Affiliate User Guide

Thank you for purchasing our extension. If you have any questions that are beyond the scope of this document, do not hesitate to leave us an email via our email support@magenest.com.

By: Magenest | Support Portal: https://servicedesk.izysync.com/servicedesk/customer/portal/152

Introduction

Affiliate for Magento 2 helps store owners create comprehensive affiliate programs for their products with flexible referral rules. The extension works effectively as a marketing solution that boosts sales and expands the market with less effort from your in-house team.

Feature

For Admin

- Manage the affiliate account, approve the participant request.
- Set the time to receive the commission for the affiliate.
- Manage the withdraw: approve the withdrawal request, set the withdrawal value and fee.
- Create up to 4 affiliate programs with 4 default types: Pay Per Click, Pay Per Lead, Pay Per Discount, Pay Per Sale.
- Set unlimited commission tiers for each affiliate program.
- Set the rule for each program.
- Manage affiliate campaign, create the banner for each campaign with two available types: text and image.
- Manage the affiliate transaction details.

For Customer

- Get a specific coupon for referring.
- View the referred transaction.
- Request the withdraw.
- View affiliate statistics with the details on each program.
- View and get the affiliate banner to their own store.
- View the commission details for each type of program.

Configuration

On the backend, go to **Affiliate > Configurations**.

On the **Configurations** page:

General Configuration

➕ **Enable Affiliate**: choose **Yes** to activate the affiliate feature.

➕ **Auto Join Affiliate Program for New Customer**:

- If **Yes**: Customers will automatically join the affiliate program when registering for a new account on the store website.
- If **No**: Customers need to join the affiliate manually on **My Account** page.

➕ **Admin Approval for Affiliate Request**: If Yes, the customer has to wait for the admin to approve the participant request to be able to join an affiliate program.

Commission Configuration

➕ **Add Commission When Order Obtained Status:** decide the time to award the commission to the referer when the order is in the corresponding status.

⚠️ **Note:** This configuration field is not applied to the affiliate program for leads. In the "Pay Per Lead" program, the referrer will receive a commission when the purchase orders of the referred leads meet the conditions set in the **configuration for the Pay Per Lead program**. And the status of these orders is **Completed.**

➕ **Commission Holding Period (Days):** enter the number of days that the commission is held before being added to the referer balance.

➕ **Subtract Commission When Creditmemo is Created:** if choose Yes, it will subtract the commission from the referrer account balance when there is a refund for the purchase of the referred. (The amount to be deducted will be equal to the commission received from the respective order)

Withdrawal Configuration

- Set the Withdraw value on **Minimum Withdrawal Amount, Maximum Withdrawal Amount.**
- **Withdraw Fee:** If choose Yes, the customer will be charged the withdrawal fee.
- **Fee Type:** Withdrawal calculation type. There are 2 types: **By Percent** and **Fixed Amount.**
- Then set the Withdraw value on **Fee Value.**

Withdrawal Configuration

Minimum Withdrawal Amount [store view]	0	
	Enter the minimum amount to make a withdrawal. Leave blank is zero.	
Maximum Withdrawal Amount [store view]	10000	
	Enter the maximum amount to make a withdrawal. Leave blank is unlimited.	
Withdraw Fee [store view]	Yes	▼
Fee Type [store view]	By Percent	▼
Fee Value [store view]	5	

Policy Configuration

- **Policy Block:** Select the block that will be the policy of the affiliate program.

Policy Configuration

Policy Block [store view]	Affiliate Program Policy	▼	☑ Use system value

---

Manage Affiliate Program

⚠️ <u>Note</u>: *Admin can create up to 4 programs.*

➕ On the Admin site, go to **Affiliate > Program**.

➕ To create an affiliate program, on the **Affiliate Program** page, click on **Create Program** button.

➕ On the **Create Program** page: select the type for the new program. There are four default options: **Pay Per Lead, Pay Per Sale, Pay Per Discount, and Pay Per Click.**

⭐ **Pay Per Lead**: in this program, the referrer will receive the commission for each account created in the store with their own unique code.

- ○ Set the necessary information for the program.
- ○ Set and adjust the commission for the program in **Is Single Tier Active** field and **Configuration Tiers** section.
- ○ **Limit Min Spent:** enter a certain amount that the referred need to spend on the store so that the commission for leads is applied.

