SL Rewards

Complete Reference Manual — every screen, setting, and button

Version 3.0.2 | WordPress Plugin Reference Manual

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Contents

1. Overview & Installation
- a. Installation

2. Admin Menu Map

3. Settings — General (Tier Rates)
- a. Base Settings (Tier 1)
- b. Tier-Specific Settings (Tiers 2–5)

4. Settings — Eligible Categories

5. Settings — Exclusions (Earning + Redemption)

6. Settings — Redemption Exclusions
- a. Excluded Categories
- b. Excluded SKUs

7. Settings — Tier Rewards

8. Settings — Terms

9. Settings — Import/Export
- a. Export Customer Rewards Data
- b. Export Points History by Date Range
- c. CSV Import Template
- d. Import Customer Data

10. Settings — Maintenance & System Information
- a. Expiration Status
- b. Manual Expiration Check
- c. Database Maintenance / System Information

11. Customers
- a. The Customer Table
- b. Edit — Inline Editing
- c. History — Points Log & Export

12. Reports
- a. Program Overview
- b. Customer Distribution by Tier

13. The Customer Experience — Enrollment & Dashboard
- a. Enrollment Prompt
- b. The Dashboard Itself

14. The Customer Experience — Redeeming at Checkout
- a. Normal Case
- b. If the Cart Has Excluded Items
- c. If They Have No Points

15. How Points Are Awarded & Expired

16. The [streamline_rewards] Shortcode

17. Integration with Streamline POS

18. Troubleshooting & Quick Reference

19. Version History

1. Overview & Installation

SL Rewards is a five-tier loyalty points program for WooCommerce: customers earn points on eligible purchases, redeem them for a discount at checkout (applied as a WooCommerce coupon behind the scenes), and can unlock named Tier Rewards at point thresholds. Every rate, limit, and expiration period can be set once for the whole program or configured independently per tier.

- **5 configurable tiers** — points per dollar, point value, expiration period, and max redemption limit, each independently settable per tier
- **Two separate exclusion systems** — one for whether a product earns points at all, one for whether points can be redeemed against it, so a product can earn but not be discounted, or be excluded from the program entirely
- **Automatic expiration** — a daily cron job plus a check on customer login, based on the exact date each batch of points was earned (or backdated to)
- **Birthday rewards** — a once-a-year bonus, tracked so it's never accidentally awarded twice
- **CSV import/export** for bulk customer data and point-history reporting

Installation

1. Upload the `streamline-rewards` folder to `/wp-content/plugins/` (or use Plugins → Add New → Upload Plugin).
2. Activate **SL Rewards** from the Plugins page — this creates two database tables (`wp_streamline_rewards` for current balances, `wp_streamline_rewards_history` for the transaction log) and schedules the daily expiration check.
3. Go to **Streamline Rewards → Maintenance** and confirm both tables exist and the cron job shows Active (Section 10).
4. Configure your program under **Settings** (Sections 3–9).
5. Place a test order as a logged-in customer and confirm points are awarded once it's completed, and redeemable afterward.

Component	Minimum
WordPress	5.0+
WooCommerce	3.0+ (HPOS/custom order tables compatible)
PHP	7.2+

