amasty

For more details see how the Affiliate for Magento 2 extension works.

Guide for Affiliate for Magento 2

Magento 2 *Affiliate* extension lets store admins run full featured affiliate programs to effectively drive sales from additional channels. Due to the module, administrators will be able to provide affiliates with ready-to-use promo materials and detailed stats reports. Clear settings ensure easy affiliate accounts management, let store admins regulate commissions and track withdrawals.

- Run multiple affiliate programs at a time
- Configure commissions for each particular program
- Set up discounts and payout requirements
- Easily upload promo materials
- Manage affiliate accounts and transactions

Configuration Settings

To configure general extension settings please go to **Stores → Configuration → Amasty Extensions → Affiliates**.
We refactored the extension's codebase to ensure maximal performance and improved stability with the latest Magento versions. Legacy code which was used for legacy Magento versions support has been removed. Now the extension is compatible with **Magento v2.3.1 and higher**. Please, be careful when updating the module, if your Magento version is older than v2.3.1

General Settings

Add Affiliate Link to Footer - enable this option to add a link to the Affiliate landing page to your store footer.

Cookie Expiration (Days) - Specify a custom cookie expiration period. By default, it's set to 365 days. It means that once a customer comes to a publisher's website using an affiliate link, the store page creates a cookie. If a referred visitor comes to your site using an affiliate link and completes any order within 365 days, he (she) will receive a discount and the affiliate will get a commission. After this period the affiliate won't earn any commission, a referred customer won't get a discount.

Notifications Autosubscription

Checked "Email Notifications" by Default - If the option is enabled, the "Email notifications" subscription will be automatically checked in the affiliate account.

See the example below:

Affiliate URL Settings

Affiliate General URL - Specify the custom text that will replace **amasty_affiliate** in the URL of the customer account.

Customer Parameter - Specify the code that will be used in URLs such as: ?c=123

Affiliate code length - The code should contain from 4 to 31 symbols. '10' is set by default.

Commission Workflow

Add Commission When Order Obtained Status - Choose the order status that will trigger adding an affiliate commission.

Subtract Commission When Order Obtained Status - Choose the order status that will trigger commission subtraction.

Subtract Commission When Creditmemo is Created - enable this option for Pay Per Sale programs only when a Creditmemo is created.

Commission Holding Period (Days) - Specify the commission 'on hold' period after which the commission will be added to the affiliate's balance. While the commission in on hold it can't be used for withdrawal requests.

Withdrawal Configuration

Minimum Withdrawal Amount - Set the minimum amount that can be specified by an affiliate within one request. E.g. if the amount equals to 50, affiliates can't request withdrawals lower than the specified amount.

The Minimum "Available" Balance to Request Withdrawal - If an affiliate balance is lower than the specified amount, he/she won't be able to request any withdrawals.

Email Notifications

In this section you can easily activate different email notification types for affiliates and store admins. If you want to edit ready-to-use templates or create a new one please go to **Marketing → Communications → Email Templates**.

⌃ To Affiliate

Welcome Email After Sign Up
[global]

| Yes ▾ |

Template
[global]

| Welcome email after sign up ▾ |

Account Status Change
[global]

| Yes ▾ |

Template
[global]

| Account status change (Defa ▾ |

New Transaction is Created
[global]

| Yes ▾ |

Template
[global]

| New transaction (Default) ▾ |

Transaction Status is Changed
[global]

| Yes ▾ |

Template
[global]

| Transaction status change (D ▾ |

Withdrawal Status is Changed
[global]

| Yes ▾ |

Template
[global]

| Withdrawal status is changed ▾ |

Refer Friends Settings

Public AddThis Account ID ra-5968d339b0751a2f is used for testing purposes only. Please click here to get your own AddThis Account ID.

Refer Friends

AddThis Account ID
[global]

ra-5968d339b0751a2f

Public AddThis Account ID ra-5968d339b0751a2f is used for testing purpose. Please click here to get your own AddThis Account ID.

Refer Friends Page Content
[global]

Here you can share the store home page link with your friends. To share the specific product page or category page just open it in the browser and use the sharing widget right from the page.

