

Affiliates Pro for PrestaShop

**User Manual** 

Version 1.4.0

This User Manual documents Affiliates Pro for PrestaShop. For PrestaShop 1.7.x and later. Module version 1.8.0.



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# I. Introduction

### **The Referral Process**

Affiliates promote the site and refer sales and customers using their affiliate link or discounts. The affiliate link is shown to affiliates in the Affiliate Area as described in the corresponding section further below.

#### **Referred Sales**

The basic referral process via an affiliate link or a discount code is as follows:

- 1. An affiliate signs up to the affiliate program of your site. Alternatively, the affiliate is added manually by an administrator.
- 2. The affiliate accesses the Affiliate Area to obtain her affiliate link and voucher code.
- 3. The affiliate uses and affiliate link, a banner or a voucher code to promote the site through channels like *Email, Facebook, Twitter, Google+*...
- 4. Potential customers view the information posted by the affiliate and click the affiliate's link. Customers can also use affiliates' vouchers to benefit from a discount on their purchase.
- 5. The customer places an order and the system recognizes that the order was referred by an affiliate.
- A referral is automatically recorded based on the order placed by the referred customer. The referral holds the commission amount credited to the affiliate and this is taken into account by the system when the accumulated totals are requested in the Affiliates > Totals section.

#### **Referred Customers**

In addition to referring sales, affiliates can also refer customers. In that case and when this functionality is enabled, a potential customer would visit an affiliate link and eventually sign up as a new customer. The affiliate who referred the customer can be granted a commission without the need for the customer to place an order.

## Promotion

There are several ways that an affiliate can refer customers or sales:

- 1. Using the Affiliate Links.
- 2. Using the Voucher Codes.
- 3. Using the banners.

4. Using the social sharing buttons for products when the Social media share buttons module (PrestaShop 1.7) or the Social Sharing module (PrestaShop 1.6) is enabled.



PrestaShop 1.7 Social Media Share Buttons

y Tweet	<b>f</b> Share	8⁺ Google+	Pinterest

PrestaShop 1.6 Social Sharing Buttons

# II. Installation

## **Installing Affiliates Pro for PrestaShop**

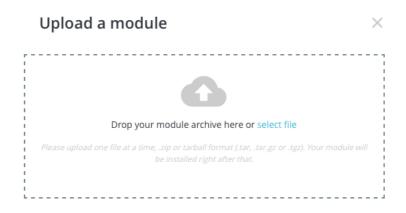
On your *PrestaShop* Dashboard go to **Improve > Modules > Modules & Services**.



Under Modules & Services, click the button to Upload a Module.

Modules			
Module	e selection	🛧 UPLOAD A MODULE	
Selection	Installed modules	Notifications	Upload a module

A dialogue will allow you to drag & drop the module's zip file or to select the file.

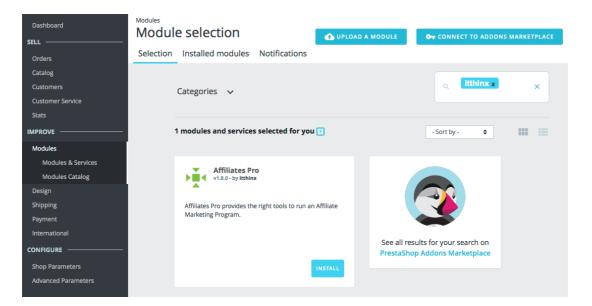


Drag & drop or choose the module's zip file.

Name	
ł	v1.8.0-affiliatesprops.zip

Once uploaded, proceed to install the module by clicking the **Install** button for *Affiliates Pro* by *itthinx*.

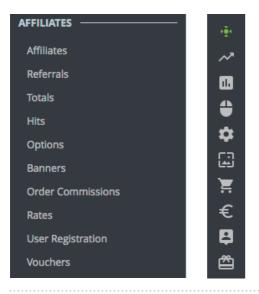
You can locate the module by using the search field that PrestaShop provides in this section. Search for *itthinx* or *Affiliates Pro*.



You will now find it under the Installed modules.

Dashboard	Modules Manage installed modules								Or CONNECT TO ADDONS MARKETPLACE			
Orders	Selection	Installe	d modules	Notific	ations							
Catalog												
Customers		Categorie	es 🗸 Sh	ow all m	nodules	~			۹			×
Customer Service		0										
Stats												
								Last	access 💠	Bu	Ik Actions	¢
Modules												
Modules & Services		1 insta	alled module	S 기								
Modules Catalog												
Design		►	Affiliates Pr									
Shipping			v1.8.0 - by itthin			o provides th rketing Progr	e right tools to am	run an		DISAB	LE 👻	
Payment					indee Wa	include 110Bi						

Once the module is installed, a new *Affiliates* menu will appear in the Dashboard. After the first installation, proceed to set up the module as follows.



**Tip:** PrestaShop provides a convenient way to add shortcuts to the administrative menu at the top of the Dashboard called *Quick Access*.

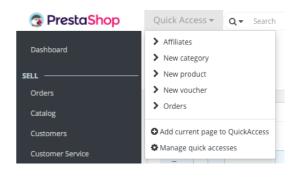
For example, to add a shortcut that leads you directly to the list of Affiliates, go to Affiliates > Affiliates and click Quick Access, then click Add current page to QuickAccess.

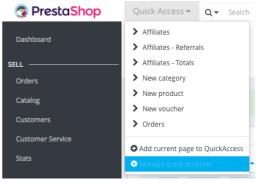
A dialogue will prompt you to name the shortcut.

October Oc	rent pag quick ac	e to QuickAccess	Email 🔻 🔺	From 💌 🔺	U
	1	John DOE	pub@prestashop.com	2016-12-20	
	2	Test Affiliate	test@example.com	2016-12-20	
	3	Testi Testa	testi@example.com	2016-12-20	
	4	Dressy Messy	dressy@example.com	2016-12-20	
	Pleas	e name this shortcu	ut:		
	Affilia	ates			
				Cancel OK	

Click OK and check that the new shortcut has been created. You might need to reload the page first for this to appear.

😨 PrestaShop Quick Access <del>-</del> Q - Search > New category Dashboard > New product > New voucher SELL -> Orders Orders Catalog 0 Manage quick accesses **Customer Service** Stats John DOE 1 IMPROVE 2 Test Affiliate Modules Design 3 Testi Testa Shipping 4 Dressy Messy Payment Samuel Two 6 International 7 Mark Three CONFIGURE Helen Four 8 Shop Parameters 9 Diane Five Advanced Parameters 10 lane Six AFFILIATES 11 Heather Nine Affiliates





You can add several additional shortcuts for the sections that you need to visit most often. Here we've added three shortcuts to the Affiliates, Referrals and Totals sections of our module.

# III. Setup

## Setting up Affiliates Pro for PrestaShop

The Affiliates Pro module offers several configuration options. We are going to review these on the following pages and help you choose the right settings for your business.

Setting up the module is pretty simple and requires just a few minutes. Yet we recommend to at least briefly review all parts, as we cover everything from the most basic options to banners and discount codes. Even though you might not want to be using all features, it can help you to understand the possibilities that this important marketing tool brings to your business and give you new ideas to improve your sales.

AFFILIATES	
Affiliates	
Referrals	
Totals	
Hits	
Options	
Banners	
Order Commissions	
Rates	
User Registration	
Vouchers	

### Choosing the Right Settings for your Affiliate Program

In the Dashboard, under **Affiliates > Options** you can adjust several settings related to the affiliate system's basic operation:

- Affiliate Area
- Referrals
- Affiliate Registration
- Data

We will have a look at these in detail in this section. First we will look at the Affiliate Area's URL and how a link to it can be used in a menu.

As you review each section discussed in detail below, please make sure to click the **Update** button to save the options after making changes in a section.

Further settings related to how commissions are set for referred orders and customers are available under:

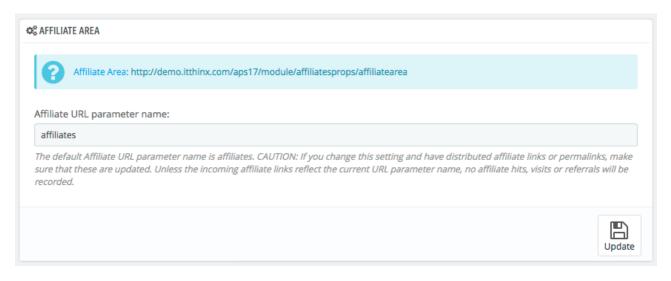
- Affiliates > Order Commissions where you will enable commissions for referred orders.
- Affiliates > Rates where you can control commission rates in more detail if required.
- Affiliates > User Registration where you can enable commissions on referred customers.

In addition to these, there are also:

- Affiliates > Banners where you can upload images that your affiliates can use.
- Affiliates > Vouchers where you can enable the automatic generation of discount codes based on PrestaShop's "cart rules" that your affiliates can use to promote your products and earn commissions.

