

Streamline Rewards

Version: 3.0.0

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License: Proprietary

Requires WordPress: 5.0+

Requires PHP: 7.2+

WooCommerce Compatibility: 3.0 - 9.5+

Complete WooCommerce rewards program with points, tiers, automatic expiration, and comprehensive customer management.

Table of Contents

- [Features](#)
 - [What's New in 3.0](#)
 - [Installation](#)
 - [Configuration](#)
 - [Usage Guide](#)
 - [Customer Experience](#)
 - [Technical Details](#)
 - [Troubleshooting](#)
 - [Changelog](#)
 - [Support](#)
-

Features

Core Functionality

- **Smart Points System** - Customers earn points for every dollar spent on eligible products
- **Flexible Redemption** - Redeem points at checkout for instant discounts with configurable limits
- **5-Tier Progressive System** - Reward loyalty with tier-specific benefits and bonuses
- **Automatic Expiration** - Points expire after configurable periods with tier-specific rules

- **Birthday Rewards** - Automatic bonus points on customer birthdays (once per year)
- **Advanced Exclusions** - Separate controls for earning vs redemption eligibility
- **Category-Based Eligibility** - Precisely control which products participate in rewards

Advanced Features

- **Tier-Specific Settings** - Configure unique values per tier:
 - Points earned per dollar (e.g., Tier 5 earns 2x points)
 - Redemption value per point (e.g., Tier 5 gets better rates)
 - Expiration periods (e.g., Tier 5 points last longer)
 - Maximum redemption limits per order
 - **Backdated Points** - Add historical points with accurate expiration calculation
 - **Dual Exclusion System:**
 - **Earning Exclusions** - Products that don't earn OR allow redemption
 - **Redemption Exclusions** - Products that earn points but can't be discounted
 - **Automated Expiration Engine:**
 - Daily scheduled checks via WP-Cron
 - Triggers on customer login
 - Manual admin override available
 - Full audit trail of expired points
 - **Import/Export Tools** - Bulk customer data management with CSV support
 - **Comprehensive Reports** - Analytics, leaderboards, tier distribution, and activity tracking
 - **Complete Points History** - Full audit trail with export capabilities per customer
 - **HPOS Compatible** - Full support for WooCommerce High-Performance Order Storage
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What's New in 3.0

Major Enhancements

1. Complete Tier-Specific Settings Interface

Configure different reward parameters for each of 5 tiers:

- **Points Per Dollar** - Higher tiers earn more (e.g., Tier 1: 1 point, Tier 5: 2.5 points)
- **Point Redemption Value** - Better rates for loyal customers (e.g., Tier 1: \$0.01, Tier 5: \$0.015)
- **Expiration Periods** - Longer validity for higher tiers (e.g., Tier 1: 365 days, Tier 5: 730 days)
- **Max Redemption Limits** - Higher caps per order for premium tiers
- **Easy Toggle** - Apply same settings to all tiers with one checkbox

2. Automatic Points Expiration System

Points now expire automatically based on earn date:

- **Daily Cron Job** - Scheduled automatic checks for all customers
- **Login Triggers** - Real-time check when customers access their account
- **Manual Override** - Admin can force expiration check anytime
- **Tier-Aware** - Different expiration periods per tier level
- **Backdate Support** - When backdating points, expiration calculates from that date
- **Full Tracking** - History records show exactly when and why points expired

3. Enhanced Exclusion Controls

Two separate exclusion systems for maximum flexibility:

Earning Exclusions (Settings → Exclusions):

- Products that DON'T earn points when purchased
- Also DON'T allow point redemption when in cart
- Use for: Gift cards, sale items, promotional products

Redemption Exclusions (Settings → Redemption Exclusions):

- Products that DO earn points when purchased
- But DON'T allow point redemption when in cart
- Use for: High-margin items, manufacturer-restricted products
- Supports both categories and individual SKUs

4. Maintenance Dashboard

New admin tools for system management:

- **Expiration Status** - View cron schedule and last check results
- **Manual Expiration** - Force check with detailed results
- **System Diagnostics** - Quick health check of all components
- **Performance Metrics** - Track customers processed and points expired

5. Improved Birthday Rewards

Enhanced birthday point system:

- **Exact Date Tracking** - Prevents duplicate rewards if plugin disabled/re-enabled
- **Automatic Annual Awards** - One-time per year, every year
- **Admin Management** - Set birthdays directly in customer editor
- **History Tracking** - Clear record of birthday point awards

6. Better Performance

- **Optimized Queries** - Faster customer list and report loading
 - **Smart Caching** - Reduced database calls for frequently accessed data
 - **Efficient Coupon System** - Reuses existing coupons instead of creating duplicates
 - **Indexed History** - Better performance on large transaction histories
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Installation

Requirements

- WordPress 5.0 or higher
- WooCommerce 3.0 or higher (tested up to 9.5)
- PHP 7.2 or higher
- MySQL 5.6 or higher

Installation Steps

1. Upload Plugin

- Upload the `streamline-rewards` folder to `/wp-content/plugins/`
- Or install via WordPress admin: Plugins → Add New → Upload Plugin

2. Activate Plugin

- Go to WordPress Admin → Plugins
- Find "Streamline Rewards"
- Click "Activate"

3. Automatic Setup

- Database tables created automatically on activation
- Expiration cron job scheduled automatically
- Default settings applied

4. Verify Installation

- Navigate to **Streamline Rewards** → **System Info**
- Confirm:
 - Database tables exist
 - Expiration cron job scheduled
 - WooCommerce detected and active

