

bLoyal App for Shopify Setup Guide

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Helping you build loyal customers™

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1 Overview

This document describes the process of installation and setup of the **bLoyal: Loyalty & Promotions** app for Shopify.

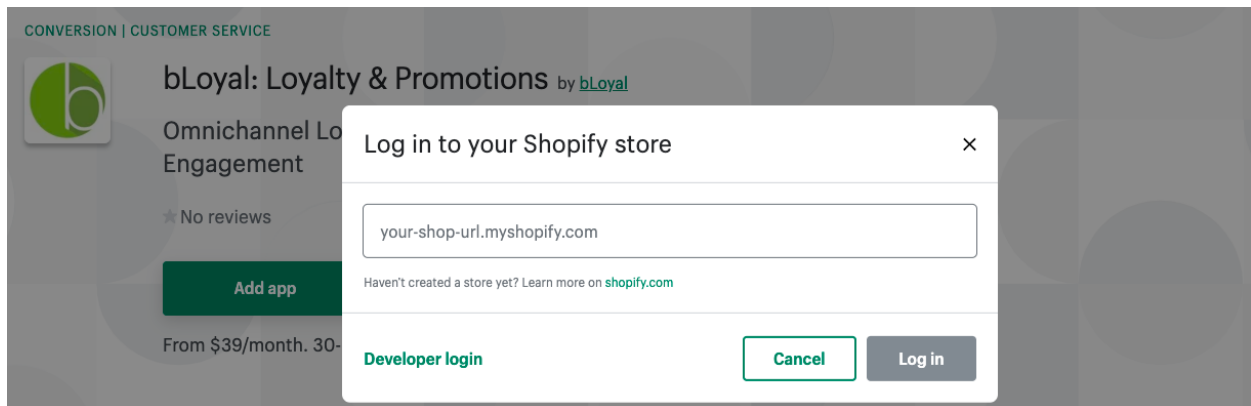
2 Prerequisites

The following are required for setup:

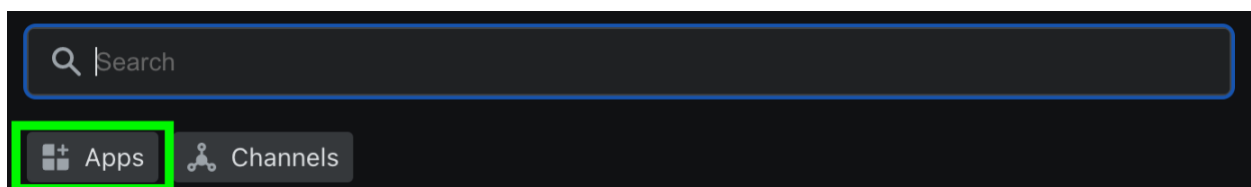
- Current Shopify account and web store.
- Obtain **bLoyal: Loyalty & Promotions** from the Shopify App Store.

3 How to Obtain the bLoyal Apps

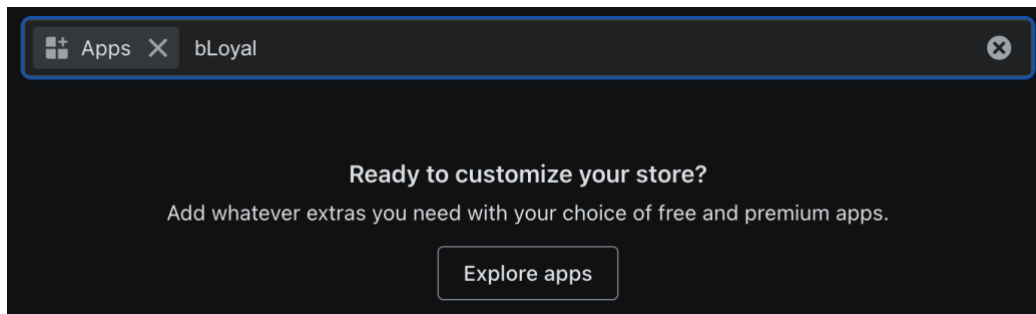
- First, log into your Shopify account. At the time of this writing, the Shopify login URL is formatted as follows:



