AFFILIATESPRO

Affiliates Pro for PrestaShop

User Manual

Version 1.4.1

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

ITTHINX

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I. Introduction

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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.
6. 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.

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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

PrestaShop 1.6 Social Sharing Buttons

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II. Installation

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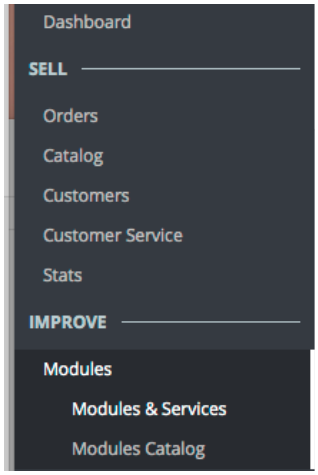
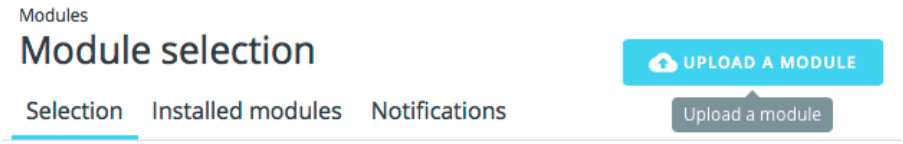
Installing Affiliates Pro for PrestaShop

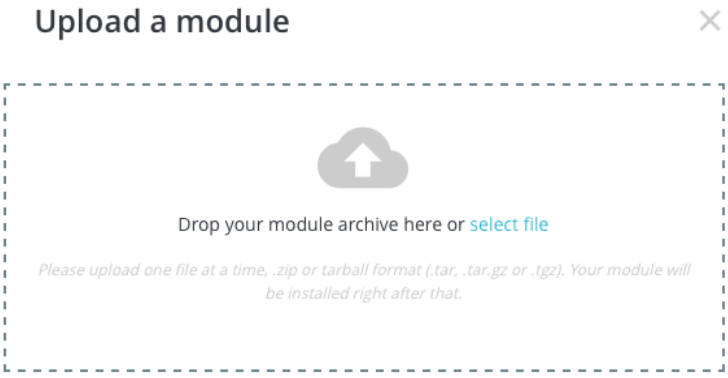
On your *PrestaShop* Dashboard go to **Improve > Modules > Modules & Services**.



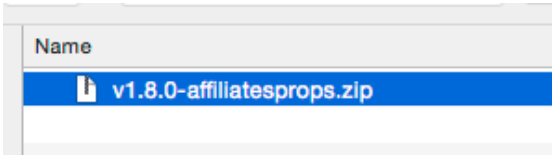
Under **Modules & Services**, click the button to **Upload a Module**.



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.



