

# Refer a Friend

## for Magento 2



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## About Refer a Friend

**Magento 2 Refer a Friend** extension allows creating effective customer referral programs beneficial for all the sides, including Magento merchants, brand advocates, and newly attracted customers. The module includes multiple configuration and management options both on backend and frontend that make it possible to tailor programs to particular business needs, track and improve certain program aspects making it even more valuable for all the participants.

**Compatibility:** Magento Open Source (CE) 2.3.X, Magento Commerce using on prem (EE) 2.3.X, Magento Commerce on Cloud (ECE) 2.3.X

## Getting Around

### Business Advantages

The business benefits of the extension are clear and straightforward. It adds new customers and generate more sales, including additional sales made by brand-new customers and purchases from existing ones who act like brand advocates within refer-a-friend programs.

### What Makes It Different

In addition to the business advantages brought by the idea of customer referral programs, the module stands out from the bulk of the same solutions with:

- Rewards available for both brand advocates and new customers;
- Integration with AddThis and ShareThis;
- Rules explained in details for brand advocates and Magento staff;
- Statistics available for individual brand advocates and general data tracking for Magento admins;
- GDPR compliance (right to be forgotten).

## Refer a Friend Frontend Use

Before to offer your customers to take part in the refer-a-friend program, you need to configure the extension according to your needs and preferences. The whole process is described in the Backend Configuration section below. When the configuration finished all the eligible shoppers are able to participate quite easily.

### Refer a Frind Frontend Interface

Following the process workflow, Refer a Friend offers brand advocates the Referral Program section added to their customer accounts so they could track and manage their referral activity.

## Referral Program

**Conditions:**  
Friend's registration on the site is mandatory to get a reward towards purchase.  
Every friend gets **10%** off on their first purchase.  
For every friend's first purchase, you get **\$20.00** off.

Total friends referred	Current reward balance	Expiration date
<b>1</b>	<b>\$20.00</b>	<b>May 22, 2018</b>

You've got a reward! Now you can go shopping - it will be applied automatically on a checkout!

Invite friends using the buttons below:

Or just copy & paste this link anywhere you want!

[Copy link to clipboard](#)

Send me an email when I get a new reward!

The section includes:

- Detailed refer-a-friend program term explanations, including discounts granted to new customers and rewards provided to brand advocates;
- Performance statistics, such as the number of invited friends, current reward balance, invitation block, and the checkbox to be notified about new rewards.

The invitation block allows brand advocates to generate a referral link and use ShareThis or AddThis functionality for effective sharing from the account and even on any website page.

In case if a customer leaves the referral group or is excluded from it by Magento admins, the rewards earned can still be applied but the ability to invite new friends is revoked.

In order to make the 'Referral Program' tab visible to customers in their accounts, you need to configure at least one rule on the backend.

## Backend Configuration

### General Configuration

The Configuration section is the first step to take when you start using the Refer a Friend extension. Please enter it following Stores > Configuration > AHEADWORKS EXTENSIONS> Refer a Friend > Configuration.

