

# Refer a Friend

Created by Unknown User (malynow), last modified by Anton Lashuk on янв 06, 2019

- Installation
- Migration from Refer a Friend 1.X
- Configuration
  - Global settings
    - General tab
    - Referral
    - Invitation
    - Advanced
  - Managing rules
  - Other pages
  - Custom position
- Uninstallation
- Troubleshooting

Having hard time finding an answer to your question?

Check out our Knowledge Base.

Extension page: <http://ecommerce.aheadworks.com/magento-extensions/refer-a-friend.html>

**IMPORTANT NOTE FOR users of Refer a Friend 1.X**  
 Versions 1.X and 2.X are not compatible. This means that 2.X can not use the rules and manage discounts from 1.X. The migration script included into the package will import the lists of existing referrers and referrals only (see the details below). Due to significant changes in the extension's design, existing discounts can not be imported and will be lost. You will need to add the bonuses manually (new version allows that). If you are currently running a referral campaign with RAF 1.X, please consider ending it prior to the installation of the new version.

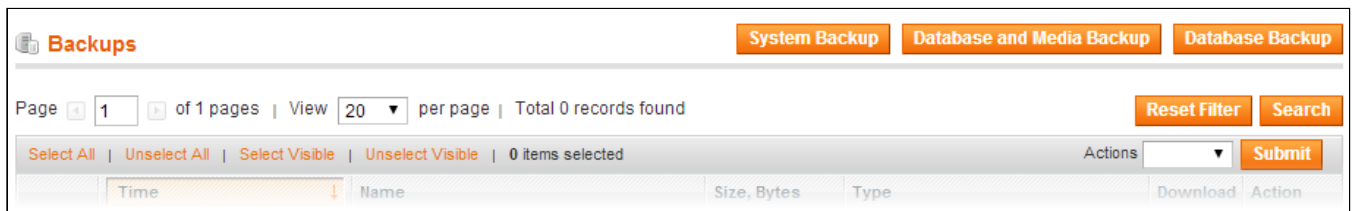
## Installation

1. Backup your web directory and store database.

[Click to view details](#)

You can make backup copies with any tool you find appropriate

If you are going to use the native Magento backup function, navigate to **System -> Tools -> Backups** and perform **System** and **Database** backups



2. Log in to the Magento backend

3. Disable compilation

[Click to view details](#)

Navigate to **System -> Tools -> Compilation**.

If Compiler status is Disabled, you can skip to the next step

If Compiler is enabled, disable it.

**Compilation** Disable Run Compilation Process

**Compilation State**

Compiler Status	Enabled
Compilation State	Compiled
Collected Files Count	7505
Compiled Scopes Count	4

**IMPORTANT:** after the extension is installed, you can enable the compilation again; **IT IS CRUCIAL** that you use **"Run Compilation Process"** function, not just "Enable button"

**Compilation** Enable Run Compilation Process

**Compilation State**

Compiler Status	Disabled
Compilation State	Compiled
Collected Files Count	7505
Compiled Scopes Count	4

Installing an extension with the Compilation enabled will result in store downtime.

4. Flush store cache

Click to view details

You can flush the store cache in 2 ways:

- **via the backend:**

Navigate to **System -> Cache Management** menu, and click **Flush Magento Cache** button

**Cache Storage Management** Flush Magento Cache Flush Cache Storage

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

Cache Type	Description	Associated Tags	Status
<input type="checkbox"/> Configuration	System(config.xml, local.xml) and modules configuration files(config.xml).	CONFIG	ENABLED
<input type="checkbox"/> Layouts	Layout building instructions.	LAYOUT_GENERAL_CACHE_TAG	ENABLED
<input type="checkbox"/> Blocks HTML output	Page blocks HTML.	BLOCK_HTML	ENABLED

- **via filesystem:**

On your server, navigate to Magento root folder, then proceed to **/var/cache/**; delete all the content there.

5. Download the extension package from your account and extract the downloaded archive

6. Copy the content of **/Step\_1/** folder to your store's root directory

**If you are using a custom theme,**  
read the instructions here.

The extension comes with 2 design packages: **/base/default/** and **/rwd/default/** .