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

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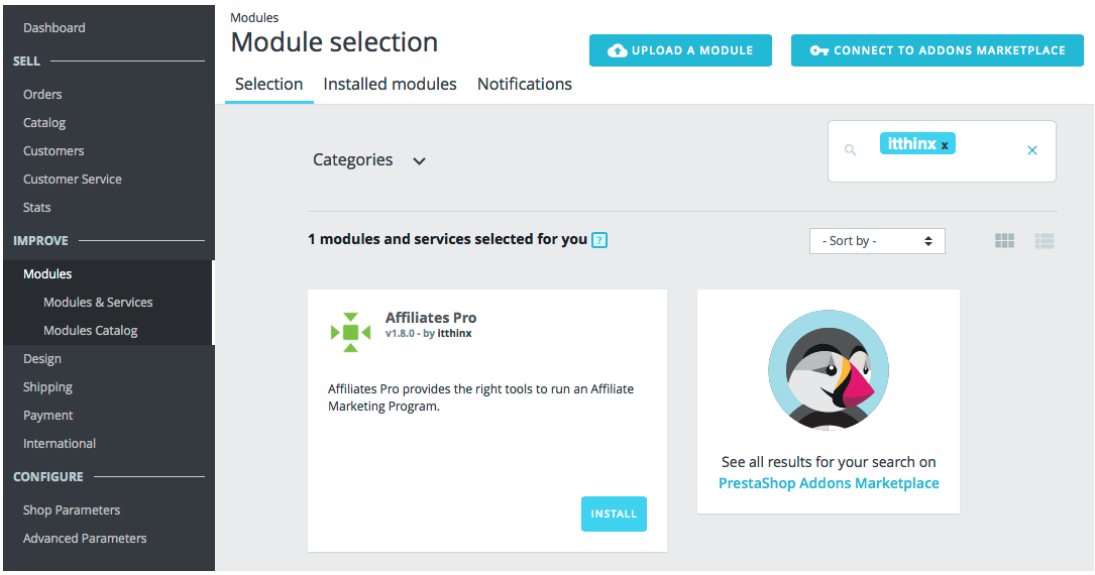
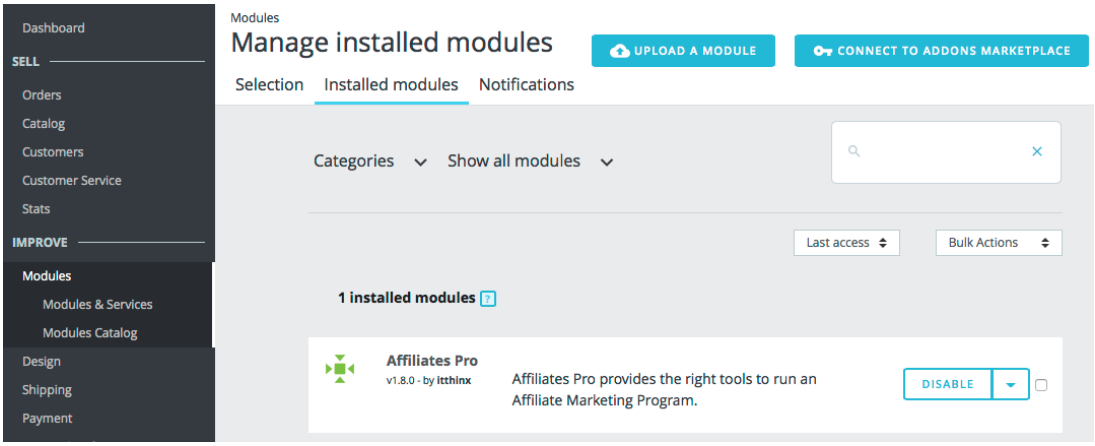
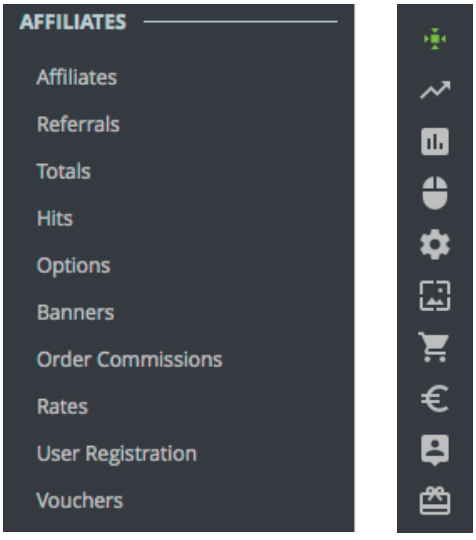
You can locate the module by using the search field that PrestaShop provides in this section. Search for *itthinx* or *Affiliates Pro*.



You will now find it under the **Installed modules**.



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.



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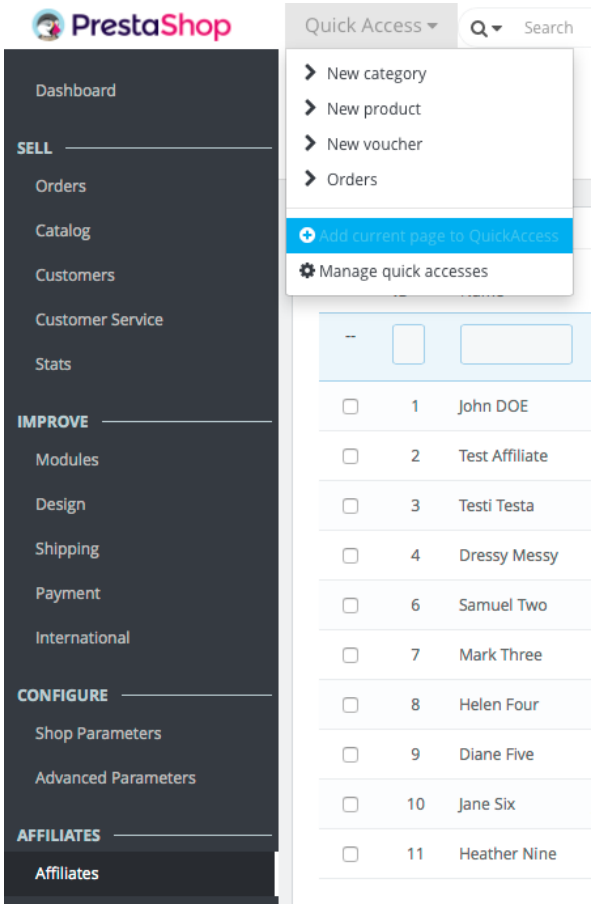
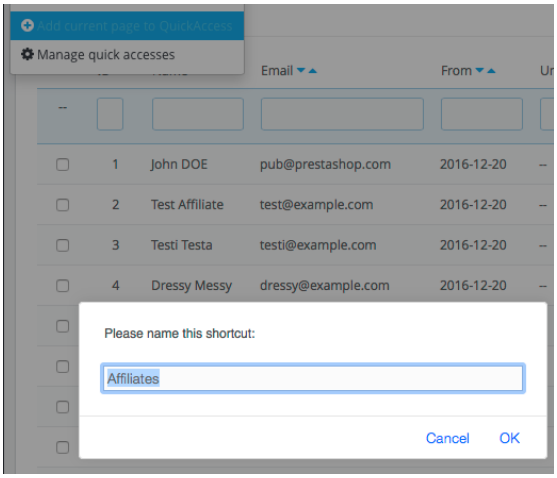
Tip: PrestaShop provides a convenient way to add shortcuts to the administrative menu at the top of the Dashboard called *Quick Access*.