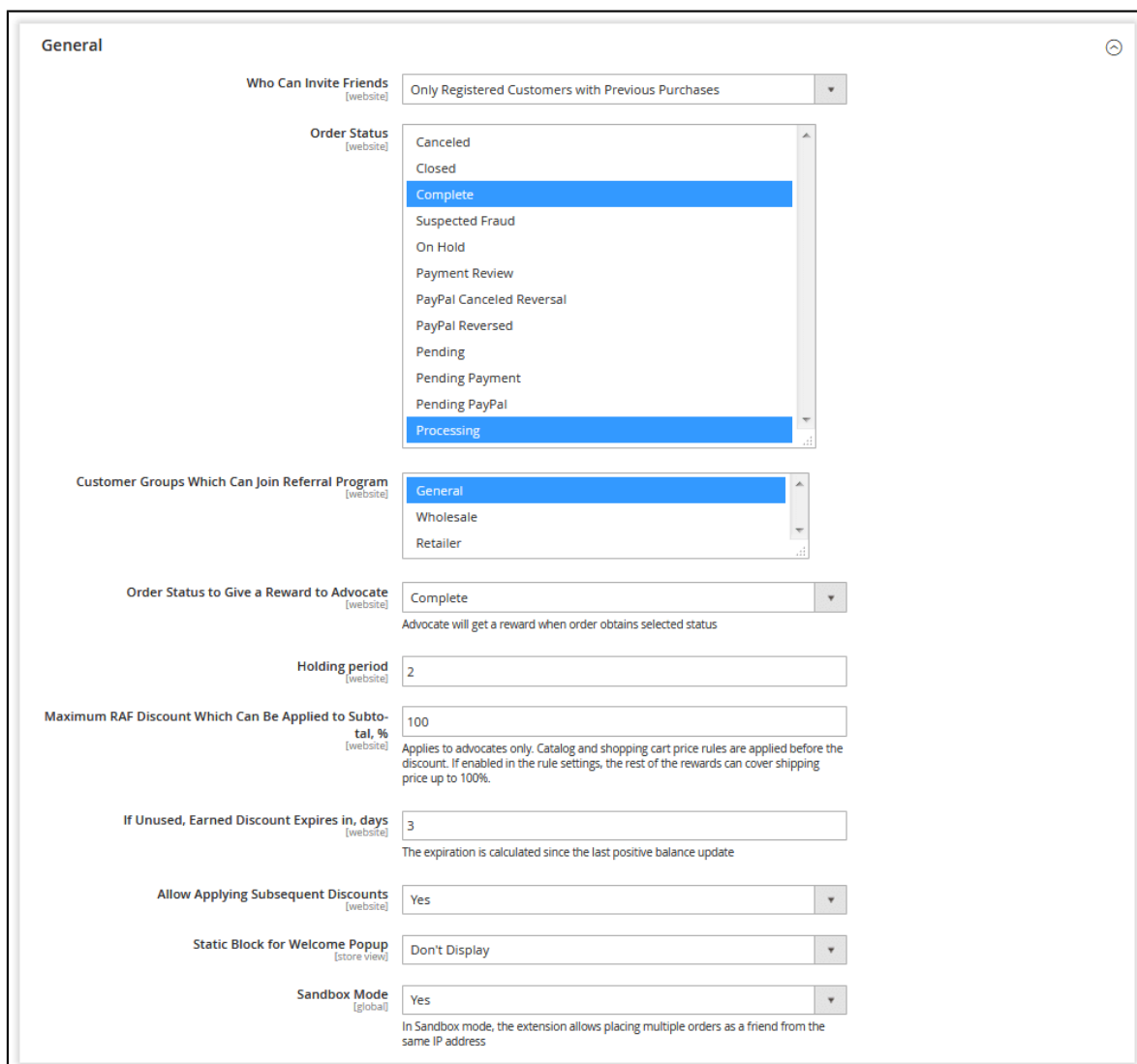
The section consists of two blocks: General and Email Options. The General block makes it possible to set up general settings of the extension as follows below.

### General Settings

- **Who Can Invite Friends** - determines customer groups eligible to act as brand advocates. There two options you can choose between: a) **All Registered Customers** and b) **Only Registered Customers with Previous Purchases**. This way, only registered customers are allowed to invite friends. If the first option is selected, all the registered visitors with or without purchases may participate. The second option allows only customers with orders to enter the program. Additionally, you can determine the type of orders they should have to fit the requirements.
- **Order Status** - flexibly manipulate with program accessibility for customers with particular order statuses. For example, you can make the program available for the customers who purchased physical products with the '**Processing**' status (not yet shipped to them) and for those ones who purchased a virtual item, i.e. the products with the '**Complete**' status.

- **Customer Groups Which Can Join Referral Program** - one more opportunity to shape and finalize the eligible circle of brand advocates is to select them among Magento customer groups. You can do this by using the **Customer Groups Which Can Join Referral Program** configuration option. This way, the groups that do not participate in the program are not distracted with unnecessary tabs in their customer accounts.

