

Peexl LLC

# Refer a Friend

User guide

# Refer a Friend Module

## Installation

**Step 1:** Download the zip package of the module from “My Downloadable Products” in Peexl store.

**Step 2:** Extract the zip package into a folder on your computer. You should see the following folders in the module: app.

**Step 3:** Disable Magento Cache: Login backend and go to System > Cache Management. Select all cache and click Disable button.

**Step 4:** Use FTP client (Filezilla, Winscp...) to upload app, skin folders to root folder of your Magento site.

**Step 5:** Enable Magento Cache.

## Some Common problems

Here are some common problems you can face when installing the Module:

- See 404 Page Not Found when going to System > Configuration > Peexl > “Refer Friends Options” in backend.  
If you see this error, don’t worry. You just need to log out the backend and then log in again. The problem should be gone now.

## Configuration

Go to System> Configuration > Peexl > “Refer Friends Options”

### Refer Friends Options

Registration Options		
Give bonus for referral registration:	<input type="text" value="Yes"/>	[STORE VIEW]
Bonus amount:	<input type="text" value="5"/>	[STORE VIEW]
Referral Purchase Option		
Give bonus for referral purchase	<input type="text" value="Yes"/>	[STORE VIEW]
Bonus Settings		
Use bonuses for purchase	<input type="text" value="Yes"/>	[STORE VIEW]
1 Bonus equals :	<input type="text" value="0.25"/>	[STORE VIEW]

Referral Invitation Form	
Enable Invitation Form:	<input type="text" value="Yes"/>
Transaction Email ID:	<input type="text" value="1"/>

Social Networks	
Enable Social Networks	<input type="text" value="Yes"/>
Enable Facebook	<input type="text" value="Yes"/>
Enable Twitter	<input type="text" value="Yes"/>
Enable Google Plus	<input type="text" value="Yes"/>

## I. Registration Options

Here you can choose whether to give bonus for referrals registration and the amount of bonuses that are given for the registration.

## II. Referral Purchase Option

Here you can choose whether to give bonus for referrals purchases or not.

## III. Bonus Settings

Here you can choose whether to use bonuses for purchase or not.

If the “Yes” option is chosen then “1 Bonus is equal to” needs to be specified. This option is needed to exchange bonuses for currency. For example if your currency is USD and you set this option to 0.25 this means that 1 Bonus equals to 25 cents. Then user can use the accumulated bonuses(money) for his own purchases.

But if “No” for “Use bonuses for purchase” option is selected then the user discount is calculated according to the rules that can be defined in the Referrals > Manage Bonus Discounts grid from the admin menu.

## IV. Referral Invitation Form

Here you can choose whether to use or not the referral invitation form. This form allows the customer to invite friends by email.