Traffic Sources Page Content
[global]

Here you can find the traffic information from the different sources. Share more, earn more!

Enable on Product Listing Page
[global]

Yes

Enable on Product Details Page
[global]

Yes

Enable on My Account / Affiliate menu
[global]

Yes

Refer Friends Page Content - Specify a custom text that will be displayed on the affiliate account page in the corresponding tab.

Traffic sources page content - specify a custom text that will be displayed in the customer account page for the 'Traffic Sources' tab.

Enable on Product Listing Page, **Enable on Product Details Page**, **Enable on My Account / Affiliate menu** - all these settings are used to display the social buttons for registered affiliates on store pages.

Checkbox Text - the Terms and Conditions checkbox is displayed in the affiliate account registration page. Here you can specify a custom text that will be placed with the checkbox.

Checkbox is Checked by Default - Choose whether the Terms and Conditions checkbox will be checked by default.

Manage Programs

To edit or create affiliate programs go to **Marketing** → **Affiliate** → **Manage Programs**.

Affiliate Programs - on the affiliate programs grid store admins will see all already created programs. It's also possible to view the details of each particular program. To add a new program please click the **Add New Program** button.

Create a New Program

Program Name - Specify a program name that will be used in the admin panel as well as shown in an affiliate account.

Status - enable/disable the program.

Shopping Cart Price Rule - The module uses the standard Magento shopping cart price rules to let you set discounts for referral customers. It's possible to use a different rule for each new affiliate program. You can use and edit either the default rule or create a new one. Pay attention that only those rules will be available, where the option **Coupon** is set to **Specific Coupon** and the **Use Auto Generation** option is enabled.

While creating a new rule, please, use Specific Coupons and enable the **Use Auto Generation** option. The module doesn't support coupons specified manually.

Commission Configuration

Pay Commission Pay per Sale ▾

Commission Type Percent ▾

Commission Value 5.0000

Use different commission from 2nd order of a Customer. Yes ▾

Select "No" to apply the above commission to all orders.

Commission Type (from 2nd order) Percent ▲

Commission Value (from 2nd order) 3.0000

Keep paying commissions to the first affiliate Yes ▾

If 'Yes': When a customer first buys products through the affiliate A's link, but later makes purchases using B's links, the transaction will still be counted for the affiliate A.

Pay Commission- The module offers two commission variants:

- **Pay Per Sale** - an affiliate will get a commission from each order made by his/her referral.
- **Pay Per Profit** - an affiliate will get a commission from the particular orders value. For this type, you need to specify **Amount Pay Commission** setting. E.g. If an 'amount pay commission' equals to $500, the affiliate will receive the commission only when the overall orders amount becomes equal or higher than $500.

Commission Type - Use either Percent or Fixed commission type.

Commission Value - Specify the commission value.

Use different commission from 2nd order of a Customer - The module lets specifying a different commission starting from the 2nd order made by a referral. This option is available for the Pay Per Sale type only.

Keep paying commissions to the first affiliate - If the option is enabled, when a customer first buys products using the affiliate A's link but later makes purchases using the affiliate B's links, the transaction will still be counted for the affiliate A.

Customers and Customer Groups ✎ ⌃

> ℹ️ Unless a particular Group (or Customer) is selected here, any Customer who is allowed to be an Affiliate may issue Coupons and Affiliate links related to this Program.
> Customers selected in Customers list will be allowed regardless of this program's Customer Groups configuration.
> Does not affect which Customers may use Affiliate links and Coupons.

Customer Groups

    General
    Wholesale
    Retailer

Customer IDs   2,3

Comma-separated.

List your customers: [Add Customers]

In the **Customers and Customer Group** tab store owners can adjust the program more precisely by adding certain customers of choice. It is highly helpful in cases when you want to promote top-performing affiliates and give them the perks of a more advanced tier of the affiliate program.

Customer Group - choose the main customer group, to which the newly created affiliated program will be applied.

Customer IDs - enter the IDs of specific customers that you want to allow using this program. In this field, you need to enter the IDs manually. Of, use the **List Your Customers** button **Add Customers** to open a pop-up window with a list of all customers.