The selector doesn't contain the 'Not Logged In' group as it is unacceptable in any case.



**General**

**Who Can Invite Friends** [website] Only Registered Customers with Previous Purchases

**Order Status** [website]

- Canceled
- Closed
- Complete
- Suspected Fraud
- On Hold
- Payment Review
- PayPal Canceled Reversal
- PayPal Reversed
- Pending
- Pending Payment
- Pending PayPal
- Processing

**Customer Groups Which Can Join Referral Program** [website]

- General
- Wholesale
- Retailer

**Order Status to Give a Reward to Advocate** [website] Complete  
Advocate will get a reward when order obtains selected status

**Holding period** [website] 2

**Maximum RAF Discount Which Can Be Applied to Subtotal, %** [website] 100  
Applies to advocates only. Catalog and shopping cart price rules are applied before the discount. If enabled in the rule settings, the rest of the rewards can cover shipping price up to 100%.

**If Unused, Earned Discount Expires in, days** [website] 3  
The expiration is calculated since the last positive balance update

**Allow Applying Subsequent Discounts** [website] Yes

**Static Block for Welcome Popup** [store view] Don't Display

**Sandbox Mode** [global] Yes  
In Sandbox mode, the extension allows placing multiple orders as a friend from the same IP address

- **Order Status to Give a Reward to Advocate** - order statuses upon which advocates will receive rewards from the brought friends' purchases.
- **Holding period** - define whether advocates should get earned rewards instantly or after a particular number of days (specified as a numerical value in this field). It's

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recommended implementing holding period in order to avoid situations when advocated may get rewards for subsequently canceled orders.

In case if '0' is set or the field is left empty, rewards will be given instantly once orders obtain the appropriate status.

- **Maximum RAF Discount Which Can Be Applied to Subtotal, %** - the most active brand advocates can earn significant rewards and use them as discounts for their own purchases. So, you can limit its use during the checkout by providing the maximum discount allowed per one order.
- **If Unused, Earned Discount Expires in, days** - use this configuration option to motivate brand advocates to actively spend their rewards. The expiration date is calculated since the last positive balance update. Hence, it is updated each time a brand advocate attracts a new customer.
- **Allow Applying Subsequent Discounts** - in case you use other loyalty programs in your store together with the refer-a-friend program, discount application from several programs at once might negatively impact your profit margin. To avoid this, you can limit discount application by disallowing discounts other than refer-a-friend program-related.
- **Static Block for Welcome Popup** - if you want to facilitate the process of inviting new customers and allow brand advocates to show their attitude towards their friends, you can set up a welcome popup to be displayed for newly attracted visitors. The configuration option makes it possible to determine its content selecting among the Magento static blocks. The popup is not displayed if none of the static blocks are selected.
- **Sandbox mode** - enable this mode to disable IP validation. Still, it is recommended to use different browsers for testing Advocate and Friend's journeys.

In case if '0' is selected, the reminder will not be sent.

## Email Options

Email options

Email Sender <small>[store view]</small>	Customer Support
Email Template Of Notification About New Friends Reward <small>[store view]</small>	AW Refer a Friend - New Friend Notification Template (Default)
Expiration Reminder Email Template <small>[store view]</small>	AW Refer a Friend - Expiration Reminder Template (Default)
Email Template Of Notification About Reward Expiration <small>[store view]</small>	AW Refer a Friend - Expiration Template (Default)

Email Options allow you to configure the notification system of the extension.

- **Email Sender.** Here, you can specify the email address acting as the sender of all email notifications.
- **Email template of Notification About New Friends Reward.** This option defines the template to be sent to brand advocates about their new rewards.
- **Expiration Reminder Email Template.** Here you can set up the email template notifying brand advocates that their rewards expire soon.
- **Email Template of Notification About Reward Expiration.** Finally, the option defines the template for notifications telling brand advocates that their rewards have been expired.