Program Information

Program Type *	Pay Per Lead ▾
Is Active	🟢 Yes
Is Single Tier	⚪ No
Name *	Affiliate Lead
Description	

Lead Configuration

Limit Min Spent *	45

Commission Tiers

After reached maximum commission time with a program, customer will continue to receive commission base on the last commission amount.

Commission Time #	Amount *	Actions
1	12	🗑
2	15	🗑

Add Tier

⭐ **Pay Per Sale:** In this program. the referrer and referred account are connected by the Unique Code given by the referred. The referrer will receive a commission from the purchase of the referred.

Programs

🔍 🔔26 👤 customer ▾

← Back   Save and Continue Edit   **Save Program**

Program Information

Program Type *	Pay Per Sales ▾
Is Active	🟢 Yes
Is Single Tier	🟢 Yes
Name *	Affiliate Sales
Description	

Single Commission Program

Commission Type	Percent Order Amount ▾
Commission Value *	5

⭐ **Pay Per Discount:** In this program, the referred makes a purchase with **Referral Coupon** given by the referrer to receive a discount for the order. Then a commission is added to the referrer's balance as well.

- Set the necessary information for the program.
- **Shopping Cart Price Rule:** Select cart price rule will apply to this program.

⭐ **Pay Per Click:** In this program, the referrer will receive the commission for each click from the referred on the affiliate link.

Manage Campaign

➕ On the Admin sidebar, go to **Affiliate > Campaign**.

➕ On **Campaign** Page

Campain Information

Enter the main information for the campaign including name, status, description, and the period that the campaign set as new.

Banner

In this section, you can see the banners currently assigned to this campaign.

Manage Banner

For each campaign, the admin can create a banner for it so that the merchants who participate in the campaign can put the banner on their store.

- On the Admin sidebar, go to **Affiliate > Banner.**

- Click on **Create a banner** for this campaign.
- On **Banner** page

- Assign the banner to a particular campaign on the **Campaign** field.
- Fill in the necessary information for the new banner.

Manage Account

Admin can manage and approve the participant request of the customer.

➕ On the Admin sidebar, go to **Affiliate > Account**.

➕ On the **Affiliate Account** listing page, the admin can view the affiliate participant and approve the request for the new participants.

- The status of the account that waits for approval is **Pending**.
- Mark an account, then on the **Action** field, select **Change Status > Approve / Reject** to change the status of the account.

Manage the withdraw

➕ On the Admin sidebar, go to **Affiliate > Withdraw**.

➕ On the **Withdraw Listing** page, the admin can view, approve, or decline all the withdrawal requests.

- On the withdrawal list, click on a pending withdrawal request.
- On the **View Withdrawal** page, click on Capture Payment/Decline Payment button to approve/decline the withdrawal.

Manage Transactions

- On the Admin sidebar, go to **Affiliate >Transaction.**
- On the **Affiliate Transactions** page, the admin can view or create a new transaction.

On the frontend

After joining the Affiliate program, the customer can get their own codes for referring to the **Promotion Materials** session.

➕ **Referral Link & Code**

- **Your Unique Register Link:** Customers can get the available link to send to the referred. This referral link is used in the Pay Per Lead program.
- **Your Unique Code:** the referer can edit the code manually or get the available code to send to the referred. This code is used for connecting the referrer account with the referred account in the Pay Per Lead and Pay Per Sale program. The referred enter this code when creating an account on the store. In case the referred has had an account already, they can enter the Unique Code of the referrer on **Your Referrer Unique Code** field

- **Coupon Codes:** The referred uses this coupon to get a discount when purchasing. And the referrer receives a commission for this discounted purchase. This code is used in the Pay Per Discount program.
- **Campaigns:** Customers can view all the campaigns to participate and take the banner to put in the store. They will receive the commission for each click on the banner when putting the banner on their store.

My Account

Referral Link & Code

Your Unique Register Link: **https://affiliate.izysync.com/customer/account/create/code/HN4CIq0rwB51TkGvDm7s/** [Copy]

Your Unique Code: **HN4CIq0rwB51TkGvDm7s** [Copy]

Coupon Codes

Affiliate Program	Coupon Code	
Affiliate Discount	U8om3KxTLvHoq5zh	[Copy]

Share the coupon and receive a commission for the purchase using this code.