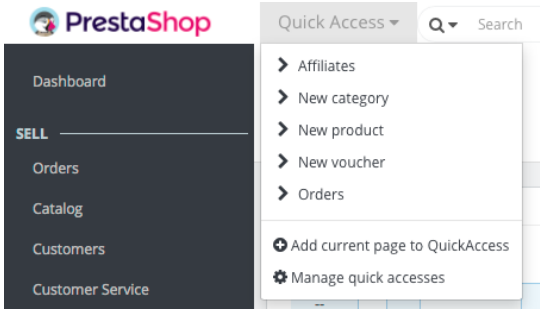
For example, to add a shortcut that leads you directly to the list of Affiliates, go to **Affiliates > Affiliates** and click **Quick Access**, then click **Add current page to QuickAccess**.



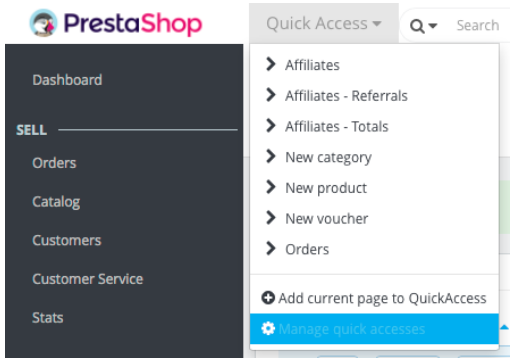
A dialogue will prompt you to name the shortcut.



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



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.



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III. Setup

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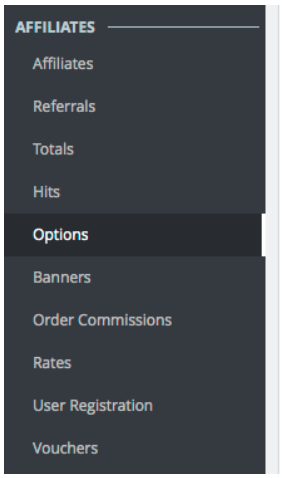
Setting up Affiliates Pro for PrestaShop



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.

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.

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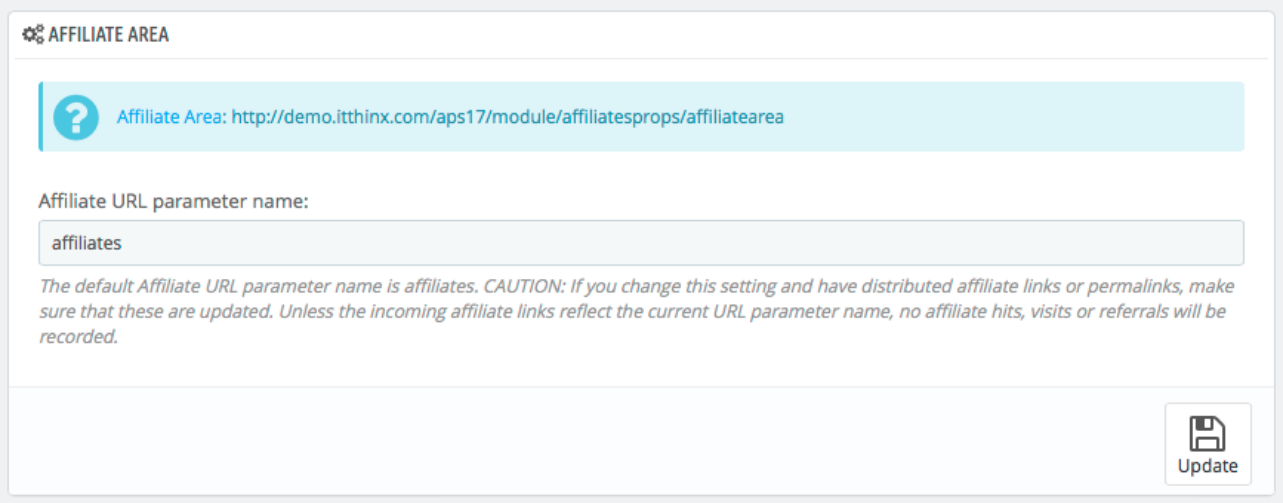
Affiliate Area