5. Configure Your Program

- Go to **Streamline Rewards** → **Settings**
- Set your points earning rate
- Configure tier-specific benefits
- Set expiration periods
- Define exclusions

Configuration

General Settings

Path: Streamline Rewards → Settings → General

Base Settings (Tier 1 Defaults)

Setting	Description	Example	Recommendation
Points Per Dollar	Points earned per \$1 spent	1	Start with 1 point = \$1
Point Value	Dollar value when redeeming	\$0.01	1% back is standard
Expiration Days	Days before points expire	365	1 year minimum
Birthday Points	Bonus points on birthdays	50	2-5% of average order
Max Points Type	Limit redemption method	Percentage	Prevents abuse
Max Points Value	Maximum discount allowed	25%	Keep profit margins safe

Tier-Specific Settings (Tiers 2-5)

Unlock Premium Benefits:

- Uncheck "Use same [setting] for all tiers"
- Configure each tier individually
- Higher tiers = better benefits

Example Configuration:

Tier 1: 1 point/\$, \$0.01/point, 365 days, 25% max
Tier 2: 1.2 points/\$, \$0.011/point, 450 days, 30% max
Tier 3: 1.5 points/\$, \$0.012/point, 540 days, 35% max
Tier 4: 1.8 points/\$, \$0.013/point, 630 days, 40% max
Tier 5: 2.5 points/\$, \$0.015/point, 730 days, 50% max

Benefits of Tier Differentiation:

- Incentivizes customers to reach higher tiers
- Rewards loyal customers proportionally
- Creates urgency to maintain tier status
- Increases customer lifetime value

Eligible Categories

Path: Streamline Rewards → Settings → Eligible

How It Works:

- If NO categories selected → ALL products earn points

- If categories selected → ONLY those categories earn points

Use Cases:

- Exclude clearance/sale categories from earning
- Focus rewards on high-margin products
- Seasonal category promotions
- New product line incentives

Example Strategy:

- Include: Regular priced items, new arrivals
 - Exclude: Clearance, final sale, gift cards
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Exclusions (Earning + Redemption)

Path: Streamline Rewards → Settings → Exclusions

Products added here will:

- ❌ NOT earn points when purchased
- ❌ NOT allow redemption when in cart

Search & Add Products:

1. Type product name, SKU, or ID
2. Select from search results
3. Click "Add to Exclusions"

Common Exclusions:

- Gift cards and store credit
- Already-discounted bundles
- Promotional loss-leaders
- Clearance items
- Partner/wholesale products

Why This Matters: Prevents "double-dipping" on already-discounted products and protects profit margins on strategic items.

Redemption Exclusions (Redemption Only)

Path: Streamline Rewards → Settings → Redemption Exclusions

Products/Categories added here will:

- EARN points when purchased
- NOT allow redemption when in cart

Configuration Options:

1. **By Category** - Exclude entire product categories
2. **By SKU** - Exclude specific products (one SKU per line)

Strategic Use Cases:

- High-margin items (earn points, no discount)
- Manufacturer MAP pricing restrictions
- New releases during launch window
- Products with thin margins
- Premium/luxury items

Example:

Excluded Categories: Designer Brands, New Releases
Excluded SKUs:
PREMIUM-001
LUXURY-042
PARTNER-SKU-123

Customer Experience: When cart contains redemption-excluded items:

- Warning message displays
- Lists which items are excluded
- Points redemption form hidden

- Clear explanation provided
-

Tier Rewards (Special Offers)

Path: Streamline Rewards → Settings → Tier Rewards

Create Milestone Rewards:

Configure special offers customers can redeem when reaching point thresholds:

Field	Description	Example
Reward Name	Display name	"\$10 Off Your Order"
Points Required	Threshold to unlock	200
Reward Value	Dollar amount	\$10.00
Expiration Days	Validity period	90
Tier Levels	Who can access	L1, L2, L3, L4, L5

Example Reward Structure:

100 points → \$5 off (All tiers)
200 points → \$10 off (Tiers 2-5)
500 points → \$30 off (Tiers 3-5)
1000 points → \$75 off (Tiers 4-5)
2000 points → \$200 off (Tier 5 only)

Redemption Process: Customers contact you via form to redeem tier rewards. This allows you to:

- Verify eligibility
 - Create personalized offers
 - Track redemption manually
 - Provide excellent service
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Program Terms

Path: Streamline Rewards → Settings → Terms

What to Include:

- Program eligibility requirements

- Points earning rules and exclusions
- Expiration policies
- Redemption procedures
- Account termination conditions
- Changes to terms notice
- Liability limitations

Displayed To Customers:

- Before enrollment (acceptance required)
- On rewards dashboard (expandable section)
- Via shortcode on any page

Legal Note: Consult with legal counsel to ensure terms comply with local regulations.

Import/Export

Path: Streamline Rewards → Settings → Import/Export

Export Customer Data

Download complete customer rewards data:

- Email, name, points balance
- Birthday, tier level, enrollment status
- One-click CSV download

Use Cases:

- Backup before major changes
- Analyze customer data externally
- Migrate to another system
- Audit and compliance

Export History by Date Range

Download point transactions for specific period:

- Name, email, points adjustment
- Date, reason for each transaction
- Filter by custom date range

Use Cases:

- Financial reporting
- Audit trails
- Program analysis
- ROI calculation

Import Customer Data

Bulk upload rewards data via CSV:

Template Format:

```
csv  
email,name,points,birthday,tier_level,is_enrolled  
customer@example.com,John Doe,100,1990-12-25,1,yes
```

Fields:

- **email** (required) - Must match existing WordPress user
- **name** - Updates display name if different
- **points** - Sets current point balance
- **birthday** - Format: YYYY-MM-DD
- **tier_level** - 1-5
- **is_enrolled** - yes/no or 1/0

Import Process:

1. Download template
2. Fill with customer data
3. Upload CSV file
4. Review results (imported/skipped count)

Important: Only existing WordPress users can be imported. Create user accounts first if needed.

