

# System Solutions LLC LoyaltyLion Shopify Rewards for D365 Business Central User Guide

## Extension

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## System Requirements

- Microsoft Dynamics 365 Business Central version 25.4 or newer.
- You must have a LoyaltyLion account previously setup.
  - LoyaltyLion is an Add On App for Shopify: [The smartest loyalty platform to maximize personalization, engagement and growth](#)

## About

- This Extension tracks LoyaltyLion Reward customers, point accumulation, and redemption of points during Business Central sales and synchronizes this information with customers, points and redemption of points to LoyaltyLion. Points accumulated in-store with Business Central sales or online through Shopify sales are shared between the two systems.

## LoyaltyLion Setup

- Configure the LoyaltyLion point calculation and reward redemption processes.
- There are two setup pages where these parameters must be defined.
- Search > **LoyaltyLion Integration Setup**
- General tab
  - Set the **API Key** from your LoyaltyLion account.
    - Sign in to LoyaltyLion and go to Settings > API keys > add a new key that has both read and write permissions for customers and orders (4 checkboxes in total).
  - Define **Base Points** which is useful for Calculation of reward points (Default Value 1).
    - Example: If the base point is set to 2, the customer will earn points = \$ Dollars spent × 2 and if the base point is set to 1, the customer will earn points = \$ Dollars spent × 1
  - Select the **Reward G/L Account** that will be used when a claimed reward is added to a sale.
  - **Sales Last Synced At**: Specifies the date and time when sales were last synced from Business Central to LoyaltyLion. This field can be changed to sync older sales.
- Customer Syncing tab
  - **Auto-Enable Enrolled Customers**: Specifies that customers who are enrolled in LoyaltyLion should automatically be enabled for earning and redeeming points when they are synced to LoyaltyLion from Business

Central. Customers must be updated in LoyaltyLion and have a matching email address in Business Central.

- **Auto-Sync Existing Sales:** Specifies that existing posted sales invoices and credit memos should be automatically synced to LoyaltyLion after a customer is enrolled in LoyaltyLion and synced to Business Central. This will allow the customer to earn points from their previous purchases. Sales older than 30 days before the customer enrolled in LoyaltyLion will not be synced.
- **Customers Last Synced At:** Specifies the date and time when customers were last synced from Business Central to LoyaltyLion, which is used to determine which customers should be synced based on their last update time in LoyaltyLion.
- Rewards Redemption tab
  - **Allow Discount Vouchers:** Specifies that Cart Discount Vouchers, as set up in the LoyaltyLion account, should be available to redeem in a sale.
  - **Allow Direct Point Redemption:** Specifies that rewards should be available to redeem directly from a customer's points balance. This work similarly to LoyaltyLion's Checkout Redemption rewards, which they do not allow to be used by integrations such as this one. Instead, they will reduce the customer's points with an adjustment.
  - **Points Redemption Ratio:** Specifies the number of points that can be redeemed per dollar (or other currency) when a customer redeems points directly from their points balance. For example, a value of 20 specifies that 20 points can be redeemed for a reward of one dollar, 40 points can be redeemed for a reward of two dollars, etc.
- Actions > **Sync Customers From LoyaltyLion:** Sync all customers that were updated since the Customers Last Synced At date and time. This also runs from the job queue.
- Actions > **Sync Sales to LoyaltyLion:** Sync all invoices and credit memos that were added since the Sales Last Synced At date and time. This also runs from the job queue.
- Related > **Point Modifiers**
  - Set Type = Item or Item Category
  - Set Item or Item Category = <an Item or Item Category>
  - Set Point Modifier = Amount of Reward Points

#### **Item Card LoyaltyLion fields**

- Block LoyaltyLion Points: This field, under the Prices & Sales tab, allows the item to be excluded from earning points when it's sold.

#### **Customer Card LoyaltyLion fields**

- Earned Points from Sales: Enables the customer to sync with LoyaltyLion.
  - The customer will only sync to LoyaltyLion if the "Earned Points from Sales" feature is enabled on the Customer Card.
- Enrolled: Indicates whether the customer has placed one or more orders on the portal and is enrolled in the LoyaltyLion program.
- Points Approved: Shows the points approved by LoyaltyLion for the customer.