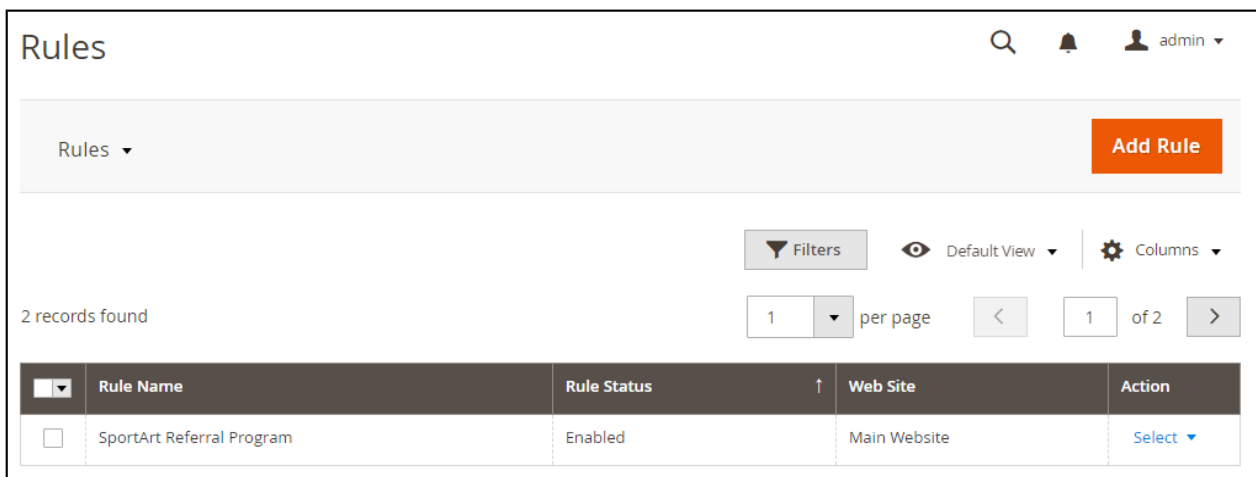
Refer a Friend is delivered with some default templates. You can use and customize them or add your own ones.



## Rules

As soon as the general settings of the extension are configured we can proceed to set refer-a-friend program rules. The main thing is that rules define the rewards earned by brand advocates and the discounts provided for new customers. The Rules section is located along the following path: **Marketing > Refer a Friend by Aheadworks > Rules**.

### Rules Grid



<input type="checkbox"/>	Rule Name	Rule Status	Web Site	Action
<input type="checkbox"/>	SportArt Referral Program	Enabled	Main Website	Select

Each refer-a-friend rule is applied to one Magento website. So, in case if you manage one website, the module doesn't display the Rules page and grid. Instead, it redirects your immediately to the rule editing page. But, if you have several websites in one Magento installation, you can create a separate rule for each of them.

The Rules grid contains 4 columns:

- **Rule name.** A custom rule name implied to distinguish it from other rules;
- **Rule Status.** The column shows whether the rule is enabled or disabled;
- **Website.** The website a particular rule is assigned to;
- **Action.** The column allows you to delete or edit rule right on the spot.

The Rules grid is a Magento 2 grid so it allows you to sort and filter grid attributes, customize its view, etc. On this page, you can also create a new rule using the Add Rule button.

## Rule Editing

The screenshot shows the 'Edit "SportArt Referral Program rule" rule' page. At the top right, there are search, notification, and user icons. Below the title bar, there are 'Reset' and 'Save' buttons. The main content area is titled 'General Information' and contains the following fields:

- Rule Name:** A text input field containing 'SportArt Referral Program rule'.
- Rule Status:** A dropdown menu set to 'Enabled'.
- Website:** A multi-selector dropdown menu set to 'Main Website'.
- Apply to Shipping Amount:** A toggle switch set to 'Yes'.

