Refer A Friend - Admin Guide

by CedCommerce Technical Publications

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1. Overview

Refer A Friend is an extension developed by CedCommerce for Magento® 2.x.x. It allows the registered front-end users to invite their friends to the Magento Store and earn the discount coupons. Thus, it helps the admins to increase their sales.

This extension allows admin to manage the referral amount, sign-up amount, denomination amount, and the denomination rules.

Key features are as follows:

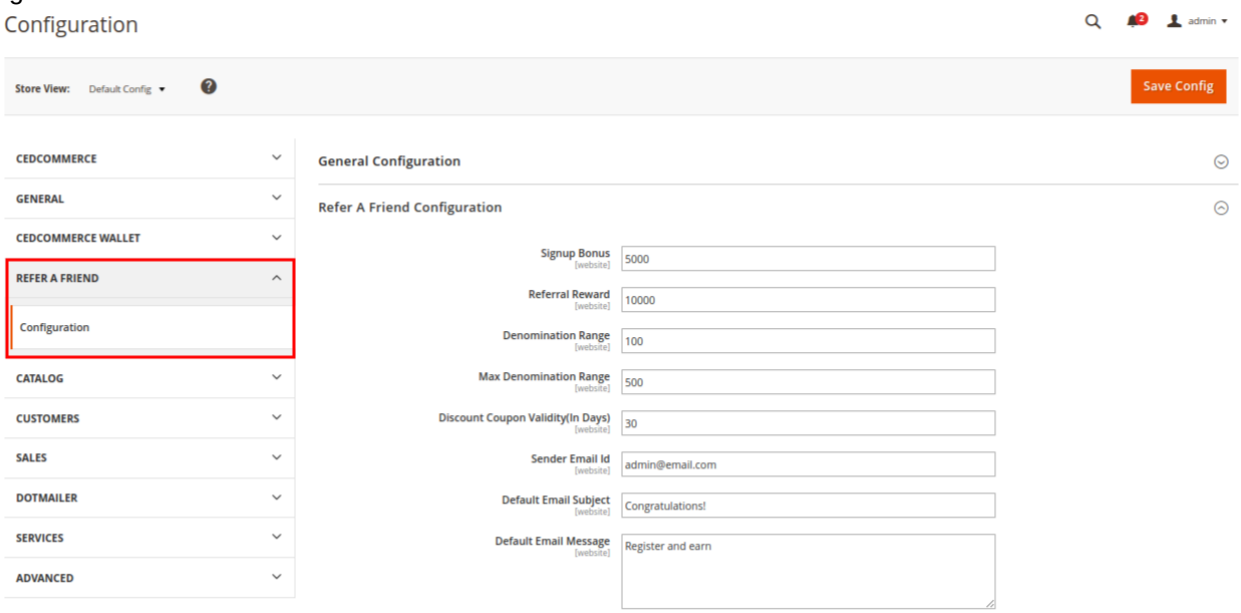
- Allows front-end users to refer their friends and avail the discounts, once the referred friend registers to the Magento store
- Users get the reward points and their friend gets the signup bonus
- Admin can view the list of the referred users
- User can convert the earned points to discount
- Helps in generating sales thereby revenue on the site

2. Configuration Settings

Once the admin installs the **Refer A Friend** extension successfully on the Merchant's store, the admin has to set up the configuration settings required to enable the features of the extension.

To configure the settings

1. Go to the **Admin** Panel.
2. On the left navigation bar, click the **STORES** menu, and the click **Configuration**.
   The **Configuration** page appears.
3. In the left navigation panel, click the **REFER A FRIEND** menu, and then click **Configuration Settings**.
   The **Refer A Friend Configuration Settings** page appears in the right panel as shown in the following figure:



4. In the right panel, under **Refer A Friend Configuration Settings**, do the following steps:

a. In the **Enabled** list, select **Yes** to enable the extension features on the admin panel and also on the front-end view.
b. In the **Signup Amount** box, enter an amount that the admin wants to allot it to a new user on signing up.
c. In the **Referral Amount** box, enter an amount that the admin wants to allot it to the user who refers a friend, and the referred friend registers to the store.
d. In the **Denomination range** box, set the denomination range for generating the discount coupons. For example, if the denomination range is 100, then the user can generate the discount coupons in the multiples of 100.
e. **Max Denomination range** set the maximum denomination amount for the discount coupon that can be created for the customer.
f. In the **Expiration Of Discount Code (In Days)** box, enter the number of days to specify the validity of the generated coupon .
g. In the **Support Email** box, enter the email id that admin wants to use for sending invitation emails.
h. In the **Default Message** box, enter a default message that the admin wants to use for sending invitation emails.