1 Item

Show [10 ∨] per page

Campaigns

Campaign title	Description	Start time	End time	Action
Sales 10%		2021-01-01	2021-01-31	Hide

	Title	Url	Click (Unique/Raw)
	Sales	https://affiliate.izysync.com/?code=HN4CIq0rwB51TkGvDm7s&bannerid=1 [Copy]	1/1

```
                                    <a target="_blank" href="https://affiliate.izysync.com/?
code=HN4CIq0rwB51TkGvDm7s&bannerid=1"><img alt="affiliate-banner"
src=https://affiliate.izysync.com/media/affiliate/tmp/banner/images.jpeg></a>
```

[Copy]

Sidebar

My Account
My Orders
My Downloadable Products
My Wish List

Address Book
Account Information
Stored Payment Methods
My Product Reviews
Newsletter Subscriptions

Affiliate Program
Affiliate Materials
Transactions
Leads
Withdrawals
Policy

Compare Products

You have no items to compare.

My Wish List

You have no items in your wish list.

➕ Customers can view the affiliate programs.

LUMA

My Account

My Orders

My Downloadable Products

My Wish List

Address Book

Account Information

Stored Payment Methods

My Product Reviews

Newsletter Subscriptions

Affiliate Program

Affiliate Materials

Transactions

Leads

Withdrawals

Policy

Dashboard

Available Programs

Program Name	Program Type	Program Commission		Note
teste afiliados	Pay Per Sales	**Tier** **Commission**		
		1 +	5.0000% (Percent Order Amount)	
Affiliate Click	Pay Per Click	**Tier** **Commission**		Maximum 25 unique click available per day
		1 +	$2,000.00 (Fixed Amount)	
Affiliate Discount	Pay Per Discount	**Tier** **Commission**		
		1 +	20.0000% (Percent Order Amount)	

Compare Products

You have no items to compare.

⊕ Transactions and Account Statistics

LUMA

My Account
My Orders
My Downloadable Products
My Wish List

Address Book
Account Information
Stored Payment Methods
My Product Reviews
Newsletter Subscriptions

Affiliate Program
Affiliate Materials
Transactions
Leads
Withdrawals
Policy

Compare Products

You have no items to compare.

Transactions

Balance	Available	On Hold	Lifetime	Paid
$2,000.00	$1,200.00	$0.00	$2,000.00	$0.00

Date	From Program	Amount	Total Transaction	Details
1/18/21, 6:09 AM	Affiliate Click	$2,000.00	$2,000.00	Received commission for clicked banner

1 Item   Show [10 ⌄] per page

Account Statistics

Program Type	Total Earned
Pay Per Click	$2,000.00
Pay Per Lead	$0.00
Pay Per Order	$0.00
Pay Per Discount	$0.00
Total Earned	$2,000.00

➕ Customers can see the list of accounts they have introduced in the lead tab.

LUMA

What's New   Women ⌄   Men ⌄   Gear ⌄   Training ⌄   Sale

My Account
My Orders
My Downloadable Products
My Wish List

Address Book
Account Information
Stored Payment Methods
My Product Reviews
Newsletter Subscriptions

Affiliate Program
Affiliate Materials
Transactions
Leads
Withdrawals
Policy

Compare Products

You have no items to compare.

My Account

Program Name	Customer Email	Status	Spent Amount	Date Created
Affiliate Lead	chienabc@gmail.com	Pending	0.0000	1/18/21, 6:56 AM

1 Item   Show 10 ⌄ per page

➕ Withdraw:

Withdrawals

Balance: $2,000.00
Available: $1,200.00
Minimum Payout: $50.00
Maximum Payout Per Request: $1,000.00

Amount *

[Send Request]

#	Date	Amount	Status	Action
1	1/18/21, 6:10 AM	$800.00	Pending	Cancel

1 Item   Show [10 ▾] per page

➕ Policy

Affiliate Policy

You have to agree with our policy when join affiliate program.

Update

- When a new update is available, we will provide you with a new package containing our updated extension.
- You will have to delete the module directory and repeat the installing steps above.
- Flush the config cache. Your store and newly installed module should be working as expected.

Support

- We will reply to support requests within **2 business days**.
- We will offer **lifetime free update and 6-month free support for all of our paid products**. Support includes answering questions related to our products, bug/error fixing to make sure our products fit well in your site exactly like our demo.
- Support **DOES NOT** include other services such as customizing our products, installation and uninstallation service.

Once again, thank you for purchasing our extension. If you have any questions relating to this extension, please do not hesitate to contact us for support.