Below the toggle switch, there is a note: 'Discount amount is applied to subtotal and shipping amount. This option applies to both parties.' Further down, there are three lines of text describing the rule's conditions and rewards:

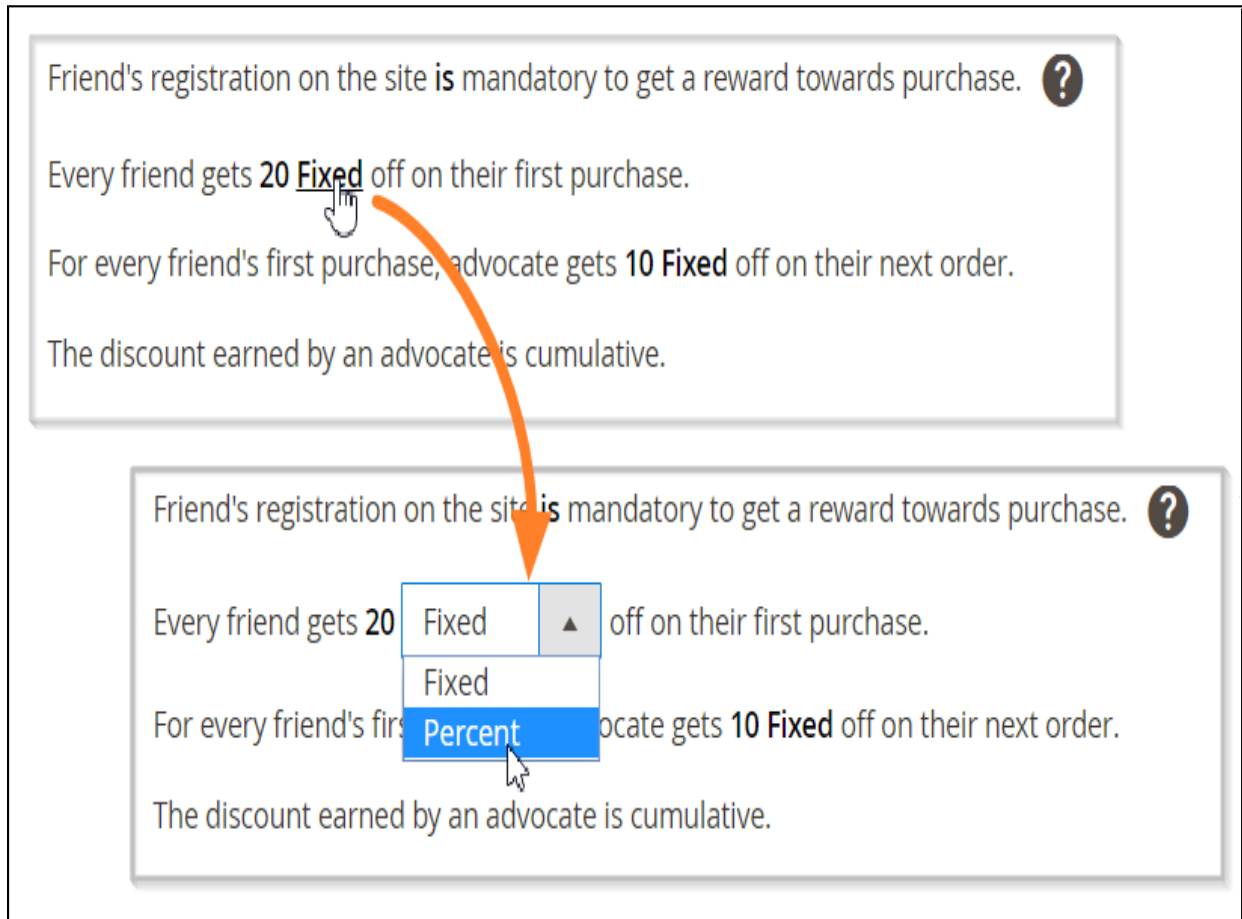
- 'Friend's registration on the site is mandatory to get a reward towards purchase.'
- 'Every friend gets **10 Percent** off on their first purchase.'
- 'For every friend's first purchase, advocate gets **20 Percent** off on their next order.'
- 'The discount earned by an advocate is cumulative.'