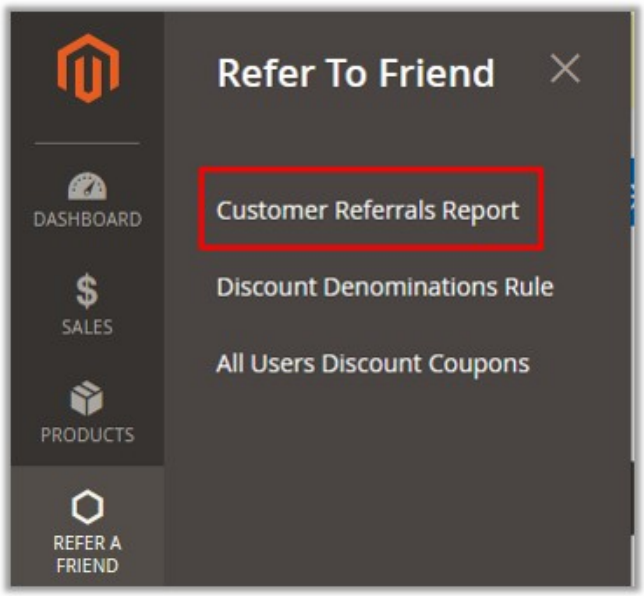
5. Click the **Save Config** button.

3. Customer Referrals Report

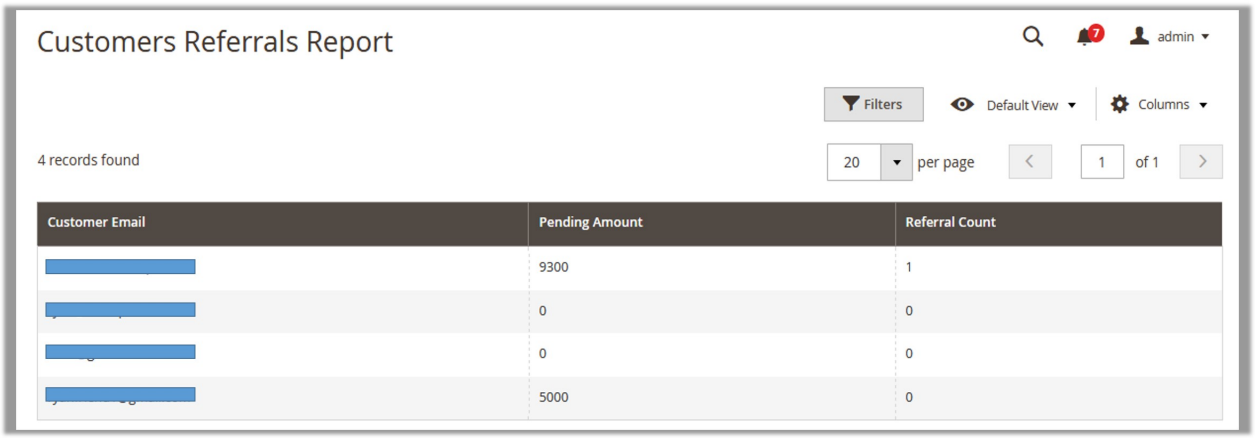
Admin can view the report that mentions all the users' referral count, their pending amounts, and the corresponding email ids.

To view the customers' referrals report

1. Go to the **Admin** panel.
2. On the left navigation bar, click the **REFER A FRIEND** menu.



3. Click **Customers Referrals Report**.
   The **Customers Referrals Report** page appears as shown in the following figure:



The admin can view all the user details consisting of the following information:

- **Customer Email**: Email id of the front-user who refers a friend to get registered to the Magento Store.
- **Pending Amount**: The balance amount that belongs to the user after generating the coupons from the total amount allotted.
- **Referral Count**: The number of friends the user had referred.

4. Denomination Rules

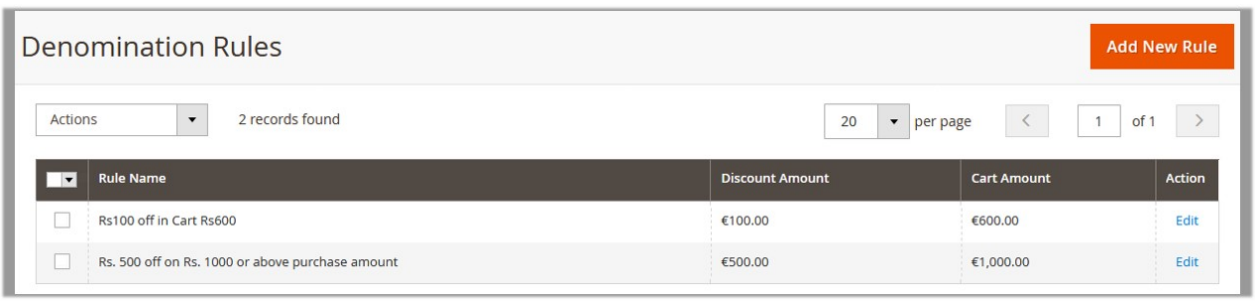
On the **Denomination Rules** page, admin can create the rules for the discount coupons that are applicable when the front-end users generate discount coupons.

