

# Affiliate

## for Magento 2



## Table of contents

Getting Around.....	3
Introducing Affiliate.....	3
Extension Logic.....	4
Backend Configuration.....	4
Extension Settings.....	4
Managing Affiliate Campaigns.....	7
Signup Requests.....	12
Accounts.....	14
Affiliate Groups.....	16
Transactions.....	18
Payouts.....	22
Sales by Affiliate Link Report.....	24
Sales by Coupon Report.....	25
Affiliate Account.....	26

## Getting Around

Magento 2 Affiliate provides store owners with a complete toolset for affiliate campaign arrangement. You can precisely set up link and/or coupon-based affiliate campaigns with individual product promotion recommendations, permitted affiliate groups, commission types and amounts, etc. Additionally, admins can flexibly manage affiliate groups and accounts, affiliate program signup requests, process campaign-related transactions, monitor stats per promotion type.

**Compatibility:** Magento Open Source 2.2.X – 2.3.X, Magento Commerce 2.2.X – 2.3.X.

## Introducing Affiliate

The Magento 2 Affiliate extension lets you run profitable affiliate campaigns based on the 'pay-per-sale' model. An affiliate receives commissions for every purchase within the promoted campaign, including those that are not directly promoted by him/her (via a link or/and coupon code) but belong to the same campaign. Just like an ordinary yet effective affiliate campaign on Amazon.

Moreover, the module introduces the following features:

- Custom lists of **product recommendations** to promote within a particular campaign;
- Individual **commission rates** and **commission holding periods** per affiliate group;
- The possibility to reward individual affiliate groups with **higher commission rates**;
- Separate performance reports for **coupon/link promotions** available for both affiliates and admins;
- **Manual** and **automatic** (by custom schedule) payouts.

## Extension Logic

In the backend, the module introduces separate grids for each key affiliate management aspect: campaigns, affiliate groups, accounts, signup requests, transactions, and payouts. On the configuration level, one needs to deal with the general signup, commission, payout, and email configuration parameters.

On the storefront, a user is provided with a designated tab from where he/she can join affiliate programs, view recommendations, get links, generate coupon codes, monitor balance history and transactions. The organization logic is the same - the data and options are split between separate tabs, which facilitates convenient management.

## Backend Configuration

### Extension Settings

Start configuring the extension by going to **Stores > Configuration > AHEADWORKS EXTENSIONS > Affiliate**.

The screenshot shows the Magento Admin Configuration page for the AHEADWORKS EXTENSIONS > Affiliate module. The page is divided into several sections: Signup Settings, Commission Configuration, and Payout Configuration. The left sidebar contains navigation options: DASHBOARD, SALES, CATALOG, CUSTOMERS, AHEADWORKS EXTENSIONS (selected), SALES, DOTMAILER, SERVICES, and ADVANCED. The main content area includes a 'Save Config' button in the top right corner. The 'Signup Settings' section includes 'Select Terms & Conditions CMS Page' (Star Fitness Terms and Conditions Page), 'Admin Approval Needed' (Yes), and a note: 'If yes, admin has to approve affiliate requests manually'. The 'Commission Configuration' section includes 'Add Commission When The Order Item Obtains Status' (Ordered) and 'Deduct Commission When The Order Item Obtains Status' (Refunded). The 'Payout Configuration' section includes 'Minimum Balance for a Payout' (0), 'Allow Payout Requests' (Yes), 'Generate Payout by Schedule' (Yes), 'Payout Creation Period, days' (14), and 'Enable Admin Payout Reminders' (Yes).

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The configuration page is divided into four sections. We will explore each one separately.

The '**Signup Settings**' section is presented by two parameters:

- **Select Terms & Conditions CMS Page** - defines the page on your web store with affiliate program terms & conditions.

After the installation, the module adds a separate CMS Terms & Conditions page with a sample content.

- **Admin Approval Needed** - defines whether you need to manually approve affiliate program signup requests. If left to '**No**', all requests will be approved automatically.

The '**Commission Configuration**' section has the following options:

- **Add Commission When The Order Item Obtains Status** - defines the referred customer's order status upon which the affiliate will get a commission (pending until the commission holding period expires): Ordered, Invoiced, or Shipped;

Commissions are accrued upon reaching a particular order item status, not order status. This is particularly useful for the orders that include the items that require commission accrual and those that don't.

In case an invoice and shipping are created at the same time (therefore, the order item instantly receives the hardcoded 'Shipped' status bypassing the 'Invoiced' status), the commission is accrued upon reaching the predefined status or the 'Shipped' status.

- **Deduct Commission When The Order Item Obtains Status** - the option allows setting automatic commission deduction (before the commission holding period expires) upon the selected order status: Canceled, Refunded, or Returned.

The '**Payout Configuration**' section contains the following parameters:

- **Minimum Balance for a Payout** - defines the minimum payout balance (in the base currency) upon reaching which the payout can be created (either manually or automatically);
- **Allow Payout Requests** - if enabled, the affiliate can send payout requests by clicking the '**Send request**' button in his/her account. The button appears when his/her balance reached the defined minimum value. This way, the affiliate can create payouts from the storefront and the admin can then process the newly created payouts from the admin area;

- **Generate Payout by Schedule** - defines if payouts should be generated once in a certain period. Provided that his/her minimum balance reached the defined value, the payout with all the available commissions will be created automatically;
- **Payout Creation Period, Days** - defines the frequency of payout regular generation;
- **Enable Admin Payout Reminders** - defines whether you should be reminded of regular payout issuing.

The screenshot displays two configuration sections: 'Admin Email Configuration' and 'Affiliate Email Configuration'. Each section contains several settings with input fields and dropdown menus. The 'Admin Email Configuration' section includes: 'Admin Email' (pr@starfitness.com), 'Sender' (PR Manager at Star Fitness), 'New Signup Request Template' (Star Fitness New Signup Request Template (D)), 'New Payout Template' (Star Fitness New Payout Template (Default)), and 'Payout Reminder Template' (Star Fitness Payout Reminder Template (Defa)). The 'Affiliate Email Configuration' section includes: 'Affiliate Confirmation Template' (Star Fitness Affiliate Confirmation Template (T)), 'Affiliate Rejection Template' (Star Fitness Affiliate Rejection Template (Defa)), 'Payout Complete Template' (Star Fitness Payout Complete Template (Defa)), and 'Payout Cancellation Template' (Star Fitness Payout Cancellation Template (De)).

Lastly, this is the '**Email Configuration**' section with a set of email configuration parameters:

- **Admin Email** - the email address for admin alerts. If left empty, admin alerts will be disabled;
- **Sender** - the name of the default email sender;
- **New Signup Request Template** - the email template for new affiliate program signup requests;

- **New Payout Template** - the email template for new affiliate program payouts;
- **Payout Reminder Template** - the email template for payout issue reminders;

For store views with separate payout reminders related to the same template, the same reminder will be sent to each email address specified.

- **Payout Cancellation Template** - the email template for payout cancellation alerts;
- **Affiliate Rejection Template** - the email template for affiliate program signup request rejections.

## Managing Affiliate Campaigns

Let's proceed to affiliate campaign management by following **Marketing > Affiliate by AheadWorks > Campaigns**

The screenshot displays the 'Campaigns' management interface in the Magento Admin. The sidebar on the left contains navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area features a 'Campaigns' header with a search icon, a notification bell, and a user profile 'admin'. Below the header is a 'Campaigns' dropdown menu and a 'New Campaign' button. The table below shows 3 records found, with 20 items per page. The table columns are: ID, Name, Allow Link Generation, Coupon, Commission, Status, Website, and Action. The footer includes the Magento logo, copyright information for 2018, and the version 'Magento ver. 2.2.2' along with links for 'Account Activity' and 'Report an Issue'.

<input type="checkbox"/>	ID ↓	Name	Allow Link Generation	Coupon	Commission	Status	Website	Action
<input type="checkbox"/>	1	10 % off Gear Collection	Yes	No coupon	15%	Active	Main Website	Select ▾
<input type="checkbox"/>	2	5 % off Man Collection	Yes	Specific coupon	10%	Active	Main Website	Select ▾
<input type="checkbox"/>	3	5 % off Woman Collection	Yes	Specific coupon	10%	Active	Main Website	Select ▾

The grid is designed for affiliate campaign management and monitoring. The data in the grid is split by the following columns:

- **ID** - an ID of a campaign;
- **Name**- the name of the campaign;
- **Allow Link Generation** - shows whether promotion via links is allowed within the campaign;
- **Coupon** - shows whether promotion via coupon codes is allowed within the campaign;
- **Commission** - the commission amount provided by the campaign. Can be fixed (displayed in the website's base currency) or percent (as shown in the above picture);
- **Status** - the status of the campaign;
- **Website** - the website the campaign is assigned to;
- **Action** - provides the '**Select**' drop-down with the following per-campaign options: **Edit, Delete, Disable**.

