiplier* (screen `category-multiplier`). 2 = double points, 0 = no points.
- **Product**: Product data → General → *Points multiplier*. A product's own multiplier wins; otherwise the highest multiplier of its categories applies; otherwise the normal rate.
- Tier and product multipliers multiply: a $18 mug in a ×2 category for a Silver (×1.25) customer earns 45 points.

Expiry and reminder emails

- *Points expire after (days)*: points added after you turn this on expire that many days after they were added. Spending uses the points that expire first.
- *Reminder email (days before)*: one "Points expiring soon" email per customer listing the points about to expire. Edit its subject, heading and text, or turn it off, in WooCommerce → Settings → Emails.

History, CSV export and daily tasks (Points → History)

Screen: `history`.

- Every points change for every customer: date, customer, type, points, balance, order and note. Filter by customer, type and date; **Export CSV** downloads the filtered rows.
- **Daily tasks** run once a day by WP-Cron (birthday bonuses, expiry, reminder emails). **Run daily tasks now** runs them on demand and shows what was done. On sites with little traffic, set up a real cron job for WP-Cron so the daily run is on time.

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8. Developers

Filters: `pppr_product_multiplier`, `pppr_user_multiplier`, `pppr_order_points`, `pppr_credit_expiry`, `pppr_account_slug` (default `points`), `pppr_account_history_rows`. Actions: `pppr_points_added`, `pppr_points_taken`, `pppr_account_card`, `pppr_account_rules`, `pppr_account_sections`.

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9. FAQ and troubleshooting

- **The Points tab gives a 404**: go to Settings → Permalinks and click Save once.
- **Shoppers cannot use points**: check that coupons are enabled, that the customer is logged in, has at least the minimum number of points, and that the cart is large enough for the minimum within the maximum share.
- **Points were not added**: points are added when the order reaches the earn status (Completed by default) and only for orders that belong to a customer account.
- **Can it give points for social shares or newsletter sign-ups?** Not yet.

- **Can points be converted to store credit or a coupon code the customer keeps?** Not yet: points are used directly at checkout.