- Points Pending: Displays the points pending approval by LoyaltyLion for the customer.
- Points Spent: Represents the points spent by the customer.
- Enrolled At: When the customer enrolled into the LoyaltyLion program.
- Last Updated: Indicates the last time the customer's details were updated on the LoyaltyLion portal.
- Last Sync: Indicates the last time the customer was synced between Business Central and LoyaltyLion.
- Merchant Id: It is a customer's unique id on LoyaltyLion portal. (Not shown on Page)

### **Customer Synchronization**

- LoyaltyLion's customer data is synced with Business Central either manually or automatically with a job queue.
- The customer will be found by email address and must already exist in LoyaltyLion.
  - If the customer doesn't exist in LoyaltyLion yet, they can sign up by logging into the store's Shopify shop. After the customer logs in and goes to the main shop page, LoyaltyLion will mark the customer as enrolled. It will now be ready to sync with a Business Central customer.
- Syncing a customer updates fields such as points approved, points spent, points pending, earned points from sales, enrollment status, last updated time, and last sync time from LoyaltyLion to Business Central.
- **Synchronization with Job Queue**
  - The job queue is created automatically when the LoyaltyLion extension is installed in Business Central.
  - The job queue syncs LoyaltyLion customers with Business Central every day at 15-minute intervals.
- **Manual Synchronization**
  - Select Customer Card > LoyaltyLion Action > **Sync Customer From LoyaltyLion** to sync the relevant fields from the customer in LoyaltyLion using the customer's email address.
  - Each time the Sync Customer process is completed, the Last Sync field will be updated in the Loyalty Lion Fast Tab

### **Point Calculation Process**

- LoyaltyLion point calculation is primarily based on dollars spent on an Invoice and the base Point and Point modifier.
- $\text{Earned Reward Points} = \text{Dollars Spent} \times \text{Base Point} \times \text{Point modifier}$
- Each Item sold is attempted to be matched to an Item on the Point Modifier page
  - **Item**
    - If the Item is found its Point Modifier is used
    - If the Item is not found the Item Category of the item is attempted to be matched to an Item on the Point Modifier page
  - **Item Category**
    - If the Item Category is found its Point Modifier is used
    - If the Item Category is not found the Parent Item Category is attempted to be matched to an Item on the Point Modifier page

- **Parent Item Category**
  - If the Parent Item Category is found its Point Modifier is used.
- If none of the above are found for the Item the Base Point specified on the LoyaltyLion Integration Setup Page is used to calculate the points using the price of the item from the invoice.
- This process is performed for all items on the sales invoice to calculate the points for each item and the sum of all points determines the total earned points for the invoice.
- Items that have the Block LoyaltyLion points enabled on the item card will not earn points.

### **Sales Invoices and Orders**

- The **Claim Reward** process is used to retrieve available rewards from the LoyaltyLion portal.
- Select > Sales Order Card > LoyaltyLion action group > Claim Reward or Sales Invoice Card > LoyaltyLion action group > Claim Reward
- **Blocked LoyaltyLion Points**
  - Sales Order Card > Loyalty Lion and Sales Invoice Card > Loyalty Lion contain a field named Blocked LoyaltyLion Points.
  - Set = On and Points will NOT be synced to the LoyaltyLion portal.
- The **LoyaltyLion Rewards page** displays a list of available rewards for the customer and also shows the customer's available points from the LoyaltyLion portal.
  - Available Points: The Available Points feature shows the total points a customer can claim, providing clarity on their current loyalty rewards eligibility.
  - Title: The Title field displays the name of the reward, helping users identify the specific rewards available for selection.
  - Discount Amount: The Discount Amount field shows the value that can be discounted for the selected reward, providing clarity on the benefit associated with the reward.
  - Points Cost: The Points Cost field shows the number of points that will be deducted for claiming the selected reward, ensuring transparency in the loyalty points usage.
- If only Direct Point Redemption rewards are enabled, it will open an input box to enter the number of points to redeem for this sale. Otherwise, it will be listed at the bottom of the rewards list.
- Select a reward and a new G/L Line will be added to the order.
  - Validations for Claim Reward:
    - If no G/L Account is selected on the LoyaltyLion Integration Setup Page, the user cannot select a reward. In such cases, an error message is displayed: "Please Select Account on Steup Page."
    - If there is no sales line for that Sales Order / Sales Invoice, then User is not able to claim reward.
    - If order is partially shipped, then User is not able to claim reward.
  - The G/L Line specifies the G/L Account Number and the reward amount.

- The G/L Line includes two additional fields from the LoyaltyLion portal:
  - Claim Reward Id - The unique identifier for the claimed reward.
  - Claim Reward Code - The code for the claimed reward.
  - These fields are not visible in the Lines
  - **Note:** User cannot claim more than one reward on the same Sales Order or Sales Invoice
- Discount Voucher rewards will be claimed right away. Direct Point Redemption rewards will remove points from the customer's balance when the sale is posted.