## Affiliate Area

In the section **Affiliate Area**, you will see the URL that points to the Affiliate Area provided by the module, where affiliates will find stats and resources to promote your site.

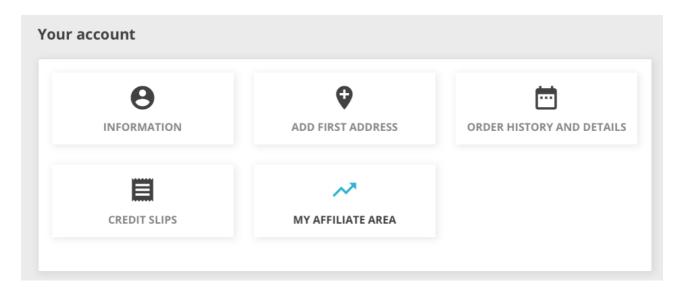


The option that determines the *affiliate URL parameter* name is also set here. Affiliate links will carry this parameter to identify the referring affiliate by his or her ID.

The default Affiliate URL parameter name is affiliates.

**Recommendation:** If you decide to change this setting, do it <u>before affiliates are added</u>. Affiliate links that use a parameter name that is different from the current setting will not be recognized.

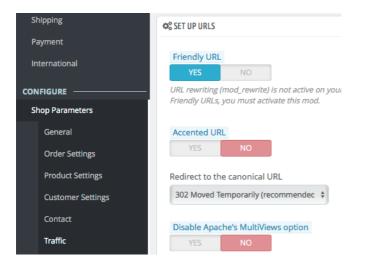
Now back to the Affiliate Area, an entry that points to this page is automatically included on the customer's account page:



You can also create a menu item on the Front End to make it more directly accessible for your affiliates. We will show you how this is done in the following section.

**Tip:** You can enable PrestaShop's option to use Friendly URLs. This will allow you to provide a more "human-readable" URL to the affiliate area instead of a parameter-based URL.

You will find the appropriate option under **Configure > Shop Parameters > Traffic > Set Up URLs** - Choose **Yes** under the option **Friendly URL** and save the settings.



Adding the Affiliate Area to a Menu

Under **Affiliates > Options**, in the **Affiliate Area** section we'll find a link and the URL of the Affiliate Area. As shown above, affiliates will also find a link to it on their account page.

Here is how this looks like when Friendly URLs are enabled ...



... and here's a parameter-based version with Friendly URLs disabled.

Affiliate Area: http://demo.itthinx.com/aps/index.php?fc=module&module=affiliatesprops&controller=affiliatearea

You can use the URL to include a new menu item (for example by using the *Main menu* module in PrestaShop 1.7 or the *Top horizontal menu* module in PrestaShop 1.6) to add additional links on the Front End of your site, to make it easier for potential affiliates to find the affiliate area and for existing ones to access their data.

🖋 Edit 🔻

To add a menu entry linked to the Affiliate Area, go to **Modules > Modules & Services > Installed modules** and click the **Configure** button for the **Main menu** module. Of course this assumes that you have this module enabled, otherwise first install it.

Modules Manag	a installed mo		
Selection			Or CONNECT TO ADDONS MARKETPLACE
Delection	installed modules	Votifications	
	Categories 🗸 Show	all modules 🗸	
			Last access 🗢 Bulk Actions 🜩
	0 installed modules	נ	
	0 built-in modules 🝸		
	1 theme modules ?		
	Main menu v1.0.5 · by PrestaShop	Adds a new menu to the top of your website. Read More	e-commerce

Affiliates Pro for

PrestaShop

1

Affiliates

In this section you will find the current configuration of the menu, a form that allows to add a new link and a list of existing links. In the form, add your entry that leads your users to the Affiliate Area:

Label: Input the desired name of the				
menu item that leads your users to the Affiliate Area here.	% ADD A NEW LINK           Label           Affiliates			
<b>Link:</b> Paste the URL of the Affiliate Area in this field.	Link http://demo.itthinx.com/aps17/module/affiliatesprops/affiliatearea New window YES NO			
Click the <b>Add</b> button and the link to the Affiliate Area will now appear in your link list.		Add		
LINK LIST				
Link ID Shop name Label	Link	New window		

http://demo.itthinx.com/aps/index.php?

fc=module&module=affiliatesprops&controller=affiliatearea

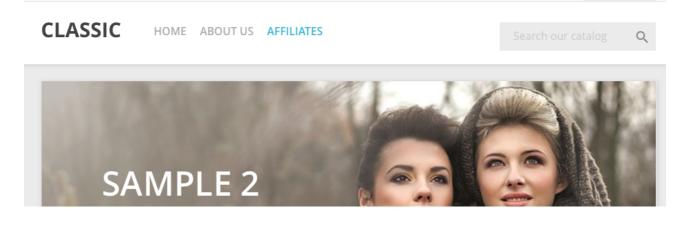
Choose the new entry "Affiliates" and click the Add button and then hit Save.

Home	
About us	
vailable item	15
D	Presses (Affiliates Pro for PrestaShop 1.
	Casual Dresses (Affiliates Pro for Pres
	Evening Dresses (Affiliates Pro for Pre
	Summer Dresses (Affiliates Pro for Pr
Products	
Choose	e product ID
Menu Top l	inks
Affiliat	es
Affiliat	25
→ Remove	
# nemore	

The menu items will now show a new entry that leads to your site's Affiliate Area.

Selected it	tems		
Home			
About u	s		
Affiliates	5		

Here's an example of how this looks like on the Front End with the Classic theme, showing the new menu item "Affiliates" that leads to the Affiliate Area.



## Referrals

This section provides several settings related to referrals that are recorded for affiliates.

¢\$ REFERRALS
Referral timeout:
30
This is the number of days since a visitor accessed your site via an affiliate link, for which a suggested referral will be valid. If you enter 0, referrals will only be valid until the visitor closes the browser (session). The default value is 1. In this case, if a visitor comes to your site via an affiliate link, a suggested referral will be valid until one day after she or he clicked that affiliate link.
Enable permanent referrals
<ul> <li>Referring affiliates are permanently assigned and granted commissions on all purchases of a referred customer.</li> </ul>
Limit permanent referrals
The number of days during which referrals are recorded, since a customer was referred by an affiliate. Leave empty for unlimited permanent referrals.
Default referral status:
Pending \$
Synchronize referrals to orders:
The referral status is updated according to the order status when this option is enabled.
Update

### **Referral Timeout**

The *Referral timeout* determines for how long a visit via an affiliate link will produce a referral. This setting can be adjusted to range from the individual session to a number of days.

#### Permanent Referrals

The following options are used to enable permanent referrals, where affiliates are receiving commissions for any order placed by customers they have referred once they have been related.

#### Enable permanent referrals

When permanent referrals are enabled, affiliates who refer customers are related to them and granted commissions on all their purchases. The process starts with a customer clicking an affiliate link or using a coupon code that is assigned to an affiliate. Once the system has recognized that the new customer has been referred by an affiliate, it creates a permanent relationship between the customer and the affiliate account. From now on, every order that the customer places, will result in an appropriate commission for the related affiliate. It's possible to limit this happening for a certain amount of time with the following option.

#### Limit permanent referrals

If this option is used, a permanent relationship between a customer and affiliate will record commissions on orders only during a limited amount of time. For example, this is useful if you want to grant commissions on all orders that have been placed by a customer during 90 days after the customer has been referred by the affiliate. After that period, the normal referral process will apply.

If you want to grant permanent referrals during a limited time, indicate the number of days during which referrals are to be recorded, since a customer was referred by an affiliate. Leave this option empty for unlimited permanent referrals (this is the default).

The permanent relation between a customer and an affiliate can be viewed and edited in the customer's profile. You can use the field to simply view who has referred the customer, to change the relationship or to void it. Note that changes to this relation take immediate effect and no history is recorded (in case you change the value and save, you won't be able to see the previous value).

Dashboard	Customers Editing customer John DOE
SELL	
Catalog	Affiliate
Customers	YES NO
Customer Service	
Stats	Affiliate From:
	2016-12-20
Modules	Affiliate Until:
Design	
Shipping	
Payment	Affiliate Status:
International	Inactive \$
	Referral Rate
Shop Parameters	0.2
Advanced Parameters	
	You can set an individual referral rate here, otherwise the default
Affiliates	Who has referred
Referrals	this
Totals	customer?
Hits	Referrer
Options	- None +
Banners	a None a V

### Default Referral Status

The **Default referral status** is a useful tool to keep track of referrals that need your attention. Every referral has a current status:

- *Accepted* : A commission that is accepted for payment but has not been paid to the affiliate yet.
- *Pending* : A commission that needs to be approved or rejected. Pending referrals should be reviewed by an administrator.
- *Rejected* : A commission that has been rejected for payment, for example because the related order has been cancelled.
- Closed : A commission that has been paid to the affiliate.