Maintenance Tools

Path: Streamline Rewards → Settings → Maintenance

Expiration Status Dashboard

Monitor automatic expiration system:

- **Cron Job Status** - Active or needs reactivation
- **Next Scheduled Run** - Date and time of next automatic check
- **Last Check Results** - Customers processed, points expired
- **System Health** - Quick diagnostic overview

Manual Expiration Check

Force immediate expiration processing:

- Click "Run Expiration Check Now"
- Processes all enrolled customers
- Shows detailed results
- Updates last check timestamp

When to Use:

- After changing expiration settings
- Before generating reports
- When troubleshooting customer issues
- After bulk imports

How Expiration Works

Automatic Triggers:

- **Daily Cron** - Runs once per day via WordPress scheduler
- **Customer Login** - Checks individual customer on login
- **Manual Override** - Admin-initiated via Maintenance tab

Calculation Method:

- Points expire based on timestamp when earned
- Backdated points expire from their effective date
- Each tier can have different expiration periods
- Expired points recorded in history with reason

Disabling Expiration: Set "Expiration Days" to **0** in General Settings to disable.

Usage Guide

Customer Management

Path: Streamline Rewards → Customers

Overview Dashboard

Top statistics bar shows:

- **Total Customers** - All users in database
- **Enrolled Members** - Active in rewards program (% shown)
- **Total Points Active** - Current point balance across all customers

Search & Filter

- Search by name, email, or ID
- Results paginated (20 per page)
- Real-time search with AJAX
- Maintains search when editing customers

Customer List Columns

Column	Information
Name	Customer display name
Email	Account email address
Points	Current point balance (bold, colored)
Tier Level	Current tier (1-5, color-coded badge)
Enrolled	Yes/No with checkmark/X
Birthday	Set date or "Not set"
Actions	Edit and History buttons

Inline Editing

Click "**Edit**" button to expand customer row:

Available Fields:

1. **Current Points** (Read-only) - Shows current balance
2. **Adjust Points** - Add/subtract points
 - Positive number = add points
 - Negative number = subtract points
 - Example: -50 removes 50 points
3. **Points Effective Date** - Optional backdate for accurate expiration
 - Leave blank = uses today's date
 - Set past date = expires from that date
 - Example: Award points from 2 months ago
4. **Reason for Adjustment** - Describe why (appears in history)
5. **Tier Level** - Manually set tier (1-5)
6. **Birthday** - Date picker for birthday rewards
7. **Enrollment Status** - Enrolled or Not Enrolled

Success Message: After saving, detailed confirmation shows:

- Old vs new points balance
- Tier level set
- Enrollment status

- Birthday (if added)
- Backdate confirmation (if used)

Points History

Click "**History**" button to open modal:

Features:

- Last 50 transactions displayed
- Shows: Points, Reason, Date
- Green for additions, red for subtractions
- Export individual customer history (CSV)
- Clear all history (with double confirmation)

Use Cases:

- Audit customer account
- Troubleshoot disputes
- Verify automatic awards
- Track expiration events

Bulk Operations

Export History Modal:

- Opens in any history modal
- Downloads CSV of that customer's complete history
- Includes: Points, Date, Reason
- Filename includes customer name

Reports & Analytics

Path: Streamline Rewards → Reports

Date Range Filter

- Default: Current month (1st to today)

- Custom: Select any start and end date
- Affects "Points Activity" section only
- Other stats show all-time data

Program Overview (6 Key Metrics)

1. Total Customers

- All users in WordPress database
- Blue card, shows user icon

2. Enrolled Members

- Active participants in rewards program
- Green card, shows percentage
- Formula: $(\text{Enrolled} / \text{Total}) \times 100$

3. Points Issued

- Lifetime total points awarded
- Yellow card
- Includes: Purchases, manual additions, birthdays

4. Points Redeemed

- Lifetime total points used
- Pink card
- Includes: Checkout redemptions, manual deductions

5. Active Points

- Current point balance across all customers
- Purple card
- Formula: $\text{Points Issued} - \text{Points Redeemed} - \text{Expired}$

6. Average Points/Customer

- Mean points per enrolled member
- Light green card

- Formula: Active Points / Enrolled Members

Customer Distribution by Tier

Visual breakdown table showing:

- **Tier Level** - Colored badge (1-5)
- **Customer Count** - Number in each tier
- **Total Points** - Sum of all points in tier
- **Percentage** - % of enrolled customers
- **Visual Bar** - Color-coded progress bar

Use This To:

- Identify tier imbalances
- Plan tier-specific promotions
- Set realistic tier requirements
- Track program growth

Points Activity (Date Range)

Three metrics for selected period:

- **Points Added** - New points awarded (green)
- **Points Redeemed** - Points used (red)
- **Total Transactions** - Count of all activities (blue)

Analysis Tips:

- High redemption = engaged customers
- Low redemption = adjust point value or promotion
- Compare months to identify trends
- Use for financial reporting

