

# **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 points. 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

## 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 then click on **Configuration**. The **Configuration** page appears.
3. In the left navigation panel, click the **REFER A FRIEND** menu, and then click on **Configuration**. The **Refer A Friend Configuration Settings** page appears in the right panel as shown in the following figure:

The screenshot displays the Magento Admin Panel configuration interface. On the left, a navigation sidebar lists various system configuration categories, with 'REFER A FRIEND' and its sub-item 'Configuration' highlighted in red. The main content area is titled 'Configuration' and features a 'Store View: Default Config' dropdown and a 'Save Config' button. Below this, there are two expandable sections: 'General Configuration' and 'Refer A Friend Configuration'. The 'Refer A Friend Configuration' section is expanded, showing several input fields with their respective values: 'Signup Bonus' (5000), 'Referral Reward' (10000), 'Denomination Range' (100), 'Max Denomination Range' (500), 'Discount Coupon Validity(In Days)' (30), 'Sender Email Id' (admin@email.com), 'Default Email Subject' (Congratulations!), and 'Default Email Message' (Register and earn).

4. In the right panel, under **Refer A Friend Configuration Settings**, do the following steps:
  - a. Expand the **General Configuration** tab. 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 Bonus** field, enter an amount that the admin wants to allot it to a new user on signing up.
  - c. In the **Referral Reward** field, enter an amount that the admin wants to allot it to the user who refers to a friend, and the referred friend who registers to the store.
  - d. In the **Denomination range** field, 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** sets the maximum denomination amount for the discount coupon that can be created for the customer.
  - f. In the **Discount Coupon Validity (In Days)** field, enter the number of days to specify the validity of the generated coupon.
  - g. In the **Sender Email field**, enter the email id that admin wants to use for sending invitation emails.
  - h. In the **Default Email 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 **Referral Report**.  
The **Referral Report** page appears as shown in the following figure:

## Referral Report




[View All Registered Sources](#)




4 records found

 20 per page
 
 1 of 1
 

Customer's Email Id	Pending Invitations	Referrals Acknowledged	Balance Referral Amount
u@...@example.com	5	2	₹55.00
r@...@com	0	0	₹100.00
ee@gmail.com	0	0	₹0.00
u@...@gmail.com	0	0	₹100.00

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

- **Customer's Email:** Email id of the front-user who refers a friend to get registered to the Magento Store.
- **Balance Referral Amount:** The balance amount that belongs to the user after generating the coupons from the total amount allotted.
- **Pending Invitations:** The number of friends the user had referred to and they still not acknowledged it.
- **Referrals Acknowledged:** The number of friends the user had referred has been acknowledged.

## 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:

## Denomination Rules





Add New Rule

Filters | Default View | Columns

Actions | 3 records found | 20 per page | 1 of 1

<input type="checkbox"/>	Rule Name	Discount Amount	Cart Amount	Status	Action
<input type="checkbox"/>	\$5 discount	₹6.00	₹100.00	Enabled	<a href="#">Edit</a>
<input type="checkbox"/>	10(applicable on \$10 and above)	₹8.00	₹59.00	Enabled	<a href="#">Edit</a>
<input type="checkbox"/>	20on50	₹20.00	₹50.00	Enabled	<a href="#">Edit</a>

**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.
- **Status:** Status of the denomination rule whether it's enabled or disabled.

### 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**.
3. Click the **Add New Rule** button.

The **Add Discount Denomination Rule** page appears as shown in the following figure:

Add Discount Denomination Rule





← Back
Save Rule

DENOMINATION RULE

Discount Denomination Rule

**Discount Denomination Rule**

Rule Name \*

Discount Amount \*

Cart Amount \*

Status \* Enable

4. In the **Rule Name** box, enter the 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 **Status** 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**.
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

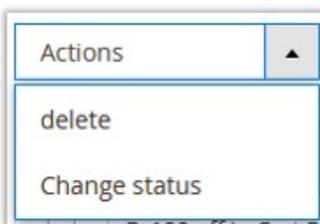
Admin can delete the selected rules and also can enable or disable the rules in bulk.