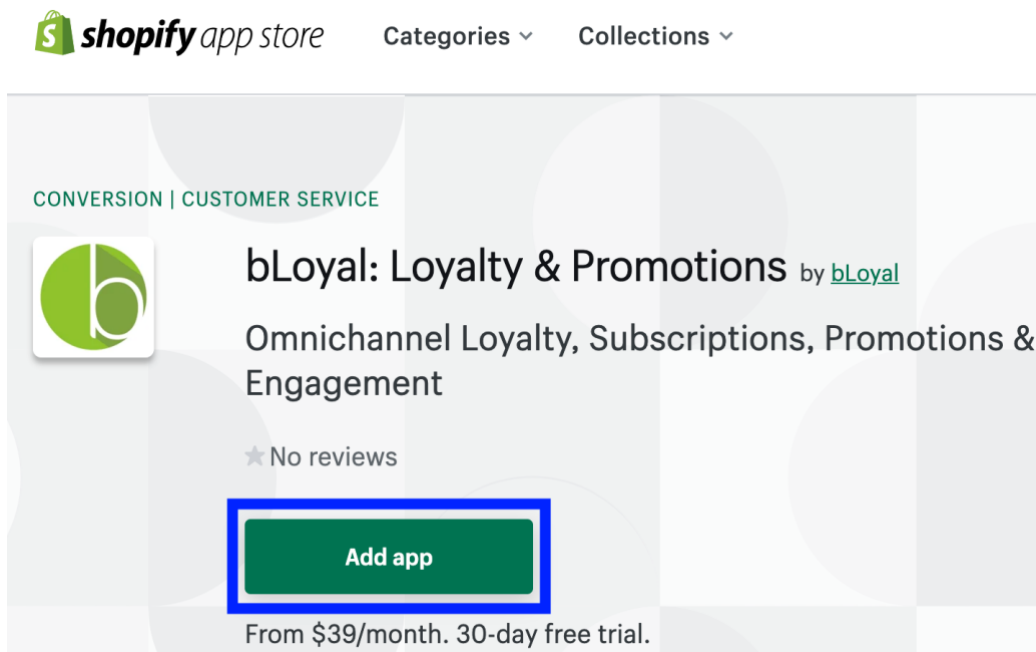
- Click the following link and then click **bLoyal: Loyalty & Promotions => Add App**:
<https://apps.shopify.com/search?q=bLoyal>
- Alternatively, you may click on the **Search** bar at the top of the page and click **Apps**:



- Click on the button that appears called **Explore Apps**.



- After clicking the link or browsing to the Shopify App Store as explained prior, search for "bLoyal" to locate the primary bLoyal app entitled, **bLoyal: Loyalty & Promotions**. Simply click the **Add App** button underneath. You may also optionally install any of our other useful apps as they become available, all of which are proven to enhance your customer loyalty base and retention:



- Review the terms and click **Install App**.

- Select the bLoyal Edition that works for your business:

Upgrade or Downgrade your plan 30 days free trial

CORE EDITION	PRO EDITION	MARKETER EDITION
\$39/month	\$99/month	\$199/month
<ul style="list-style-type: none">✓ Single Master Customer Record✓ Order Level Accruals and promotions✓ Loyalty Tiers Program✓ Automated Lifecycle Engagement	<ul style="list-style-type: none">✓ Everything in Core, plus✓ SKU Level Accruals and Promotions✓ Pre-Paid and Recurring Subscriptions✓ Dynamic customer segments	<ul style="list-style-type: none">✓ Everything in Pro, plus✓ Frequent Buyer programs✓ Cross-Sell and Upsell Capabilities✓ Recurring Ship and Pickup Orders
DOWNGRADE NOW	CURRENT PLAN	UPGRADE NOW

*All charges are billed in USD. Recurring charges, including monthly or usage-based charges, are billed every 30 days.

- Approve the subscription:

On your next bill

Core Edition
\$39.00 USD
Recurring every 30 days
Starts today

Charged now **\$39.00 USD**

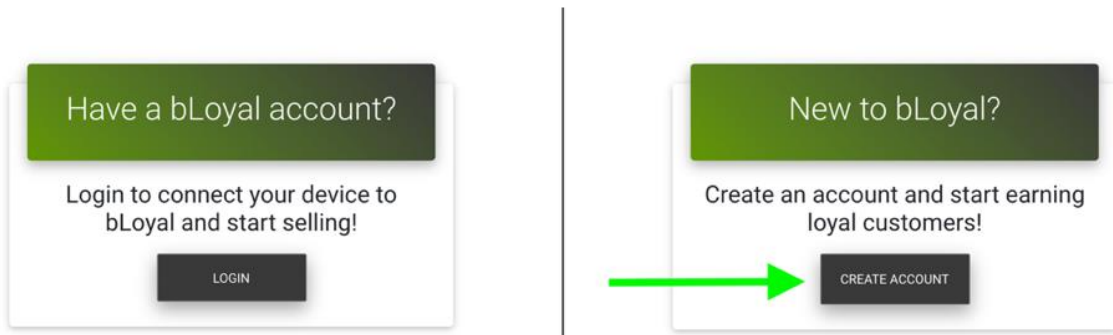
[Approve subscription](#)