### Synchronizing with Orders

When the **Synchronize referral to orders** option is enabled, the referral status is updated according to the order status. This is recommended and enabled by default, unless you want to review referrals manually, you should have this option enabled.

## **Affiliate Registration**

In this section you can enable the option that allows visitors to sign up as new affiliates.

You can also enable an option that offers new customers to join your affiliate program while they create their account.

This section also provides a convenient option to determine the page with your affiliate program's terms and conditions, so that it is presented to new affiliates for acceptance while they sign up.

Ø <sup>®</sup> <sub>8</sub> AFFILIATE REGISTRATION	
Affiliate Registration:	
Allow affiliate registration.	
Allow customers to "Join the Affiliate Progr	am" on the customer registration form.
Terms of the Affiliate Program	
Affiliate Program 🗘	
	Update

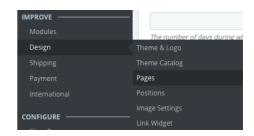
- Check **Allow affiliate registration** if new affiliates should be allowed to register on the site. If you only add affiliates manually in the back office, this option does not need to be enabled.
- Check Allow customer to "Join the Affiliate Program ..." if customers should be allowed to join the affiliate program when they sign up for a new customer account.
- Under **Terms of the Affiliate Program** you can choose a page on your site that outlines the terms and conditions of your affiliate program.

### Terms of the Affiliate Program

Normally you would have terms and conditions that constitute an agreement between your business and its affiliates. Your affiliates should be required to accept the terms and conditions of your affiliate program in order to participate and maintain an affiliate account.

PrestaShop's built-in functions allow you to create pages and we'll provide a quick example to show you how you would set up such a page.

#### **Creating a Terms and Conditions Page**



Go to **Improve > Design > Pages** and click Add new CMS page - this will lead you to a form where you will give the page a convenient title and input the terms and conditions of your affiliate program as the page content.

PAGE Page Category Home * Meta title Affiliate Program Meta description The terms and conditions of our Affiliate Program Meta keywords affiliate a affiliates a marketing a affiliate program t&c a terms conditions a Add tag  * Friendly URL affiliate-program Page content	AGE   AGE   home   Affiliate Category   Home   Meta title   Affiliate Program   Meta description   The terms and conditions of our Affiliate Program   Meta keywords   effiliate:   marketing:   effiliate:   marketing:   effiliate:   Terms and Conditions that apply to our affiliate program   Recommended Modules and Services	sign / Pages	🔅 Debug mode	Affiliates Pro for PrestaSho	p 1
Page Category Home * Meta title Affiliate Program Meta description The terms and conditions of our Affiliate Program Meta keywords affiliate > affiliate > marketing > affiliate program × t&c × terms × conditions × Add tag  Page content Page content	Home       *         Home       *         Meta title       Affiliate Program         Meta description       *         The terms and conditions of our Affiliate Program       *         Meta keywords       *         affiliate grogram       *         Meta keywords       *         affiliate grogram       *         Keta keywords       *         affiliate grogram       *         Keta keywords       *         affiliate grogram       *         Add tag       *         *       Friendly URL         affiliate-program       *         Page content       *         (*) A B I U I I IIII IIII IIIIIIIIIIIIIIIII	ages > Add new page	Reco	ommended Modules and Services	н
Home       :         Meta title       Affiliate Program         Meta description       :         The terms and conditions of our Affiliate Program       :         Meta keywords       :         affiliate is affiliate is marketing is affiliate program is t&c is terms is conditions is affiliate program is t&c is terms is conditions is affiliate program is two terms is conditions is affiliate program is the conditions is affiliate program is	Home Image: Conditions of our Affiliate Program     Meta description   The terms and conditions of our Affiliate Program   Meta description     Meta description     The terms and conditions of our Affiliate Program     Meta keywords   affiliate it affiliate it affiliate it marketing it affiliate program it itself it conditions it affiliate it affiliate it affiliate program itself itsel	PAGE			
Meta title  Affiliate Program  Meta description  The terms and conditions of our Affiliate Program  Meta keywords  affiliate x affiliates x marketing x affiliate program x t&c x terms x conditions x  Add tag  Friendly URL affiliate-program  Page content	Meta title   Affiliate Program     Meta description   The terms and conditions of our Affiliate Program   Meta keywords      affiliate x     affiliate y     affiliate y     affiliate x     affiliate y     affi	Page Category			
Affiliate Program Meta description The terms and conditions of our Affiliate Program Meta keywords affiliate > affiliate > marketing > affiliate program × t&c × terms × conditions × Add tag  Friendly URL affiliate-program Page content	Affiliate Program         Meta description         The terms and conditions of our Affiliate Program         Meta keywords         affiliate in affiliates in marketing in affiliate program in takes in the terms in conditions in affiliate program in takes in the terms in terms in the terms in the terms in terms in the terms in terms in the terms in terms in terms in the terms in terms in terms in the terms in ter	Home			\$
Meta description         The terms and conditions of our Affiliate Program         Meta keywords         affiliate x affiliates x marketing x affiliate marketing x affiliate program x t&c x terms x conditions x         Add tag         • Friendly URL affiliate-program         Page content	Meta description   The terms and conditions of our Affiliate Program     Meta keywords     affiliate x affiliates x marketing x affiliate marketing x affiliate program x t&c   terms x conditions x   Add tag	* Meta title			
The terms and conditions of our Affiliate Program Meta keywords affiliate x affiliates x marketing x affiliate marketing x affiliate program x t&c x terms x conditions x Add tag Friendly URL affiliate-program Page content	The terms and conditions of our Affiliate Program  Meta keywords  affiliate × affiliates × marketing × affiliate marketing × affiliate program × t&c × terms × conditions ×  Add tag  Friendly URL  affiliate-program  Page content  < > ▲ B I U I I I I I I I I I I I I I I I I I	Affiliate Program			
The terms and conditions of our Affiliate Program          Meta keywords         affiliate x       affiliate x       affiliate x       affiliate marketing x       affiliate program x       t&c x       terms x       conditions x         Add tag         Friendly URL       affiliate-program        Page content	The terms and conditions of our Affiliate Program  Meta keywords  affiliate × affiliates × marketing × affiliate marketing × affiliate program × t&c × terms × conditions ×  Add tag  Friendly URL  affiliate-program  Page content  < > ▲ B I U I I I I I I I I I I I I I I I I I	Meta description			
affiliate x       affiliate x       affiliate marketing x       affiliate program x       t&c x       terms x       conditions x         Add tag       *       Friendly URL       affiliate-program       affiliate-program         Page content       *       Page content       *       *	affiliate x       affiliate x       marketing x       affiliate program x       t&c x       terms x       conditions x         Add tag       *       Friendly URL       affiliate-program         Page content         >				
	A B I U ∓ ₱ G E ▼ □ ▼ □ ▼ □ ▼ □ ▼ □ ■ ■     Image: A gradient of the second s	Friendly URL			
	Terms and Conditions that apply to our affiliate program ndexation by search engines	-			
	ndexation by search engines		• : • •		
		YES NO			

The new page will appear in the list of pages under Improve > Design > Pages - you

ID 🔻 🔺	URL 🔽 🔺	Title 🔽 🔺	Position 🔻 🔺	Displayed	
				\$	Q Search
1	delivery	Delivery	<b>4</b> 1	~	🖋 Edit 🔻
2	legal-notice	Legal Notice	<b>4</b> 2	~	🖋 Edit 🛛 🔻
3	terms-and-conditions-of-use	Terms and conditions of use	<b>4</b> 3	~	🖋 Edit 🛛 👻
4	about-us	About us	<b>4</b>	~	🖋 Edit 🛛 🔻
5	secure-payment	Secure payment	<b>4</b> 5	~	🖋 Edit 🛛 👻
6	affiliate-program	Affiliate Program	<b>⊕</b> 6	~	🖋 Edit 📼

After you have created the page that contains your affiliate program's terms and conditions, go back to **Affiliates > Options** to select it.

## **Deleting Data**

A convenient option is provided to delete all module data that has been stored by *Affiliates for PrestaShop*. This option is useful if you just need to start clean while you run tests.

Do not enable this option or use this procedure if you want to preserve your affiliate data.

\$ DATA				
Uninstall and dat	a persistence			
<ul> <li>Delete all mod</li> </ul>	ıle data on uninstall.			
	tion is active while the module is u filiates and their referrals and are g		dule, make sure to ba	ck up your data or do not enable
this option. By en	bling this option you agree to be so	ely responsible for any l	loss of data or any oth	her consequences thereof.

AFFILIATES

Affiliates Referrals

Totals

Hits

Options

Banners

Order Commissions

## **Configuring Commissions.**

#### Setting Order Commissions

This is where you will enable the most common case for an affiliate program, allowing affiliates to earn commissions on orders they refer.

Go to Affiliates > Order Commissions and check the option Allow order commissions if you want to grant commissions on purchases that your affiliates refer.