The '**Action**' drop-down above the grid allows **deleting, enabling, or disabling** campaigns one by one or massively.

To create a new campaign, click on the '**New Campaign**' button at the top right of the page.

Let's explore the main campaign parameters on the example of the already created campaigns. For this purpose, we'll choose the '**Edit**' option from the '**Select**' drop-down in the '**Action**' column.

**Edit Campaign** ← Back Delete Save

### General Information

**Campaign Name \*** 5 % off Man Collection  
The text entered here will be displayed in the affiliate account without changes.

**Description** 5 % off Man Collection  
The text entered here will be displayed in the affiliate account without changes.

**Status \*** Active

**Website \*** Main Website

**Affiliate Groups \*** All Groups  
Default  
All-star  
Hall of Fame

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### Conditions

**Commission rate and/or coupon code will be applied only to the cart items that fall under the specified conditions (leave blank for all items).**

If **ALL** of these conditions are **TRUE**:

Category is Men

Campaign parameters are split into several sections. We'll explore them one by one.

The '**General Information**' section allows you to specify campaign credentials and choose the required affiliate groups (individual groups or all groups).

In the '**Conditions**' section, you can set campaign-specific conditions based on cart item and product attributes. Remember that the conditions you set will be applied per item, not to the whole shopping cart.

The screenshot displays the 'Edit Campaign' interface with a sidebar on the left containing navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area is titled 'Edit Campaign' and includes a 'Save' button. It is divided into three sections: 'Link Configuration', 'Coupon Configuration', and 'Commission Configuration'. The 'Link Configuration' section has a toggle for 'Allow Link Generation' (set to 'Yes') and a 'Tracking Gap, days' field set to '15'. The 'Coupon Configuration' section includes a 'Coupon' dropdown (set to 'Specific coupon'), a 'Coupon Code' field (set to 'MANSOFF'), a 'Uses per Affiliate' field (set to '1'), a 'Discount Type' dropdown (set to 'Percent'), and a 'Discount Amount' field (set to '10.00'). The 'Commission Configuration' section has a 'Commission Type' dropdown (set to 'Percent') and a 'Commission Amount' field (set to '10.00'). At the bottom, there is a 'Recommended Products' section with a 'Pick recommended products' button.

With the '**Link Configuration**' parameter set, you can enable link generation for your campaign and define a **link tracking gap** - the referred customer cookie's lifetime period during which the affiliate will be able to get commissions from campaign-related purchases.

The '**Coupon Configuration**' section lets you precisely set up the coupon-based promotion type. To enable the coupon parameters, choose '**Specific coupon**' in the '**Coupon**' drop-down. After this, you will be able to define a **coupon code template**, **uses per affiliate** (how many times an end user can use the provided coupon code), **discount type** (percent or fixed), and **discount amount**.

When the '0' value is set for the 'Uses per Affiliate' option, the number of coupon usages is unlimited.

Once any of the affiliates have generated a coupon code for the first time within the campaign, a mirror rule is created automatically in the 'Cart Price' rules. Without this rule, the coupon code can't be applied.

In this mirror rule, the 'Uses per Affiliate' option is automatically set to unlimited for all customer groups.

### **Warning!**

It's not recommended to change the mirror rule's settings since the campaign-related coupons won't work the way they are configured in the affiliate marketing campaign.

If you delete the Affiliate module, all the previously created rules will not be erased. This means that all the related coupons will keep working. To avoid this, you need to delete rules manually.

If you delete a website, all the assigned affiliate campaigns will be deleted. However, the previously configured mirror shopping cart rules will remain, meaning that you will have to delete them manually.

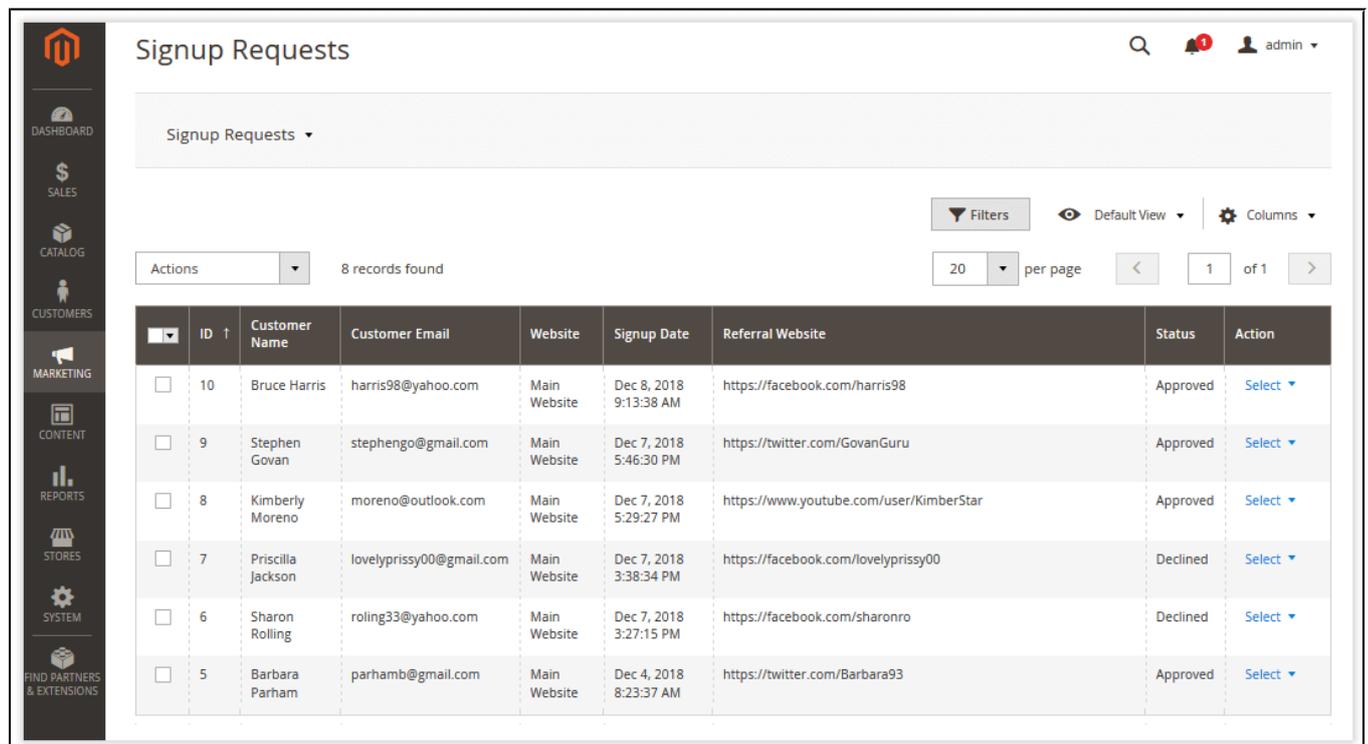
The '**Campaign Configuration**' options allow defining the **commission type** (percent or fixed) and **amount** (displayed in the format defined by the commission type).

Lastly, this is the '**Recommended Products**' section where you can optionally pick products to be displayed as recommendations for promotion. The recommendation list can be further edited whenever required.

To share campaigns with the same conditions between multiple websites, use the 'Save & Duplicate' option in the 'Save' drop-down at the top right of the page.

## Signup Requests

All signup requests can be monitored and managed from **Marketing > Affiliate by AheadWorks > Signup Requests**.