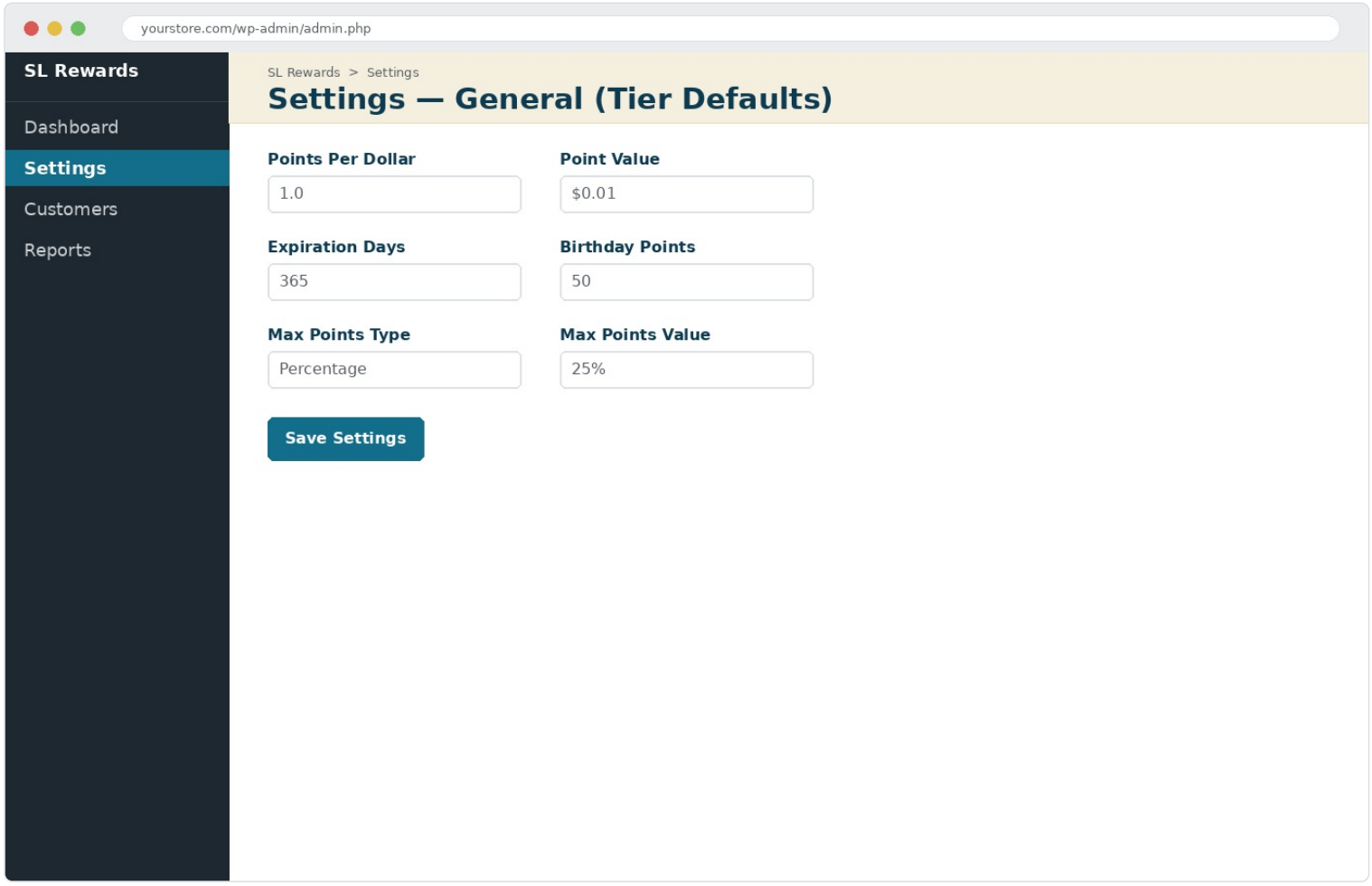
2. Admin Menu Map

SL Rewards adds one top-level menu, **Streamline Rewards** (clicking it redirects straight to Settings), with three further pages:

Page	What it's for
Settings	The 8-tab configuration screen covered in Sections 3–10
Customers	Search, view, and manually adjust every customer's points, tier, birthday, and enrollment (Section 11)
Reports	Program-wide statistics, tier distribution, a leaderboard, and recent activity (Section 12)

> **System Information:** a fourth page, linked from Settings → Maintenance, shows database table status and diagnostics (Section 10).

3. Settings — General (Tier Rates)



Settings → General — base program parameters, used as the Tier 1 defaults.

Base Settings (Tier 1)

Field	Description
Points Per Dollar	Points earned per $1 spent on eligible products (Tier 1 default)
Point Value ($)	Dollar value of each point when redeemed (Tier 1 default)
Expiration Days	Days before points expire; 0 disables expiration (Tier 1 default)
Birthday Reward Points	Points automatically awarded on the customer's birthday, once per year — this one is program-wide, not per-tier
Max Points Type	No Limit, Amount, or Percentage — limits how many points can be used per order (Tier 1 default)
Max Points Value	If Amount: the maximum dollar discount (e.g. 50 = $50 max). If Percentage: the max share of the cart (e.g. 25 = 25% max)

Tier-Specific Settings (Tiers 2–5)

For each of the four fields above except Birthday Points, a checkbox — **"Use same [setting] for all tiers"** — is checked by default. Uncheck it to reveal individual fields for Tiers 2 through 5, letting higher tiers earn faster, redeem at a better rate, hold points longer, or redeem a larger share of the cart. Max Points has both a Type and a Value per tier.

> **Typical structure:** ramp every field up together as tier increases — e.g. Tier 1 at 1.0 pts/$ and 25% max redemption, up to Tier 5 at 2.5 pts/$ and 50% max redemption — so the program visibly rewards your best customers.

4. Settings — Eligible Categories

A simple checklist of every WooCommerce product category. If **no** categories are checked, every product in the store earns points by default. If you check specific categories, **only** products in those categories earn points — everything else earns nothing (though it can still be purchased with redeemed points, unless separately excluded — see Section 6). Click **Save Eligible Categories** to apply.

> **Common use:** check every category except Clearance/Sale and Gift Cards, so promotional and already-discounted items don't stack an extra rewards benefit on top.