The rule editing page contains the following configuration options:

- **Rule Name.** The text field to be filled with a rule name;
- **Rule Status.** The box allows you to enable or disable the rule;
- **Website.** The multi-selector to assign the rule to a particular Magento website;
- **Apply to Shipping Amount.** The toggle switch button that allows you to choose either applying rewards and discounts to shipping charges or not.

## Rule Conditions

Rule conditions are provided on the same page in a human-readable form. The conditions of the rule can be changed by clicking on the words highlighted with bold font:



- **Customer Registration.** Set whether friends registration is mandatory to get the discount on their first purchase. We recommend you to set it mandatory in order to avoid the chance that one customer receives several discounts.
- **Friend Discounts.** Set the discount amount and choose whether it is fixed or % of its first order (see the image above).
- **Brand Advocate Rewards.** As in the case with friend discounts, these discounts can be either fixed or %. In the case of a percent discount, it is recommended to set the option "**Maximum RAF Discount Which Can Be Applied to Subtotal, %**" in the General configuration to a reasonable amount, for example to 15%. In this case, even if an advocate has a lot of friends and earned a huge discount, they will not be able to apply more than 15% at a time.

That's it. The rules are configured. Now their terms are clearly displayed in the customer accounts of brand advocates on the frontend.

In order to make the 'Referral Program' tab visible to customers in their accounts, you need to configure at least one rule.

## Advocates

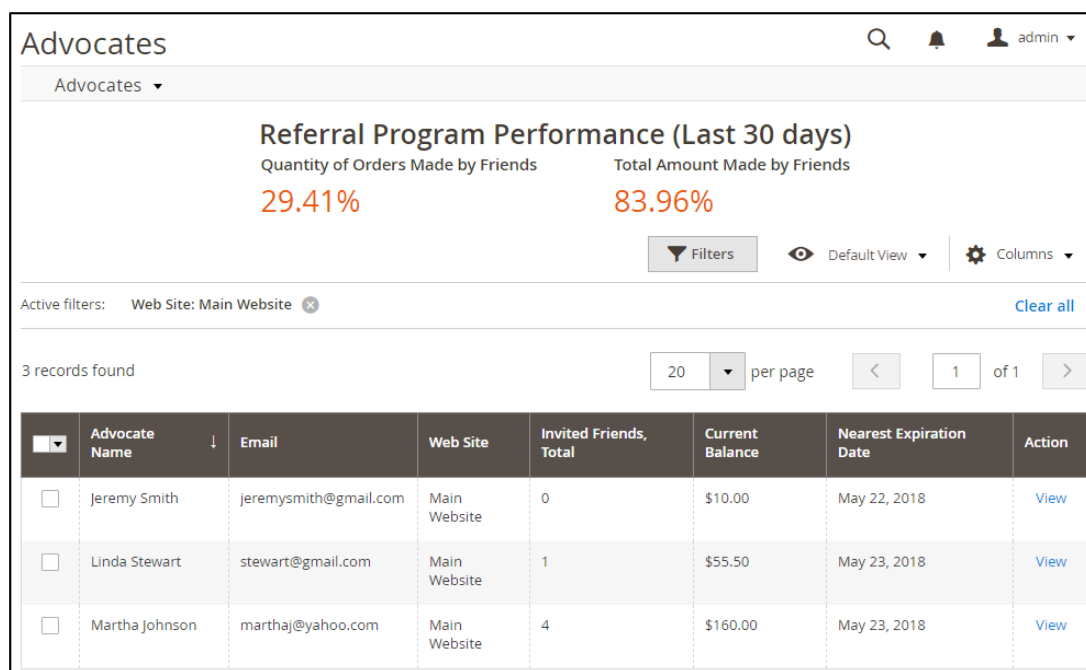
As soon as the rule configuration is finished, the extension is ready to work and invite new customers. So, the next backend section is mostly intended to provide you with additional options to track and manage the program more consciously.