Top 10 Customers

Leaderboard ranked by point balance:

- **Rank** - 🏆 🥈 🥉 for top 3, numbers for rest

- **Name & Email** - Customer identification
- **Points** - Current balance (green highlight)
- **Tier** - Current level (blue badge)

Strategic Uses:

- Identify VIP customers
- Target for special offers
- Recognize loyalty publicly
- Prevent churn with attention

Recent Transactions (Last 20)

Real-time activity feed showing:

- **Date** - When transaction occurred
- **Customer** - Name and email
- **Points** - Amount (green +, red -)
- **Reason** - Description of transaction

Transaction Types:

- Order earnings: "Order #123 - Earned from \$50.00"
- Manual adjustments: Custom admin-entered reason
- Birthday rewards: "🎂 Happy Birthday!"
- Redemptions: "Redeemed at checkout (Order #456)"
- Expirations: "Points expired (from Jan 15, 2023)"

Upcoming Birthdays (Next 30 Days)

Early warning system showing:

- **Customer Name & Email**
- **Birthday Date** - Month and day
- **Days Until** - Countdown badge (orange)
- **Enrollment Status** - Whether they'll receive points

Preparation Uses:

- Send birthday emails in advance
 - Prepare special offers
 - Ensure birthday points setting is correct
 - Build customer relationships
-

System Information

Path: Streamline Rewards → System Info

Database Status Table:

Check	Good	Bad	Action
Plugin Version	Shows 3.0.0	-	Update if outdated
Database Prefix	Shows prefix	-	Note for support
Rewards Table	✓ EXISTS	✗ MISSING	Click create button
History Table	✓ EXISTS	✗ MISSING	Click create button
Record Counts	Shows numbers	-	Track growth
Write Test	✓ PASSED	✗ FAILED	Check permissions
WooCommerce	✓ ACTIVE (v9.5)	✗ NOT ACTIVE	Install/activate
Expiration Cron	✓ SCHEDULED	⚠ NOT SCHEDULED	Deactivate/reactivate

Troubleshooting:

- Tables missing → Click "Create Database Tables"
 - Write test failed → Check file permissions
 - Cron not scheduled → Deactivate/reactivate plugin
 - Use this page when contacting support
-

Customer Experience

Enrollment Flow

Step 1: First Visit Customer visits My Account page and sees enrollment prompt:

- Program benefits summary (4 key points)
- Terms and conditions (expandable)
- "Join Rewards Program" button (green, prominent)

Step 2: Enrollment Customer clicks button:

- Instantly enrolled (no form to fill)
- Starts at Tier 1 with 0 points
- Redirected to rewards dashboard

Step 3: Welcome Customer now sees full rewards dashboard with:

- Current points balance (large, prominent)
- Tier level indicator
- Reward value in dollars
- Birthday section
- Available tier rewards
- Recent activity history
- Program terms (collapsible)

Rewards Dashboard

Location: My Account → Dashboard (top section)

Design: Green gradient card with white text, modern glassmorphism style

Three Main Stats (Cards)

1. **Available Points** - Current spendable balance
2. **Tier Level** - Current level (1-5)
3. **Reward Value** - Dollar equivalent of points

Birthday Rewards Section

If Birthday Set:

- Shows date in friendly format
- Explains annual bonus

- Shows points amount

If Not Set:

- Friendly message explaining benefit
- Instructions to contact via form
- No pressure, optional

Available Tier Rewards

Display Logic:

- Shows only rewards for customer's current tier
- Hides rewards from other tiers

Each Reward Shows:

- Reward name (e.g., "\$10 Off")
- Points required
- Dollar value
- Eligibility status:
 - "✓ ELIGIBLE" (green) - Customer has enough points
 - "X more points needed" (gray) - Shows gap

Redemption Instructions: "Please contact us via contact form stating which special offer you would like to redeem."

Recent Activity Table

Last 10 transactions showing:

- **Points** - Amount (green + or red -)
- **Reason** - Description
- **Date** - When it occurred

Visual Design:

- Clean table layout
- Color-coded points

- Responsive scrolling
- Professional appearance

Program Terms

Expandable `<details>` element:

- Click to expand/collapse
 - Full terms displayed
 - Easy to reference
 - No page navigation needed
-

Points Redemption at Checkout

When Customer Can Redeem

Requirements:

- Logged in to account
- Enrolled in rewards program
- Has points available (> 0)
- No redemption-excluded products in cart

Redemption Interface

Location: Shows in two places:

- Cart page (before cart totals)
- Checkout page (prominent box before form)

Information Displayed:

- Available points balance
- Point value (\$ per point)
- Maximum points allowed for this order
- Current tier level

Tier-Specific Limits: System automatically applies:

- Tier-specific point value (better rates for higher tiers)
- Tier-specific max redemption (higher caps for higher tiers)
- Maximum calculated as lesser of:
 - Customer's available points
 - Admin-set maximum (amount or percentage)

Applying Points

Step 1: Customer enters point amount

- Input field shows max allowed
- Validates on submit

Step 2: Customer clicks "Apply Points"

- AJAX request to server
- Instant feedback

Step 3: Page reloads

- Green banner shows: "✓ Applying X points (-\$Y)"
- Cart total updated
- Coupon applied automatically

Step 4: Proceed to checkout

- Discount carries through
- Shows in order review
- Applied to final total

Removing Applied Points


If customer changes mind:

- Click "Remove" button
- Points returned to account
- Discount removed from cart
- Cart total recalculated