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.

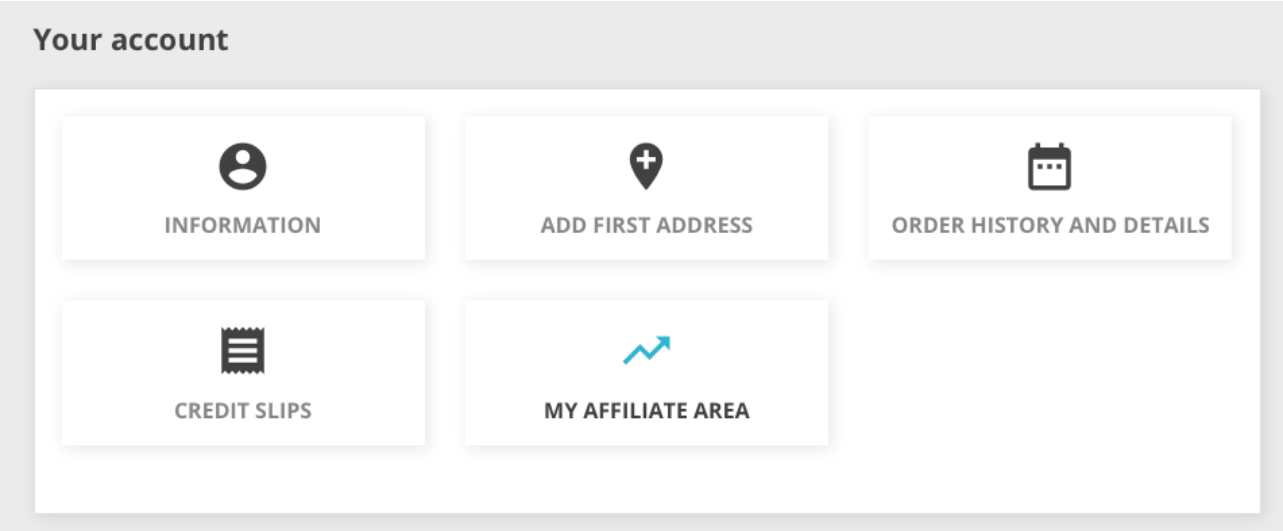


The option that determines the *affiliate URL parameter* name is also set here. Affiliate links will carry this parameter to identify the referring affiliate by his or her ID.

The default ***Affiliate URL parameter name*** is *affiliates*.

Recommendation: If you decide to change this setting, do it before affiliates are added. 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.

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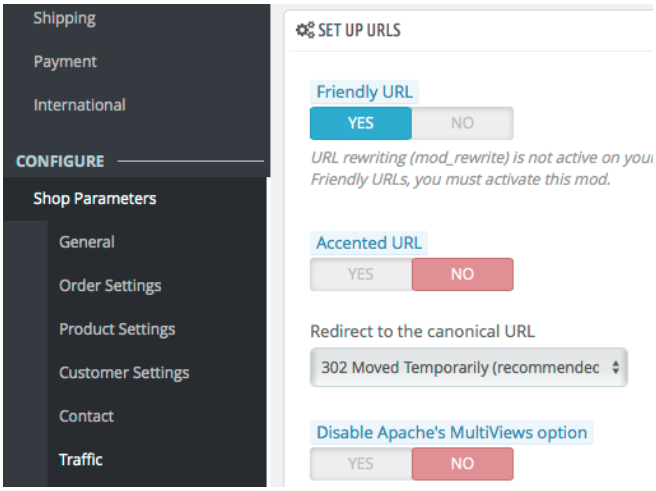
Tip: You can enable PrestaShop's option to use Friendly URLs. This will allow you to provide a more "human-readable" URL to the affiliate area instead of a parameter-based URL.