The admin can perform the following tasks:

- View the existing rules(#View)
- Add a new rule(#Add)
- Edit the existing rule(#Edit)

To view the existing rules

1. Go to the **Admin** Panel.
2. On the left navigation bar, click the **REFER A FRIEND** menu, and then click **Denomination Rules**. The **Denomination Rules** page appears as shown in the following figure:

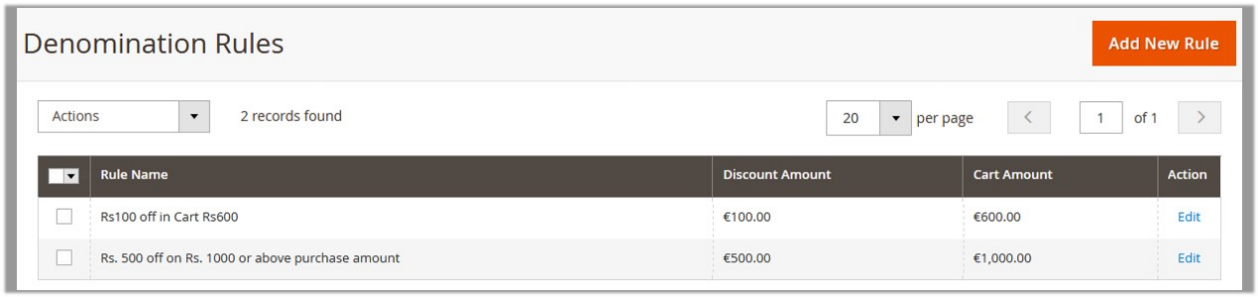


The admin can view the following information on this page:

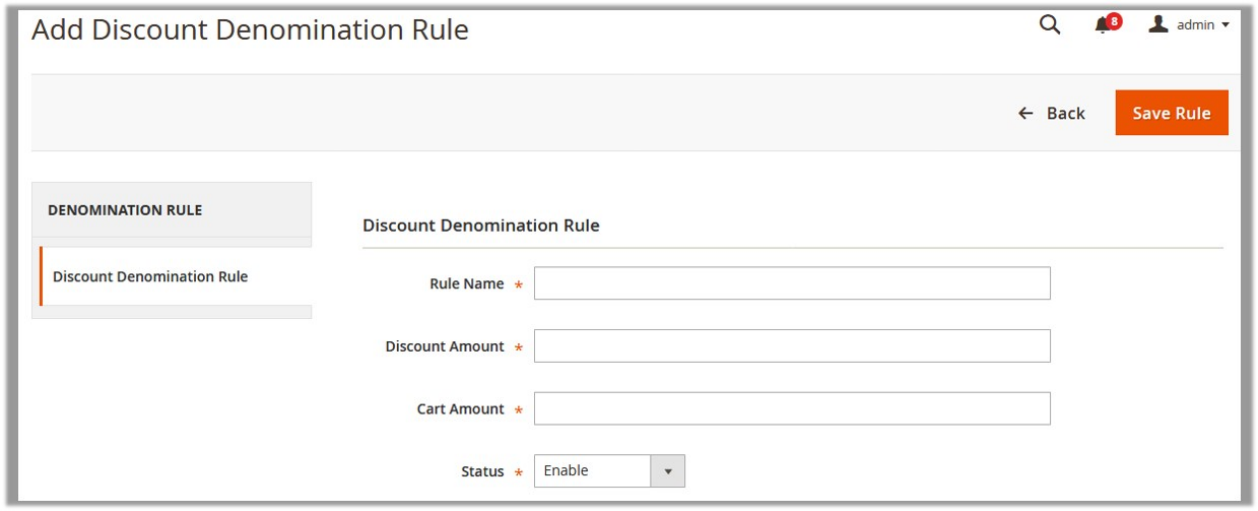
- **Rule Name**: Name of the rule defined.
- **Discount Amount**: The amount assigned to a discount amount when the user purchases the products on the specific amount that the admin defines while creating the rule.
- **Cart Amount**: The total purchase amount.