Set the commission rate under **Default rate**, for example, introduce the value 0.10 if you want to grant 10% commissions on net order amounts in general.



5	Races
lick the <b>Update</b> button to save the settings.	
¢© ORDERS	
Enable:          Image: Comparison of the second s	
<b>0.2</b> The referral rate determines the referral amount based on the net sale made. Example: Set the referra affiliates to get a 10% commission on each sale.	al rate to 0.1 if you want your
	Update

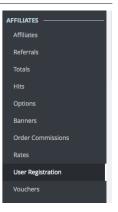
While this general rate applies to any affiliate, it is also possible to determine specific rates for particular affiliates, to use individual rates for product categories, individual rates per product or a combination of those.

Please refer to the following section on **Rates** for more details.

#### Setting Customer Referral Commissions

Go to Affiliates > User Registration and check the option Enable the user registration integration if you want to grant your affiliates a commission when they refer new customers.

When enabled, these commissions are granted when an affiliate refers new customers, i.e. when a new customer signs up, a referral is recorded in favor of the referring affiliate. This is different from order commissions. In this case, a referral may be recorded only once per customer and there is no order involved - it's sufficient for a new customer to register.



Also note that if both this user registration and order commissions are enabled, when a new customer signs up and places an order there will be two referrals. One for the fact that the customer has registered on your site, and another for the order that the new customer has placed.

Enable: If checked, referrals will be recorded for new referred customers.

*Amount*: If you introduce a numerical value here, your affiliate will earn this amount when she or he refers a new customer.

**Base Amount**: If you introduce a numerical value here, the commission amount will be equal to the amount introduced multiplied by the applicable referral rate for the referring affiliate.

& AFFILIATES USER REGISTRATION
Enable:
Enable the user registration integration
Amount:
10
When an affiliate refers a new user, a referral is recorded, granting the affiliate this amount in the chosen currency.
Base Amount:
<i>This is an alternative to the fixed Amount set above. If set, the referral amount equals this base amount multiplied by the referral rate for orders.</i>
Currency:
Referral Status:
Accepted \$
The status for referrals that record commissions when affiliates refer new users.
Update

Currency: Select the currency for the referrals.

Referral Status: The commissions per referral will be recorded with the chosen status.

If you'd rather review referrals on new customers individually before these referrals are taken into account for affiliate payments, it is recommended to use the status *Pending* and mark the corresponding referrals as *Accepted* individually after review and before producing periodic totals.

Adjust the options accordingly and click the **Update** button to save the settings.

### Rates

The system features commission rates that range from a simple general rate applicable by default to any affiliate, to more complex configurations that allow to determine specific rates based on who the referrer is and what product has been purchased.

### Default Rate

The default rate is set under **Affiliates > Order commissions** in the field **Default rate**.

This rate applies by default to any referral calculation based on net order amounts.

For example, if the rate is set to 0.20 and an affiliate refers an order whose net amount is USD 100, the resulting commission for the referring affiliate will be  $0.20 \cdot \text{USD} 100 = \text{USD} 20$ .

¢\$ ORDERS	
Enable: <ul> <li>Allow order commissions.</li> </ul>	
Default rate:	
The referral rate determines to affiliates to get a 10% commis	

Nedit 🖉

Individual Rates

3

Test Affiliate

You can indicate an individual referral rate after an affiliate registers, otherwise the default rate set in **Affiliates > Order commissions** will apply.

To set an individual commission rate, go to **Affiliates > Affiliates** and click **Edit** on the desired affiliate.

	2	Test Affiliate	test@example.com	2016-12-20		active	🖋 Edit 💌
unless input a grant 3	you h nothe 0% c	nave already er value if des ommissions	you will see the de changed it there. H sired. For example, to a specific affiliate ample, simply inpu	Here you can if you want to e instead of th	e	Affiliate Status: Active Referral Rate	\$
		•	r to hit <b>Save</b> .			0.3	
•			ual rate for one or te entry also under		8,	You can set an individu	<i>ial referral rate here,</i>

0.300000

rate

1

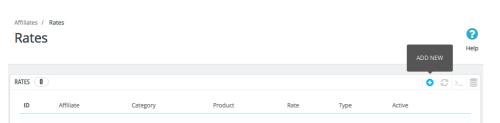
**Rates**. We will see more on how to define rates in that section as follows.

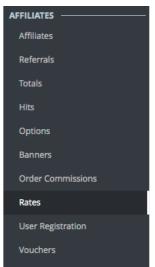
### Rates per Product, Category and Affiliate

Besides the default rate used to determine the commissions for affiliates, we also have the option to use different rates for some products, per product category, per affiliate as shown above or even combinations of these.

For example, you could also set a specific commission rate for a product sales that come through one particular affiliate.

To review and define specific rates, go to Affiliates > Rates. You will be presented with a table that shows defined rates if any, and where you can create new rates, edit or delete existing ones.

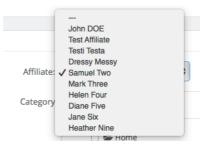




To add a new rate, click Add New and you will be presented with a form that allows to choose an affiliate, a product, a product category and to input a rate.

Affiliates / Rates								<b>?</b> Help
NEW RATE								
	Affiliate:		\$					
	Category		🖯 Collapse All	🕀 Expand All	Check All	O Uncheck All	search	
		🗌 🖿 Home						
		Only the first one selected	d will be saved.					
	Product							
	* Rate	0						
	Туре:	Rate	\$					
	Active:	Active	\$					

In the **Affiliate** field you can choose the particular affiliate to which that rate should apply. If left empty, it will apply to any affiliate based on the product category or product chosen.



Category 🗆 Collapse All In the **Category** field you can choose one category. The 🗆 🗁 Home commission rate for products in that category then 🗆 🗁 Women 🗆 🗁 Tops applies instead of the default rate. T-shirts Tops Blouses Dresses Casual Dresses Evening Dresses Summer Dresses shirt Product The **Product** field allows you to define a rate for a demo\_1 Faded Short Sleeves T-shirt specific product. Input part of the product's name and suggestions will show up. Choose the desired product from the suggestions that appear. 0.25 \* Rate Input the desired commission rate in the **Rate** field. For example, you could input 0.1 to grant 10% Rate Type: commissions based on the conditions chosen for this rate. Active: 
 Active Inactive The **Type** field characterizes the kind of rate. Available options, if any other than Rate, are displayed in the dropdown - otherwise this field can be ignored. You can also activate or deactivate a rate using the Active field without the need to delete it. Make sure to click the **Save** button to store the rate definition. Here's an example of our Rates table with two entries, one defined for a category and another for an affiliate. RATES 2 0 2 >\_ 2 Affiliate Product -Rate 🔻 🖌 Active 🔻 🔺 Category -Type 🔻 🔺 ÷ Q Search ٥ 0.400000 7 🖋 Edit 🛛 🔻 1 rate

□ 2 Bulk actions ▲ Heather Nine

0.500000

rate

1

🖋 Edit 🛛 🔻

### Banners

To add a new banner go to **Affiliates > Banners** and click **Add New**.

BANNERS 2 ID T A Title T A Image T A	
ID ▼ ▲ Title ▼ ▲ Image ▼ ▲	
	Q Sear
1 Affiliates Pro for PrestaShop	🖋 Edit

In the form, you can choose the image you would like to provide to your affiliates as a banner. You must provide a title for the banner.

You can optionally indicate a height and width, although these are detected automatically and don't need to be set explicitly. We recommend to upload images that are intended to be used by your affiliates with their original dimensions.

Upload Image	
banner-transparent.png	눧 Choose a file
Title	
Affiliates Pro for PrestaShop	
eight	
anner image height in pixels (leave empty for automatic detection).	
lidth	
anner image width in pixels (leave empty for automatic detection).	

Once you have uploaded one or more banners, these will be listed in the Banners section.

ELL	Banners			He
Orders				
Catalog				
Customers	BANNERS 4			022
Customer Service	ID 🗸 🔺	Title 🔽 🔺	Image 🔻 🔺	
Stats				
MPROVE				Q Search
Modules				
Design	0 1	Affiliates Pro for PrestaShop	►	de Edit 👻
Shipping		· · · · · · · · · · · · · · · · · · ·	<b>PRESTA</b> SHOP	
Payment				
International				
	□ 2	Affiliates Pro for PrestaShop	AFFILIATESPRO     PRESTASHOP	🖋 Edit 🔻
Shop Parameters				
Advanced Parameters				
	3	Affiliates Pro for PrestaShop	AFFILIATESPRO	🖋 Edit 🔻
AFFILIATES		Anniales Pro for Prestashop	📦 PRESTASHOP	∂" cuit ♥
Referrals				
Totals	- 4	IX Itthinx Banner Logo	🕃 ІТГНІМ×	Sedit 🔻
Hits				
Options	Bulk actions			
Banners				

All the banners uploaded are also displayed in the Affiliate Area. Affiliates can use the HTML code displayed for each banner to include it on their web sites. Here's an example from an affiliate area showing a big and a small banner image along with the HTML that affiliates would use to embed it on their website.