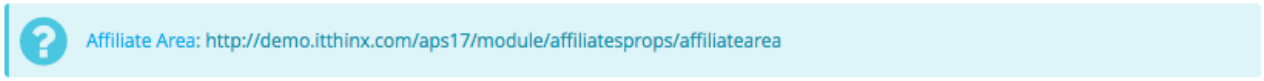
You will find the appropriate option under **Configure > Shop Parameters > Traffic > Set Up URLs** - Choose **Yes** under the option **Friendly URL** and save the settings.



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.

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.

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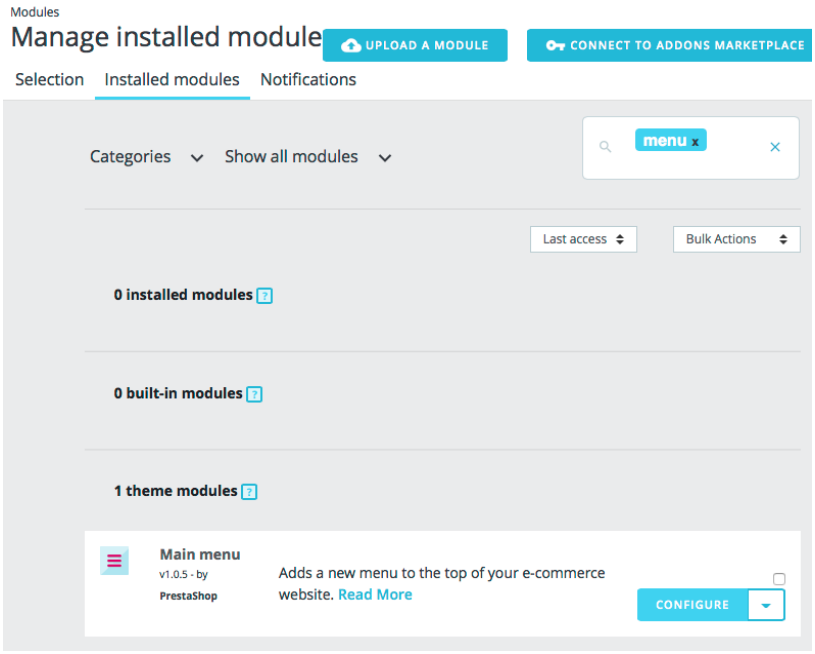
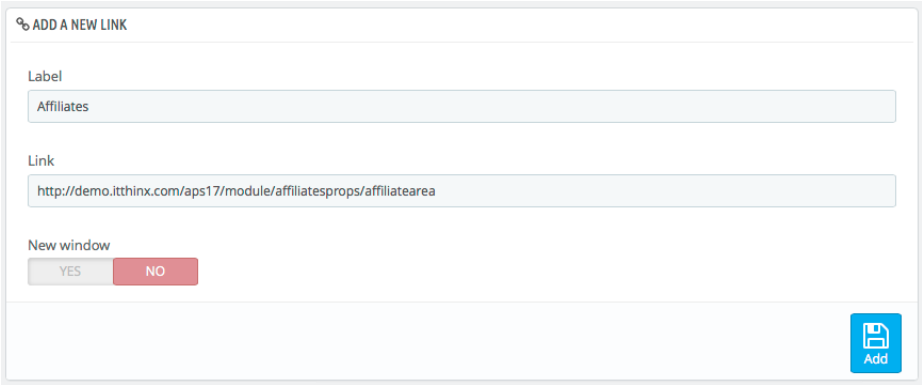
To add a menu entry linked to the Affiliate Area, go to **Modules > Modules & Services > Installed modules** and click the **Configure** button for the **Main menu** module. Of course this assumes that you have this module enabled, otherwise first install it.