4 Account Creation

After subscribing, you will be presented with the following prompt:



- Click the **Activate Device** button.
- You will then be presented with the login/signup prompt. Click **Create Account** (or **Login** if you have already done this step prior and are re-installing the bLoyal plugin or adding a new one):



- Fill out your company and desired admin account details and credentials. Please note: The *Company Login Domain* field does not accept spaces or special characters. It will be used to log into Director, your new web-based backoffice interface and CRM system.

Company Details

Company Name
My Company

Address
1234 Main St

Apt, suite, or floor

Enter your city
Bellevue

Country

United States ▼

State

Washington ▼

Postal Code
98007

BACK
CONTINUE

Owner Details

First Name
Ryan

Last Name
Gallagher

Email
info@mycompany.test

Mobile Phone
123-555-4109

Create your login credentials

Company login domain
MyCompany ?

Username
MyCompanyAdmin

Password
.....

Verify Password
.....

BACK
CONTINUE

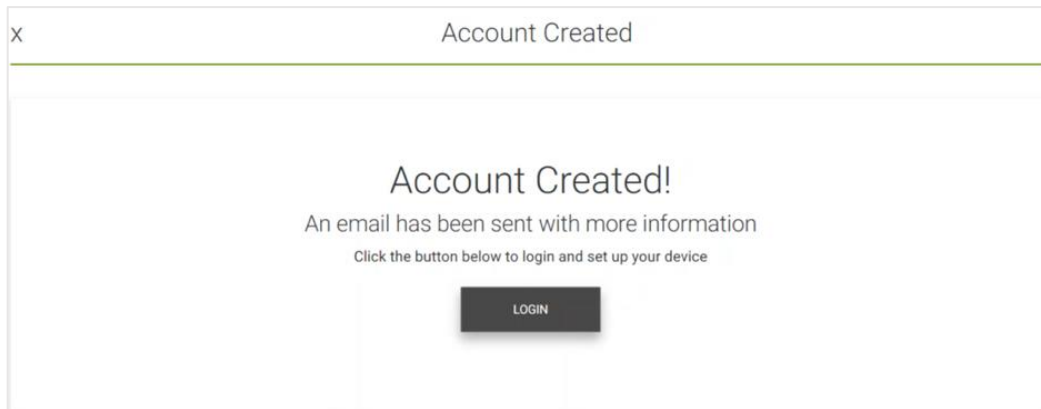
- After entering your details and clicking **Continue**, you'll see that your account is processing. During this time, your bLoyal account is being created automatically. This process will take roughly 5-10 minutes. You'll be logged in and will receive an email once your account has finished processing. You may wait while your account is being created, or you may close the page or exit the app and return to it later and then simply login using the *Company Login Domain*, *Username*, and *Password* you had entered in prior.

x
Account Processing

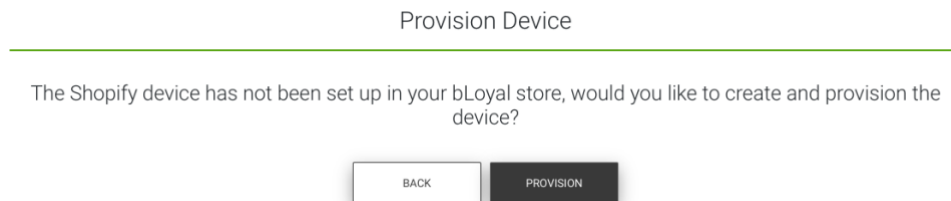
Your account is being created, this will take 5-10 minutes.
 You will be logged in and receive an email once your account has finished processing
 You may wait while your account is created or close this page, return to Home and continue setup later
 Your account is 0% done

...

