

# 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](mailto:support@magenest.com).

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

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## 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.



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## Configuration

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

On the **Configurations** page:

## General Configuration

### General Configuration

Enable Affiliate

[store view]

Yes

Auto Join Affiliate Program for New Customer

[store view]

No

If choose "No", the customer needs to join Affiliate Program in My Account Dashboard manually.

Admin Approval for Affiliate Request

[store view]

Yes

+ **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

### Commission Workflow

Add Commission When Order Obtained Status

[store view]

Complete

Commission Holding Period (Days)

[store view]

2

Leave blank if your website has no holding period.

Subtract Commission When Creditmemo is Created

[store view]

Yes

+ **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]

Enter the minimum amount to make a withdrawal. Leave blank is zero.

Maximum Withdrawal Amount  
[store view]

Enter the maximum amount to make a withdrawal. Leave blank is unlimited.

Withdraw Fee  
[store view]

Fee Type  
[store view]

Fee Value  
[store view]

## Policy Configuration

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

### Policy Configuration

Policy Block  
[store view]

☒ Use system value

## Manage Affiliate Program

⚠ **Note:** 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

Search

20

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.

Programs
Back
Save and Continue Edit
Save Program

Program Information

Program Type \*
Pay Per Discount

Is Active
☒ Yes

Is Single Tier
☒ Yes

Name \*
Affiliate Discount

Description

Discount Configuration

Shopping Cart Price Rule \*
discount 1
Edit Rule | Create New Rule

Single Commission Program

Commission Type
Percent Order Amount

Commission Value \*
5

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

Programs
Back
Save and Continue Edit
Save Program

Program Information

Program Type \*
Pay Per Click

Is Active
☒ Yes

Is Single Tier
☒ Yes

Name \*
Affiliate Click

Description

Click Configuration

Limit Click Per Day \*
25
Maximum click per day that will receive commission

Single Commission Program

Commission Value \*
5

## Manage Campaign

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

+ On **Campaign** Page

## Campaign Information

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

Campaign Details

NEW CAMPAIGN

Campaign Information

Banners

Campaign Information

Campaign Name \* Sale 10% mango

Is Active ☒ Yes

From \* 01/1/2021

To \* 01/31/2021

Description

← Back

Save Campaign

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## Banner

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

Campaign Details

NEW CAMPAIGN

Campaign Information

Banners

Banners

Create a banner

Title	Link	Click(Unique/Raw)	Image	Action
Sales	<a href="https://affiliate.izysync.com/">https://affiliate.izysync.com/</a>	1/1		Select ▾

← Back

Delete

Save Campaign

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## 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.

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.

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# 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.

View Withdrawal

← Back

Decline Request

Approve Request

Withdrawal details

Customer Details

Customer ID	49
Customer Name	le hai
Withdraw Amount	\$800.00
Time Created	1/18/21, 6:10 AM
Status	Pending

Customer ID	49
Customer Name	le hai
Balance	\$2,000.00
Total Commission	\$2,000.00
Total Withdraw	\$0.00
Time Created	1/18/21, 3:32 AM
Status	Approved

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# Manage Transactions

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

Affiliate Transactions

Create Transaction

Filters

Default View

Columns

Export

2 records found

20

per page

1

of 1

	Transaction ID	Status	Program	Email	Receive Money	Subtract Money	Description	Create At	Update At	Action
<input type="checkbox"/>	2	RECEIVED	Affiliate Click	lehai@gmail.com	2000.0000	0.0000	Received commission for clicked banner	Jan 18, 2021 6:09:02 AM	Jan 18, 2021 6:09:02 AM	<a href="#">Edit</a>
<input type="checkbox"/>	1	RECEIVED	teste afiliados	roni_cost@example.com	1.9500	0.0000	Received commission for your sales customer from order #33	Jan 15, 2021 5:20:06 PM	Jan 15, 2021 5:20:06 PM	<a href="#">Edit</a>

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# 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



Search entire store here... 



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[Men](#)
[Gear](#)
[Training](#)
[Sale](#)

My Account

[My Orders](#)
[My Downloadable Products](#)
[My Wish List](#)

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[Address Book](#)
[Account Information](#)
[Stored Payment Methods](#)
[My Product Reviews](#)
[Newsletter Subscriptions](#)

---

[Affiliate Program](#)
[Affiliate Materials](#)
[Transactions](#)
[Leads](#)
[Withdrawals](#)
[Policy](#)

## My Account

### Account Information

**Contact Information**

le hai  
lehai@gmail.com  
[Edit](#) | [Change Password](#)

**Newsletters**

You aren't subscribed to our newsletter.  
[Edit](#)

---

**Address Book** [Manage Addresses](#)

---

**Default Billing Address**

You have not set a default billing address.  
[Edit Address](#)

**Default Shipping Address**

You have not set a default shipping address.  
[Edit Address](#)

---

**Affiliate**

---

**Your Referrer Unique Code**

[Compare Products](#)

You have no items to compare.

- **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  
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.

# My Account

## Referral Link & Code

Your Unique Register Link: <https://affiliate.izysync.com/customer/account/create/code/HN4Clq0rwB51TkGvDm7s/> [Copy](#)

Your Unique Code: **HN4Clq0rwB51TkGvDm7s** [Copy](#)

## Coupon Codes

Affiliate Program	Coupon Code
Affiliate Discount	U8om3KxTLvHoq5zh <a href="#">Copy</a>

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

1 Item

Show  per page

## Campaigns

Campaign title	Description	Start time	End time	Action
Sales 10%		2021-01-01	2021-01-31	<a href="#">Hide</a>
		Title	Url	Click (Unique/Raw)



Sales <https://affiliate.izysync.com/?code=HN4Clq0rwB51TkGvDm7s&bannerid=1> [Copy](#)

1/1

```
<a target="_blank" href="https://affiliate.izysync.com/?code=HN4Clq0rwB51TkGvDm7s&bannerid=1"></a>
```

[Copy](#)

+ Customers can view the affiliate programs.

[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
		Tier	Commission	
teste afiliados	Pay Per Sales	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.

- 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  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.

[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](#)

## My Account

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

1 Item


Show  per page

### Compare Products

You have no items to compare.

 **Withdraw:**



Search entire store here...  

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[My Account](#)  
[My Orders](#)  
[My Downloadable Products](#)  
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[Affiliate Program](#)  
[Affiliate Materials](#)  
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**Withdrawals**

[Policy](#)

## 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	<a href="#">Cancel</a>

1 Item

Show [10](#) per page

### + Policy



Search entire store here...  

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[My Account](#)  
[My Orders](#)  
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[Affiliate Program](#)  
[Affiliate Materials](#)  
[Transactions](#)  
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[Withdrawals](#)

**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.