►	AFFILIATESPRO PRESTASHOP
src="http:/	<pre>ttp://demo.itthinx.com/aps17/?affiliates=2"&gt;<img '="" 1c7241cbabdd5887f31c073098fa1211.png"="" affiliatesprops_banners="" alt="Affiliates Pro for PrestaShop" aps17="" demo.itthinx.com="" height="288" img="" title="Affiliates Pro for PrestaShop"/></pre>
src="http:/	tp://demo.itthinx.com/aps17/?affiliates=2"> <img //demo.itthinx.com/aps17/img/affiliatesprops_banners/cc89d93af6404ff684f1fc1decb02652.png" height="32" title="IX Itthinx Banner Logo" alt="IX Itthinx Banner Logo"&gt;</img 
Performa	ince
Total Earn	
Commissi	ons pending payment

## **Discount Codes**

### Generating Discount Codes or Vouchers

Discount codes or Vou affiliates to credit them each purchase the cod	with a commission for	Da SELL	ashboard		iscounts /		
One or more vouchers	can be assigned to an		rders atalog	Ca	art Rules	Ca	atalog Price Rules
affiliate.			Products	CART RULES 11			
To generate vouchers	you must first create a		Categories		ID	ID 🗸 🔺 Name 🗸	
cart rule.	,		Monitoring		-		
			Attributes & Features				
Go to Sell > Catalog >	Discounts > Add		Brands & Suppliers				
New Cart Rule.			Files			11	Discount Coupon
			Discounts			10	Discount Coupon
	Discounts / Cart Rules Cart Rules Cart Rules Catalog Price Rules		e Add new cart r	ule			

Add a Name to the Cart Rule and input a code that helps you to easily recognize the Cart Rule as your template used for affiliate vouchers. Let's assume we want to create a Discount Coupon for a 20% discount.

CART RULE							
<b>i</b> INFORMATION		F ACTIONS					
	* Name	Discount Coupon					
	Description	20% Off your purchase	2				
	Code	20off	℃ Generate				
		Caution! If you leave thi	s field blank, the	e rule will automation	cally be applied to benef	îting customers.	
	Highlight	YES NO					
	Partial use	YES NO					
	Priority	1					
	Status	YES NO					
X Cancel						Save and stay Save	

Recommendation: Indicate a meaningful description, as it will appear on the vouchers generated and will be displayed in the affiliate area.

Disable the cart rule **Status** (select NO) as this cart rule is a template to generate affiliates' vouchers and shouldn't be made available as a valid discount in general.

Indicate the **Conditions**, for example 1 voucher available per customer, here we've also set a very high limit of 100.000.000 voucher uses and a validity way off in the future.

<b>i</b> INFORMATION	CONDITIONS		IS							
Limit	to a single customer	4								Q
	Valid	From	2016-12-01 12:00:00	)	Ë	То	2100-12-31 1	2:00:00		Ë
	Minimum amount	0		USD \$	Tax excl	luded	¢	Shipping exclud	led	÷
	Total available	10000	0000							
Total av	ailable for each user	1								
	Restrictions	Carr	ier selection							
		Cust	omer group selection							
		Com	patibility with other ca	art rules						
		Prod	luct selection							
×									B	

CART RULE	
information 24 conditions	J → ACTIONS
Free shipping	YES NO
Apply a discount	Percent (%)
	<ul> <li>○ Amount</li> <li>○ X None</li> </ul>
Value	% 20
	▲ Does not apply to the shipping costs
Apply a discount to	<ul> <li>Order (without shipping)</li> <li>Specific product</li> </ul>
	Cheapest product
	Selected product(s) A You must select some products before
Exclude discounted products	YES NO
Send a free gift	YES NO
X Cancel	Save and stay Save
×	

The validity conditions should be appropriate so that your affiliates can use them to promote your store and refer customers efficiently. Here we choose ridiculously high limits for the fields **Valid ... To** and **Total available**, to make sure that referred customers can virtually always use them.

In the third tab, **Actions**, you should determine what kind of discount is granted. All vouchers that are generated for affiliates off this template will automatically grant the same discount.

In this example, we grant a 20% discount off the entire purchase. After you have saved the cart rule, you will find our vouchers template created under "Cart Rules". Here you can see our template along with some automatically generated vouchers based on it.

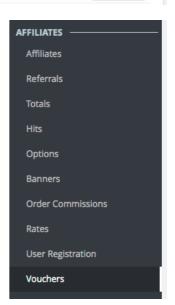
C	art Rul	les Ca	atalog Price Rules						
C/	RT RULE	s <u>11</u>							022
		ID 🔻 🔺	Name 🔽 🔺	Priority 🔻 🔺	Code 🔻 🔺	Quantity 🔻 🔺	Expiration date 🔻 🔺	Status	
							From	\$	Q Search
		1	Discount Coupon	1	20off	10000000	12/31/2100 12:00:00	×	🖋 Edit 💌
		2	Discount Coupon	1	87P41QHI	10000000	12/31/2100 12:00:00	~	🖋 Edit 💌
		3	Discount Coupon	1	WQ6FW8V1	10000000	12/31/2100 12:00:00	~	🖋 Edit 🔻

If you want to create some yourself based on the template, now you can go back to **Affiliates > Vouchers** and generate your vouchers for your existing affiliates and/or enable automatic voucher generation for new affiliates.

To generate the Vouchers for your affiliates, go to **Affiliates > Vouchers** and configure them.

For example, to create vouchers for all affiliates who have not yet any vouchers assigned, follow these indications:

 Tick the option Automatically generate vouchers for new affiliates. This will create vouchers for new affiliates based on the cart rules previously setup.



- 2. Select the **Cart Rule** you want to use as a template.
- 3. Untick the option Also generate voucher for affiliates who already have vouchers assigned unless you want to assign more than one voucher per affiliate.
- 4. Activate the vouchers **Status** so that they can be used when generated.
- 5. **Save** this configuration, click **Generate Vouchers** and accept the confirmation message.

SENERATE VOUCHERS	
You can generate vouchers for	all affiliates here based on a Cart Rule which will be used as a template.
Generate Vouchers	Automatically generate vouchers for new affiliates. Creates vouchers for new affiliates based on the Cart Rule used as template.
* Cart Rule to be used as template	20off \$
Additional Vouchers	<ul> <li>Also generate vouchers for affiliates who already have vouchers assigned.</li> <li>Do not enable this if you only want one voucher per affiliate.</li> </ul>
Status	Active, generated vouchers can be used immediately. This setting overrides the status of the cart rule used as template.
Generate Vouchers	Save

In the example below, Affiliate #11 was assigned a voucher with the selected cart rule (see the next section for a more complete view of generated vouchers).

10	11	Heather Nine	11	1QI93KE8	🖋 Edit 🔻

This voucher will behave according to the information, conditions and actions of the template *20off*. Note that a **Voucher Code** is automatically assigned to the vouchers generated.

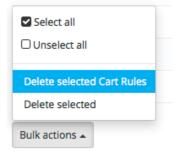
### **Vouchers Overview**

HERS	s (10)					• 2 >_
	ID 🔻 🔺	Affiliate ID 🔻 🔺	Affiliate Name 🔽 🔺	Cart Rule ID 🔻 🔺	Voucher Code 🔽 🔺	
						Q Search
	1	2	Test Affiliate	2	87P41QHI	🖋 Edit 🛛 🔻
	2	3	Testi Testa	3	WQ6FW8V1	🖋 Edit 🛛 🔻
	3	4	Dressy Messy	4	CR72YPI1	🖋 Edit 🛛 🔻
	4	6	Samuel Two	5	94PBKTLT	Sedit 🔻
	5	7	Mark Three	б	ZBWZ2EIX	Sedit 💌
	6	8	Helen Four	7	4PD1W829	Sedit 🔻
	7	9	Diane Five	8	Y9AWXSW6	Sedit 🔻
	8	10	Jane Six	9	WLGHF3AE	Sedit 💌
	9	1	John DOE	10	D6EFJXCN	Sedit 🔻
	10	11	Heather Nine	11	1QI93KE8	🖋 Edit 🔻

All vouchers generated are displayed under **Affiliates > Vouchers**.

Here you can **Edit** the vouchers assigned to affiliates, single and bulk actions allow you to **Delete** the voucher assignments and also to **Delete the Cart Rules** and the vouchers.

Note that for deletion we have two options, one that allows to delete the assignment and leaves the cart rule intact, and another that allows to delete the cart rule itself.



#### Vouchers in the Affiliate Area

Vouchers are also displayed in the Affiliate Area. Affiliates will sign in and go to the page **My Affiliates Area** to find assigned discount codes, if any, under the heading **Vouchers**.