To add a new rule

1. Go to the **Admin** Panel.
2. On the left navigation bar, click the **REFER A FRIEND** menu, and then click **Denomination Rules**.
   The **Denomination Rules** page appears as shown in the following figure:



3. Click the **Add New Rule** button.
   The **Add Discount Denomination Rule** page appears as shown in the following figure:

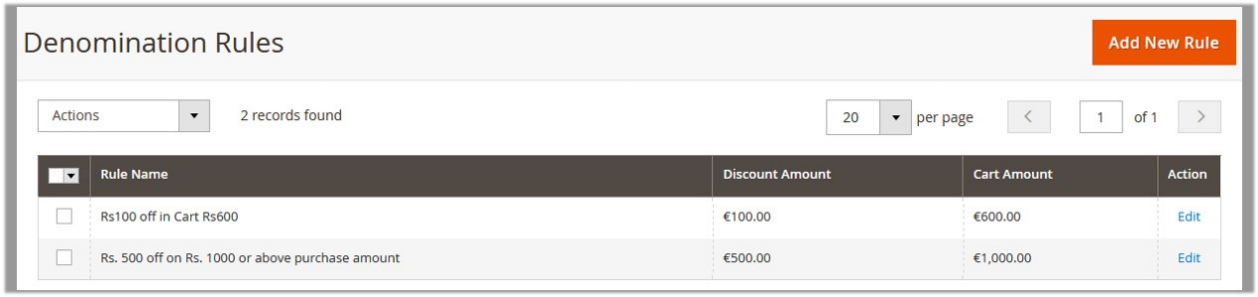


4. In the **Rule Name** box, enter a name of the rule.
5. In the **Discount Amount** box, enter a discount amount.
6. In the **Cart Amount** box, enter the purchase amount on which the rule applies.
7. In the **Satus** list, select **Enable** to enable the rule.
8. Click the **Save Rule** button.

To edit the existing rule

1. Go to the **Admin** Panel.
2. On the left navigation bar, click the **REFER A FRIEND** menu, and then click **Denomination Rules**.

The **Denomination Rules** page appears as shown in the following figure:



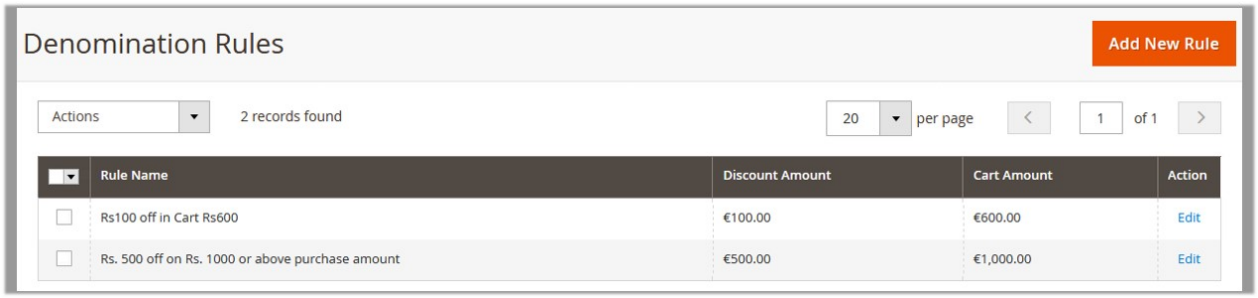
3. Scroll down to find the required rule for editing.
4. In the **Action** column, click the **Edit** link.
   The editing page appears.
5. Make the changes as per the requirement, and then click the **Save Rule** button.

4.1. Submit Actions

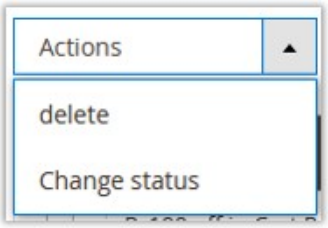
Admin can delete the selected rules and also can enable or disable the rules in bulk.

To delete the selected rules in Bulk

1. Go to the **Admin** Panel.
2. On the left navigation bar, click the **REFER A FRIEND** menu, and then click **Denomination Rules**.
   The **Denomination Rules** page appears as shown in the following figure:



3. Select the check boxes associated with the required rules.
4. Click the **Arrow** button next to the **Actions** field.
   The **Actions** list appear as shown in the following figure:

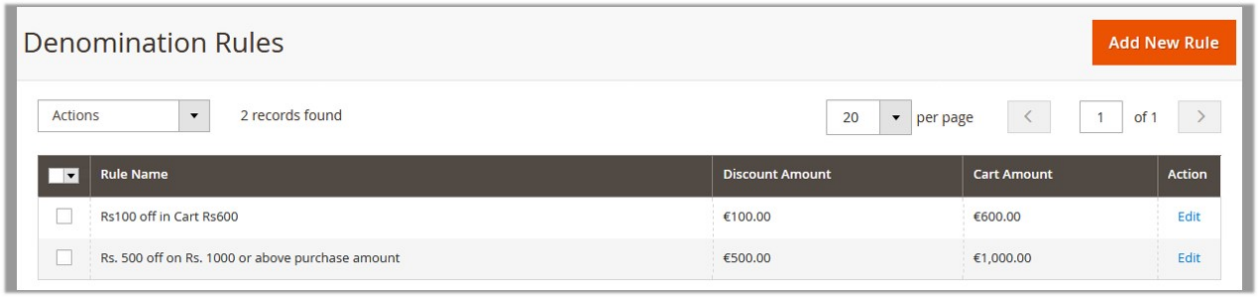


5. In the **Actions** list, click **Delete**.
   A confirmation dialog box appears as shown in the following figure:

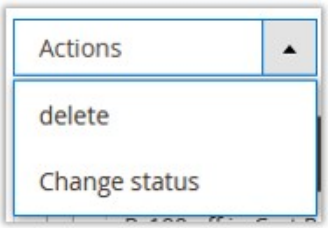
6. Click the **OK** button.
   The selected rules are deleted and a success message appears.

To enable or disable the selected rules

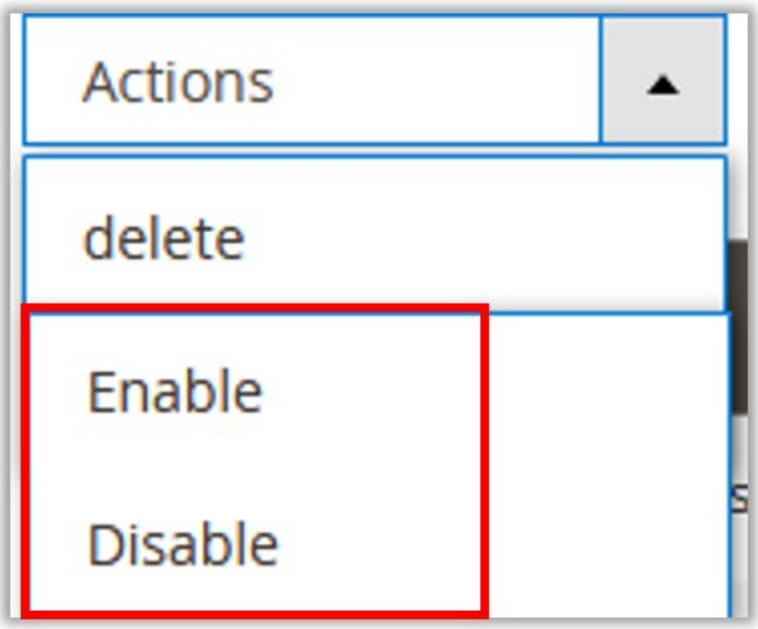
1. Go to the **Admin** Panel.
2. On the left navigation bar, click the **REFER A FRIEND** menu, and then click **Denomination Rules**.
   The **Denomination Rules** page appears as shown in the following figure:



3. Select the check boxes associated with the required rules.
4. Click the **Arrow** button next to the **Actions** field.
   The **Actions** list appear as shown in the following figure:



5. In the **Actions** list, click **Change status.**
   The menu appears as shown in the following figure:



6. Click **Enable** to enable the selected rules.
   OR
   Click **Disable** to disable the selected rules.
   A success message appears.

5. All Users Discount Coupons

On the All Users Discount Coupons page, the admin can view the following information on generated coupons:

- **Customer Emai**l: Email id of the front-user who refers a friend to get registered to the Magento Store.
- **Coupon Code**: Coupon code generated by the user.
- **Amount**: The used amount for which the user had generated the coupon code.
- **Cart Amount**: The total purchase amount.
- **Created Date**: The coupon generation date.
- **Expiration Date**: The coupon expiration date.

6. Front-end View

On the front-end view, the front-end users can do the following tasks:

- Invite friends(http://docs.cedcommerce.com/refer-a-friend-admin-guide/?section=invite-friends)
- View all invited friends and referral details(http://docs.cedcommerce.com/refer-a-friend-admin-guide/?section=invited-friends-details)
- Invitation transaction summary(http://docs.cedcommerce.com/refer-a-friend-admin-guide/?section=invitation-transaction-summary)