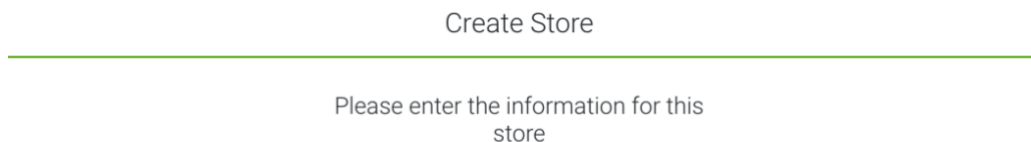
- Once your account has finished provisioning, you'll be presented with the following success message:



- Click **Login**. The next step will be provisioning your Shopify "device" in your bLoyal Director account. Devices represent web stores, POS systems, etc. and are used to integrate them with bLoyal. To start this process, simply click on the **Provision** button:



- Next, you'll be prompted to enter your store's details. After filling them in, click the **Create Store** button:



- Once your store has been created, you'll be presented with the following success message and will be returned to your **Apps** page in MyShopify:

Setup Complete

Setup Complete!

Your device is ready to go

To add additional users, change your device or store name please refer to your account creation email.

Thanks for choosing bLoyal!

FINISH

The screenshot shows the 'bLoyal: Loyalty Tender' app configuration page. The interface includes a sidebar with navigation options like Home, Orders, Products, Customers, Finances, Analytics, Marketing, Discounts, and Apps. The main content area is titled 'bLoyal: Loyalty Tender' and shows the 'App Configuration' tab. The version is 2.0.0. The configuration is divided into four sections: 'Cart Discount & Loyalty Summary', 'Custom Label Settings', 'Loyalty Tender', and 'Gift Card Tender'. Each section has an 'Enable' dropdown set to 'Yes' and a 'Save Setting' button. The 'Custom Label Settings' section includes a text input for 'Apply bLoyal Coupon Button Text' with the value 'Apply Coupon'. The 'Loyalty Tender' section has a 'Title' input with the value 'Loyalty Dollars'. The 'Gift Card Tender' section has a 'Title' input with the value 'Gift Card'.

5 Configuration

Now that your bLoyal account and **bLoyal: Loyalty & Promotions App for Shopify** are all set up, you will have the following options to choose from under **Apps => bLoyal: Loyalty & Promotions** in MyShopify:

App Configuration

Configuration Option	Description
Cart Discount & Loyalty Summary	Enable/disable the display of a preview screen with applicable loyalty accruals and discounts to customers during checkout.
Custom Label Settings	Customize button labels. Ex., 'Apply Coupon' button could be renamed to 'Use My Coupon' (or anything else you choose).
Loyalty Tender	Enable/disable the use of Loyalty Currency as a tender. Optional: you may change its label as well. Ex., 'Loyalty Bucks.'
Gift Card Tender	Enable/disable the use of bLoyal gift cards as a tender. Optional: you may change its label as well. Ex., '[Your Brand Name] Gift Certificate'
Payment Tender Mapping	The codes of your elected loyalty currency and gift card tenders (in Director) should be input here. These ordinarily do not need to be changed from the defaults: <i>LOYALTY</i> and <i>GIFTCARD</i> , respectively.
Click & Collect Settings	Enabling this option offers a "pickup at store" option which calls the bLoyal Loyalty Engine API to get the list of pickup locations applicable to the cart (based on available inventory).
Log Settings	Enable/disable advanced logging. Please only do so as advised by bLoyal Support.
bLoyal API Settings	Your company login domain (as you had entered when you created your bLoyal account) and API key for Shopify (auto-provisioned for you). Please do not modify these fields unless otherwise advised by bLoyal Support.
Advanced Settings	Manual web service URL entry. Please disregard this section unless otherwise advised by bLoyal Support.

Pricing

Make changes to your bLoyal Edition within this section.

Web Snippets

You may now embed bLoyal Web Snippets on any page in Shopify. You may utilize any of the following snippets:

- *Customer Signup*
- *Club Signup*
- *Customer Dashboard*
- *Customer Referrals*

As we add more React-based snippets over time, they will automatically be available at the time of their release.

For more information on bLoyal Web Snippets, please visit the [bLoyal Web Snippets section](#) under **Integrations** at [bLoyal MySupport](#).

6 Support

If you have any questions or experience any issues getting set up with bLoyal in Shopify, please contact bLoyal Support at support@bloyal.com or 1-877-388-7638, and we would be happy to help. Our hours are 8:00 AM – 5:00 PM Pacific Time, Monday – Friday.