This is an example of how the pop-up with a list of all customer looks like:

Select Customers

Cancel   **Add Selected Customers**

▼ Filters

3 records found (3 selected)   20 ▼ per page   <   1   of 1   >

☑ ▼	ID ↓	Name	Email	Group	Phone	ZIP	Country	State/Province	Customer Since
☑	1	Veronica Costello	roni_cost@example.com	General	(555) 229-3326	49628-7978	United States	Michigan	Feb 22, 2017 11:20:01 AM
☑	2	Jane Green	jane.green@example.com	General					Aug 22, 2017 3:09:50 PM
☑	3	Maksim Quivee	maksim.quivee@example.com	General					Jun 5, 2020 8:23:49 AM

Select the customers whom you want to grant permission to use this affiliate program.

Kindly note that by adding customers in the **Customers and Customer Group**, the extension will allow them to use the specified affiliate program regardless of their customer group.

For example, you have User A in the general group with ID=352. User A brings lots of value to your store, as his referral links are popular and generate many purchases. You agreed to move User A to a more advanced affiliate program for wholesalers, named 'Special Plan'. To do that, simply go to the 'Special Plan' settings and enter the number '352' (User A's ID) in the **Customer IDs** setting of the **Customers and Customer Group** tab. Then, the affiliate program 'Special Plan' will appear in User A's customer account. But User A still will be a General group customer.

In case changes in Customer Group for affiliate-user or affiliate program settings led to the exclusion of affiliate-user from the affiliate program, the coupon codes generated for this affiliate will stop working.

Manage Accounts

To create a new affiliate account from the admin panel or to manage already existing ones go to

amasty

Marketing → Affiliate → Manage Accounts.

All the existing customers have the opportunity to create affiliate accounts. Let's see what the process is.

At first, a customer in his customer account should go to the **Affiliate Settings** tab and agree with **Terms and Conditions**.

Remember, that you can create affiliate accounts on the grid only after the customer agreed with terms and conditions in his customer account.

To add a new account click the **Add Account** button and fill in affiliate information like you usually do when creating a customer from the admin panel.

To see the details of a specific affiliate, please click the **Edit** link for the corresponding affiliate on the grid.

On each affiliate account page you'll find the following info:

- General Information

Veronica Costello

← Back   Reset   Save and Continue Edit   **Save**

General Information ⌃

Status	Enabled ▾
Terms and Conditions	Accepted ▾
First Name	Veronica
Last Name	Costello
Email Address	roni_cost@example.com
Customer Account	Veronica Costello
Receive Notification Emails	Yes ▾

Payment Information ⌄

- Payment Information

amasty

Veronica Costello

← Back   Reset   Save and Continue Edit   **Save**

General Information ⌄

Payment Information ⌃

PayPal Email Address	paypal@example.com
Referring Website	referring-website.com
Balance	$108.00
On Hold	$0.00
Total Commission	$158.00
Commission Paid	$50.00

Coupons ⌄

- Coupons

Veronica Costello

← Back   Reset   Save and Continue Edit   **Save**

General Information   ⌄

Payment Information   ⌄

Coupons   ⌃

▼ Filters   👁 Default View ▾ | ⚙ Columns ▾

3 records found   20 ▾   per page   ‹   1   of 1   ›

Program Name	Coupon	Custom Coupons	Action
Pay per Sale	0FOEEnBBT42i36XGPY2k	AUTUMN_COLLECTION_SALE, SUMMER_COLLECTION_SALE	Edit
Pay Per Profit	mee23rObwxqVUg4sVCy	NEW_COUPON_OCTOBER	Edit
Advanced Affiliate Program	YN9SGUN719ZP	COUPON-SPECIAL-OFFERS	Edit

Transactions   ⌄

You may assign to affiliates as auto-generated coupon codes so custom ones.