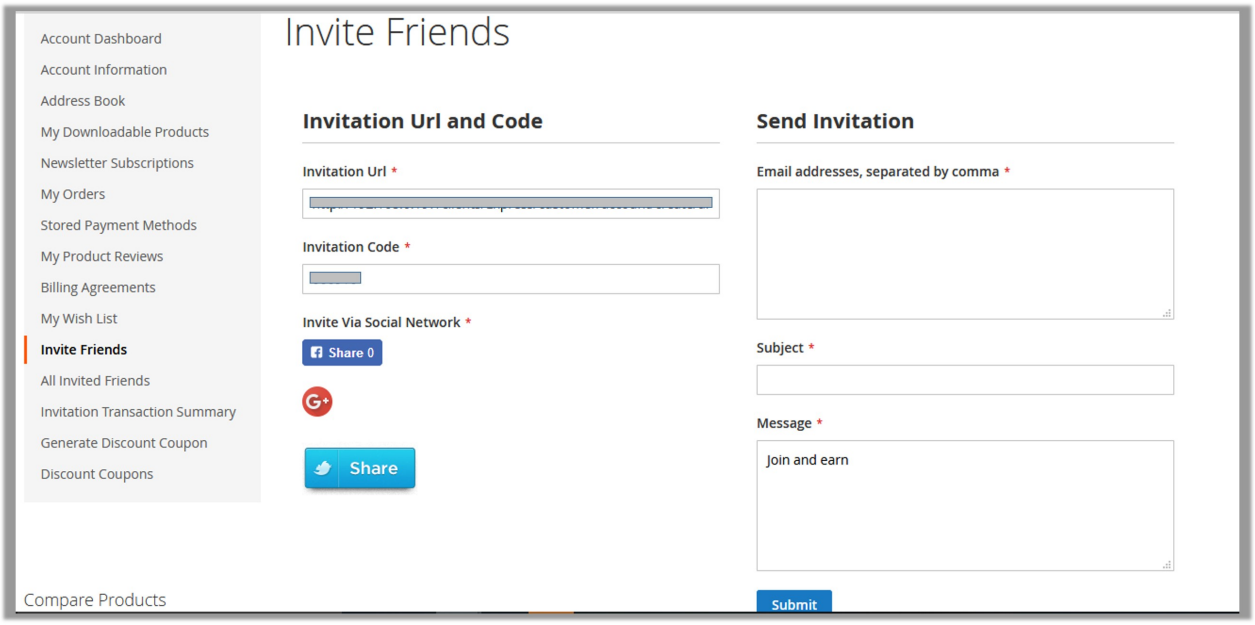
- Generate Discount Coupon(http://docs.cedcommerce.com/refer-a-friend-admin-guide/?section=generate-discount-coupons)
- Discount Coupons(http://docs.cedcommerce.com/refer-a-friend-admin-guide/?section=discount-coupons)

6.1. Invite Friends

A front-end user can invite friends to register themselves to the Magento store.

To invite friends

1. Go to the Front-end View.
2. In the left navigation panel, click **Invite Friends**.
   The **Invite Friends** page appears as shown in the following figure:



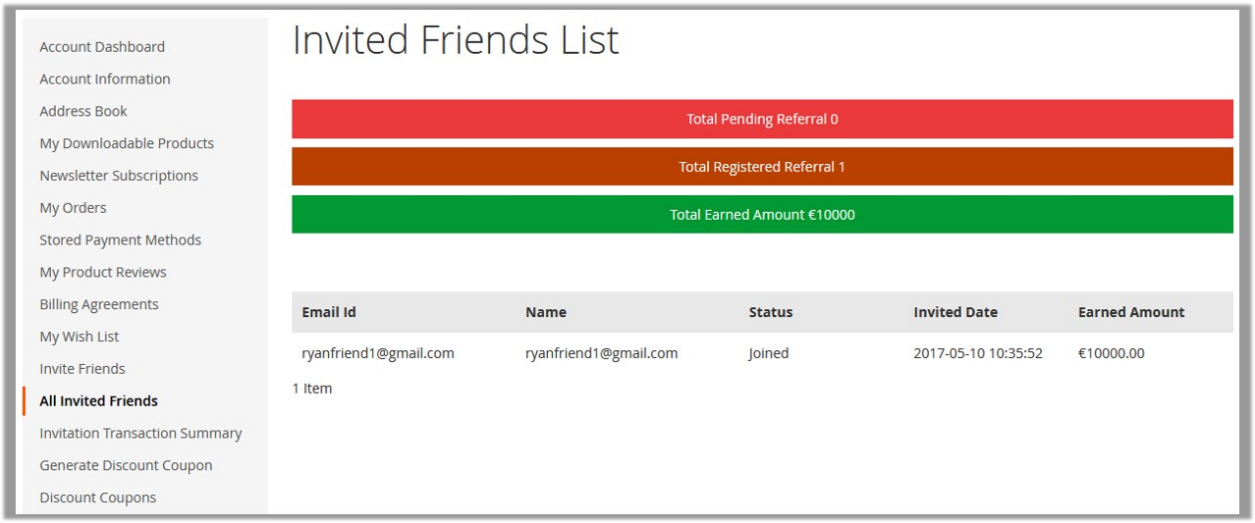
   Note: The Invitation Url and the code are available by default. The user can also invite their friends using the social media network such as Facebook, Google+, and Twitter.
3. In the right panel, under **Send Invitation**, do the following steps:
   a. In the **Email addresses** box, enter the email ids.
   b. In the **Subject** box, enter the subject of the email.
   c. In the **Message** box, enter the message.
4. Click the **Submit** button.