In case you are using a custom theme, it is recommended to copy the design files to your current theme's folders. In case there are several themes in use at the same store, the design files must be copied to each of them.

- Find this folder in the package: `/step_1/app/design/frontend/base/default/` ; copy its content to `/app/design/frontend/[your_package]/[your_theme]/`
- Find this folder in the package: `/step_1/skin/frontend/base/default/` ; copy its content to `/skin/frontend/[your_package]/[your_theme]/`

7. Copy the content of **/Step\_2/** folder to your store's root directory

8. Flush store cache again; log out from the backend and log in again.

## Migration from Refer a Friend 1.X

1. **Make sure that Refer a Friend 2 is installed successfully**
2. **Backup your database**
3. Copy the file **awraf\_export.php** to your store root folder if it was not copied during the installation.
4. Execute it under your browser, i.e. simply go to [http://YourStore.com/awraf\\_export.php](http://YourStore.com/awraf_export.php).
5. **After the migration is complete, make sure to delete the file awraf\_export.php by security reasons.**

## Configuration

### Global settings

The General Configuration section of the extension is located in **Refer a Friend** → **Configuration** (or **System** → **Configuration** → **aheadWorks Extensions** → **Refer a Friend** ).

### General tab

- **Calculate Purchase Amount As** ('Item Price' / 'Item Price + Tax') – This option defines whether the discount specified in the rules (see below) should be calculated considering tax settings.
- **Allow Usage With Coupons** ('Yes/No') - Determines whether the discount can be applied together with coupons and Shopping Cart Price Rules.  
*Both Coupons and Shopping Cart Price Rules have higher priority than the Refer a Friend discounts, so when set to 'No', this option will prevent customer from applying a discount if any Shopping Cart Rule has been triggered.*
- **Max discount % to order** – maximum amount of discount (percent type) which can be applied to an order. Depending on the rules settings, referrer can obtain quite a significant discount. This option will limit the possibility to use both fixed and percent discount types.  
*Example: a referrer earned 78% in total, but if this option is set to 15, the referrer can use*

General		
Calculate Purchase Amount As	Item price + Tax	[STORE VIEW]
Allow Usage With Coupons	Yes	[STORE VIEW]
Max discount % to order	50	[STORE VIEW]
Apply discount if cart total is equal or greater than	10	[STORE VIEW]
	<small>▲ Specify amount in base website currency</small>	
Minimum discount to be able to redeem	5	[STORE VIEW]
	<small>▲ Specify amount in base website currency</small>	

15% Off discount at a time only.

- **Apply discount if cart total is equal or greater than** – this option defines minimum cart total amount allowed for discount usage. This option works both for fixed and percent discount.  
*Example: If the option is set to 99, it will be impossible to apply a discount to a cart unless the current subtotal reaches \$99.*
- **Minimum discount to be able to redeem** – customer can not spend less than specified here. This option applies to fixed discount only.  
*Example: if this option is set to 25, Referrer can not use their discount at all, until they earn 25\$ or more. However, they still can apply their 10%.*

## Referral

- **Recognize referrals by** option defines how the extension should recognize referrals:
  - If **Referral Link** is selected new customers will only be considered referrals if they have proceeded to the store by the invitation link sent;
  - If **Email Address** is selected new customers will be considered referrals if they have registered the account under the same email address the invitation has been sent to.
- **Give bonus to referral for registration** (Yes/No) – determines whether referred friend will get any bonus.
- **Bonus type** (Fixed discount/Percent Discount)  
*Important: If Bonus type is **Percent Discount**, referrer will be able to use it indefinitely. However, admin can edit or delete this discount manually in Refer a Friend → Manage Discounts later.*
- **Bonus amount** - The amount of discount which referral will earn after registering at the store.  
Note, if referral logs in (rather than create a new account on the site), they are considered to be an existing customer and therefore, will not earn the bonus. Referrer will not receive any bonus for that referral's activity either.