5. Settings — Exclusions (Earning + Redemption)

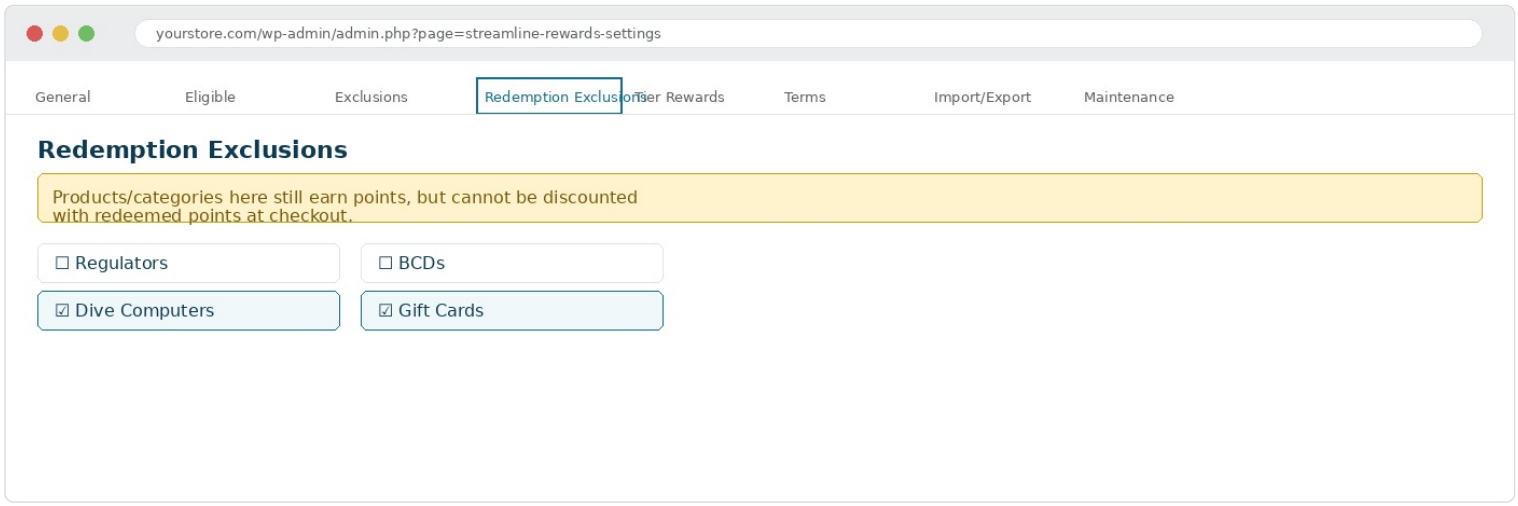
This tab excludes specific **products** (not categories) from the program entirely — an excluded product neither earns points when purchased, nor can be discounted with redeemed points.

1. Type into **Search and Add Product** — matches by Product ID, SKU, or name.
2. Select the matching product from the dropdown that appears.
3. Click **Add to Exclusions**.

The **Excluded Products List** table below shows every currently excluded product (ID, name, SKU) with a **Remove** button per row.

> **This is the strictest exclusion:** for a product that should still earn points but just not be discounted with points, use Redemption Exclusions (Section 6) instead — this tab turns the program off for that product entirely.

6. Settings — Redemption Exclusions



Redemption Exclusions — these products still earn points, they just can't be discounted with them.

What this tab does: products and categories selected here are not eligible for points redemption at checkout — customers cannot use points to discount them. They still earn points on these purchases as normal.

Excluded Categories

A checkbox grid of every product category — check any category where points shouldn't be redeemable.

Excluded SKUs

A plain-text box, one SKU per line, for excluding specific products by SKU regardless of category.

Click **Save Redemption Exclusions** to apply both lists together.

Strategy: use this for high-margin or MAP-restricted items — customers still feel rewarded for buying them (they earn points), but you protect the margin on the item itself by keeping it off-limits for point discounts.

When a customer's cart contains an excluded item, the redemption box at checkout doesn't just disappear — it explains exactly which items are excluded and why (earning-excluded, SKU-excluded, or category-excluded), so the customer isn't left guessing why they can't apply their points.

7. Settings — Tier Rewards

Define named rewards customers can work toward and redeem at a points threshold — e.g. "$10 Off Your Order" at 200 points.

Field	Description
Reward Name	Display name (e.g. "$5 Off")
Points Required	The threshold to unlock it (e.g. 100)
Reward Value ($)	Dollar value of the reward (e.g. 5.00)
Expiration Days	How long the reward stays valid once unlocked (e.g. 365)
Tier Levels	Checkboxes L1–L5 — which tiers can see and redeem this specific reward

Click **Add Another Tier** to add more reward rows, and **Delete** on a row to remove it. Click **Save Reward Tiers** when done.

> **Redemption is manual by design:** a Tier Reward is not an automatic checkout discount — the customer's dashboard tells them to contact you directly (via your site's contact form) with which reward they want and their account details, so you can verify and issue it yourself. This keeps the process personal and gives you a chance to confirm eligibility before honoring it.