### *To delete the selected rules in Bulk*

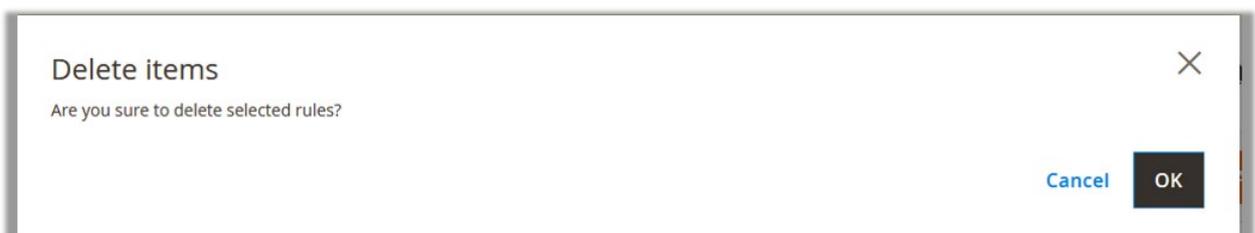
1. Go to the **Admin** Panel.
2. On the left navigation bar, click the **REFER A FRIEND** menu, and then click **Denomination Rules**.  
The **Denomination Rules** page appears as shown in the following figure:

<input type="checkbox"/>	Rule Name	Discount Amount	Cart Amount	Action
<input type="checkbox"/>	Rs100 off in Cart Rs600	€100.00	€600.00	<a href="#">Edit</a>
<input type="checkbox"/>	Rs. 500 off on Rs. 1000 or above purchase amount	€500.00	€1,000.00	<a href="#">Edit</a>

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:



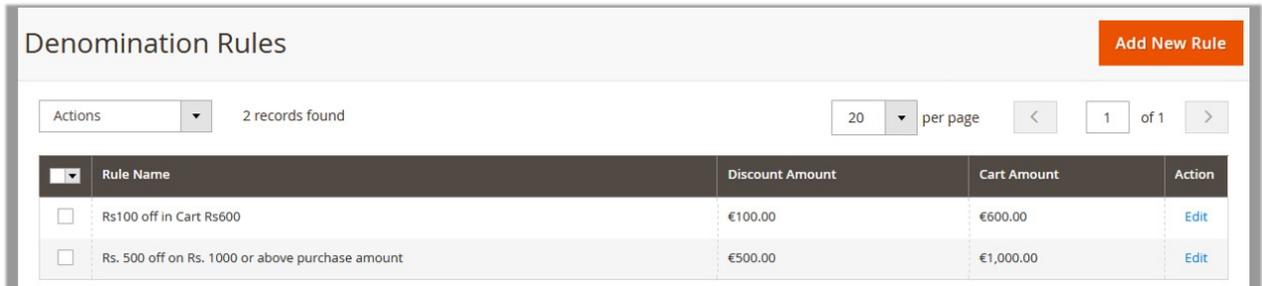
5. In the **Actions** list, click **Delete**.  
A confirmation dialog box appears as shown in the following figure:



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

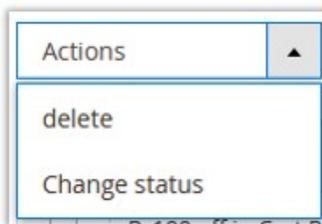
### To enable or disable the selected rules

- Go to the **Admin** Panel.
- 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:

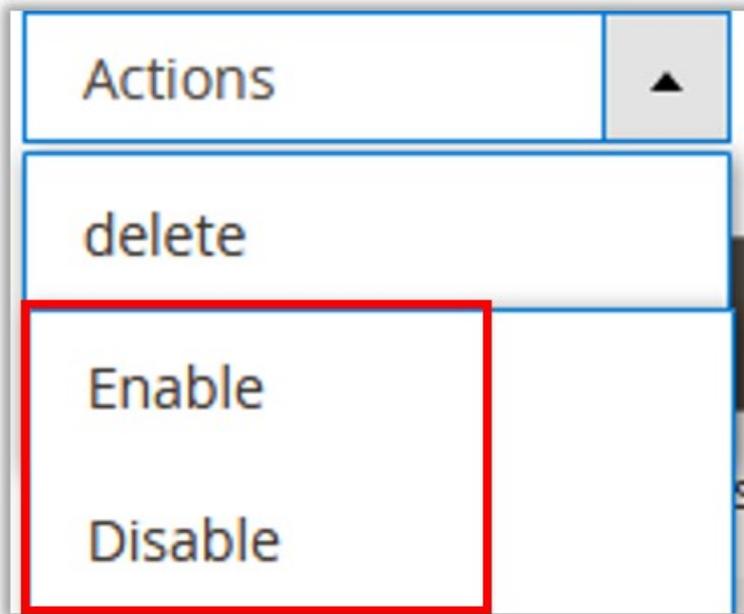


<input type="checkbox"/>	Rule Name	Discount Amount	Cart Amount	Action
<input type="checkbox"/>	Rs100 off in Cart Rs600	€100.00	€600.00	<a href="#">Edit</a>
<input type="checkbox"/>	Rs. 500 off on Rs. 1000 or above purchase amount	€500.00	€1,000.00	<a href="#">Edit</a>