The voucher shows its code and also a brief description previously indicated on the Cart Rule (voucher template).

buchers u can use the following voucher codes to refer customers:	
1QI93KE8 20% Off your purchase	
anners	

# **IV. Managing Affiliates**

## **Affiliates Overview**

From your site's Dashboard go to **Affiliates** > **Affiliates**. This section shows the current affiliates.

Dashboard		<sup>liates</sup>	ates							Help
SELL										нер
Orders										
Catalog	AFF	ILIATES	9						02>_	
Customers			ID 🔻 🔺	Name 🔻 🔺	Email 🔽 🔺	From 🔻 🔺	Until 🔻 🔺	Status 🔻 🔺		
Customer Service								. +	Q Search	
Stats										
			1	John DOE	pub@prestashop.com	2016-12-20		inactive	🖋 Edit 🔻	
Modules			2	Test Affiliate	test@example.com	2016-12-20	-	active	🖋 Edit 🔻	
Design			3	Testi Testa	testi@example.com	2016-12-20		active	🖋 Edit 🛛 🔻	
Shipping			4	Dressy Messy	dressy@example.com	2016-12-20		active	🖋 Edit 🔻	
Payment			6	Samuel Two	samueltwo@example.com	2016-12-22	-	active	🖋 Edit 🔻	
International			7	Mark Three	markthree@example.com	2016-12-22	-	active	🖋 Edit 🔻	
CONFIGURE			8	Helen Four	helenfour@example.com	2016-12-22		active	🖋 Edit 🔻	
Shop Parameters			9	Diane Five	dianefive@example.com	2016-12-22		active	🖋 Edit 🔻	
Advanced Parameters			10	Jane Six	janesix@example.com	2016-12-22	-	active	🖋 Edit 🔻	
AFFILIATES										
Affiliates		Bulk ac	tions 🔺							
Referrals										

Affiliates can be edited and also added manually by an administrator.

If affiliates are allowed to join by themselves, i.e. affiliate registration is enabled, new affiliates who have signed up through the affiliate registration form will be shown in this section.

If you would like to add a new affiliate manually, simply click the **Add New** button and you will be taken to the usual form that allows to add a new customer, with the field **Affiliate** already set to **Yes** beforehand, to signal that this new customer is also an affiliate.

Affiliates	ADD NEW	Creating a new Customer						
AFFILIATES 11	0 2	D Group name						
		J Visitor						
		2 Guest						
		Customer						
		Default customer group Customer ¢ Affiliate YES NO						

## **Customers as Affiliates**

Affiliates are customer accounts that have the affiliate flag enabled. Any customer can be qualified as an affiliate from the **Customers** section as well.

Orders																
Catalog		0	stome	15		Ave 🗎	rage Age		ti Or	ders per Custome	er.	Ne Ne	wsletter Regist	rations		c
Customers			L TIME			ALL	TIME		AL	LTIME		AL	LTIME			
Customers		50% Female Customers			rs	0 years		0.1				2				
Addresses				TOMERS 10												
Customer Service	MANA	NGE TU	UK LUS												00	
Stats	_	1	ID 🗸 🔺	Social title 🕶 🔺	First name 🕶 🔺	Last name 🕶 🔺	Email address 💌 🔺	Sales 🔻 🔺	Enabled	Newsletter 💌 🔺	Partner offers 🕶 🔺	Registration •	🔹 Last visit 🗸 🗸	Affiliate 🕶 🔺		
IMPROVE		- [		· •					- ÷			From 🛗	-		Q Sea	irch
Modules												To 🛗				
Design			10	Mrs.	Jane	Six	janesix@example.com		~	×	×	12/22/2016	5	~	<i>∎</i> Edit	•
Shipping			9	Mrs.	Diane	Five	dianefive@example.com		~	×	×	12/22/2016	5	~	<i>∎</i> Edit	•
Payment International			8	Mrs.	Helen	Four	helenfour@example.com		× .	×	×	12/22/2016	5	~	ø Edit	•
			7	Mr.	Mark	Three	markthree@example.com		× .	×	×	12/22/2016	5	~	Edit	•
Shop Parameters			6	Mr.	Samuel	Two	samueltwo@example.com		×	×	×	12/22/2016	5	~	/ Edit	*
Advanced Parameters			5	Mr.	Some	Banana	some@example.com		× .	×	×	12/20/2016	5		/ Edit	*
AFFILIATES ————			4	Mrs.	Dressy	Messy	dressy@example.com	\$34.31	~	~	×	12/20/2016	12/20/2016 15:37:00	~	/ Edit	•

A column labeled *Affiliate* is provided in the **Customers** section where customers can be activated or deactivated as affiliates directly. If you click the red cross for a customer who is not affiliated, he will be added as an affiliate. If you click the green check mark, he will be removed as an affiliate (not as a customer) and a red trash icon will be shown instead.

These icons show what affiliate status a customer has:

- Green checkmark : The customer is an affiliate.
- Red trash can : The customer was deleted as an affiliate (but is still a customer).
- Grey checkmark : The customer is an inactive affiliate (pending activation or reactivation).
- Red cross : The customer is not an affiliate.

Edit a customer to view and modify details related to the customer's participation as an affiliate and status.

You can quickly add the customer as an affiliate by changing the setting under **Affiliate** from **No** to **Yes** when you edit the customer's profile (or by clicking the red cross in the list).

Here you can also change the **Affiliate Status** to Active, Inactive or Deleted, see or set the **Referral Rate**, see what **Vouchers** are related to the affiliate and which affiliate has referred the customer under **Referrer**.

Affiliate NO	
Affiliate From:	
2016-12-22	<b></b>
Affiliate Until:	
Affiliate Status: ✓ Active Inactive Deleted Referral Kate	
0.2 You can set an individual referral rate here, otherwise the default rate 0.2 applies.	
Vouchers	
Referrer  - None  \$	

Affiliate

# V. Affiliate Area

### Structure of the Affiliate Area.

The Affiliate Area includes the necessary resources for affiliates to promote the site through their channels. It also includes information about accumulated commissions and other statistical information.

#### Affiliate Links

The Affiliate Area shows the affiliate's ID. It is used to identify the affiliate as the referrer via affiliate links, when provided as the value of the affiliate URL parameter.

Under Affiliate URL, the basic form of the affiliate link is provided, linking to the front page of your site. The link can be used by affiliates in emails, it can be shared in social media or used to construct HTML links on websites. For the latter purpose, the URL is used in the Affiliate Link presented below. The HTML code provided under Affiliate Link can be used directly by affiliates on their websites to link to your shop.

Aff	liate Area
Welc	ome to your affiliate area.
Here	you can find information about your affiliate link and earnings.
Your	Affiliate ID: 2
Ref	erral Resources
	visitors to our website using your Affiliate URL to share through social media and Affiliate Link on your website and in emails.
Affi	iate URL
Use t	he Affiliate URL to share or create links:
htt	p://demo.itthinx.com/aps17/?affiliates=2
htt	p://demo.itthinx.com/aps17/?affiliates=2
	p://demo.itthinx.com/aps17/?affiliates=2
Affi	
Affi Use t	iate Link

Remember that affiliates can also share links to your products if the *Social Media Share Buttons* module (in PrestaShop 1.7, previously in PrestaShop 1.6 the *Social Sharing* module) is enabled. When an affiliate is logged in and views a product page, a click on one of the sharing buttons will share an affiliate link to the product, identifying the affiliate as the referrer. Please also review the section on Social Sharing below for further information, as this way of producing affiliate links is not part of the Affiliate Area itself.

#### Vouchers

Any discount code or vouchers that are related to the affiliate are shown in the Affiliate Area. The affiliate can distribute the code to potential customers and will receive a commission on orders that have been placed using the assigned discount code.



Please refer to the section on Vouchers to enable the automatic generation and assignment of discount codes that affiliates can use.

#### Banners

Each banner that has been uploaded to the **Affiliates > Banners** section is shown in the Affiliate Area.

Below each image, affiliates will find the HTML code required to add the banner to their website.

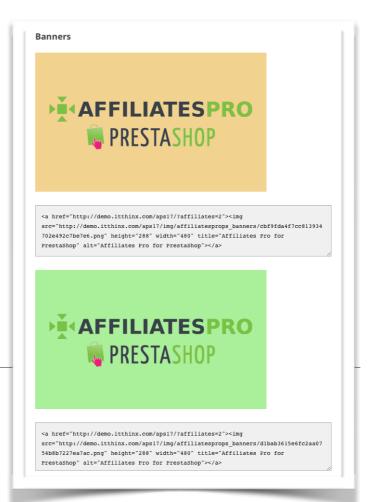
The code includes the affiliate link which identifies the affiliate as the referrer.

Your affiliates can use the HTML code shown for each banner to embed the banner on their website or to use it in emails.

#### Performance and Earnings

The Affiliate Area provides information about the total earnings and referred sales performance to the affiliate.