8. Settings — Terms

A full WordPress rich-text editor (the same editor used for pages and posts — headings, bold, bullet lists, links) where you write your **Program Terms & Instructions**. Click **Save Terms**. These terms appear in two places automatically: on the enrollment prompt shown to not-yet-enrolled customers (Section 13), and inside a collapsible "View Program Terms & Conditions" section on the rewards dashboard for already-enrolled customers.

9. Settings — Import/Export

Export Customer Rewards Data

Click **Export Customer Data to CSV** to download every customer's points, enrollment status, name, birthday, and tier level in one file.

Export Points History by Date Range

Pick a Start Date and End Date and click **Export History** to download every points adjustment (for every customer) in that window. The export includes Name, Email, Points Adjustment, Date, and Reason — useful for an audit of exactly what changed and why over a given period.

CSV Import Template

Click **Download Template** for a starter file. The exact column format is:

```
email,name,points,birthday,tier_level,is_enrolled
customer1@example.com,John Doe,100,1990-12-25,1,yes
```

Import Customer Data

Choose your filled-in CSV and click **Import CSV**. Each row is matched to an existing WordPress user by email — rows with no matching user, or with fewer than 6 columns, are skipped and counted in the result message. A matching row updates the customer's display name (if changed), birthday, points balance, enrollment, and tier level all at once.

> **Import sets the absolute point balance, not an adjustment:** the `points` column in an imported row becomes that customer's new total — it does not add to their existing balance. Export first if you want to calculate correct new totals from the current numbers.

10. Settings — Maintenance & System Information

Expiration Status

Shows whether the daily expiration cron job is ✓ **Active** (with its next scheduled run time) or ⚠ **Not Scheduled** (deactivate and reactivate the plugin to reschedule it), plus the results of the last automatic check — customers processed and total points expired.

Manual Expiration Check

Click **Run Expiration Check Now** to force an immediate pass across all customers, using each one's tier-specific expiration setting, without waiting for the daily cron.