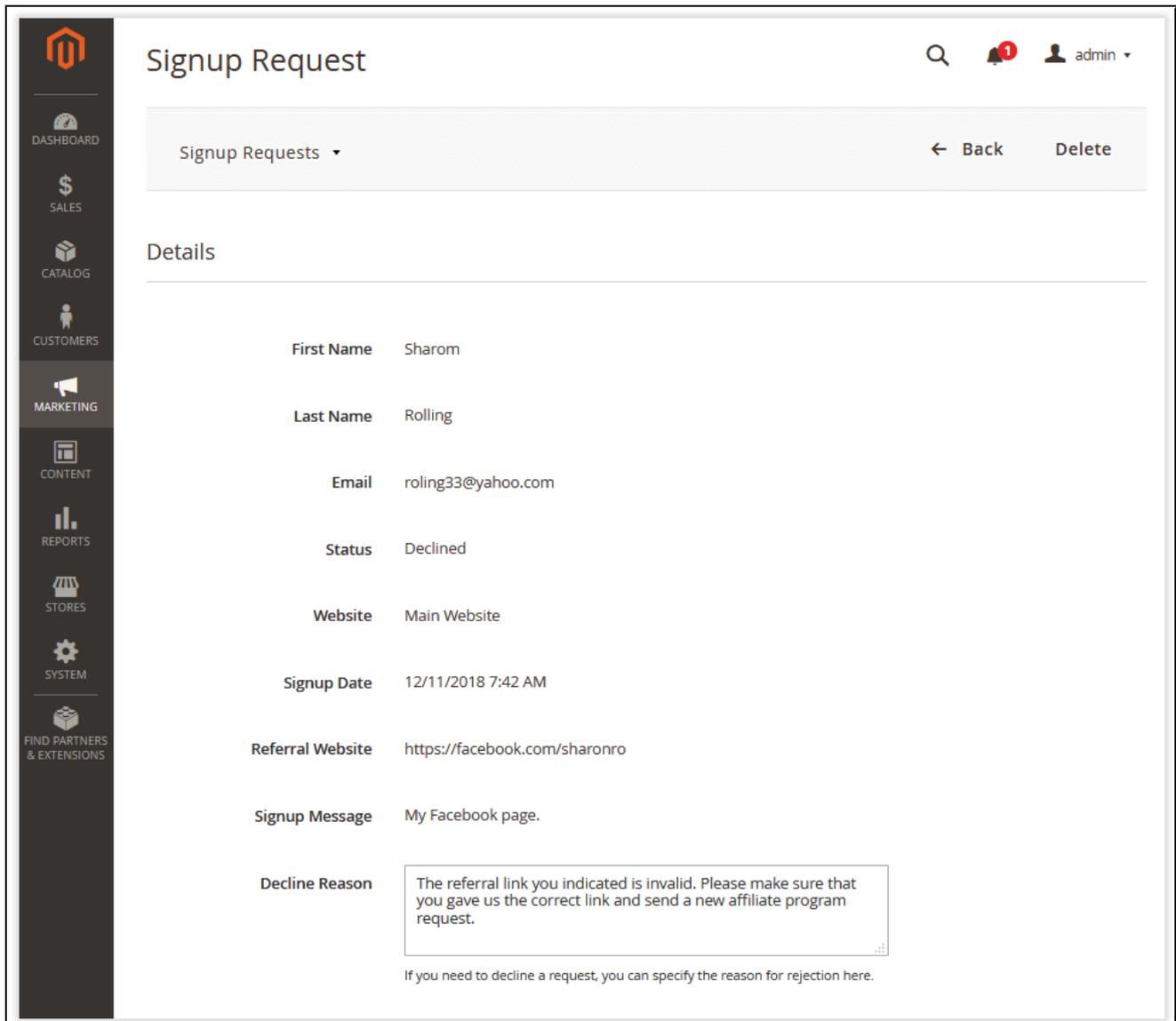
<input type="checkbox"/>	ID ↑	Customer Name	Customer Email	Website	Signup Date	Referral Website	Status	Action
<input type="checkbox"/>	10	Bruce Harris	harris98@yahoo.com	Main Website	Dec 8, 2018 9:13:38 AM	https://facebook.com/harris98	Approved	Select ▾
<input type="checkbox"/>	9	Stephen Govan	stephengo@gmail.com	Main Website	Dec 7, 2018 5:46:30 PM	https://twitter.com/GovanGuru	Approved	Select ▾
<input type="checkbox"/>	8	Kimberly Moreno	moreno@outlook.com	Main Website	Dec 7, 2018 5:29:27 PM	https://www.youtube.com/user/KimberStar	Approved	Select ▾
<input type="checkbox"/>	7	Priscilla Jackson	lovelyprissy00@gmail.com	Main Website	Dec 7, 2018 3:38:34 PM	https://facebook.com/lovelyprissy00	Declined	Select ▾
<input type="checkbox"/>	6	Sharon Rolling	roling33@yahoo.com	Main Website	Dec 7, 2018 3:27:15 PM	https://facebook.com/sharonro	Declined	Select ▾
<input type="checkbox"/>	5	Barbara Parham	parhamb@gmail.com	Main Website	Dec 4, 2018 8:23:37 AM	https://twitter.com/Barbara93	Approved	Select ▾

The data in the '**Signup Requests**' grid is broken down by the following columns:

- **ID** - an ID of a request;
- **Customer Name**- the name of the customer;
- **Customer Email** - the email address from which the customer sent a signup request;
- **Website** - the website to which the customer sent the request;
- **Signup Date** - the affiliate's signup date;
- **Referral Website** - the primary traffic source from where the affiliate will promote the products within the campaign;
- **Status** - the current request status: **Pending, Approved, or Declined**;
- **Action** - the column contains the 'Select' drop-down with the following options: **View, Delete, Approve, and Decline**.

You can perform the latter three operations massively from the **'Actions'** drop-down above the grid.

In case of signup request decline, you can optionally specify the reason in the designated field on the **'Signup Request'** page.



**Signup Request**

Search 🔍 | Notifications 🔔 1 | User: admin

Signup Requests ▾      ← Back      Delete

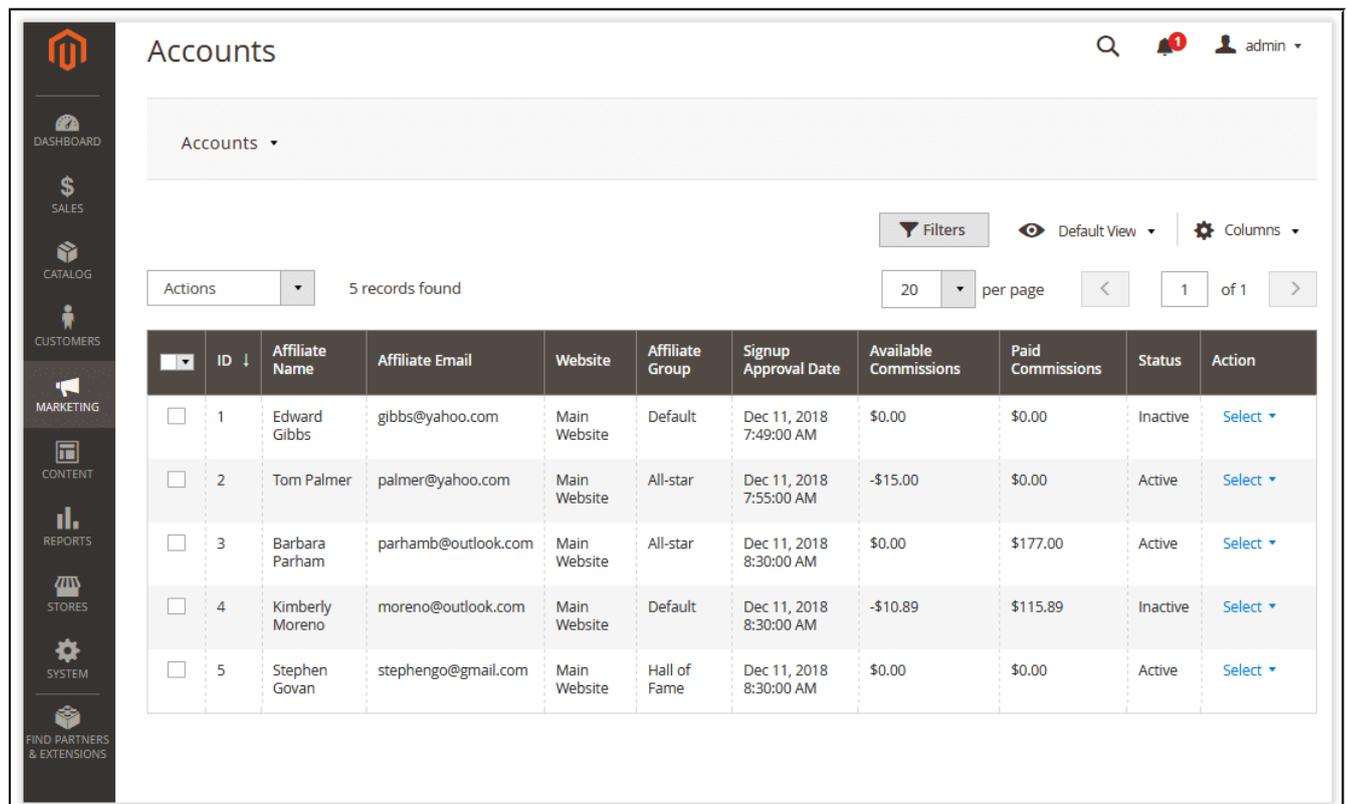
### Details

First Name	Sharom
Last Name	Rolling
Email	roling33@yahoo.com
Status	Declined
Website	Main Website
Signup Date	12/11/2018 7:42 AM
Referral Website	<a href="https://facebook.com/sharonro">https://facebook.com/sharonro</a>
Signup Message	My Facebook page.
Decline Reason	<div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;">The referral link you indicated is invalid. Please make sure that you gave us the correct link and send a new affiliate program request.</div>

If you need to decline a request, you can specify the reason for rejection here.