Add Custom Coupons

Cancel **Save**

Code *	Actions
AUTUMN_COLLECTION_SALE	🗑
SUMMER_COLLECTION_SALE	🗑

Add Row

- Transactions

Veronica Costello

← Back   Reset   Save and Continue Edit   **Save**

General Information ⌄

Payment Information ⌄

Coupons ⌄

Transactions ⌃

▼ Filters   👁 Default View ▾ | ⚙ Columns ▾

11 records found   20 ▾ per page   ‹   1   of 1   ›

Date Updated	Amount	Status	Message
Aug 8, 2019 9:29:06 AM	$70.40	Completed	Commission for order #000000008
Aug 8, 2019 9:31:40 AM	$15.00	Completed	Per Profit
Aug 8, 2019 9:31:40 AM	$15.00	Completed	Per Profit
Aug 8, 2019 9:33:14 AM	$15.00	Completed	Per Profit
Aug 8, 2019 9:38:36 AM	$69.60	Completed	Commission for order #000000011
Aug 8, 2019 9:39:16 AM	$50.00	Completed	Withdrawal

- Withdrawals

Veronica Costello

← Back   Reset   Save and Continue Edit   **Save**

General Information	⌄

Payment Information	⌄

Coupons	⌄

Transactions	⌄

Withdrawals	⌃

🔽 Filters   👁 Default View ▾ | ⚙ Columns ▾

1 records found   20 ▾ per page   ‹   1   of 1   ›

Date Updated	Amount	Status
Aug 8, 2019 9:39:16 AM	$50.00	Completed

You can also enable or disable a customer's affiliate account: please, go to **Customers → All Customers** and click to edit the necessary customer's account. Then go to the **Affiliate Account** tab.

Disable the affiliate account if you want to remove the customer from affiliates. In this case, the customer receives a letter with a suggestion to contact the administrator.

Set **Receive Notifications** to **Yes** if you want the customer to receive notifications about the affiliate program.

Manage Banners

To manage affiliate banners or create a new one go to **Marketing → Affiliate → Manage Banners**.

There are 2 banner types:

- Image
- Text

Affiliate Banners

Add Banner

Filters   Default View ▼   Columns ▼   Export ▼

Actions ▼   3 records   20 ▼ per page   ‹   1 of 1   ›

☐▼	ID ↓	Link	Title	Type	Status	Action
☐	1	https://example.com	Free shipping over $50	Image	Enabled	Edit
☐	2	https://example.com	50% OFF	Image	Enabled	Edit
☐	3	https://example.com	Best price	Text	Enabled	Edit

On the Manage Banners Page, you can edit already created banners or click the **Add Banner** button to upload a new one.

On the **Banner Settings** page you can upload a banner image (for the Image type), or specify a promo text (for the Text type).
Try this **Magento 2 Data Feed Manager** to easily provide your affiliates with data feeds that they need to deal with product-focused sites and merchandising tools.

General Information

Title * Free shipping over $50

Type Image ▼

Image * Upload

banner1.png
370x194, NaN undefined

Link * https://example.com

Rel Nofollow Yes ▼

Status Enabled ▼

Manage Transactions

To manage affiliate transactions go to **Marketing → Affiliate → Manage Transactions**.

Type	Affiliate Email	Customer Email	Order ID	Order Subtotal	Commission	Discount	Date Updated	Status
Per Sale	jane.green@example.com	jane.green@example.com	000000003	$58.00	$2.40	-$10.00	Aug 23, 2017 1:15:35 PM	On Hold
Per Sale	jane.green@example.com	jane.green@example.com	000000004	$3,900.00	$58.20	-$1,960.00	Aug 23, 2017 1:22:12 PM	On Hold
Per Sale	jane.green@example.com	jane.green@example.com	000000005	$2,760.00	$78.30	-$150.00	Aug 23, 2017 1:27:59 PM	On Hold
Per Sale	jane.green@example.com	jane.green@example.com	000000006	$3,680.00	$0.00	-$200.00	Aug 23, 2017 1:43:24 PM	Completed

On the Manage Transactions grid, an admin user can see all affiliate transactions. To view the details of any particular transaction simply click the **View** link on the grid.

Below you can see the example of **transaction details** page:

Manage Affiliate Transaction

General Information

Affiliate Account	Jane Green
Customer Email Address	jane.green@example.com
Order ID	000000003
Commission	$2.40
Discount	-$10.00
Order Subtotal	$58.00
Status	On Hold
Type	Per Sale

Manage Withdrawals

To manage withdrawals please go to **Marketing → Affiliate → Manage Withdrawals**.