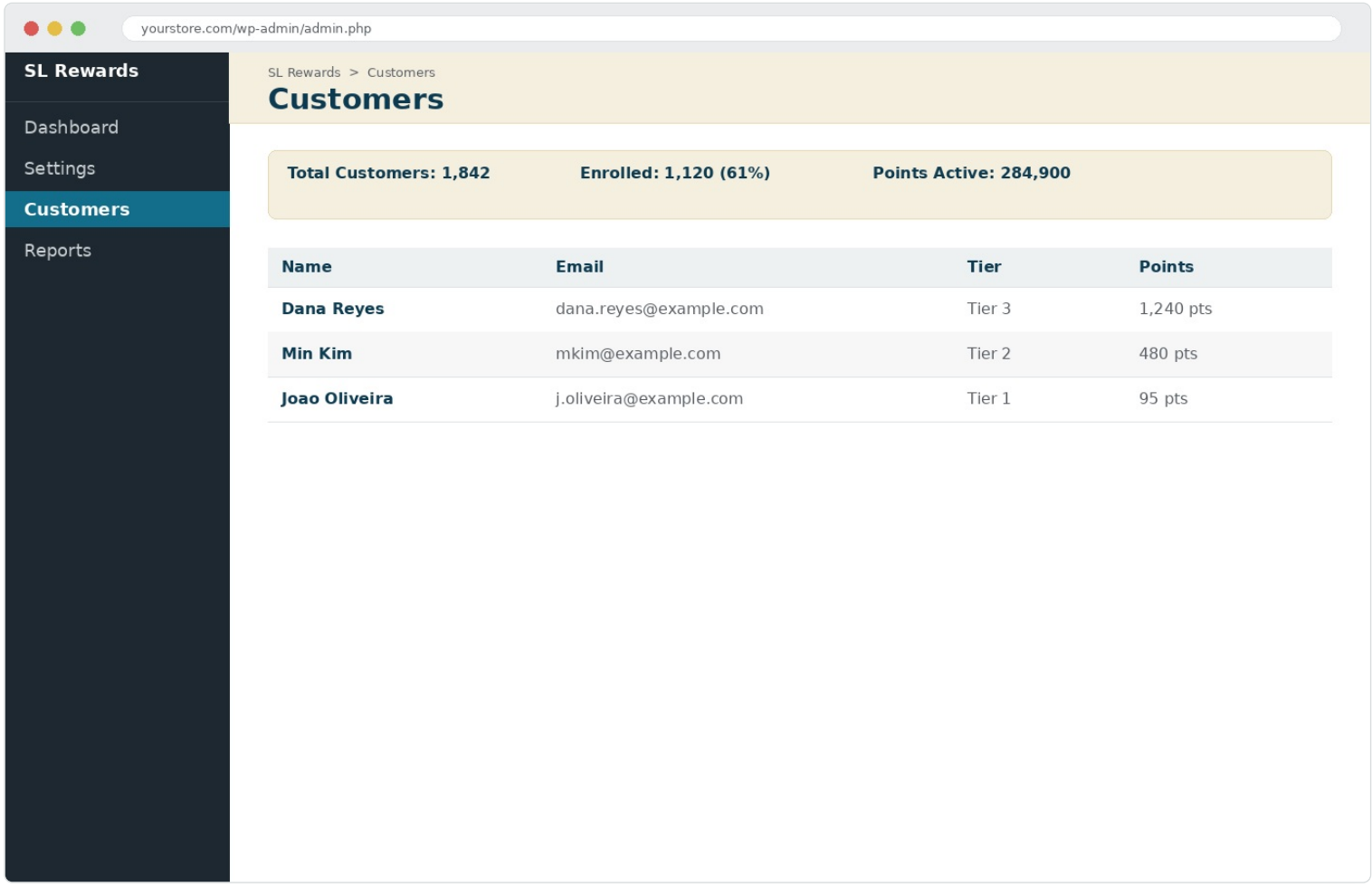
> **How expiration works:**

- Points expire based on the timestamp they were **earned** (or backdated to)
- Each tier can have its own expiration period
- Checks run automatically once daily via cron, and also whenever a customer logs into their account
- Set Expiration Days to 0 in General Settings to disable expiration entirely
- Backdating points via "Points Effective Date" (Section 11) makes expiration count from that backdated date, not the date you actually entered them

Database Maintenance / System Information

Click **View System Information** to open a dedicated page showing database table status, record counts, and diagnostic checks — useful when troubleshooting with support.

11. Customers



Customers — search, tier, and points balance at a glance.

Path: **Streamline Rewards → Customers**. Three statistics sit above the table: Total Customers, Enrolled Members, and Total Points Active across everyone. Search by name or email; results are paginated 20 per page.

The Customer Table

Each row shows Name, Email, Points, Tier Level, Enrolled (✓/✗), Birthday (or "Not set"), and two actions: **Edit** and **History**.

Edit — Inline Editing

Clicking Edit expands an inline form directly in the table:

Field	Notes
Current Points	Read-only — shown for reference only
Adjust Points	A signed number: positive adds, negative subtracts (e.g. -50 removes 50 points). This is an adjustment, not a new total.
Points Effective Date	Optional — backdate the adjustment for accurate expiration. Example: adding 100 points dated two months ago expires 365 days from that date, not from today. Leave blank to use today.
Reason for Adjustment	Free text, defaults to "Manual adjustment" — recorded in the customer's history
Tier Level	Level 1–5
Birthday	Date picker — this is also how you set a birthday a customer requested by contacting you (Section 13)
Enrollment Status	Enrolled or Not Enrolled

Click **Save Changes** to apply, or Cancel to discard. A success banner confirms exactly what changed (old → new points, tier, enrollment, birthday, and effective date if backdated).