## Accounts

Let's see how accounts can be monitored within the module by going to **Marketing > Affiliate by AheadWorks > Accounts**.



ID	Affiliate Name	Affiliate Email	Website	Affiliate Group	Signup Approval Date	Available Commissions	Paid Commissions	Status	Action
1	Edward Gibbs	<a href="mailto:gibbs@yahoo.com">gibbs@yahoo.com</a>	Main Website	Default	Dec 11, 2018 7:49:00 AM	\$0.00	\$0.00	Inactive	Select
2	Tom Palmer	<a href="mailto:palmer@yahoo.com">palmer@yahoo.com</a>	Main Website	All-star	Dec 11, 2018 7:55:00 AM	-\$15.00	\$0.00	Active	Select
3	Barbara Parham	<a href="mailto:parhamb@outlook.com">parhamb@outlook.com</a>	Main Website	All-star	Dec 11, 2018 8:30:00 AM	\$0.00	\$177.00	Active	Select
4	Kimberly Moreno	<a href="mailto:moreno@outlook.com">moreno@outlook.com</a>	Main Website	Default	Dec 11, 2018 8:30:00 AM	-\$10.89	\$115.89	Inactive	Select
5	Stephen Govan	<a href="mailto:stephengo@gmail.com">stephengo@gmail.com</a>	Main Website	Hall of Fame	Dec 11, 2018 8:30:00 AM	\$0.00	\$0.00	Active	Select

The '**Accounts**' grid lists all the necessary information about affiliate accounts split by the following columns:

- **Affiliate Name** - the name of an affiliate;
- **Affiliate Email** - the email address of the affiliate;
- **Website** - the website from where the affiliate performs promotion;

The affiliate account is valid on a particular website. If the affiliate wants to have an account on several websites, he/she needs to create separate credentials for each one. Thus, he/she will have separate affiliate accounts with individual balances on each website that may have individual base currencies.

- **Affiliate Group** - the affiliate's group;
- **Signup Approval Date** - the date when the affiliate's signup request was approved;
- **Available Commissions** - the total sum of the available commissions (the ones with the holding period already expired) plus admin transactions per affiliate;
- **Paid Commissions** - the total amount of paid commissions. The amount is calculated based on the sum of completed payouts;
- **Status** - the current status of the affiliate's account;
- **Action** - the column contains the '**Select**' drop-down with the following options: **Edit** and **View Signup Request**.

From the '**Actions**' drop-down above the grid, you can activate/deactivate the selected account(s).

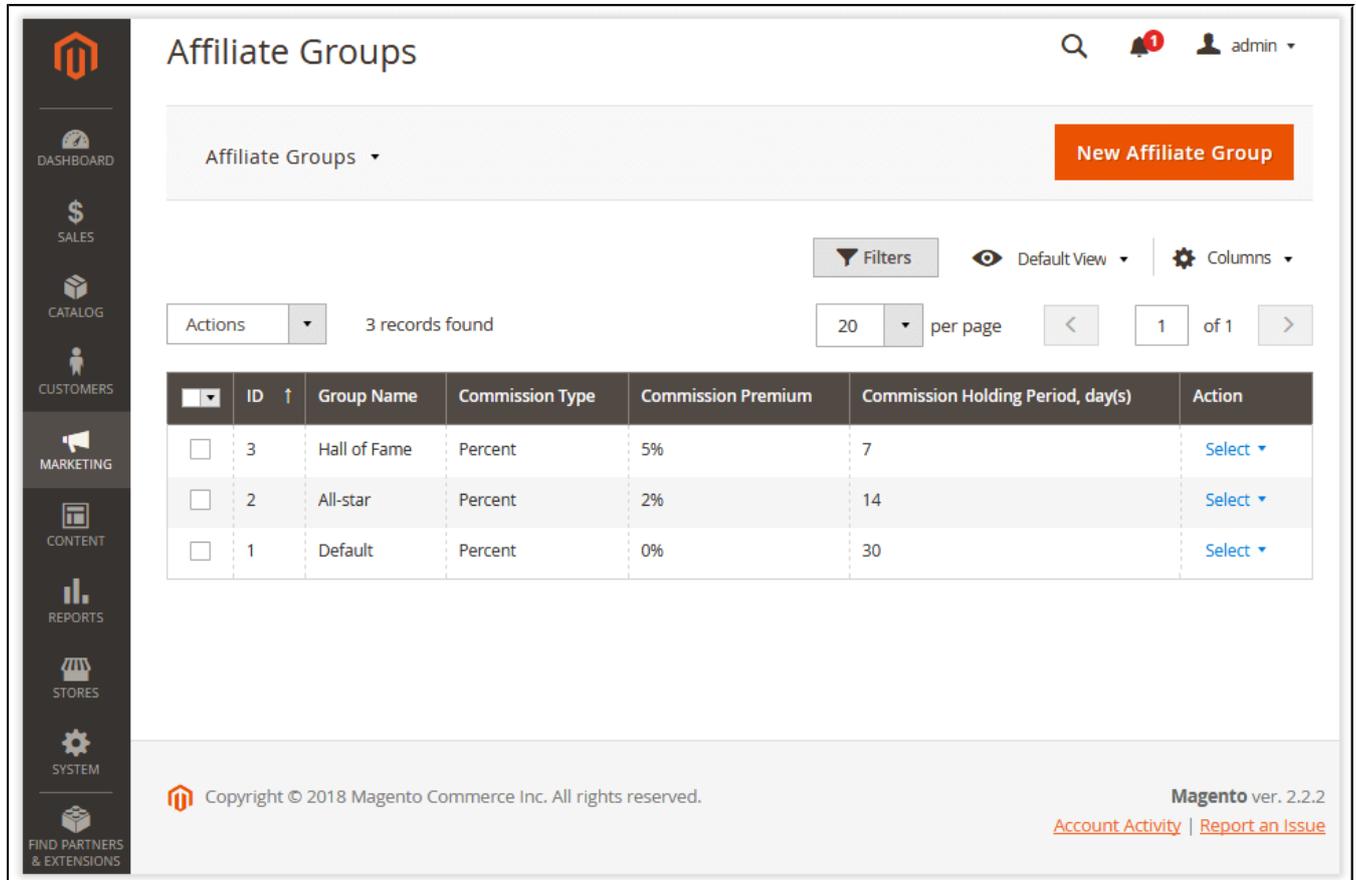
On the '**Edit Affiliate Account**' page, you can view the key affiliate account info, the affiliate's signup request (on a separate page), edit the account's **status** and **group**.

The screenshot shows the 'Edit Affiliate Account' page. The sidebar on the left contains navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area is titled 'Edit Affiliate Account' and has a 'Back' button and a 'Save' button. Below the title is the 'Affiliate Details' section, which contains the following information:

Status	Active
First Name	Stephen
Last Name	Govan
Email	stephengo@gmail.com
Affiliate Group	Hall of Fame
Signup Approval Date	12/11/2018 8:30 AM
Signup Request	<a href="#">View</a>
Pending Commissions	\$155.25
Available Commissions	\$0.00
Processed for Payout	\$0.00
Paid Commissions	\$0.00
Referral Website	<a href="https://twitter.com/GovanGuru">https://twitter.com/GovanGuru</a>
Payment Type	Other
Payment Info	I prefer Signifyd.

## Affiliate Groups

To view all affiliate groups presented in your store, follow **Marketing > Affiliate by AheadWorks > Affiliate Groups**.



The screenshot shows the 'Affiliate Groups' management page in the Magento Admin interface. The page title is 'Affiliate Groups' and the user is logged in as 'admin'. The page features a sidebar with navigation options: Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area displays a table of affiliate groups with the following data:

ID	Group Name	Commission Type	Commission Premium	Commission Holding Period, day(s)	Action
3	Hall of Fame	Percent	5%	7	Select
2	All-star	Percent	2%	14	Select
1	Default	Percent	0%	30	Select

The '**Affiliate Groups**' grid lists the main data about affiliate groups in the following columns:

- **ID** - an id of an affiliate group
- **Group Name** - the name of the group;
- **Commission Type** - the type of commission provided for the group (fixed or percent);
- **Commission Premium** - the amount of the commission premium (if provided) for the group;
- **Commission Holding Period, day(s)** - the duration of the commission holding period (in days) per group;
- **Action** - the column contains the 'Select' drop-down from where you can edit/delete the corresponding group.