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



- 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. Discount Coupons

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

- **Customer Email:** 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(<https://docs.cedcommerce.com/magento-2/refer-a-friend-admin-guide-2/?section=invite-friends>)
- View all invited friends and referral details(<https://docs.cedcommerce.com/magento-2/refer-a-friend-admin-guide-2/?section=invited-friends-details>)
- Invitation transaction summary(<https://docs.cedcommerce.com/magento-2/refer-a-friend-admin-guide-2/?section=invitation-transaction-summary>)

- Discount Coupons(<https://docs.cedcommerce.com/magento-2/refer-a-friend-admin-guide-2/?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 **Refer A Friend**.  
The **Refer A Friend** page appears as shown in the following figure:

**Note:** The Referral Url and the code are available by default. The user can also invite their friends using social media networks such as Facebook 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. Referral Report

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 on **the Referral Report**.  
The **Referral Report** page appears as shown in the following figure:

Email Id	Status	Invited Date
eedtest2010@gmail.com	Joined	5/27/20, 5:45 PM
jedfbcejdf@edf.com	Pending	5/27/20, 8:03 PM
g@edf.com	Pending	5/27/20, 8:23 PM
nyoncedweller@gmail.com	Pending	5/28/20, 8:42 PM

**The Referral Report page displays the following details:**

- **Total Pending Referral:** Total number of pending invitees, those who have not yet registered themselves to the store.
- **Total Referral Acknowledged:** Total number of invitees, those who have registered themselves to the store.
- **Email Id:** The **Email Id** column displays all the email ids 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.

## 6.3. Transaction Summary

The **Transaction Summary** page displays the transaction details of the user.

**To view the transaction details**

1. Go to the Front-end View.
2. In the left navigation panel, click on **Transaction Summary**.

The **Transaction Summary** page appears as shown in the following figure:

Description	Amount	Transaction Type	Date
Referral Reward [redacted]	₹50.00	CREDIT	5/27/20, 5:51 PM
Discount Coupon Generated: 111E775D	₹5.00	DEBIT	5/27/20, 6:58 PM
Discount Coupon Generated: E653E139	₹10.00	DEBIT	5/27/20, 7:26 PM
Discount Coupon Generated: 52FEAB44	₹10.00	DEBIT	5/27/20, 8:08 PM
Discount Coupon Generated: A76952E1	₹5.00	DEBIT	5/28/20, 8:43 PM

Items 1 to 5 of 11 total      1 2 3 >      Show 5 per page

**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 and time.

## 6.4. Discount Coupons

On the **Discount Coupons** page, the user can create 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 the **Discount Coupon**.

The **Create Discount Coupons** page appears as shown in the following figure:

Your Current Balance: ₹50.00

### Create Discount Coupon

---

Select Coupon Amount \*

₹5.00 (Applicable on purchase of ₹0.00 and above)
▼

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

Your generated **Discount Coupons** appears as shown in the following figure:

### Your Discount Coupons

Coupon Code	Amount	Created At	Valid Till	Status	Purchase Required
111E775D	₹5.00	5/27/20, 6:58 PM	5/29/20, 6:58 PM	Unused	₹100.00
E653E139	₹10.00	5/27/20, 7:26 PM	5/29/20, 7:26 PM	Used	₹0.00
52FEAB44	₹10.00	5/27/20, 8:08 PM	5/29/20, 8:08 PM	Unused	₹5.00
A76952E1	₹5.00	5/28/20, 8:43 PM	5/30/20, 8:43 PM	Unused	₹100.00
5EB02372	₹10.00	5/29/20, 10:57 AM	5/31/20, 10:57 AM	Used	₹5.00

Items 1 to 5 of 6 total

1 2 >

Show 5 per page

***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 the coupon has been generated.
- **Valid Till:** The date and time when the coupon expires.
- **Status:** It will show whether the coupon code generated is used or unused.
- **Purchase Required:** The purchase amount on which the coupon code is applicable.