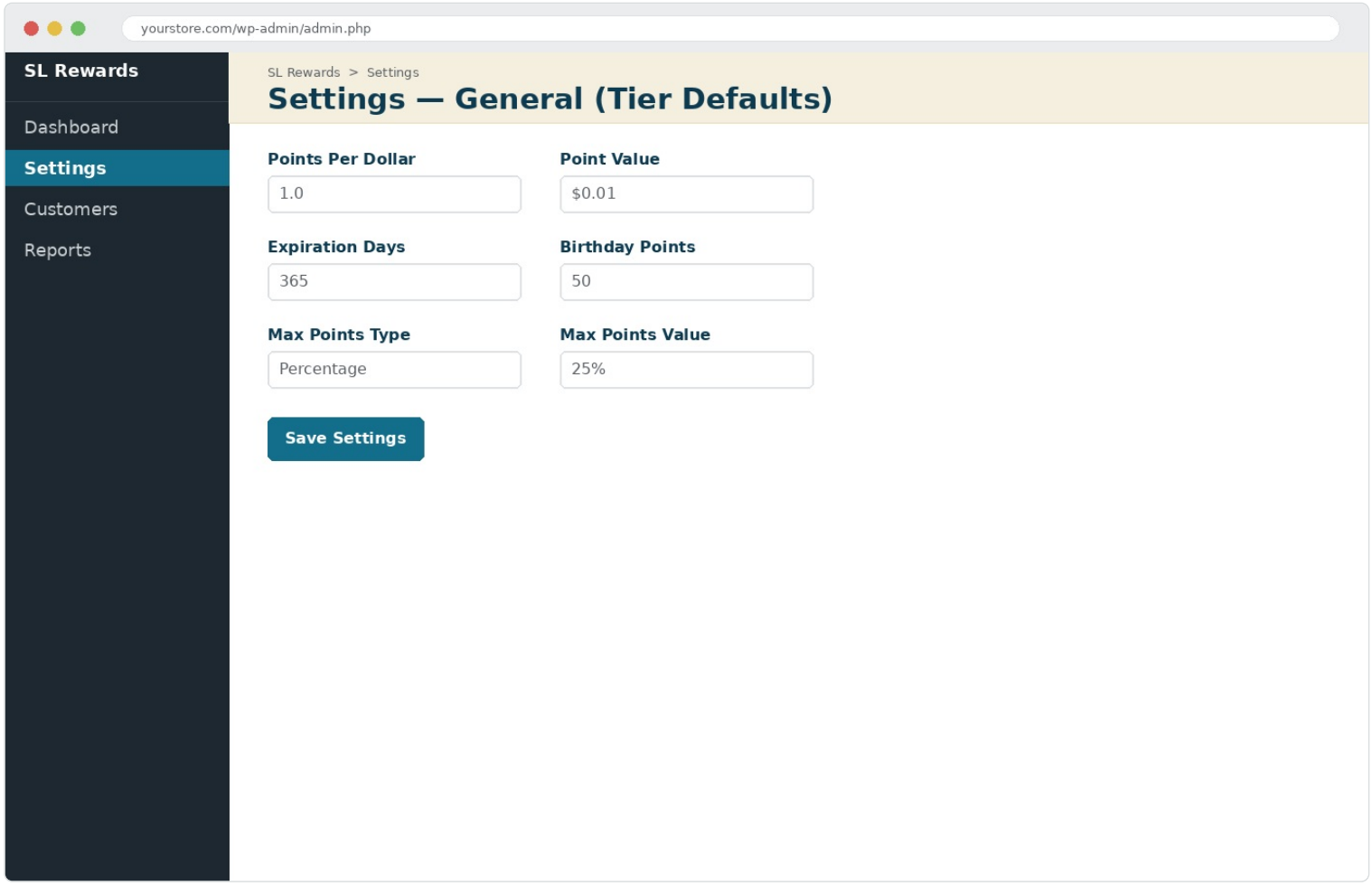
History — Points Log & Export

Click History to open a modal showing the customer's last 50 transactions. From here:

- **Export History** — downloads this customer's full points log as CSV

- **Clear All History** — permanently deletes this customer's logged transaction history (requires confirmation; does not affect their current point balance)

12. Reports



Reports is a separate page from Settings, but uses the same style of stat cards shown here.

Path: **Streamline Rewards → Reports**. Filter the whole page by date range (defaults to the current month) using the From Date / To Date fields and **Filter Reports**.

Program Overview

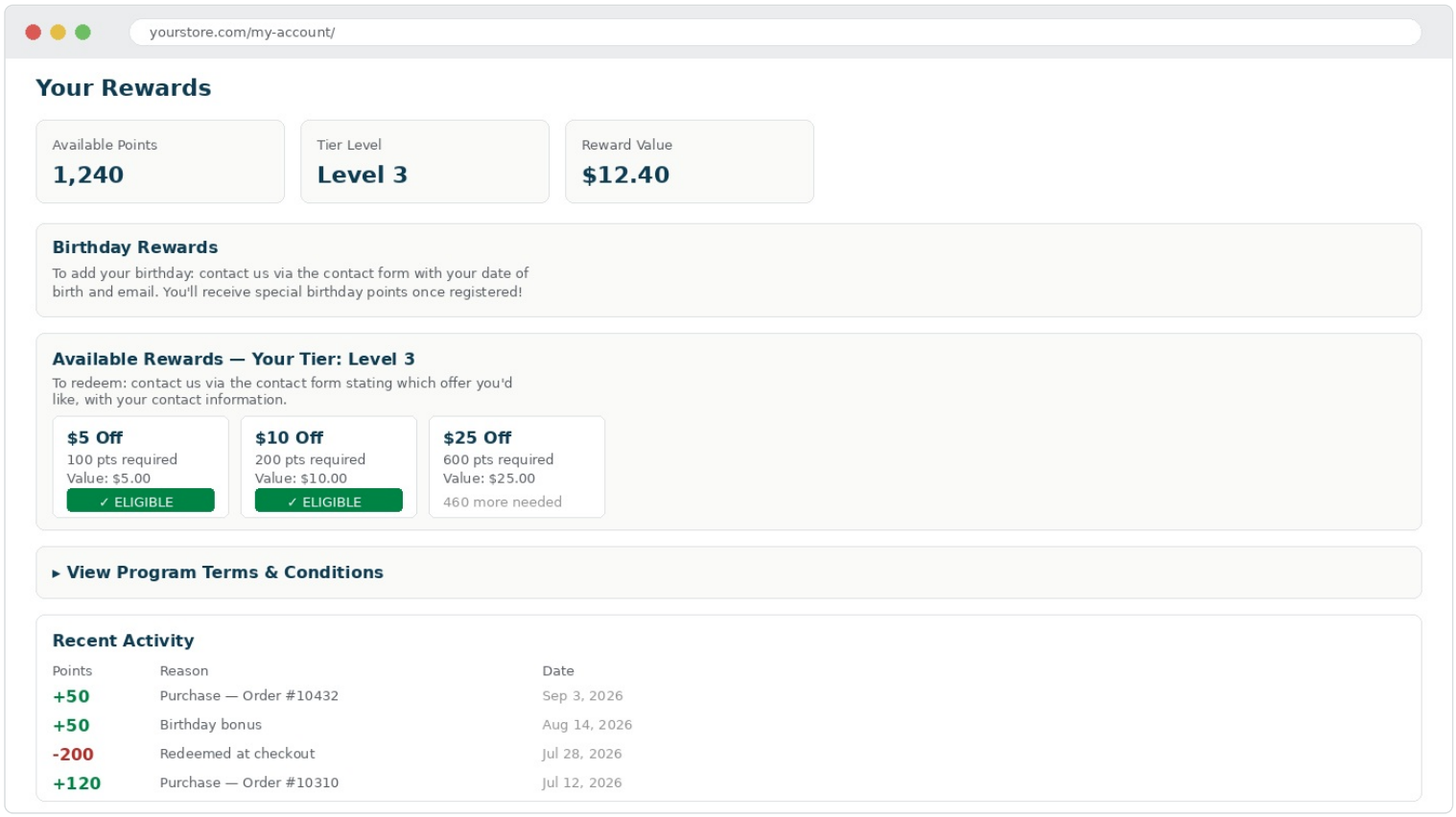
Metric	What it counts
Total Customers	Every WordPress user account on the site
Enrolled Members	Customers who've joined the rewards program, plus the enrollment rate as a percentage of Total Customers
Points Issued	Sum of every positive entry in the points history log (lifetime)
Points Redeemed	Sum of every negative entry in the points history log (lifetime), shown as a positive number
Active Points	Current total balance across every enrolled customer right now
Avg Points/Customer	Active Points ÷ Enrolled Members