#### **Delete G/L line (Refund Points) on a Sales Order or Sales Invoice**

- If the user deletes a G/L Line before posting a Sales Order or Sales Invoice the reward points associated with that line are refunded to the LoyaltyLion portal.

#### **Sync Invoice to LoyaltyLion**

- Sync Invoice is used to send earned LoyaltyLion points to the LoyaltyLion portal based on a Posted Sales Invoice.
- The Posted Sales Invoice is sent to the LoyaltyLion portal as an order if a discount voucher is used. To add points to the LoyaltyLion customer, it uses an adjustment.
- Points are calculated based on dollars spent using the base point and point modifier parameters and sent afterwards.
- The earned or blocked points are updated on the Posted Sales Invoice Card Page > LoyaltyLion Group > LoyaltyLion Points fields:
  - Blocked Loyalty Lion Points: The Blocked LoyaltyLion Points field indicates whether the order should sync to LoyaltyLion or not, ensuring proper control over loyalty point updates and order synchronization.
  - LoyaltyLion Points: The LoyaltyLion Points field shows the total number of points earned from the sale.
- This process can be initiated in three different ways:
  - **Job Queue**
    - After the sale is posted, the job queue will sync the earned points to LoyaltyLion.
  - **Sync Invoice Manually**
    - Posted Sales Invoice > LoyaltyLion > Sync Invoice
    - Note: If the invoice is older than 30 days before the customer enrolled, the Sync Invoice action is disabled and the User will not be able to sync the invoice with LoyaltyLion.
  - **Sync Multiple Invoices Manually**
    - Posted Sales Invoices list page > select the invoices you'd like to sync > Sync Invoices
      - Note: the selected invoices must not have been synced already, blocked, or older than 30 days before the customer enrolled. The customer(s) must also be enabled to earn points.
    - Customer card > Sync All Sales to Loyalty Lion
      - This will sync all invoices and credits starting 30 days before the customer's enrollment date into the LoyaltyLion program.

### **Sync Credit Memo (Refund Rewards)**

- This is used to refund rewards or cancel an invoice from the LoyaltyLion Portal when a User Corrects/Cancel or Creates a Credit Memo for the Posted Sales Invoice.
- Points are deducted from the LoyaltyLion portal, a Refund Order is created in the LoyaltyLion portal, and the Order in the LoyaltyLion portal is set to Refund
- On the Credit Memo, the fields are:
  - Blocked Loyalty Lion Points: The Blocked LoyaltyLion Points field indicates whether the credit memo should sync to LoyaltyLion to control whether loyalty points are adjusted or refunded.
  - LoyaltyLion Points: The LoyaltyLion Points field shows the number of points that have been refunded due to the credit memo, reflecting the adjustment made to the customer's loyalty points balance in LoyaltyLion.
- If a credit memo is applied to a sale, it will refund the sale's points. Otherwise, it will recalculate the points based on the credit memo's items and remove the points from the customer.
- The process occurs after a Credit Memo is posted and is synchronized as follows:
  - **Correct/Cancel Posted Sales Invoice**
    - User performs a Correct/Cancel Posted Sales Invoice and the Posted Sales Credit memo syncs with LoyaltyLion and refund the customer's Reward Points. The job queue will sync the credit memo to LoyaltyLion.
  - **Create Corrective Credit Memo**
    - User creates and posts a Credit Memo which will then sync with LoyaltyLion and refund the customer's Reward Points. The job queue will sync the credit memo to LoyaltyLion.
  - **Manual Sync Posted Sales Credit Memo**
    - If there is an error and the Posted Sales Credit Memo does not sync with LoyaltyLion the User can manually sync the Credit memo with LoyaltyLion to get points refunded for that order.

### **Reward Claim/Refund Process in LS Express POS**

- The additional extension called **LoyaltyLion and LSE Integration** can be installed to add functionality to LS Express POS. Contact System Solutions for more details.
- In LS Express POS orders are created on the POS page and the functionality works in the same way as described for Sales Orders and Sales Invoices

### **Claim Reward in LS Express POS**

- Select LS Express > POS > LoyaltyLion > Claim Reward works the same as described above for retrieving rewards for Sales Orders and Sales Invoices
- A G/L Line with the G/L Line account description is added as a POS sales line

### **Delete G/L Line from LS Express POS**

- Like a regular sale, if the user deletes the G/L Line from the LS Express POS sales line, the system processes the deletion of the claimed reward from LoyaltyLion and refunds the points to LoyaltyLion accordingly.