Referral		
Recognize referrals by	Referral link	[STORE VIEW]
	▲ Referral Link - a customer becomes a referral only after following referral link. Email Address - a customer becomes a referral if they register with the email an invitation has been sent to.	
Give bonus to referral for registration	Yes	[STORE VIEW]
Bonus type	Fixed discount	[STORE VIEW]
Bonus amount	1	[STORE VIEW]

## Invitation

- **Allow invitation** (Yes/No) – When set to 'No',

only Broadcast links and Sharing features are available.

- **Email sender and Select email template** - these self-explanatory options define the Sender and the Template of the Invitation message.
- **Redirect to:** Here one can define the URL of the page where referral will be redirected to after clicking the referred link.  
*The option should have the format <http://yourstore.com/somepage.html>*

### Advanced

- **Reset all rule activities** – this button will reset all transactions, discounts and statistics. This option will not delete existing rules, though.

## Managing rules

The rules can be created and managed in **Refer a Friend** → **Manage Rules** backend tab.

After you click **Add New Rule** button, make sure to set it up properly prior to saving. *Some of the rule parameters are not editable after a rule gets saved.*

The options are:

- **Rule Name** — a text field, you can specify any recognizable name
- **Rule Type** – there are 3 different types:

1. **Store sign up.** Referrer will receive a bonus for the sign ups of his referrals (no purchases required).
2. **Discount for a number of items.** Referrer will get a bonus for the certain (or greater) amount of items purchased by referral(s). Since the version 2.1.1 this option works 'per-friend'.
3. **Discount for referrals' purchase amount.** When referral(s) spend a certain sum, referrer will get a bonus. Since the version 2.1.1 this option works 'per-friend'..

*Discounts are added to referrer when referral's order(s) obtain 'Invoiced' status.*

- **Bonus Type** there are two options for each rule type: Fixed flat rate and percent discount. Customer can use both percent and fixed discount on a purchase at a time.

Note, if several rules with percent discounts triggered at a time, a greater discount will be used only, without summarizing them. *For example,*

there are two rules set: the first one provides 20% off, another one gives 30%. If both rules have been triggered, referrer will receive 30% off (the greater discount of those two will be applied).

**Important:** In current version, the percent discount does not have an expiration option, so basically, it is a lifetime discount. However this discount can be canceled by admin. Also, it's amount can be limited with the option **Max discount % to order** in **Refer a Friend** → **Configuration** → **General**.

- **Active From \*** Specify the date when the rule is to start working.

- **Target \*** This is one of the most important options, which depends on Rule Type:

1. if Rule Type is '**Store sign up**' → Target = **Quantity of sign ups** required to trigger the rule.
2. if Rule Type is '**Discount for a number of items**' → Target = **Number of items** which referrals have to purchase to trigger the rule.
3. if Rule Type is '**Discount for referrals purchase amount.**' → Target = **Minimal amount** which should be spent by referrals in the store to trigger the rule.

Rule Type	Store sign up
Bonus Type	Fixed flat rate discount for signup quantity
Active From *	02/11/2014 12:48 PM
Target *	5
Bonus Amount *	10
	<small>▲ Enter amount in base website currency</small>

- **Bonus Amount \*** Depending on Bonus Type, it can be set in base website currency or in percent.

- **Trigger limit** - This option defines how many times the rule bonus can be earned by the referrer. *E.g., if you set up a rule to give a bonus for 5 items purchased by the customer's referrals, and set the **Trigger Limit** to "1", the bonus will only be granted once, when the rule amount is reached for the first time. If the **Trigger Limit** is set to "2", the bonus will be granted for the referrals' purchasing 5 and 10 items. If the **Trigger Limit** = "3", the bonus will be granted for 5, 10 and 15 items.* Also, check the description of the option '**Save Remainder For Later Usage**'. If the **Trigger Limit** option is left empty (i.e., "no limit"), the referrer will earn the bonus each time the Target amount is reached.