The information provided includes the commissions pending payment and



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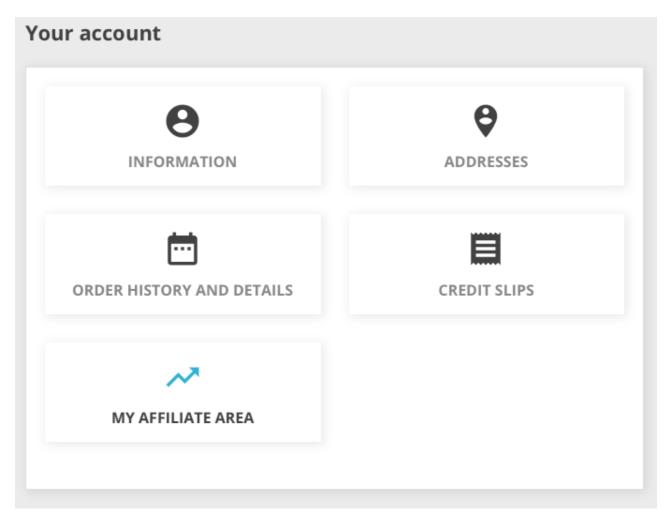
commissions paid for the full affiliate lifetime. It also includes the number of sales referred and number of referrals that are pending payment, as well as those that have already been paid.

PerformanceTotal EarningsCommissions pending paymentUSD 5.20Commissions paidUSD 193.46Number of sales referredAccepted referrals pending payment: 1<br/>Referrals paid: 1Monthly EarningsNovember 2016 USD 193.46December 2016 USD 5.20

A monthly summary is provided, which lists affiliate earnings for each month for the full period of affiliation.

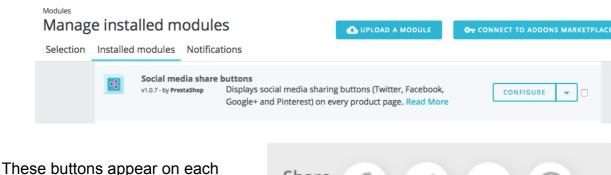
## **My Account Integration**

The **Affiliate Area** is also accessible for affiliates through the **My Account** section on the Front End. If desired and you haven't done so yet, enable the **My Account block** module under **Modules > Modules & Services** of your *PrestaShop* dashboard.

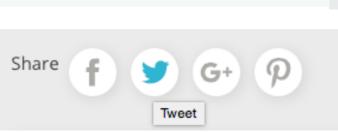


### **Social Sharing**

To promote products through social channels like *Facebook, Twitter, Google+* and *Pinterest*, the affiliates can use the share buttons provided by the Social Media Share module.



product when the **Social Media Share Buttons** module is enabled.



Normal visitors can use them to share links to your products, but

when an affiliate is logged in, those shared links will also carry the identification of the referring affiliate. Thus, your affiliates can promote your products easily by sharing links and earn commissions for referred sales.

9	
What's happening?	
Faded Short Sleeves T-shirt http://demo.itthinx.com/aps affiliates=2	17/tshirts/1-faded-short-sleeves-tshirt.html?

When an affiliate is logged in, the shared links are converted into affiliates links automatically. In this example, the affiliate clicked the Twitter button and as is shown in the Tweet form, the link to the product also carries the identification of the referring affiliate.

# **VI.** Affiliate Commissions and Payment

## **Referrals, Commissions and Totals**

We will review two important aspects in the following sections:

- 1. How referrals are handled, including reviewing automatically created referrals, adding referrals manually and editing existing referrals. This is covered in the first section **Referrals Overview** below.
- 2. How payments for affiliates are managed. This is covered in the section **Accumulated Commission Totals** below.

*Affiliates Pro for PrestaShop* uses referrals to record commissions related to <u>transactions</u>. This includes commissions on <u>referred orders</u> and commissions on <u>referred customers</u>.

The system provides an overview on recorded referrals for further review. Referrals recorded for orders can be synchronized to the order status so that manual review is reduced to a minimum. Referred customers will result in referrals if that is enabled.

Affiliate payments can be processed using the reports that the system provides for that purpose. Note that the system will not process affiliate payments automatically in order to assure that a due review process has been applied before any payments are granted.

The payment process will usually involve producing a monthly report of *Accepted* referrals, using the facilities provided under **Affiliates > Totals**. Please refer to the **Accumulated Commission Totals** section further below for details.

We will now start to review how referrals are managed on an individual basis, thereafter we will review the process of handling totals and paying affiliates.

### **Referrals Overview**

Referrals represent commission assignments for referred purchases and customers.

Each referral has an associated amount and currency. These are determined by the applicable referral rates as set under **Affiliates > Order commissions** and **Affiliates > Rates** and the related net order amount for purchases.

For customer referrals, the referral amount and currency are determined by the settings under **Affiliates > User Registration**.

Orders									
Catalog	REFERRAL	s 6							02>
Customers		ID 🔻 🔺	Date 🔽 🔺	Affiliate 🔻 🔺	Description 🔽 🔺	Amount 🔻 🔺	Currency 🔻 🔺	Status 🔻 🔺	
Customer Service								+	Q Searc
PROVE		1	2016-12-20 13:55:42	Test Affiliate	Order #6	5.20	USD	accepted	🖋 Edit 🔹
Modules		2	2016-12-20 15:11:11	Samuel Two	manually created referral for an offline transaction	90.00	USD	accepted	🖋 Edit
Design		3	2016-11-03 10:41:20	Test Affiliate	manually added for testing	193.46	USD	closed	de Edit
Shipping		4	2016-12-22 12:22:41	Test Affiliate	User Registration heathernine@example.com	11.11	USD	accepted	🖋 Edit 🕚
ayment nternational		5	2016-12-22 12:25:37	Heather Nine	User Registration darrenten@example.com	11.11	USD	accepted	🖋 Edit 🔹
NFIGURE		6	2016-12-22 12:26:10	Heather Nine	Order #7	6.96	USD	accepted	🖋 Edit 🗖
hop Parameters									
dvanced Parameters	BUIK a	ctions 🔺							
Shop Parameters Advanced Parameters	Bulk a	ctions 🔺							

#### Automatic Referrals

Referrals are recorded automatically for orders if that option is enabled. Please refer to the setup instructions provided in the corresponding section.

Taking the above into account, it is clear that we do normally **not** need to record referrals manually. However, there might arise circumstances where we will find the need to record an additional commission for an affiliate, or where automatically recorded information needs to be adjusted manually. For these cases, the information provided below on adding and editing referrals manually is provided.

#### Manual Referrals and Review

Referrals can also be added manually in this section.

Affiliates / Referrals Referrals	0
	ADD NEW
REFERRALS 6	<b>○</b>

To add a referral manually, go to **Affiliates > Referrals** and click **Add New**. This will lead you to the form that allows to specify details of the referral to add.

Dashboard SELL Orders	Affiliates / Referrals Add new	<b>З</b> Нер
Catalog		
Customers	NEW REFERRAL	
Customer Service	* Affiliate:	John DOE \$
Stats		
	* Date & time:	2016-12-30 09:49:08
Modules	Description:	
Design		
Shipping	* Amount:	0
Payment	Anoun	·
International	Currency ID:	USD \$
CONFIGURE	Status:	Accepted \$
Advanced Parameters	Reference:	
AFFILIATES		
Affiliates	Cancel	Save
Referrals		Surc

The form provides the following fields that determine the referral:

- Select the Affiliate who will receive the referral.
- Choose the Date & time corresponding to when the referral has been produced.
- Add an optional **Description**.
- Introduce an Amount that represents the commission that is granted with this referral.
- Choose the Currency ID, for example use USD, EUR, GBP, CAD, ...
- Select the referral Status:
  - Choose Accepted if the commission for this referral has not yet been paid.
  - Choose Pending if the referral is yet up or consideration.
  - Choose Closed if the commission for this referral has been paid.
  - · Choose Rejected if the referral is not granted.

To edit an existing referral, go to the referrals overview under **Affiliates > Referrals** and click the line corresponding to the desired referral. The same options as when adding a referral are available.

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Dashboard	Affiliates / Referrals Edit	8
SELL		Help
Orders		
Catalog	ID: 2	
Customers	* Affiliate:	
Customer Service	Samuel Two \$	
Stats	* Date & time:	
	2016-12-20 15:11:11	<b>6</b>
Modules		
Design	Description:	
Shipping	manually created referral for an offline transaction	
Payment		
International	* Amount: 90.00	
Shop Parameters	Currency ID:	
Advanced Parameters	USD \$	
AFFILIATES	Status:	
Affiliates	Accepted \$	
Referrals	Reference:	
Totals		
Hits		
Options	×	
Banners	Cancel	Save

## **Accumulated Commission Totals**

The **Totals** section is used to obtain the necessary reports that allow us to manage our affiliate payments.