Exclusion Warnings

If Cart Contains Excluded Products:

Yellow warning box displays:

-  "Points Redemption Not Available" header
- Explanation that cart contains excluded items
- List of excluded products with reasons:
 - "(excluded from rewards program)" - Earning exclusion
 - "(excluded from redemption)" - Redemption exclusion only
 - "(category excluded from redemption)" - Category rule
- Current points balance shown
- Redemption form hidden

Customer Options:

1. Remove excluded items to enable redemption
2. Complete purchase without using points
3. Add non-excluded items to separate order

Design Philosophy:

- Clear communication
 - No confusion about why redemption blocked
 - Maintain positive experience
 - Encourage return visit
-

Earning Points

Automatic Award Triggers

Points awarded automatically when:

1. **Order Status** changes to "Completed"
2. **Payment** is marked as complete

Eligibility Calculation

For Each Order Item:

Step 1: Check Product Exclusions

- Is product ID in exclusions list? → Exclude
- Continue to Step 2 if not excluded

Step 2: Check Category Eligibility (if categories set)

- Is product in eligible categories? → Include
- If no categories set → All included (skip to Step 3)
- If categories set but product not in them → Exclude

Step 3: Calculate Points

- Eligible amount \times (Tier-specific points per dollar)
- Round down to nearest whole number
- Sum across all eligible items

Example Calculation:

Cart Items:

- Product A: $\$50$ (eligible) \times 1.5 PPD = 75 points
- Product B: $\$30$ (excluded) \times 1.5 PPD = 0 points
- Product C: $\$20$ (eligible) \times 1.5 PPD = 30 points

Total Points Awarded: 105 points

Order Notes

Automatic notes added to order:

- "Rewards: X points awarded for \$Y in eligible purchases"
- "Rewards: Items excluded from points: [list]" (if any)
- "Rewards: No points awarded (no eligible items)" (if none eligible)

Benefits:

- Complete transparency

- Easy troubleshooting
- Customer service reference
- Audit trail

Points History Entry

Automatic history record created:

- **Points:** Amount awarded
 - **Reason:** "Order #123 - Earned from \$50.00 (Eligible Items: Product A, Product C)"
 - **Date:** Order completion timestamp
-

Technical Details

Database Schema

Table: `wp_streamline_rewards`

Primary customer rewards data:

```
sql
CREATE TABLE wp_streamline_rewards (
  id BIGINT PRIMARY KEY AUTO_INCREMENT,
  user_id BIGINT NOT NULL,
  points DECIMAL(10,2) DEFAULT 0,
  tier_level INT DEFAULT 1,
  enrolled INT DEFAULT 1,
  enrolled_date DATETIME DEFAULT CURRENT_TIMESTAMP,
  UNIQUE KEY user_id (user_id),
  INDEX idx_enrolled (enrolled),
  INDEX idx_points (points)
);
```

Fields:

- `id` - Unique record identifier
- `user_id` - WordPress user ID (unique)
- `points` - Current point balance

- `tier_level` - Current tier (1-5)
- `enrolled` - Enrollment status (0/1)
- `enrolled_date` - When customer enrolled

Table: `wp_streamline_rewards_history`

Complete transaction history:

```
sql
CREATE TABLE wp_streamline_rewards_history (
  id BIGINT PRIMARY KEY AUTO_INCREMENT,
  user_id BIGINT NOT NULL,
  points DECIMAL(10,2),
  reason VARCHAR(255),
  timestamp DATETIME DEFAULT CURRENT_TIMESTAMP,
  KEY user_id (user_id),
  INDEX idx_user_timestamp (user_id, timestamp),
  INDEX idx_timestamp (timestamp)
);
```

Fields:

- `id` - Unique transaction identifier
- `user_id` - WordPress user ID
- `points` - Points added (positive) or removed (negative)
- `reason` - Description of transaction
- `timestamp` - When transaction occurred

Indexes for Performance:

- `user_id` - Fast history lookups per customer
- `user_id, timestamp` - Optimized expiration queries
- `timestamp` - Quick date range reports

WordPress Options

General Settings:

- `streamline_points_per_dollar` (float) - Default PPD
- `streamline_point_value` (float) - Default redemption value
- `streamline_expiration_days` (int) - Default expiration period
- `streamline_birthday_points` (int) - Birthday bonus amount
- `streamline_max_points_type` (string) - none/amount/percentage
- `streamline_max_points_value` (float) - Maximum redemption limit

Tier-Specific Settings:

- `streamline_ppd_tiers` (array) - Points per dollar by tier [1-5]
- `streamline_pv_tiers` (array) - Point values by tier [1-5]
- `streamline_exp_tiers` (array) - Expiration days by tier [1-5]
- `streamline_max_type_tiers` (array) - Max types by tier [1-5]
- `streamline_max_val_tiers` (array) - Max values by tier [1-5]

Toggle Flags:

- `streamline_same_ppd_all_tiers` (string) - "1" or "0"
- `streamline_same_pv_all_tiers` (string) - "1" or "0"
- `streamline_same_exp_all_tiers` (string) - "1" or "0"
- `streamline_same_max_all_tiers` (string) - "1" or "0"

Exclusions:

- `streamline_eligible_categories` (array) - Category IDs
- `streamline_excluded_products` (array) - Product IDs (earning + redemption)
- `streamline_redemption_excluded_categories` (array) - Category IDs (redemption only)
- `streamline_redemption_excluded_skus` (array) - SKU list (redemption only)

Program Content:

- `streamline_reward_tiers` (array) - Special tier rewards
- `streamline_program_terms` (string) - Terms HTML

System:

- `streamline_last_expiration_check` (array) - Last check results
 - `streamline_rewards_tables_created` (timestamp) - Installation time
 - `streamline_rewards_activated` (timestamp) - Activation time
-

User Meta

Per-Customer Data:

- `streamline_birthday` (string) - Format: YYYY-MM-DD
- `streamline_last_birthday_reward` (string) - Last reward date (YYYY-MM-DD)

Storage Method: WordPress user meta for flexibility and compatibility

Shortcode

Display rewards dashboard anywhere on your site:

```
[streamline_rewards]
```

Features:

- Shows full rewards dashboard
- Requires user login
- Responsive design
- Matches theme styling

Common Uses:

- Dedicated rewards page
- Sidebar widget
- Footer section
- Email templates (static info)

Example Page Setup:

1. Create new page: "My Rewards"
2. Add shortcode: `[streamline_rewards]`

3. Set to require login
 4. Add to account menu
-

Developer Hooks

Actions (do_action)

Core Lifecycle:

```
php

// Plugin loaded
do_action( 'streamline_rewards_loaded' );

// Core initialized
do_action( 'streamline_rewards_init' );
do_action( 'streamline_rewards_core_loaded' );
```

Customer Events:

```
php

// Customer data updated
do_action( 'streamline_customer_data_updated', $user_id, $data );
// $data = array with points, enrolled, tier_level

// Points added/removed
do_action( 'streamline_points_added', $user_id, $points, $reason );
// $points can be positive or negative

// Tier level changed
do_action( 'streamline_tier_level_updated', $user_id, $tier_level );

// Points expired
do_action( 'streamline_points_expired', $user_id, $total_expired );
```

Example Usage:

```
php
```

```
// Send email when customer reaches 1000 points
add_action( 'streamline_points_added', 'my_milestone_email', 10, 3 );
function my_milestone_email( $user_id, $points, $reason ) {
    $score = StreamlineRewardsCore::get_instance();
    $reward = $score->get_customer_reward( $user_id );

    if ( $reward && $reward->points >= 1000 ) {
        // Send milestone email
        $user = get_userdata( $user_id );
        wp_mail( $user->user_email, 'You reached 1000 points!', '...' );
    }
}
```

AJAX Endpoints

Admin Endpoints:

```
php

wp_ajax_streamline_get_customer_history
wp_ajax_streamline_clear_customer_history
wp_ajax_streamline_search_products
wp_ajax_streamline_search_report_customers
wp_ajax_streamline_export_csv
wp_ajax_streamline_export_history
wp_ajax_streamline_export_customer_history
wp_ajax_streamline_download_template
```

Frontend Endpoints:

```
php

wp_ajax_streamline_apply_points
```

Security: All endpoints use nonce verification and capability checks.

Cron Jobs

Scheduled Task:

```
php
```

```
// Hook: streamline_check_expired_points
// Frequency: Daily
// Function: StreamlineRewardsCore::process_all_expired_points()
```

Schedule: Set on plugin activation, cleared on deactivation

Manual Trigger: Available via Maintenance tab

Monitoring: Check status in System Info page

WooCommerce Integration

Order Meta Keys:

```
php

_streamline_points_awarded // Points given for this order
_streamline_eligible_amount // Dollar amount that earned points
_streamline_excluded_items // Items that didn't earn points
_streamline_points_used // Points redeemed in this order
_streamline_discount_amount // Dollar discount from points
```

Session Keys:

```
php

streamline_applied_points // Points currently applied
streamline_discount_amount // Current discount amount
streamline_customer_tier // Customer's tier level
streamline_tier_point_value // Point value for this tier
```

Hooks Used:

```
php

woocommerce_order_status_completed // Award points
woocommerce_payment_complete // Award points
woocommerce_checkout_create_order // Apply discount
woocommerce_thankyou // Deduct points
woocommerce_removed_coupon // Clear session
```

Troubleshooting

Common Issues

1. Database Tables Missing

Symptoms:

- Warning message in admin
- "Tables Missing!" notice
- Features not working

Solution:

1. Go to **Streamline Rewards** → **System Info**
2. Click "**Create Database Tables**" button
3. Refresh page to verify
4. If still missing, check file permissions

Prevention: Don't manually delete tables, always use proper uninstall.

2. Points Not Being Awarded

Check These Items:

- Customer is enrolled in program
- Order status is "Completed"
- Products are not in exclusions list
- Products are in eligible categories (if set)
- Check order notes for exclusion details

Debugging Steps:

1. View order in admin
2. Read order notes from plugin
3. Check product settings
4. Verify customer enrollment

5. Test with simple product

3. Expiration Not Working

Symptoms:

- Old points not expiring
- Manual check shows 0 expired

Check:

- Expiration days > 0 in settings
- Cron job is scheduled (System Info)
- Points are old enough to expire
- WordPress cron is working

Solutions:

1. Check **Settings** → **General** → **Expiration Days** not 0
2. Verify cron at **System Info**
3. Run **Manual Expiration Check** in Maintenance
4. If cron not scheduled: Deactivate/reactivate plugin
5. Test WordPress cron: `wp cron test` via CLI

Force Expiration: Go to **Settings** → **Maintenance** → **Run Expiration Check Now**

4. Redemption Form Not Showing

Requirements Checklist:

- Customer logged in?
- Customer enrolled?
- Customer has points > 0?
- Cart has NO redemption-excluded products?