Amasty Affiliate Withdrawal

	ID ↓	Email	Amount	Date Updated	Status	Action
☐	8	peter.parker@examle.com	$50.00	Aug 11, 2017 3:03:25 PM	Canceled	Edit
☐	9	jane.green@example.com	$50.00	Aug 15, 2017 3:03:50 PM	Canceled	Edit
☐	10	tombrown.example.com	$50.00	Aug 16, 2017 9:26:52 AM	Completed	Edit

The module doesn't have any built in payment systems, it only tracks and displays withdrawal details. Therefore, the affiliate commissions are paid with the help any methods or 3-d party services chosen by store administrators.

Affiliate Account

To become an affiliate a user needs to create a customer account on your website and then one the **Affiliate Settings Tab**.

Account Settings

To get subscribed to the affiliate program a user should fill in the form and click the **Save** button. The request doesn't require any confirmation. Once the form is saved, the user automatically becomes an affiliate and additional setting tabs appear in the account.

Affiliate Programs

Here an affiliate can view the list of all available affiliate programs. An affiliate automatically takes part in all active programs.

Affiliate Account

Affiliate Programs

Program	Type	Commission	Commission from 2nd order	Discount Type
Pay per Sale	Per Sale	5.00%	3.00%	Fixed amount discount
Pay Per Profit	Per Profit	$15.00	0.00%	Fixed amount discount

My Balance

In the **'My Balance'** tab an affiliate will be able to check his/her current balance.

My Balance

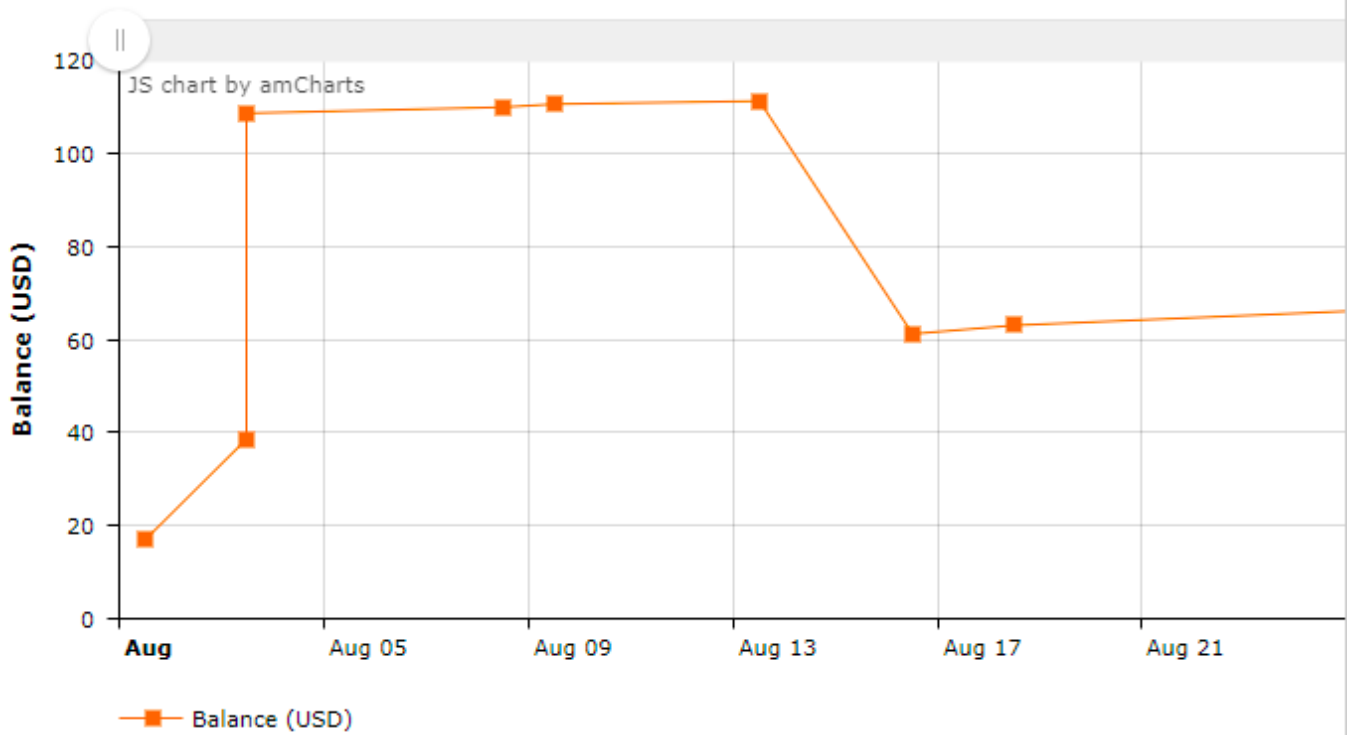|				
Balance: $116.26	Available: $116.26	On Hold: $0.00	Lifetime: $116.26	Paid: $0.00