The '**Actions**' drop-down above the grid allows you to massively delete the selected affiliate group(s).

To create a new affiliate group, click on the '**New Affiliate Group**' button above the grid.

Let's explore the main affiliate group parameters.

The screenshot displays the 'Edit Affiliate Group' interface. The sidebar on the left contains navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area is titled 'Edit Affiliate Group' and includes a breadcrumb 'Affiliate Groups', 'Back', 'Delete', and 'Save' buttons. The 'Group Details' section contains four form fields: 'Group Name' (Hall of Fame), 'Commission Type' (Percent), 'Commission Premium' (5.00), and 'Commission Holding Period' (7). A note states: 'The text entered here will be displayed in the affiliate account without changes.' The footer shows 'Copyright © 2018 Magento Commerce Inc. All rights reserved.' and 'Magento ver. 2.2.2' with links for 'Account Activity' and 'Report an Issue'.

So, when creating/editing an affiliate group, you need to indicate the group's **Name**, **Commission Type**, **Commission Premium**, and **Holding Period**.

Individual commission amounts and holding periods per group allow you to reward the best performing groups with higher commissions and shorter holding periods. This way, you will encourage them to keep actively participating in your campaign as well as prompt the less performing ones to share more. Note that you can change those values by increasing/decreasing them anytime.

## Transactions

To monitor the entire affiliate program transaction flow in your store, go to **Marketing > Affiliate by AheadWorks > Transactions**.

<input type="checkbox"/>	ID ↑	Affiliate Name	Affiliate Email	Type	Website	Status	Amount	Creation Date	Holding Period Expiration Date	Comment	Action
<input type="checkbox"/>	8	Tom Palmer	palmer@yahoo.com	Admin changes	Main Website	Complete	-\$15.00	Dec 13, 2018 1:57:49 PM		Wrong payout amount. Deduct \$15.00	<a href="#">Go to Affiliate</a>
<input type="checkbox"/>	7	Kimberly Moreno	moreno@outlook.com	Admin changes	Main Website	Complete	-\$10.89	Dec 13, 2018 1:56:33 PM		Wrong payout amount. Deduct \$10.89	<a href="#">Go to Affiliate</a>
<input type="checkbox"/>	6	Edward Gibbs	gibbs@yahoo.com	Commission	Main Website	Pending	\$63.00	Dec 13, 2018 1:54:49 PM	Dec 20, 2018 1:54:49 PM	Commission in the amount of \$63.00	<a href="#">Go to Affiliate</a>
<input type="checkbox"/>	5	Kimberly Moreno	moreno@outlook.com	Payout	Main Website	Pending	\$115.89	Dec 13, 2018 1:27:48 PM		Payout in the amount of \$115.89	<a href="#">Go to Affiliate</a>
<input type="checkbox"/>	4	Barbara Parham	parhamb@outlook.com	Payout	Main Website	Pending	\$177.00	Dec 13, 2018 1:26:46 PM		Payout in the amount of \$177.00	<a href="#">Go to Affiliate</a>
<input type="checkbox"/>	1	Stephen Govan	stephengo@gmail.com	Commission	Main Website	Pending	\$155.25	Dec 13, 2018 1:23:00 PM	Jan 12, 2019 1:23:00 PM	Commission in the amount of \$155.25	<a href="#">Go to Affiliate</a>

The data in the '**Transactions**' grid is divided by the following columns:

- **ID** - an ID of a transaction;
- **Affiliate Name** - the name of the affiliate whom the transaction relates to;
- **Affiliate Email**- the email address of the affiliate;
- **Type** - the type of the transaction: **Commission** (transactions from each campaign purchase), **Payout** (transactions accrued to affiliate balances. The completed payouts can be exported to the **XML/CSV** file formats), and **Admin changes** (positive/negative transactions that you manually create);

**Commissions** are created upon the following event:

The order item with (a) product(s) sorted by any campaign conditions obtained the status defined on the configuration level.

All admin manual transactions relate to the '**Admin Changes**' transaction type.

- **Website** - the website from where transactions are performed;
- **Status** - the status of the transaction: **Complete, Pending, or Canceled**.

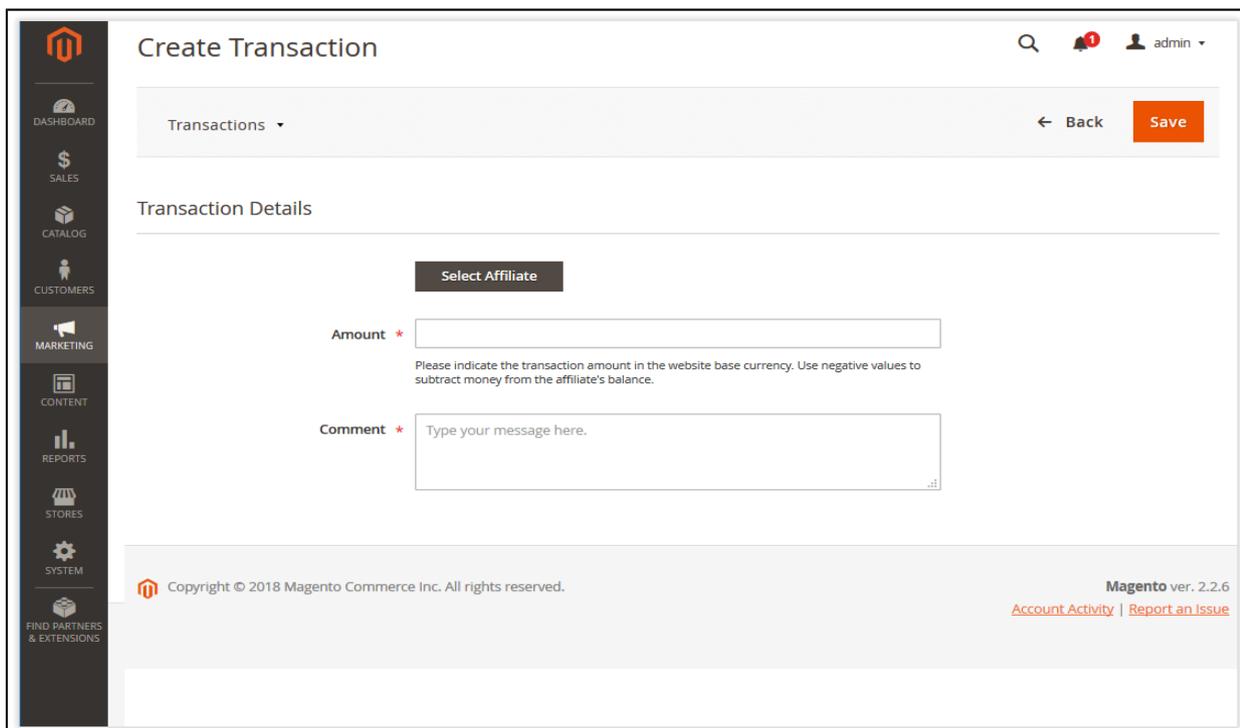
Balance changes upon transaction status updates are indicated in the table below.

Transaction type	Status change	Affiliate account changes
Commission	Cancelled	Pending commissions get decreased by the commission amount
Commission	Complete	Pending commissions get decreased by the commission amount, Available commissions get increased by the commission amount
Payout	Processing	Nothing changes
Payout	Cancelled	Processed for payout get decreased by the payout amount, Available commissions get increased by the payout amount
Payout	Complete	Processed for payout get decreased by the payout amount, Total paid get increased by the payout amount
Commission	Cancelled	Pending commissions get decreased by the commission amount

- **Amount** - the amount of the transaction;
- **Creation Date** - the transaction's creation date;
- **Holding Period Expiration Date** - the date when **a)** the transaction changes the status from '**Pending**' to '**Complete**'; **b)** pending commissions in the affiliate account get decreased by the transaction amount, while the available commissions increase by it, respectively;