The Advocates section can be found as follows: **Marketing > Refer a Friend by Aheadworks > Advocates.**

## Advocates Grid

The main page of the section contains the Advocates grid and referral program performance statistics.

The Performance area of the page contains two indicators. **Quantity of Orders Made by Friends** displays the share of orders made by friends in % out of the total number of orders in the store for last 30 days. **Total Amount Made by Friends** is the same indicator related to the monetary value of friends' and all website orders.



Advocates

Referral Program Performance (Last 30 days)

Quantity of Orders Made by Friends: 29.41%

Total Amount Made by Friends: 83.96%

Active filters: Web Site: Main Website

3 records found

	Advocate Name	Email	Web Site	Invited Friends, Total	Current Balance	Nearest Expiration Date	Action
<input type="checkbox"/>	Jeremy Smith	jeremysmith@gmail.com	Main Website	0	\$10.00	May 22, 2018	<a href="#">View</a>
<input type="checkbox"/>	Linda Stewart	stewart@gmail.com	Main Website	1	\$55.50	May 23, 2018	<a href="#">View</a>
<input type="checkbox"/>	Martha Johnson	marthaj@yahoo.com	Main Website	4	\$160.00	May 23, 2018	<a href="#">View</a>

The Advocates grid comprises the following columns:

- **Advocate Name.** Contains customer names;
- **Email.** Contains customer emails;
- **Web Site.** Displays the web site a customer operates in;

- **Invited Friends, Total.** Shows the number of invited friends by this particular customer;
- **Current Balance.** Balances of rewards earned by brand advocates;
- **Nearest Expiration Date.** Displays the dates of reward expirations.
- **Action.** Contains active links to Advocate Information pages.

## Advocate Information Page

The Advocate Information Page contains two distinct areas: **Summary** and **Transactions History**.

### Summary

This area allows you to track the performance of individual brand advocates, including their **number of invited friends**, **current reward balances**, and **nearest expiration dates**.

### Advocate Information

Advocates ▾      ← Back      Save and Continue Edit      **Save**

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#### Summary

Name	Invited Friends	Current Rewards	Nearest Expiration Date
Martha Johnson marthaj@yahoo.com	4	\$160.00	May 23, 2018

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#### Transactions History

Add transaction \*   
Enter a negative number to subtract from the customer's balance

Admin comment   
Visible to admin only

15 records found      2 per page      1 of 8

ID	Date	Action	Amount	Comment for Admin	Rewards Balance
1	May 18, 2018	Adjusted by Admin	+\$50.00		\$50.00
2	May 18, 2018	Advocate Spent Discount On Order	-\$43.60	Spent referral discount on order #000000001	\$6.40

## Transactions History

The Transactions History section area shows the history of all transactions in a dedicated grid. The grid contains the following columns:

- **Date.** Displays the date when the transaction occurred;
- **Action.** Describes the essentials of the transaction;
- **Amount.** Displays balance increments or decrements in green and red accordingly;
- **Comment for Admin.** Comments to the transactions available to admins;
- **Reward Balance.** The balance available after the transaction.

The same as any Magento grid, this one makes it possible to sort and filter data and customize the view.

The greatest benefit and value brought by this section is that it allows you to manually update particular reward balances. You can use this opportunity in case of order refunds or in order to additionally award particular brand advocates for their prominent achievements. Each such transaction can be accompanied by comments visible to admins only.

## Other Features

In addition to the functionality described above, the extension also provides some more benefits for store owners and development teams.

- **GDPR Compliance (Right to erasure)**

In order to follow the **GDPR** requirements, the module erases all refer-a-friend activities in case if a customer profile is deleted.

- **Web API and Unit Tests**

The code of the extension is covered by unit tests and includes REST API, so you can test its compatibility and integrate it with other solutions much easier.

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

Feel free to contact our support team with any questions:

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