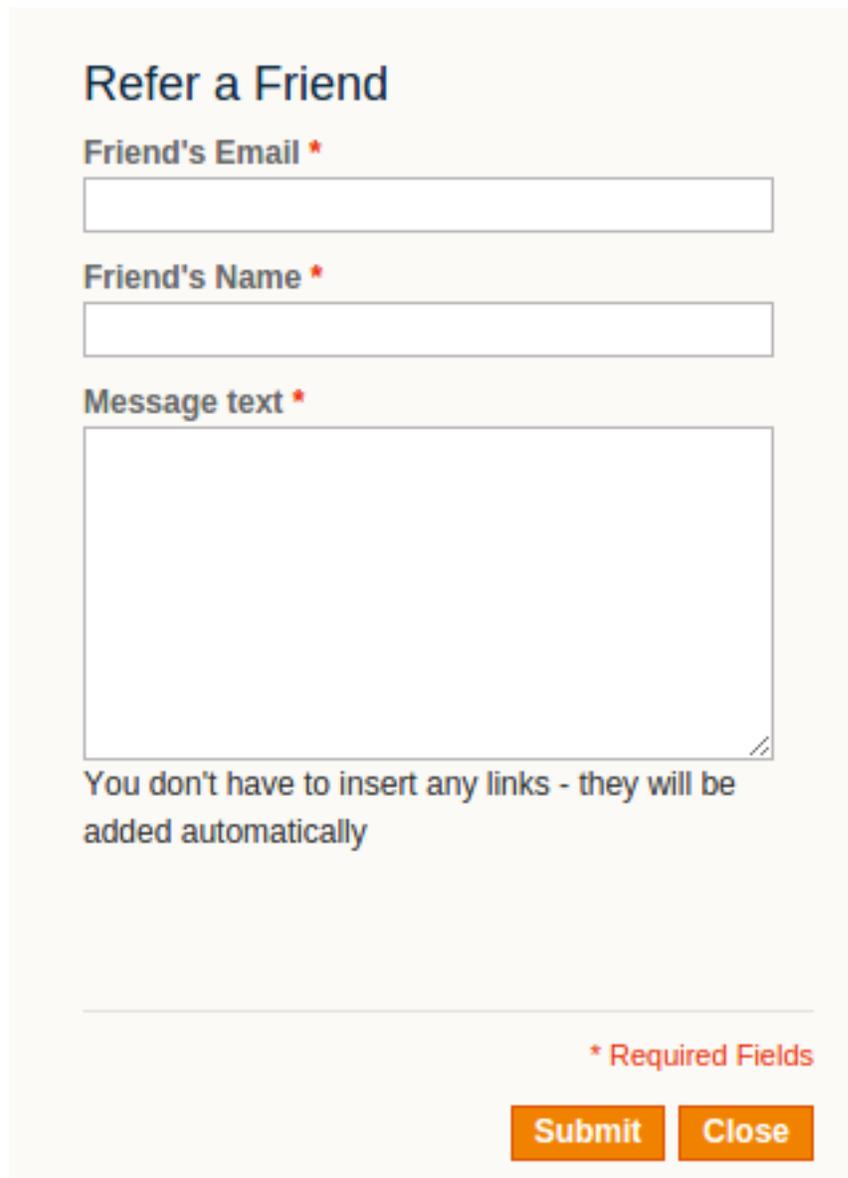
**If you enable this option you must enter the Transactional Email**

\*Template ID which was installed with your module (The name of transactional email template is “**Referral Invitation Email Template**”) and you can find it in System->Transactional Email

\*\*Also the administrator can modify the template but do not delete the predefined variables from template if you want the link and the customer message to be sent.

{{var customer\_text}}

{{var referal\_url\_link}}



The image shows a web form titled "Refer a Friend". It contains three input fields: "Friend's Email", "Friend's Name", and "Message text". Each field is marked with a red asterisk to indicate it is required. The "Message text" field is a larger text area. Below the text area, there is a note: "You don't have to insert any links - they will be added automatically". At the bottom right, there is a legend: "\* Required Fields". Below the legend are two orange buttons: "Submit" and "Close".

**Refer a Friend**

**Friend's Email \***

**Friend's Name \***

**Message text \***

You don't have to insert any links - they will be added automatically

\* Required Fields

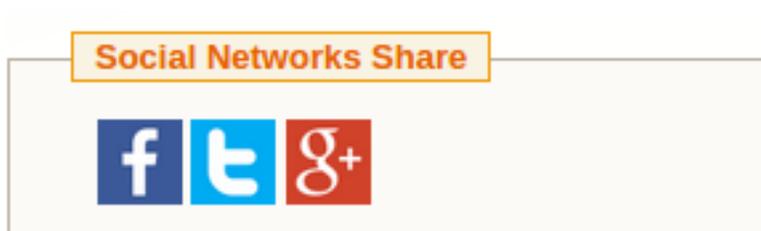
**Submit** **Close**

## V. Social Networks

Here you can enable or disable the social network share of the referral registration link. And also you can select which social network you want the customer to use.

Available social networks are :

- facebook
- twitter
- google plus



## Referral's Purchase bonus management

Go to Referrals > Referral's Orders Rules from the admin menu.