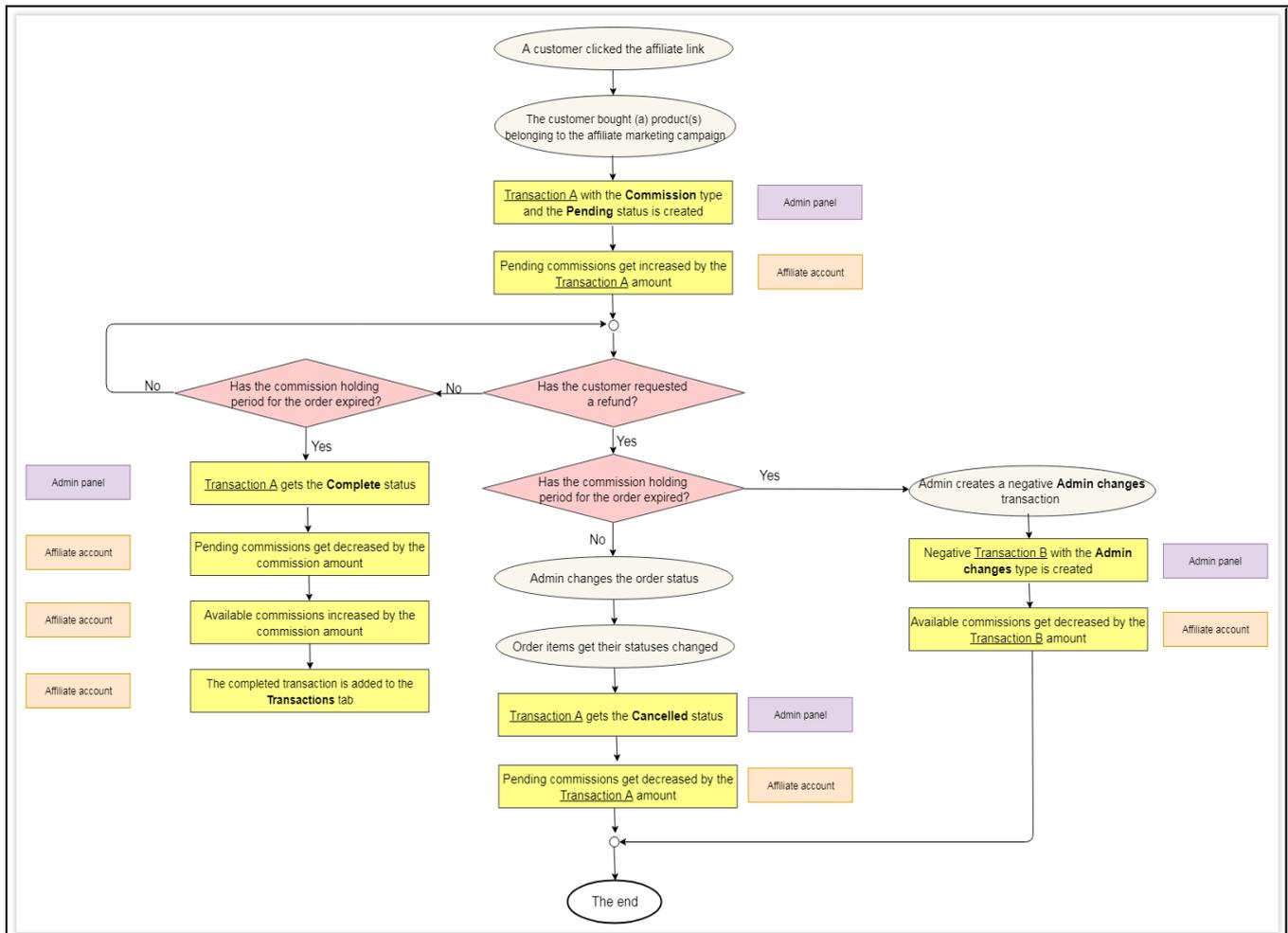
- **Comment** - the admin comment to the transaction. For transactions of the '**Commission**' type, the comment includes the order item(s) for which the commission should be accrued;
- **Action** - the column with active links to the '**Edit Affiliate Account**' page.

To create a new transaction, click on the '**Create Transaction**' button above the grid. You will be redirected to the page where you need to select the required affiliate, specify the transaction amount (positive or negative), and add a comment.



The screenshot shows the 'Create Transaction' form in the Magento admin interface. The form is titled 'Create Transaction' and is located in the 'Transactions' section. It features a sidebar with navigation options: DASHBOARD, SALES, CATALOG, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The main content area includes a 'Select Affiliate' button, an 'Amount' input field with a red asterisk, and a 'Comment' input field with a red asterisk. Below the 'Amount' field, there is a note: 'Please indicate the transaction amount in the website base currency. Use negative values to subtract money from the affiliate's balance.' The form also includes a 'Back' button and a 'Save' button. The footer of the page displays the Magento logo, copyright information for 2018, and the version number 'Magento ver. 2.2.6'. There are also links for 'Account Activity' and 'Report an Issue'.

Transaction flow is arranged in the way illustrated in the picture below.



## Adding commissions for bundle order items

For complex purchases with both parent and child items the logic is the following:

- An item has a particular status if either a parent item or all child items have this status;
- To indicate which item type - parent or child - determines the end item's status, you need to consider the following bundle product options: **Dynamic Price (Yes/No)** and **Ship Bundle Items (Together/Separately)**;
- According to the core Magento 2 logic, a configurable product is equal to a bundle product with the 'Dynamic Price' option set to 'No' and the 'Ship Bundle Items' parameter set to 'Together'. Simply put, hereinafter it is suggested that the configurable type is a particular case for bundle products;
- For products with **Dynamic Price = No** and **Ship Bundle Items = Together**, all statuses are determined by the **parent item**;

- For products with **Dynamic Price = Yes** and **Ship Bundle Items = Separately**, all statuses are determined by **child items**;
- For products with **Dynamic Price = No** and **Ship Bundle Items = Separately**, by **child items**, only the '**Shipped**' status is determined;
- For products with **Dynamic Price = Yes** and **Ship Bundle Items = Together**, all statuses are determined by **child items**, and the '**Shipped**' status is determined by the parent item
- The module doesn't determine the order item status independently. Instead, it relies on the native Magento 2 logic.

## Payouts

To monitor money outflow in the context of affiliate payouts, go to **Marketing > Affiliate by AheadWorks > Payouts**.

The screenshot displays the 'Payouts' management page in a Magento 2 admin interface. The page title is 'Payouts' and it shows a search bar, a notification bell with a red '1', and a user profile 'admin'. Below the title is a 'Payouts' dropdown menu. The main content area features a table with 2 records found. The table has columns for ID, Affiliate Name, Affiliate Email, Type, Payment Type, Payment Info, Payout Amount, Currency, Status, Created At, Updated At, and Action. The first record is for Barbara Parham, a manual payment of \$177.00 USD, pending, created and updated on Dec 13, 2018. The second record is for Kimberly Moreno, an automatic payment of \$115.89 USD, pending, also created and updated on Dec 13, 2018. The interface includes a sidebar with navigation options like Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The footer contains the Magento logo, copyright information for 2018, and the version number 2.2.2.

ID	Affiliate Name	Affiliate Email	Type	Payment Type	Payment Info	Payout Amount	Currency	Status	Created At	Updated At	Action
1	Barbara Parham	parhamb@outlook.com	Manual	Other	I prefer Signifyd.	\$177.00	USD	Pending	Dec 13, 2018 1:26:46 PM	Dec 13, 2018 1:26:46 PM	Select
2	Kimberly Moreno	moreno@outlook.com	Automatic			\$115.89	USD	Pending	Dec 13, 2018 1:27:48 PM	Dec 13, 2018 1:27:48 PM	Select

The '**Payouts**' grid contains the key payout info split by the following columns:

- **ID** - an ID of a payout;
- **Affiliate Name** - the name of the affiliate;
- **Affiliate Email** - the email address of the affiliate;
- **Type** - the type of the payout (manual or automatic);
- **Payment Type** - the type of payment (PayPal or other);
- **Payment Info** - the additional payment info. If the affiliate uses PayPal as the payment type, this field will indicate his/her PayPal email address. In the case of another payment type, the field will contain the corresponding info about the appropriate payment destination;
- **Payout Amount** - the amount of the payout;
- **Currency** - the base currency of the store;
- **Status** - the status of the payout: **Pending**, **Processing**, **Canceled**, or **Complete**;
- **Created At** - the payout creation date;
- **Updated At** - the payout's last update date;
- **Action** - the column contains the '**Select**' drop-down from where you can go to the affiliate details page, process, complete, or cancel the corresponding payout.

The '**Actions**' drop-down above the grid allows massively changing the status of the selected payouts to '**Processing**', '**Complete**', or '**Canceled**'.

With the '**Export**' button above the grid, you can export the payout info into the **CSV/XML** file formats to issue mass payouts to affiliates. More specifically, the workflow goes in the following way:

1. Payouts are exported to CSV/XML;
2. The admin manually edits the exported payouts in accordance with the cheque standards;
3. The edited payouts are imported into the required payment processors;
4. The admin issues payouts massively.

## Sales by Affiliate Link Report

To access the performance stats of link-based promotions, go to **Reports > Affiliate by AheadWorks > Sales by Affiliate Link**.