Date	Balance	Amount	Details
8/25/17, 12:23 PM	$66.26	+ $3.27	Commission per oder #000000013
8/18/17, 12:23 PM	$62.99	+ $1.83	Commission per oder #000000012
8/16/17, 9:26 AM	$61.16	- $50.00	Withdrawal

Promo Data

In this tab, an affiliate will be able to copy coupon codes and banners to run an affiliate program on his/her website.

Promo Data

Coupon Codes

Affiliate Program	Coupon Code	
Pay per Sale	0FOEEnBBT42i36XGPY2k	Copy
Pay Per Profit	mee23rObwxqVUg4sVCy	Copy

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

Referral Link

Enter any URL from this store in the form below to generate a new referral link

Copy

An affiliate can use any of the banners from his/her account.

Banners

Name	Type	Clicks	Link	Preview	
Free shipping over $50	image	0	https://example.com		Copy
50% OFF	image	0	https://example.com		Copy
Best price	text	0	https://example.com	Grab your shoes at the BEST price!	Copy

Promo Wdigets

It's possible to generate and edit promo widgets right in the account.

Promo Widget

Settings

Title *

Bestsellers

Products Qty *

6

Width, px

350

Height, px

350

○ Bestsellers
◉ New Products

☑ Product Name
☑ Price

Preview

Bestsellers

Ina Compression Short-28-Orange
$49.00

Ina Compression Short-28-Red
$49.00

Ina Compression Short-29-Blue
$49.00

Ina Compression Short-29-

Ina Compression

Ina Compression

Traffic Sources

Affiliates can see a detailed report on traffic sources. The statistics show the number of successful purchases made, grouped by methods of affiliate link/coupon sharing.

Traffic Sources

Here you can find the traffic information from the different sources. Share more, earn more!

Traffic Sources

Source	Count
banner	4
link	1
widget	4

Refer Friends

Let affiliates share your store pages on social networks. All registered affiliates will be able to share any product and category pages as well as the store home page.

Affiliate Account ⌄

Refer Friends

Here you can share the store home page link with your friends. To share the specific product page or category page just open it in the browser and use the sharing widget right from the page.

My Withdrawals

In the **Withdrawals** tab affiliates can see their withdrawals history and send new withdrawal requests.

My Withdrawals

Balance: $108.54   Available: $108.54   Minimum Payout: $50.00

Amount *

100   **Send Request**

The minimum "Available" balance to request a withdrawal is $100.00

#	Date	Amount	Status	Action
8	8/10/17, 3:03 PM	$100.00	Canceled	Repeat
9	8/15/17, 3:03 PM	$50.00	Canceled	Repeat
10	8/16/17, 9:26 AM	$50.00	Pending	Cancel

Find out how to install the **Affiliate** extension for Magento 2 via Composer.

Rate the user guide

★★★★★ from 4 votes (Details)

○ ○ ○ ○ ○ Rate

★☆☆☆☆ 0 visitor votes
★★☆☆☆ 0 visitor votes
★★★☆☆ 0 visitor votes
★★★★☆ 0 visitor votes
★★★★★ 3 visitor votes

amasty