Trigger limit	
Save remainder for later usage	No

- **Save Remainder For Later Usage** - This option complements the **Trigger Limit** option, and defines how the target amount is calculated for a multi-trigger rule. This is how it works: *The rule is to give a discount for 3 items purchased. If the option to save remainder is 'No', a friend must purchase at least 3 items in a single order. If the option is set to 'Yes', the quantity of purchased items can be split into several orders: the friend can purchase 2 items in one order, and then 1 item in the next one.*

- **Rule Priority** – the higher the value is, the more priority the rule has.
- **Stop Further Rules Processing:** When set to 'Yes', all rules with priority lower than the current one will not be triggered.
- **Status** Enabled/Disabled
- **Store view \*** Choose store view where the rule is active.

After the rule is created, click **Save** or **Save and Continue Edit**.

Note, after the rule is saved, the options **Rule Type**, **Bonus Type** and **Active From** can not be modified.

## Other pages

- **Refer a Friend** → **Manage Discounts** and **Refer a Friend** → **Manage Transactions** pages are generally the same. The difference is Manage Discounts displays the information about percent-rate bonuses, while Manage Transactions shows transactions with flat amount. Admin has a possibility to add both flat and percent discounts manually. In Manage Transactions it is also possible to subtract balance by entering a negative value.
- **Refer a Friend** → **Statistics** The page which shows statistics by referrer. It is possible to export it to CSV or XML file format.

## Custom position

To insert "Invite a friend" button into CMS block or page use the following variable:

```
{{block type="core/template" name="invite_block" template="aw_raf/invite_button.phtml"}}
```

- Make sure to remove all buttons before uninstallation.
- Do not insert this code directly into phtml.

## Uninstallation

Disable compilation, in case it is enabled.

1. Remove all extension's buttons and widgets inserted manually.

2. Login to your FTP, navigate to **app/etc/modules/**
3. Open the file AW\_Raf.xml and change the following line:

```
<active>true</active>
```

to

```
<active>false</active>
```

Now your Magento is unaware of the existence of this module.

4. Clear the cache under **var/cache**
5. Make sure that the site is working properly, otherwise roll back the changes and apply to our [technical support](#).
6. If everything works fine, it is safe to delete the files of the extension.
7. In case you need to clean the database, **make a backup** and then run the following query in MySQL:

```
drop table if exists `aw_raf_rule`;  
drop table if exists `aw_raf_activity`;  
drop table if exists `aw_raf_transaction`;  
drop table if exists `aw_raf_discount`;  
drop table if exists `aw_raf_referral`;  
drop table if exists `aw_raf_trigger`;  
drop table if exists `aw_raf_orderref`;  
drop table if exists `aw_raf_statistics`;  
delete from `core_resource` where code = 'awraf_setup';
```

**Note, if you are using the tables with prefixes, you have to specify them in all table names before running the query above.**

- If you are not sure how to do that or expect any troubles with it, please contact your server administrator regarding the matter
- If you remove the tables as it is described above, you will need to create all rules again after the extension is reinstalled. All transactions and statistics history will be lost as well.

## Troubleshooting

**After the extension installation the store gives an error, or blank page, or suggests to start Magento installation procedure.**

Change the owner of the extracted extension files to the web server user and set 775 permissions on them. Clear the store cache and try again.

**After the installation System->Configuration->Refer a Friend returns 404 error.**

Logout from backend and login back again.

**There is no aheadWorks extensions under my configuration section, or having the extension tab clicked I get a blank page, or Access Denied error.**

Clear the store cache, browser cookies, logout and login again.

**My configuration changes do not appear on the store.**

Clear the store cache, clear your browser cache and domain cookies and refresh the page.

You can always find the latest version of the software, full documentation, demos, screenshots and reviews at <http://ecommerce.aheadworks.com>



License agreement: <http://ecommerce.aheadworks.com/LICENSE-M1.txt>

Contact us: <http://ecommerce.aheadworks.com/contacts/>

**Copyright © 2019 aheadWorks Co. <http://www.aheadworks.com>**

Нравится  
это

Станьте первыми кому понравится

Ни одной