Customer Distribution by Tier

A breakdown of enrolled customer count and total points held, per tier level (1 through 5).

The full report additionally includes a Top Customers leaderboard by points balance and a Recent Transactions feed spanning order earnings, manual adjustments, birthday rewards, redemptions, and expirations — useful for spotting your best customers or auditing recent activity at a glance.

13. The Customer Experience — Enrollment & Dashboard



A customer's full rewards dashboard, shown on My Account once enrolled.

The dashboard is injected automatically into **My Account → Dashboard** for every logged-in customer — it's hooked directly into WooCommerce's own account dashboard tab, so there's no separate page to create and no shortcode needed for this specific view (the `[streamline_rewards]` shortcode in Section 16 is only for showing this same dashboard somewhere else).

Enrollment Prompt

A not-yet-enrolled customer sees an enrollment card instead of a dashboard: a summary of program benefits (points per dollar, tier-based perks, birthday rewards), your Program Terms if you've written any (Section 8), and a single **Join Rewards Program** button — no form to fill out.

The Dashboard Itself

Once enrolled, everything below appears in this order on the page:

1. **Three stat cards** — **Available Points** (their current balance), **Tier Level**, and **Reward Value** (their points converted to a dollar amount, using their tier's own point value).
2. **Birthday Rewards** — if a birthday is already on file for this customer, it shows the exact date and how many bonus points they'll receive each year on it. If no birthday is on file, it instead asks them to contact you via your contact form with their date of birth and email — there's no self-service birthday field anywhere on the frontend; adding one always has to go through you as the admin (Section 11).
3. **Available Rewards** — every Tier Reward available at their specific tier level (Section 7), each shown as its own card with the points required and its dollar value, and marked either a green ✓ **ELIGIBLE** badge (they have enough points right now) or a gray note showing exactly how many more points they still need. A Tier Reward the customer's tier level doesn't qualify for at all is left off their dashboard entirely, rather than shown as ineligible. A note above the cards explains that redeeming means contacting you through your contact form with which offer they want, since there's no self-service "redeem" button here.
4. **View Program Terms & Conditions** — a collapsible section (closed by default) showing whatever you wrote in the Terms tab (Section 8).
5. **Recent Activity** — their last 10 points transactions, in a simple three-column table: **Points** (green with a + sign for points earned, red with a − sign for points spent or removed), **Reason** (e.g. "Purchase — Order #10432," "Birthday bonus," "Redeemed at checkout," or whatever reason an admin entered for a manual adjustment — Section 11), and **Date**. This section doesn't appear at all for a customer with no history yet, rather than showing an empty table.

14. The Customer Experience — Redeeming at Checkout

The points redemption widget appears in two places automatically: just above the order total on the **Cart** page, and at the top of the **Checkout** page under a "Use Your Rewards Points" heading. Both use the exact same form.