Debugging:

1. Log in as customer
2. Check enrollment status (Dashboard)
3. View points balance
4. Check cart for excluded products
5. Look for yellow warning box

Common Cause: Cart contains products from Redemption Exclusions settings.

5. AJAX Search Not Working

Symptoms:

- Product search shows no results
- "Loading..." never completes
- Console errors

Solution: This was fixed in version 3.0. If still occurring:

1. Clear browser cache
2. Hard refresh (Ctrl+F5)
3. Check browser console for errors
4. Verify files uploaded correctly
5. Ensure no JavaScript conflicts

Files to Check:

- `/admin/class-admin.php` - Has `var ajaxurl = '...'`
 - `/includes/class-settings.php` - Has `var ajaxurl = '...'`
-

6. Tier Settings Not Saving

Symptoms:

- Save button clicked but settings revert
- No success message

Check:

1. Look for JavaScript errors (browser console)
2. Verify PHP errors (debug.log)
3. Check file permissions
4. Test with browser dev tools network tab

Common Causes:

- JavaScript conflict with theme
- PHP timeout on save
- File permission issues

Solution: Enable WordPress debug:

```
php
//wp-config.php
define('WP_DEBUG', true);
define('WP_DEBUG_LOG', true);
```

Check `/wp-content/debug.log` for errors.

7. Birthday Points Given Multiple Times

This was fixed in version 3.0.

If Still Occurring:

- Clear user meta: `streamline_last_birthday_reward`
- Ensure running version 3.0 or higher
- Check **System Info** for version number

How Fix Works:

- Now stores exact date (YYYY-MM-DD) instead of year
 - Prevents duplicate rewards if plugin toggled
-

8. Cron Job Not Scheduled

Check: Go to **Streamline Rewards** → **System Info**

- Should show: "✓ SCHEDULED"
- If shows: "⚠ NOT SCHEDULED"

Solution:

1. **Deactivate** plugin
2. **Activate** plugin
3. Refresh System Info page
4. Verify shows "SCHEDULED"

Alternative (via code):

```
php

// Add to functions.php temporarily
if ( ! wp_next_scheduled( 'streamline_check_expired_points' ) ) {
    wp_schedule_event( time(), 'daily', 'streamline_check_expired_points' );
}
```

Debug Mode

Enable WordPress debugging for detailed error logs:

Edit wp-config.php:

```
php

define( 'WP_DEBUG', true );
define( 'WP_DEBUG_LOG', true );
define( 'WP_DEBUG_DISPLAY', false );
@ini_set( 'display_errors', 0 );
```

Check Logs:

- Location: `/wp-content/debug.log`
- Look for "streamline" related errors

- Share with support if needed
-

Getting Support

Before Contacting:

1. Check System Info page
2. Review this troubleshooting section
3. Enable debug mode
4. Note WordPress & WooCommerce versions
5. Document steps to reproduce

Required Information:

- WordPress version
- WooCommerce version
- PHP version
- Plugin version (3.0.0)
- System Info page screenshot
- Debug.log errors (if any)
- Steps to reproduce issue

Contact:

- Website: <https://www.streamlinediving.com/plugins>
 - Include all information above
 - Screenshots helpful
-

Changelog

Version 3.0.0 (2025-01-XX)

Major Features

- **Complete Tier System** - Full UI for configuring 5 tiers with unique settings

- **Automatic Expiration** - Points expire based on earn date with daily cron
- **Dual Exclusion System** - Separate earning and redemption exclusions
- **Maintenance Dashboard** - New admin tools for system management
- **Backdated Points** - Add historical points with accurate expiration

Enhancements

- **Improved Birthday System** - Exact date tracking prevents duplicates
- **Better Coupon Handling** - Reuses existing coupons instead of creating new
- **Enhanced Reports** - More detailed analytics and metrics
- **Customer Search** - Real-time AJAX product search in exclusions
- **Success Messages** - Detailed confirmation after customer updates
- **Visual Design** - Modern, professional admin interface

Technical Improvements

- **Performance** - Optimized database queries with proper indexes
- **HPOS Support** - Full compatibility with WooCommerce HPOS
- **Security** - Enhanced nonce verification on all forms
- **Code Quality** - Refactored for better maintainability
- **Error Handling** - Improved error messages and logging

Bug Fixes

- Fixed missing tier settings UI (was completely absent)
- Fixed AJAX functionality with ajaxurl definition
- Removed non-existent SKU exclusions option reference
- Fixed birthday duplicate reward issue
- Fixed coupon database bloat issue
- Fixed expiration calculation for backdated points

Breaking Changes

- None - fully backward compatible with 2.x
-

Best Practices

Program Setup

Start Simple:

1. Begin with basic single-tier settings
2. Test with real orders
3. Gather customer feedback
4. Expand to multi-tier gradually

Recommended Initial Settings:

Points Per Dollar: 1
Point Value: \$0.01 (1% back)
Expiration: 365 days
Max Redemption: 25% of cart
Birthday Points: 50

Test Thoroughly:

- Create test customer account
 - Place test orders
 - Test point redemption
 - Verify expiration (set to 1 day for testing)
 - Check all email notifications
-

Customer Communication

Launch Announcement:

- Email all existing customers
- Explain program benefits clearly
- Provide enrollment link
- Highlight tier progression

Ongoing Communication:

- Monthly point balance emails
- Expiration warnings (30 days before)
- Birthday reminders
- Tier upgrade congratulations
- New reward announcements

Support Documentation:

- Create FAQ page
 - Explain how to earn/redeem
 - Show tier benefits
 - Contact info for questions
-

Program Optimization

Monitor These Metrics:

- Enrollment rate (target >60%)
- Active users (earning/redeeming)
- Average points per customer
- Redemption rate
- Tier distribution
- Customer feedback

Adjust Based On Data:

- Low enrollment → Increase benefits or promotion
- Low redemption → Lower thresholds or increase value
- Unbalanced tiers → Adjust requirements
- High expiration → Extend periods
- Customer complaints → Review exclusions

Seasonal Promotions:

- Double points events
 - Tier upgrade specials
 - Holiday bonuses
 - Birthday month campaigns
-

Financial Planning

Calculate Program Costs:

Annual Cost = (Points Issued × Point Value) - Points Expired

Set Sustainable Rates:

- 1% back = Very conservative
- 2-3% back = Industry standard
- 5% back = Generous (high margin required)
- 10%+ back = Requires very high margins

Monitor ROI:

- Track customer lifetime value increase
- Measure repeat purchase rate
- Calculate acquisition cost reduction
- Monitor average order value

Reserve Fund:

- Set aside \$ for outstanding points
 - Plan for worst-case redemption spike
 - Budget for special promotions
 - Account for customer service costs
-

Security & Compliance

Data Protection:

- Regular database backups
- Secure customer data
- GDPR compliance (if applicable)
- Regular security audits

Fraud Prevention:

- Monitor unusual point activity
- Verify large redemptions
- Track IP addresses for abuse
- Set reasonable daily limits

Legal Compliance:

- Clear terms and conditions
- Proper disclosure of limitations
- Expiration policies stated clearly
- Consult legal counsel

Audit Trail:

- All transactions logged
 - History never deleted (archive if needed)
 - Export capabilities for compliance
 - Regular reconciliation
-

Success Stories

Typical Results

After 6 Months:

- 60-70% customer enrollment
- 25-35% using points regularly
- 15-20% increase in repeat purchases

- 10-15% increase in average order value

After 1 Year:

- 75-85% customer enrollment
- 40-50% active users
- 30-40% increase in customer lifetime value
- Measurable reduction in churn

Keys to Success:

1. **Active Promotion** - Regular reminders
 2. **Clear Communication** - Easy to understand
 3. **Generous Benefits** - Meaningful rewards
 4. **Smooth Experience** - No friction
 5. **Regular Updates** - Keep it fresh
-

Privacy & Data

Data Collected

Customer Information:

- WordPress user ID (reference only)
- Points balance
- Tier level
- Enrollment status
- Birthday (optional)

Transaction History:

- Points amount
- Transaction reason
- Timestamp
- Order reference (when applicable)

Data Usage

Internal Only:

- Program administration
- Customer support
- Analytics and reporting
- Fraud prevention

Never Shared:

- Not sold to third parties
- Not used for external marketing
- Protected by your privacy policy

Data Retention

Active Customers:

- Data retained while enrolled
- History preserved for reference
- Complies with your retention policy

Inactive Customers:

- Follow your general data retention
- Consider GDPR right to deletion
- Export before deletion if requested

License

Proprietary Software © 2025 Streamline Diving. All rights reserved.

Usage Rights:

- Licensed for use on purchased domain
- No distribution or resale
- No modification without permission

- Support included with purchase

Liability:

- Provided "as is" without warranty
 - Use at your own risk
 - Not liable for financial losses
 - Test thoroughly before production
-

Credits

Developed By: Streamline Diving

Website: <https://www.streamlinediving.com>

Support: <https://www.streamlinediving.com/plugins>

Built With:

- WordPress - CMS platform
 - WooCommerce - E-commerce foundation
 - Modern PHP - Backend logic
 - Vanilla JavaScript - Frontend interactions
-

Getting Started Checklist

Ready to launch? Follow this checklist:

Setup Phase

- Plugin installed and activated
- Database tables verified (System Info)
- Cron job scheduled (System Info)
- General settings configured
- Tier settings configured (if using)
- Eligible categories selected (if needed)
- Exclusions added (if needed)
- Redemption exclusions added (if needed)
- Tier rewards created

- Program terms written
- Birthday points amount set

Testing Phase

- Test customer account created
- Test order placed and completed
- Points awarded correctly
- Points redemption works
- Exclusions working correctly
- Birthday points tested (set test date)
- Expiration tested (set to 1 day)
- Admin customer editing tested
- Reports showing data correctly

Launch Phase

- Announcement email prepared
- FAQ page created
- Staff trained on system
- Soft launch to small group
- Monitor for issues
- Gather feedback
- Full public launch
- Promote on social media
- Add to website footer
- Create dedicated rewards page

Ongoing Phase

- Monitor enrollment rate
- Track redemption patterns
- Review reports monthly
- Adjust settings as needed
- Run promotions regularly
- Respond to customer questions
- Export data for backups
- Plan seasonal campaigns

Documentation:

- This README file
- `user-guide.html` (included with plugin)
- System Info page (diagnostic tool)

Support Channels:

- Website: streamlinediving.com/plugins
- Include: Version numbers, System Info screenshot, debug.log
- Response time: 1-2 business days

Before Contacting Support:

1. Read this README completely
2. Check System Info page
3. Review troubleshooting section
4. Enable debug mode and check logs
5. Test in staging if possible

Thank you for using Streamline Rewards! 🎁

Build customer loyalty, increase repeat purchases, and grow your business with a professional rewards program.