Dashboard	Affiliates / Totals								•
SELL									Help
Orders									
Catalog	filter								
Customers		Affiliate ID							
Customer Service									
Stats		From			<b>—</b>				
		Until							
Modules		Status:	-	¢					
Design									
Shipping		Currency ID:	-	\$					
Payment						•	8		
International	Clear					Payment File	Export	Close referrals	Filter
Shop Parameters	TOTALS								
Advanced Parameters	Affiliate ID	Name		Email		Total	C	urrency	
AFFILIATES	2	Test Affiliate		test@example.con	n	209.77	U	SD	
	6	Samuel Two		samueltwo@exam	ple.com	90.00	U	SD	
Affiliates	11	Heather Nine		heathernine@exa		18.07		SD	
Referrals	10	Jane Six		janesix@example.	com	9.84	U	SD	
Totals									

### **Reviewing Accumulated Totals**

This section provides an overview of total referral amounts by affiliate, functions to handle payments and to close referrals according to payouts.

The filters provided for this section allow to review accumulated affiliate commissions

pending payment (with referral status *Accepted*) and past commissions paid (with referral status *Closed*) for the period of time indicated by the From and Until fields.

If you process payments on a periodic basis, you can limit the range of referrals taken into account to be within a given time period using the *From* and *Until* fields.

From	2016-11-01	Ë
Until	2016-11-30	쓴
Status:	Accepted	\$
Currency ID:	USD	\$

In the following examples, no specific dates have

been used in the From and Until fields. However, we do recommend to limit the dates in order to take into account potential refunds that can occur after a certain amount of time. For example, in your periodic payments to affiliates, you could produce your totals on the 20th of each month for referrals up to the latest day of the previous month.

### Paying Affiliates - Obtaining a Payment File

To pay your affiliates their commissions or referral earnings, you can use the Payment File button to generate a CSV file of affiliates and their totals. This file can be used to send mass payments via PayPal (for business accounts that have this feature enabled - you need to contact PayPal if this option is not available to you) or any other payment processor that allows to send payments in bulk.

You can also use this file as a reference to process your affiliate payments individually or in bulk through other means like Bank Transfer or Cheque. If offline payments are used, this still provides a useful basis for spreadsheets where you can keep track of payment transactions and their reference numbers, dates etc.

The mass payment file generated will consist of the email addresses, the total amount, the currency and the affiliate ID for all affiliates that have unpaid commissions for the date range and conditions previously specified.

FILTER				
	Affiliate ID			
	From		<b>—</b>	
	Until		<b>—</b>	
	Status:	Accepted	\$	
	Currency ID:	USD	\$	
<b>X</b> Ilear				Payment File Export Close referrals Fil
ALS				
Affiliate ID	Name	Ema	ail	Total Currency
2	Test Affiliate	test	@example.com	16.31 USD
6	Samuel Two	sam	ueltwo@example.com	90.00 USD

**IMPORTANT** : Make sure that the conditions correspond to the payment **period under** 

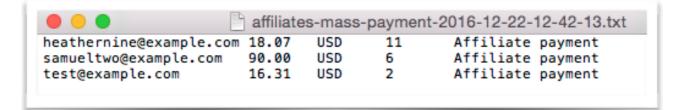
**consideration** and that the referral status is set to **Accepted**. This is required so that the payment amounts reflect only commissions that have been accepted for payment and have not already been paid.

Use the **Payment File** button to download the mass payment file.

Affiliate ID			
From		<u> </u>	
Until		<b></b>	
Status:	Accepted	\$	
Currency ID:	USD	¢	
×			Payment File

The generated payment file contains one line per entry, holding the email address, the amount, the currency, the affiliate's ID and a line item description.

Here's an example payment file obtained for the totals as shown above:



### **Exporting Totals**

Affiliates Pro for PrestaShop allows to export the totals and produce reports for your records. Use the **Export** button on the **Totals** screen to obtain your report according to the current filters set.

The file that is generated will provide a column header and the following values separated by tabs for each

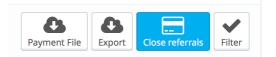
	Affiliate ID			
	From		<b></b>	
	Until			
	Status:	Accepted	¢	
Ci	urrency ID:	USD	\$	
×				Payment File

entry: the affiliate's ID, the affiliate's name, the email address, the total commission amount and the currency.

• •	•	affiliates-totals-export-20	016-12-2	2-12-43-23.txt
Id	Affiliate	Email Total Currenc	у	
Id 11	Heather Nine	heathernine@example.com	18.07	USD
6	Samuel Two	samueltwo@example.com	90.00	USD
2	Test Affiliate	test@example.com	16.31	USD

Marking Accumulated Commissions as Paid

After the affiliates have been paid, the related referrals should be marked as *Closed* by using the function provided in this section.



You should **only close referrals** whose current status is *Accepted*, as these referrals are assumed to be accepted for payment but have not yet been paid. After you have processed the payments for your affiliates based on the totals obtained, you should use the **Close referrals** function using the same filter settings.

**Important**: Closing referrals means that the accepted referrals have been paid to the affiliates. Before the referrals are closed, you will be presented with an overview of conditions covering the referrals that are about to be closed/marked as paid. Please note that this cannot be undone (unless you were going to edit each referral individually afterwards).

After you click the **Close referrals** button, you will be presented with a confirmation screen before you definitely close the related referrals.

! CLOSE REFERRALS					
Are you sure you want to close the referrals with these conditions?					
Affiliate ID					
From					
Until					
Status:	accepted				
Currency ID:	USD				
X Cancel	c	Close referrals			

Make sure that the parameters are correct and click the **Close referrals** button. This will finish marking the related referrals as closed.

Closed referrals are understood to have been paid to the affiliates.

Summing it up, to mark the referrals as paid, go to **Totals**, adjust the filter settings, obtain your payment totals and after making your payments, click the **Close Referrals** button to confirm. All related referrals will change their status to *Closed*, meaning that you have sent your affiliates their money.

## VII. Clicks or Hits

### **Hits on Affiliate Links**

Under Affiliate > Hits you can see the list of incoming hits from clicks or other requests on affiliate links.

Each hit is related to the affiliate whose link was clicked or requested and the date and time of the hit are shown.

22					
Hit ID 🔻 🔺	Date & Time 🔽 🔺	Affiliate 🔻 🔺	Hits 🔽 🔺		
	From			Q Search	
	То				
1	12/20/2016 13:52:57	Test Affiliate	1		
2	12/20/2016 15:37:00	Testi Testa	1		
3	12/20/2016 15:37:04	Testi Testa	1		
4	12/22/2016 12:22:03	Test Affiliate	1		
5	12/22/2016 12:23:43	Heather Nine	1		
6	12/22/2016 12:33:56	Heather Nine	1		
7	12/22/2016 12:35:01	Jane Six	1		
8	12/23/2016 07:47:52	Heather Nine	1		
9	12/23/2016 07:50:59	Heather Nine	1		

You can click a hit to see the detail.

Hit ID			
9			
Datetime			
2016-12-23 0	7:50:59		
Affiliate ID			
11			
11 Hits			
Hits			

For referrals based on affiliate links, you will see that a hit on the affiliate's link was registered previously. It's not necessary for this to have happened immediately before the referral was recorded, it's sufficient if the hit was recorded within the timeframe of the referral timeout (according to the setting *Referral timeout* under **Affiliates > Options > Referrals**).

AFFILIATES	
Affiliates	
Referrals	
Totals	
Hits	

# **VIII. Support and Troubleshooting**

## **Contacting Support**

You can contact our Support Team by sending an email to support@itthinx.com or you can post a support ticket at <u>https://addons.prestashop.com/en/customer-support.php</u>. If you choose to contact our Support Team via email, it is required to attach a **proof of purchase** for a **valid license** of this product and within a still valid support period.

Whether you contact us at our support email or through the marketplace, please make sure to include a **link to your site**. We might also need to have **admin access to your site** in order to help you more efficiently. Please make sure to **provide temporary admin access** and forward a link to your site's admin URL, the temporary admin email account and password so that our support team can help you more quickly.

We will respond usually within 24 hours after receiving your support request. Please make sure that you have made a **full backup of your site and database**.

## F.A.Q

• I can't find the *Affiliate* column on the **Customers** screen.

Solutions:

Depending on your screen, the full width of the Customers section might not be visible. Please try to use horizontal scroll in the window and scroll to the right to uncover the column.

• I can't find the Affiliate menu on the Dashboard or I can't see all menu items.

Solutions:

PrestaShop's menu does not adjust well if all menu items don't fit on the screen. As the menu does not scroll or adapt when new menu items are added, it can happen that some or all points of a new menu are not visible.

In that case, you can use your browser's zoom function to decrease the font size, usually using **Cmd +** - (hold down the command key and press the minus key) on Mac or **Ctrl +** - on Windows. You can usually reestablish the view using **Cmd + 0** or **Ctrl + 0**.

You can also add the most frequently used sections to the Quick Access menu on top. Please refer to the Setup section for details.