Normal Case

- Shows Available Points, the customer's tier-specific Point Value, and the Maximum Points You Can Use for this cart (respecting the tier's Max Points Type/Value limit from Section 3)
- The customer enters a point amount (capped at that maximum) and clicks **Apply Points** — this runs instantly via AJAX and applies the discount as a WooCommerce coupon behind the scenes
- Once applied, the box shows the exact discount ("Applying 200 points (-$2.00)") with a **Remove** button

If the Cart Has Excluded Items

Instead of the entry field, the widget explains that one or more products in the cart are excluded from redemption, still shows the customer's available point balance for reference, and — for full transparency — lists exactly which items are excluded and why: "excluded from rewards program" (Section 5), "excluded from redemption" by SKU, or "category excluded from redemption" (both Section 6).

If They Have No Points

The widget simply states they don't have any points to redeem yet.

> **Requires login:** the redemption widget and the entire dashboard only appear for logged-in customers — guest checkouts never see rewards at all.

15. How Points Are Awarded & Expired

Event	What happens
Order status changes to **Completed**	Points are calculated and awarded on the order's eligible line items
Payment is marked complete	Points are also awarded at this point (so points post whichever happens first for a given order — payment completing, or the order later being marked Completed)
Customer's birthday arrives	The configured Birthday Reward Points are awarded automatically, once per year, checked whenever the plugin loads on a page request
Daily cron / customer login	Expired points (per that customer's tier expiration setting) are removed

Only products in an Eligible Category (Section 4), and not on the Exclusions list (Section 5), earn points — the exact per-dollar rate and any tier bonus comes from the customer's tier level at the time of the order.

16. The [streamline_rewards] Shortcode

Drop `[streamline_rewards]` onto any page or post to embed the exact same dashboard shown on My Account — useful if you want rewards visible on a custom account page, a landing page, or anywhere else in your site's navigation. A logged-out visitor sees a simple "Please log in to view your rewards" message instead.

17. Integration with Streamline POS

When both plugins are active, SL Rewards appears as the **Rewards** tab inside the POS Extensions panel — its Settings, Customers, and Reports pages load directly inside POS via an iframe, and the POS customer detail panel shows a customer's rewards balance and tier live. Access is controlled per POS user under Settings → Users → Manage Extensions → Rewards (Settings / Customers / Reports sub-permissions) — see the *Streamline POS* manual, Section 24, for the full explanation of how Extensions and plugin dependency work together.

> **Requires SL Rewards active:** like every POS extension, the Rewards tab only functions with this plugin installed and active on the same site — granting the POS permission does not install SL Rewards itself.

18. Troubleshooting & Quick Reference

Issue	What to check
Points not awarded after purchase	Points post when the order status becomes Completed, or when payment is marked complete — check the order's actual status/payment state.
Customer can't redeem points	Confirm they're logged in, enrolled, have a positive balance, and the cart has no earning- or redemption-excluded items (Sections 5–6).
Points expired earlier than expected	Check whether they were backdated via Points Effective Date — expiration counts from that date, not the entry date (Section 11).
Expiration cron shows "Not Scheduled"	Deactivate and reactivate the plugin to re-register the scheduled task (Section 10).
Imported CSV changed balances unexpectedly	The points column in an import sets the absolute new balance — it does not add to the existing one (Section 9).
POS Rewards tab blank or not working	Confirm SL Rewards is installed and active, and the POS user has the relevant Manage Extensions → Rewards sub-permission (Section 17).

Adjust a customer's points	Customers → Edit → Adjust Points → Reason → Save Changes
Set up tier-specific rates	Settings → General → uncheck "Use same for all tiers"
Stop a product from earning points at all	Settings → Exclusions → search and add the product
Let a product earn points but not be discounted	Settings → Redemption Exclusions → category or SKU
Force an expiration check right now	Settings → Maintenance → Run Expiration Check Now
Add rewards to a custom page	Insert the [streamline_rewards] shortcode

19. Version History

What's changed in each release of SL Rewards, in plain language — for reference and troubleshooting.

Version	Date	What Changed
3.0.2	—	Version bump with no changelog entry recorded — behavior matches 3.0.1 as documented throughout this manual.
3.0.1	—	Maintenance release — code quality and compatibility improvements, no user-visible changes.
3.0.0	—	Major update: per-tier settings for all five tiers (Section 3), an automatic points expiration engine with daily cron, login trigger, and manual override (Section 10), and separate earning vs. redemption exclusion lists (Section 5, Section 6). Added the Maintenance dashboard (Section 10) and backdated points with accurate expiration from the backdated earn date (Section 11). Also fixed a birthday-reward duplication bug, made coupon redemption reuse existing coupons instead of creating new ones each time, expanded Reports (Section 12), and added real-time AJAX product search to the Exclusions settings (Section 5).
2.x	—	Earlier releases: multi-user support with role-based permissions, a full UI redesign, gift card functionality, and the original rewards system foundation.

About the dates: these releases predate this Version History section, so exact ship dates aren't recorded — entries are backfilled from the plugin's own changelog, which groups everything before 3.0.0 into a single "2.x" bucket rather than individual version numbers. Every future update gets a dated row here going forward.