Affiliate Email	Campaign	Hits	Orders	Buyers	Commissions	Conversion	Website
<a href="mailto:gibbs@yahoo.com">gibbs@yahoo.com</a>	10 % off Gear Collection	12	7	4	\$110.00	33.33%	Main Website
<a href="mailto:palmer@yahoo.com">palmer@yahoo.com</a>	5 % off Man Collection	36	22	14	\$220.75	38.89%	Main Website
<a href="mailto:parhamb@outlook.com">parhamb@outlook.com</a>	10 % off Gear Collection	137	94	69	\$170.00	50.37%	Main Website
<a href="mailto:moreno@outlook.com">moreno@outlook.com</a>	5 % off Woman Collection	125	58	41	\$0.00	32.8%	Main Website
<a href="mailto:stephengo@gmail.com">stephengo@gmail.com</a>	5 % off Man Collection	68	30	18	\$436.03	26.47%	Main Website

The '**Sales by Affiliate Link**' grid contains the reporting data split by columns:

- **Affiliate Email** - the email address of the affiliate;
- **Campaign** - the related affiliate campaign;
- **Hits** - the number of clicks on the link;
- **Orders** - the number of orders within the campaign;
- **Buyers** - the number of visitors who came via the affiliate link and made at least one purchase;
- **Commissions** - the available commission amount;
- **Conversion** — the number of visitors who came via the affiliate link and made at least one purchase to hits ratio.

The report collects info only about available commissions and only for the last three months.

## Sales by Coupon Report

To view the performance stats of coupon-based promotions, go to **Reports > Affiliate by AheadWorks > Sales by Coupon**.

Affiliate Email	Campaign	Coupon Code	Total No of Uses	Commissions	Website
palmer@yahoo.com	5 % off Man Collection	MANSOFF	27	\$130.25	Main Website
moreno@outlook.com	5 % off Woman Collection	WOMANSOFF	9	\$0.00	Main Website
stephengo@gmail.com	5 % off Man Collection	MANSOFF	4	\$50.00	Main Website

The 'Sales by Coupon' grid contains the reporting data split by columns:

- **Affiliate Email** - the email address of the affiliate;
- **Campaign** - the related affiliate campaign;
- **Coupon Code** - the coupon code of the affiliate;
- **Total N<sup>o</sup> of Uses** - shows how many times the coupon was used;
- **Commissions** - the available commission amount.

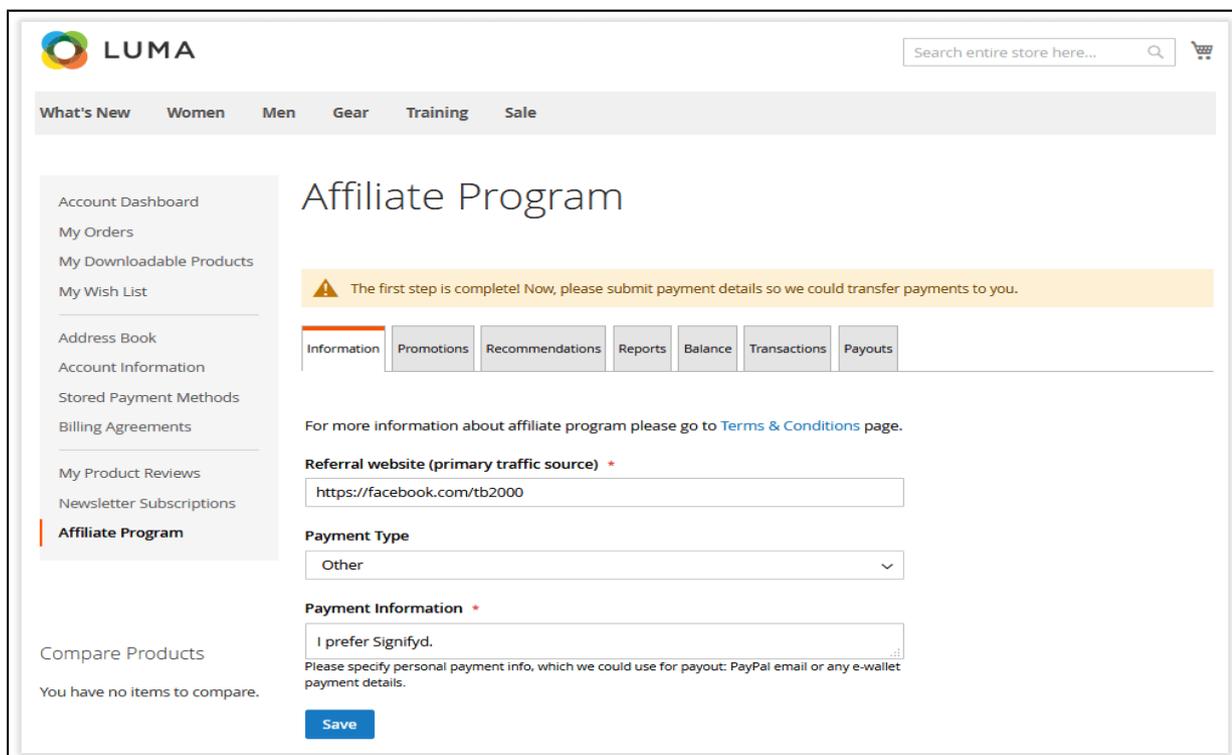
The report collects info only about available commissions and only for the last three months.

Although in this release both the admin area and affiliate account encompass the affiliate campaign info only for the last three months, all statistics are stored in the 'aw\_aff\_link\_statistics' table. If required, you can upload the data from the table to analyze it outside Magento.

## Affiliate Account

The module adds the '**Affiliate Program**' section to a customer account from where one can send affiliate program signup requests, get links, generate coupon codes, monitor campaign stats per promotion type, and more! For user convenience, the information in the section is divided by the following tabs:

- **Information** - contains the main info about the program, including the affiliate's referral link (the primary traffic source), payment type (PayPal or other), and payment information. The data in the tab can be edited anytime;



The screenshot shows the LUMA website's 'Affiliate Program' account page. The page features a navigation menu with categories like 'What's New', 'Women', 'Men', 'Gear', 'Training', and 'Sale'. A search bar and a shopping cart icon are located in the top right. The main content area is titled 'Affiliate Program' and includes a notification banner stating: 'The first step is complete! Now, please submit payment details so we could transfer payments to you.' Below the notification are several tabs: 'Information', 'Promotions', 'Recommendations', 'Reports', 'Balance', 'Transactions', and 'Payouts'. The 'Information' tab is active, displaying a form with the following fields: 'Referral website (primary traffic source) \*' with the value 'https://facebook.com/tb2000', 'Payment Type' set to 'Other', and 'Payment Information \*' with the value 'I prefer Signifyd.'. A 'Save' button is located at the bottom of the form. A note at the bottom of the form reads: 'Please specify personal payment info, which we could use for payout: PayPal email or any e-wallet payment details.'

- **Promotions** - lists all the campaigns available to a particular affiliate with commission and premium (if available) amounts. From there, link/coupon generation takes place;

The screenshot shows the LUMA Affiliate Program dashboard. At the top, there's a search bar and navigation tabs for 'What's New', 'Women', 'Men', 'Gear', 'Training', and 'Sale'. The main heading is 'Affiliate Program'. A yellow notification bar states: 'The first step is complete! Now, please submit payment details so we could transfer payments to you.' Below this are tabs for 'Information', 'Promotions', 'Recommendations', 'Reports', 'Balance', 'Transactions', and 'Payouts'. The 'Promotions' tab is active, showing a 'Code Prefix' field with 'PALMER' entered. A note explains that the code prefix is used in coupon codes and cannot be changed, with an example: 'ABC10 - Unique ID; SHOES15OFF - coupon code template; Generated coupon: ABC10-SHOES15OFF'. A green 'VIP' label indicates a 2% premium. Below is a table of campaigns:

Campaign	Description	Commission	VIP	Coupon Code	Link Action	Coupon Action
10 % off Gear Collection	10 % off Gear Collection	15% + 2%		Not generated	<a href="#">Get Link</a>	<a href="#">Get Coupon</a>
5 % off Man Collection	5 % off Man Collection	10% + 2%		Not generated	<a href="#">Get Link</a>	<a href="#">Get Coupon</a>
5 % off Woman Collection	5 % off Woman Collection	10% + 2%		Not generated	<a href="#">Get Link</a>	<a href="#">Get Coupon</a>

3 item(s)

The commission value is pulled from the campaign commission value. If the affiliate is a member of an affiliate group where the premium is more than 0, the green 'VIP' label will be displayed next to the regular commission amount.

Link processing goes by the following scenario:

- The campaign and affiliate account data is extracted from a promo link;
- The system verifies if the current affiliate account is allowed to participate in the campaign and if the campaign complies with the current website;
- If validation expires, the appropriate cookie will be assigned to the visitor, the lifetime value will be taken from the campaign. In case of several cookies, the originally assigned cookie will not be overridden by the following ones as long until it becomes invalid or its lifetime.