**Referral's Orders Rules** + Add new Rule

Page 1 of 1 pages | View 20 per page | Total 6 records found Reset Filter Search

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected Actions Submit

	Total FROM	Total To	Bonus
Any	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	1.00	100.99	10
<input type="checkbox"/>	101.00	250.99	20
<input type="checkbox"/>	251.00	750.99	50
<input type="checkbox"/>	751.00	1500.99	100
<input type="checkbox"/>	1501.00	2550.99	200
<input type="checkbox"/>	2551.00	1000000.00	500

Here you can set the bonus rules for the referrals orders depending on the order amount.

### Important!

These rules works only in case of "No" option for "Use bonuses for purchase" from the configuration.

## Manage Bonus Discounts:

Go to Referrals > "Manage Bonus Discounts" from the admin menu.

**Manage Bonus Discounts** ➕ Add new Discount

Page  of 1 pages | View  per page | Total 2 records found Reset Filter Search

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected Actions  Submit

	Bonus Amount FROM	Bonus Amount To	Discount value
Any <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	1	1000	1.00 %
<input type="checkbox"/>	1001	2000	2.00 %

Here you can set up the discount user gets according to accumulated bonuses. The discount can be fixed or a percentage value.

**Important!**

These rules works only in case the "No" option for "Use bonuses for purchase" from the configuration is selected.

To see all the transaction of bonuses go to Referrals > "Bonuses transactions" from the admin menu.

**Bonuses transactions**

Page  of 1 pages | View  per page | Total 9 records found Reset Filter Search

Customer	Transaction Bonuses	Description	Created At
From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	<input type="text"/>	From: <input type="text"/> To: <input type="text"/>
test.net@gmail.com		5 Bonus For Friend Registration	Dec 22, 2013 3:00:00 AM
test.net@gmail.com		5 Bonus For Friend Registration	Dec 23, 2013 3:00:00 AM
test.net@gmail.com		5 Bonus For Friend Registration	Dec 24, 2013 3:00:00 AM
test.net@gmail.com		20 Bonus For Friend Purchase	Dec 24, 2013 3:00:00 AM
test.net@gmail.com		500 Bonus For Friend Purchase	Dec 26, 2013 3:00:00 AM
test.net@gmail.com		-132 Customer Spent Bonus	Jan 2, 2014 6:13:00 AM
test.net@gmail.com		-135 Customer Spent Bonus	Jan 2, 2014 7:10:00 AM
test.net@gmail.com		-40 Customer Spent Bonus	Jan 1, 2014 6:00:00 AM
test.net@gmail.com		-40 Customer Spent Bonus	Jan 6, 2014 2:41:43 PM

To see some referral statistics go to Referrals > "Referral Statistics" from the admin menu.

**Referral Statistics**

Page  of 1 pages | View  per page | Total 5 records found Reset Filter Search

Customer	Registered referrals	Nr. Of Referrals Purchases	Amount Of Referrals Purchases	Bonuses from registration	Bonuses from referral purchases	Customer spent Bonuses	Customer available Bonuses
From: <input type="text"/> To: <input type="text"/>							
test.net@gmail.com	3	2	\$4,634.97	15	520	-347	188

## Customer account:

Go to My Account > "Referrals" from the admin menu.

Here customer can see his referral statistics, current bonuses or discount value

**MY ACCOUNT**

- Account Dashboard
- Account Information
- Address Book
- My Orders
- Billing Agreements
- Recurring Profiles
- My Product Reviews
- My Tags
- My Wishlist
- My Applications
- Newsletter Subscriptions
- My Downloadable Products
- Referrals

**REFERRALS**

1 Item(s) Show 10 per page

Email	Purchases Qty	Total Amount	Total Bonuses
romanciuctv@mail.ru	3	\$4,816.91	525

1 Item(s) Show 10 per page

**Referral invitation link**

<http://mage.dev/customer/account/create/?referral=c81e728d9d4c2f636f067f89cc14862c>

**BONUSES**

Description	Bonuses
From Referral Registration	15
From Referral Purchases	520
Spent	-347
<b>Total</b>	<b>188</b>

**Discounts**

1.00%

**Did you know?**  
 Our customer service is available 24/7  
**(555) 555-0123**  
 Hold on, help is on the way.



## Support

If you need support related to Peexl extension usage, feel free to contact at [support@peexl.com](mailto:support@peexl.com)