

Refer a Friend (F-REF)

Function	Refer a Friend
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Author	Gareth Gorman
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Status	Working

Revision History

Version	Date	Summary of changes	Author
1.0	September 2017	Created	Gareth Gorman

Table of contents

- [1. Introduction](#)
- [2. Commerce Admin](#)
- [3. Customer Front End \(The website\)](#)
- [4. Confirmation of sign-off](#)

1. Introduction

This document is the functional specification for Refer a Friend

This document has 2 main sections:

Commerce Admin- The functionality required from the platform to manage your requirement (including any oversight url)

Customer Front end - The functionality required from the customer facing element of the system (the website).

Should there be any requirements that you are unsure of then please contact the document author prior to sign off for discussion. Any changes to the requirements after sign off may be regarded as out of scope and chargeable.

2. Commerce Admin

F-REF/01.0	Discounts/Rewards
F-REF/01.1	The Commerce system will allow authorised users to create a discount as normal, including all existing requirements e.g. once per customer
F-REF/01.2	<p>The Commerce system will allow authorised users to choose, via a setting, a discount for the existing customer when purchases are made by a 'friend'.</p> <p>Each time a 'friend' makes a first purchase the system will automatically generate a unique single use coupon code on that discount and assign it to the existing customer's customer ID. The existing customer will receive an email notifying them of this, using a specific email template.</p> <p><i>ie if 1 friend has made a purchase the existing customer receives a £5 discount, if 2 friends make a purchase then the existing customer receives two £5 discount coupon codes / emails.</i></p>

F-REF/01.3	<p>The Commerce system will allow authorised users to choose (if required), via a setting, a discount for purchases made by the referred 'friend'.</p> <p>Each time a 'friend' is referred the system will automatically generate a unique single use coupon code. The friend will then be notified that they've been referred, using a specific email template that also contains the coupon code (if specified).</p>
F-REF/01.4	<p>The Commerce system will allow authorised users to choose (if required), via a setting, a discount for purchases made by the existing customer'.</p> <p>Each time the existing customer refers a 'friend' or group of friends, the system will automatically generate a unique single use coupon code. The existing customer will then be thanked for referring 'friends', using a specific email template that also contains the coupon code (If specified).</p>

F-REF/02.0	Customers
F-REF/02.1	<p>Within the customer area of Commerce Admin, the system will allow authorised users to filter the customer list by customers which have been referred by:</p> <ul style="list-style-type: none"> ● The 'existing / referred by' customers email address ● The 'existing / referred by' customer id
F-REF/02.2	<p>Within the customer area of Commerce Admin, the system will allow authorised users to the export the results filtered in F-REF/03.1 to a csv file, which will include two additional columns which hold the 'existing / referred by' customer's ID, and the 'existing / referred by' customer's email address, for each customer where a referrer is set.</p>

3. Customer Front End (The website)

F-REF/03.0	Existing Customers Referring a friend
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F-REF/03.1	The Commerce system will allow authorised users to set if an existing customer will receive an email upon a friend being referred.
F-REF/03.2	The website will allow registered customers to complete and submit the 'Refer a Friend' form with one or many of the the following information <ul style="list-style-type: none"> ● Friends Name ● Friends Email
F-REF/03.3	On successful submission the website will display a 'thank you' page <i>Note the content will be as configured within the Commerce Admin CMS</i>
F-REF/03.4	The website will automatically email the referred friends with the 'refer a friend' email template

F-REF/04.0	Friends
F-REF/04.1	In order for the referred friend to use the discount (as outlined in F-REF/01.3) then they must register and/or checkout with the email address provided by the existing customer.
F-REF/04.2	The friend will qualify for all discounts applicable by entering the coupon code issued which they received in the refer a friend email
F-REF/04.3	If set to receive emails in F-REF/04.1, the existing customer will receive an email to confirm that the friend has made a purchase. The email will contain the 'reward' discount coupon code as specified in F-REF/01.2

4. Confirmation of sign-off

Name:	
Position:	

I confirm I have received this functional specification and give my authorisation to proceed with the development.

Signed: _____

Date: _____