Currently, coupon-based discounts are calculated including taxes. For example, we have a **Subtotal = \$20** and **Tax Amount = \$4**. The native Magento rule determines the product price discount by coupon = **50%**.

The **Discount Amount** is calculated by the following formula:  
**(Subtotal (\$20) + Tax Amount (\$4)) \* price discount (50%)**.  
Thus, the Discount Amount = **\$12**.

The transaction amount is now calculated by the following formula:  
**(Subtotal (\$20) - Discount Amount (inc. Tax Amount (\$12)) \* commission percent (50%) = \$4**.

- **Recommendations** - displays all product recommendations per campaign;

## Affiliate Program

 The first step is complete! Now, please submit payment details so we could transfer payments to you.

Information Promotions **Recommendations** Reports Balance Transactions Payouts

To save your time and effort that you would spend searching for products suitable for promotion on your resource, we've gathered our top picks in one place. Check out the list of recommended products to find the ones that work best for you.

**VIP** Being a member of a All-star affiliate group gives you 2% premium from each item purchase (in addition to the regular commission).

Select Campaign \*  
5 % off Man Collection

Apply

Product Preview	Name	Approximate commission <b>VIP</b>	Approximate price	Link Action
	Lando Gym Jacket	\$9.90 + 2%	\$99.00	<a href="#">Get Link</a>
	Dash Digital Watch	\$9.20 + 2%	\$92.00	<a href="#">Get Link</a>
	Didi Sport Watch	\$9.20 + 2%	\$92.00	<a href="#">Get Link</a>

3 item(s)

- **Reports**- allows monitoring the campaign performance stats separately for the coupon- and link-based promotions;

**LUMA** Search entire store here...

What's New Women Men Gear Training Sale

Account Dashboard  
My Orders  
My Downloadable Products  
My Wish List  
Address Book  
Account Information  
Stored Payment Methods  
Billing Agreements  
My Product Reviews  
Newsletter Subscriptions  
**Affiliate Program**

## Affiliate Program

Information Promotions Recommendations **Reports** Balance Transactions Payouts

### Performance by Link

Filters

Campaign	Traffic Source	Hits	Orders	Buyers	Earned Commissions	Conversion
5 % off Man Collection	no_source	36	22	14	\$220.75	74.2%

1 item(s)

### Performance by Coupon

Filters

Campaign	Coupon Code	Total № of Uses	Earned Commissions
5 % off Man Collection	MAN5OFF	27	\$130.25

1 item(s)

Compare Products  
You have no items to compare.

My Wish List  
You have no items in your wish list.

- **Balance** - allows monitoring the balance info with already calculated totals to know when pending commissions become available;

**LUMA** Search entire store here...

What's New Women Men Gear Training Sale

Account Dashboard  
My Orders  
My Downloadable Products  
My Wish List  
Address Book  
Account Information  
Stored Payment Methods  
Billing Agreements  
My Product Reviews  
Newsletter Subscriptions  
**Affiliate Program**

## Affiliate Program

The first step is complete! Now, please submit payment details so we could transfer payments to you.

Information Promotions Recommendations Reports **Balance** Transactions Payouts

Available Commissions	Pending Commissions	Processed for Payout	Total Paid
<b>\$0.00</b>	<b>\$155.25</b>	<b>\$0.00</b>	<b>\$0.00</b>

Campaign	Qty of Ordered Items	Commission Amount	Commission Registration Date	Commission Availability Date
10 % off Gear Collection	23	\$155.25	Dec 13, 2018	Jan 12, 2019

Compare Products  
You have no items to compare.

- **Transactions** - allows tracking the history of the 'Completed' and 'Admin Changes' transaction types;

**LUMA** Search entire store here...

What's New Women Men Gear Training Sale

Account Dashboard  
My Orders  
My Downloadable Products  
My Wish List  
Address Book  
Account Information  
Stored Payment Methods  
Billing Agreements  
My Product Reviews  
Newsletter Subscriptions  
**Affiliate Program**

## Affiliate Program

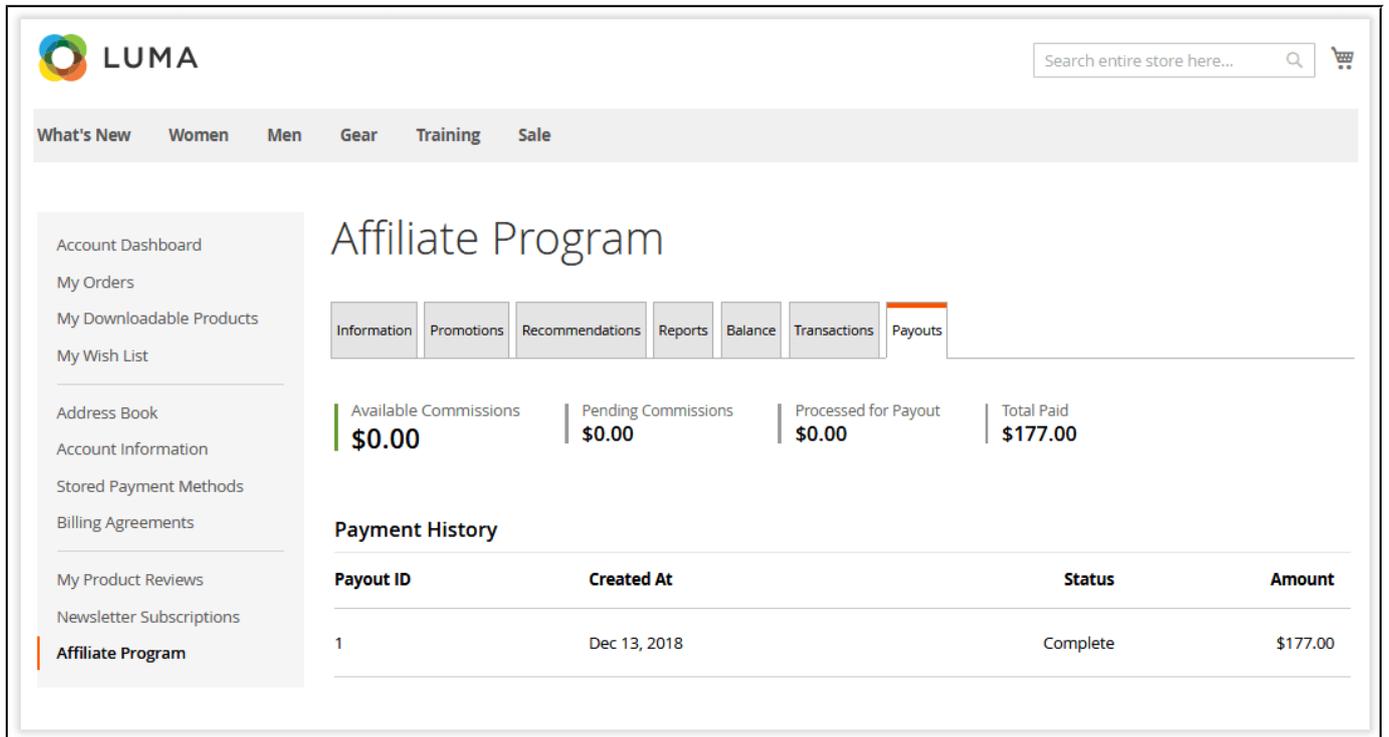
Information Promotions Recommendations Reports Balance **Transactions** Payouts

Filters

Transaction ID	Date	Amount	Transaction Type	Details
8	Dec 13, 2018 1:57:49 PM	<b>-\$15.00</b>	Admin changes	Transaction created by admin.

1 item(s)

- **Payouts**- there, the affiliate can view his/her payout progress and send payout requests.



The screenshot displays the LUMA Affiliate Program dashboard. On the left is a navigation menu with options like 'Account Dashboard', 'My Orders', and 'Affiliate Program'. The main content area is titled 'Affiliate Program' and includes a sub-menu with 'Payouts' selected. Below this, there are four summary cards: 'Available Commissions \$0.00', 'Pending Commissions \$0.00', 'Processed for Payout \$0.00', and 'Total Paid \$177.00'. A 'Payment History' table follows, showing one entry with Payout ID 1, created on Dec 13, 2018, with a status of 'Complete' and an amount of '\$177.00'.

Payout ID	Created At	Status	Amount
1	Dec 13, 2018	Complete	\$177.00

For an in-depth look visit Affiliate demo store at the extension's [product page](#).

Feel free to contact our support team with any questions:

[Submit a help desk ticket](#)

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