6.2. Invited Friends Details

The Invited Friends List page displays all the details of the invited friends and referral details.

To view the invited friends and referral details

1. Go to the Front-end View.
2. In the left navigation panel, click **All Invited Friends**.
   The **Invited Friends List** page appears as shown in the following figure:



The Invited Friends List page displays the following details:

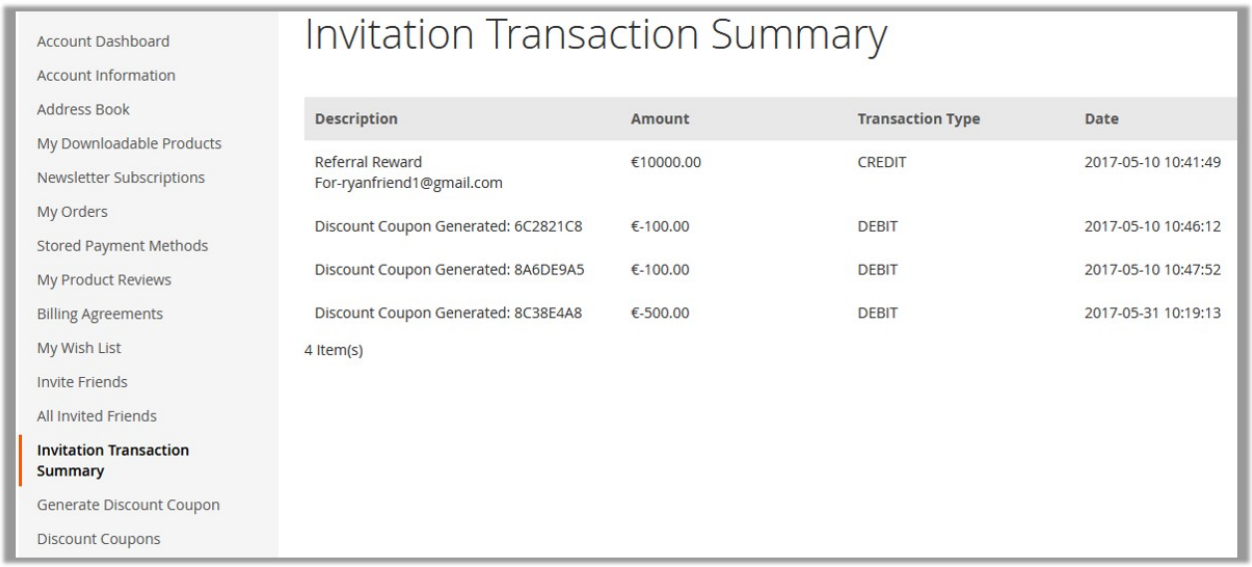
- **Total Pending Referra**l: Total number of pending invitees, those who have not yet joined the store.
- **Total Registered Referral**: Total number of invitees, those who have registered themselves to the store.
- **Total Earned Amount**: Total amount earned by getting all the friends registered to the store.
- **Email Id**: The **Email Id** column displays all the email ids of the registered invitees.
- **Name**: The **Name** column displays the names of the registered invitees.
- **Status**: The **Status** column displays the status of the invitees, whether joined or pending.
- **Invited Date**: The **Invited Date** column displays the date when the user had sent the invite.
- **Earned Amount**: The **Earned Amount** column displays the amount the user has earned by getting the specific invitee registered.

6.3. Invitation Transaction Summary

The **Invitation Transaction Summary** page displays the transcation details of the user.

To view the transaction details

1. Go to the Front-end View.
2. In the left navigation panel, click **Invitation Transaction Summary**.
   The **Invitation Transaction Summary** page appears as shown in the following figure:



The Invitation Transaction Summary page displays the following details:

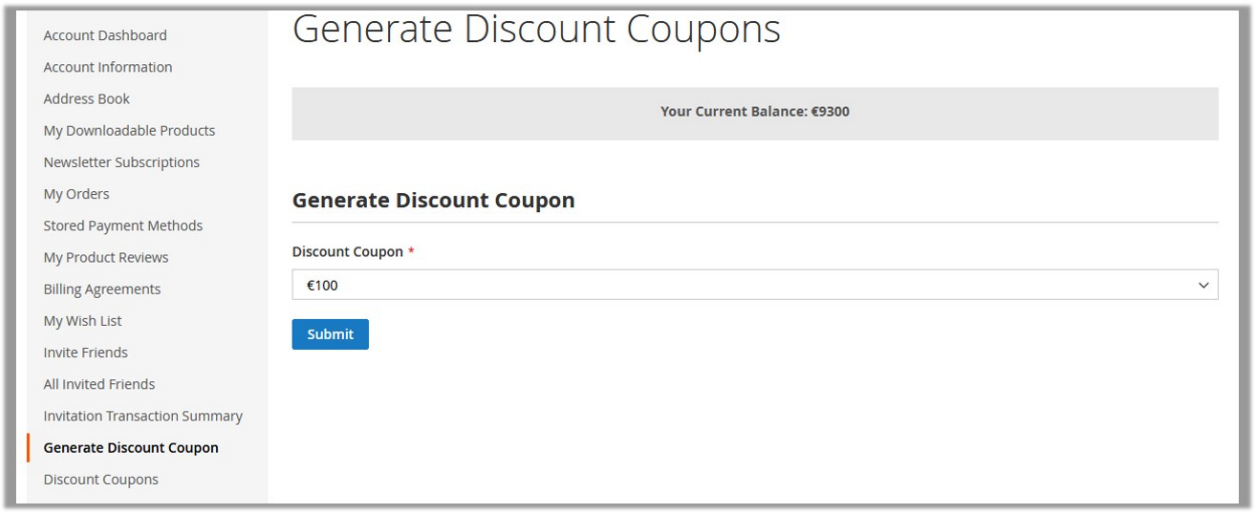
- **Description**: Displays the description of the transaction held on using the earned amount while purchasing the products by generating the coupon code.
- **Amount**: Displays the amount credited or debited.
- **Transaction Type**: Displays the transaction type, whether **CREDIT** or **DEBIT**.
- **Date**: Displays the transaction date.

6.4. Generate Discount Coupons

On the **Generate Discount Coupons** page, the user can generate the coupon codes from the total referral earned amount to use it while online shopping.

To generate discount coupons

1. Go to the Front-end View.
2. In the left navigation panel, click **Generate Discount Coupon**.
   The **Generate Discount Coupons** page appears as shown in the following figure:



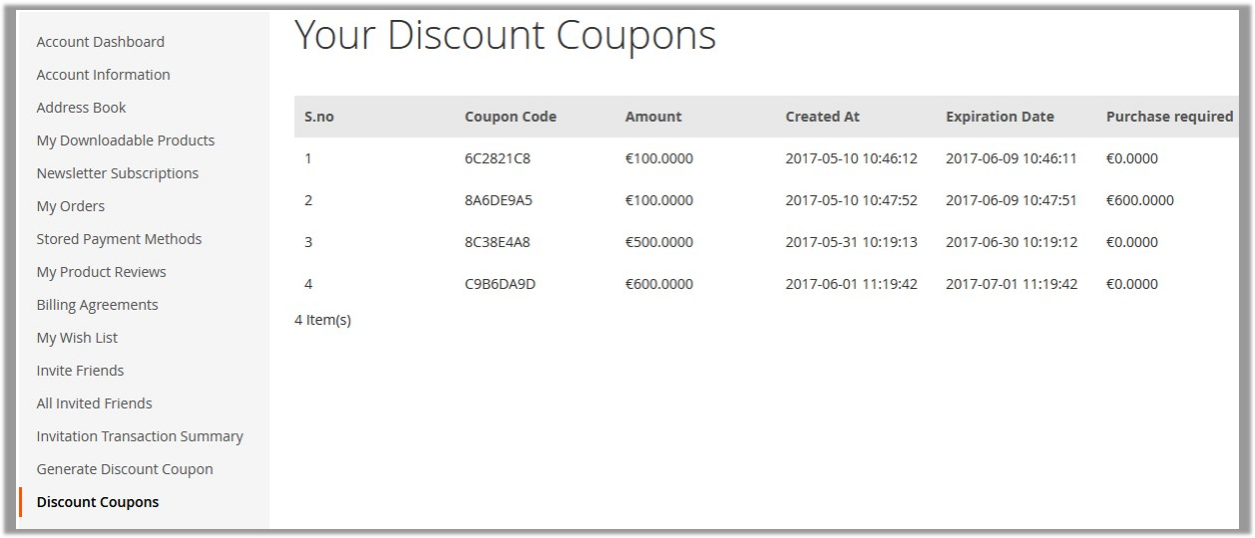
3. Under **Generate Discount Coupon**, in the **Discount Coupon** list, select the required amount to generate the coupon for.
4. Click the **Submit** button.

6.5. Discount Coupons

The Discount Coupons page displays the details of the generated coupons.

To view the coupon details

1. Go to the Front-end View.
2. In the left navigation panel, click **Discount Coupons**.
   The **Your Discount Coupons** page appears as shown in the following figure:



The Your Discount Coupons page displays the following details:

- **Coupon Code**: The generated coupon code.
- **Amount**: The amount for which the coupon has been generated.

- **Created At**: The date and time when coupon has been generated.
- **Expiration Date**: The date and time when coupon expires.
- **Purchase Required**: The purchase amount on which the coupon code is applicable.