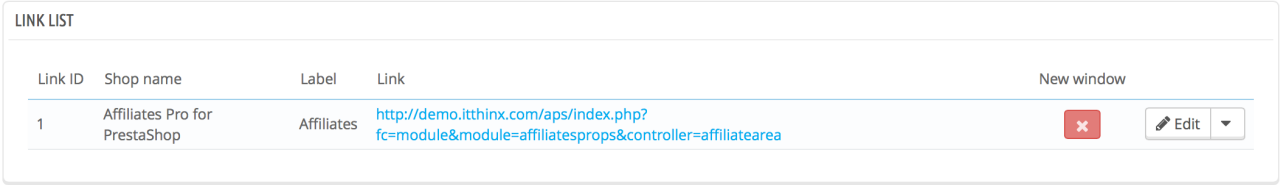
In this section you will find the current configuration of the menu, a form that allows to add a new link and a list of existing links. In the form, add your entry that leads your users to the Affiliate Area:

Label: Input the desired name of the menu item that leads your users to the Affiliate Area here.



Link: Paste the URL of the Affiliate Area in this field.

Click the **Add** button and the link to the Affiliate Area will now appear in your link list.



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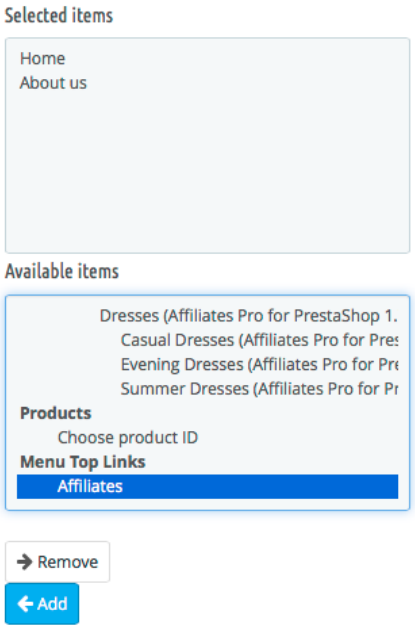
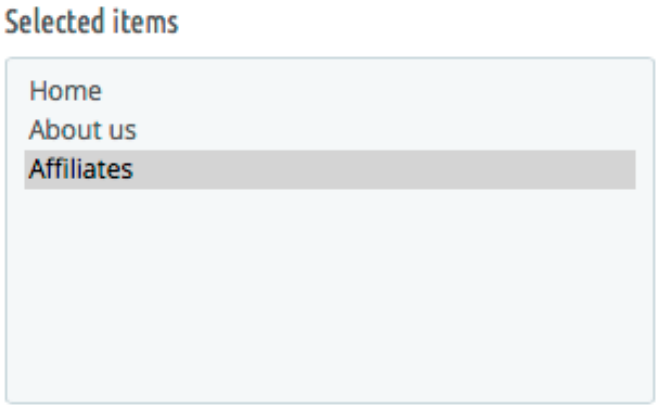
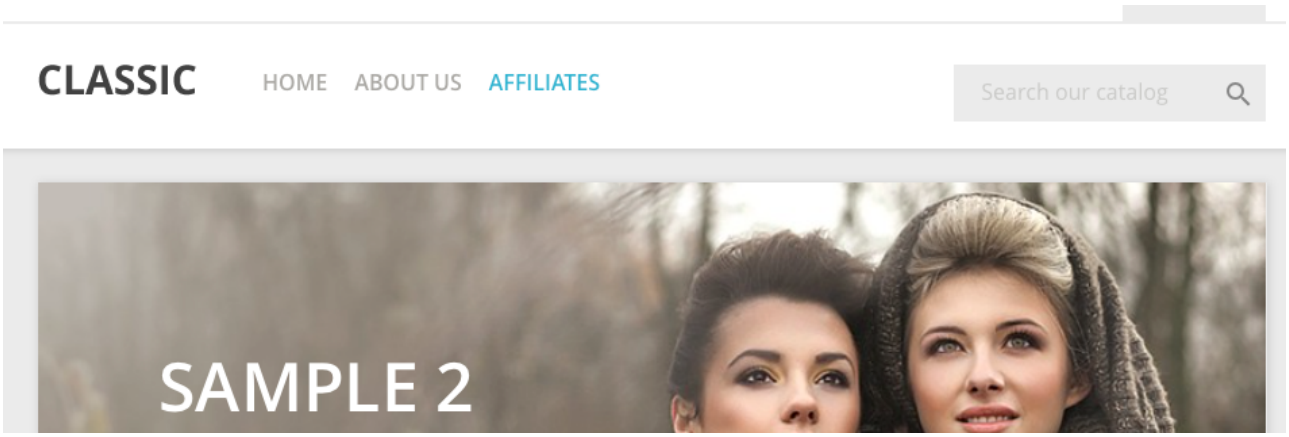
Choose the new entry “Affiliates” and click the **Add** button and then hit **Save**.



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



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.



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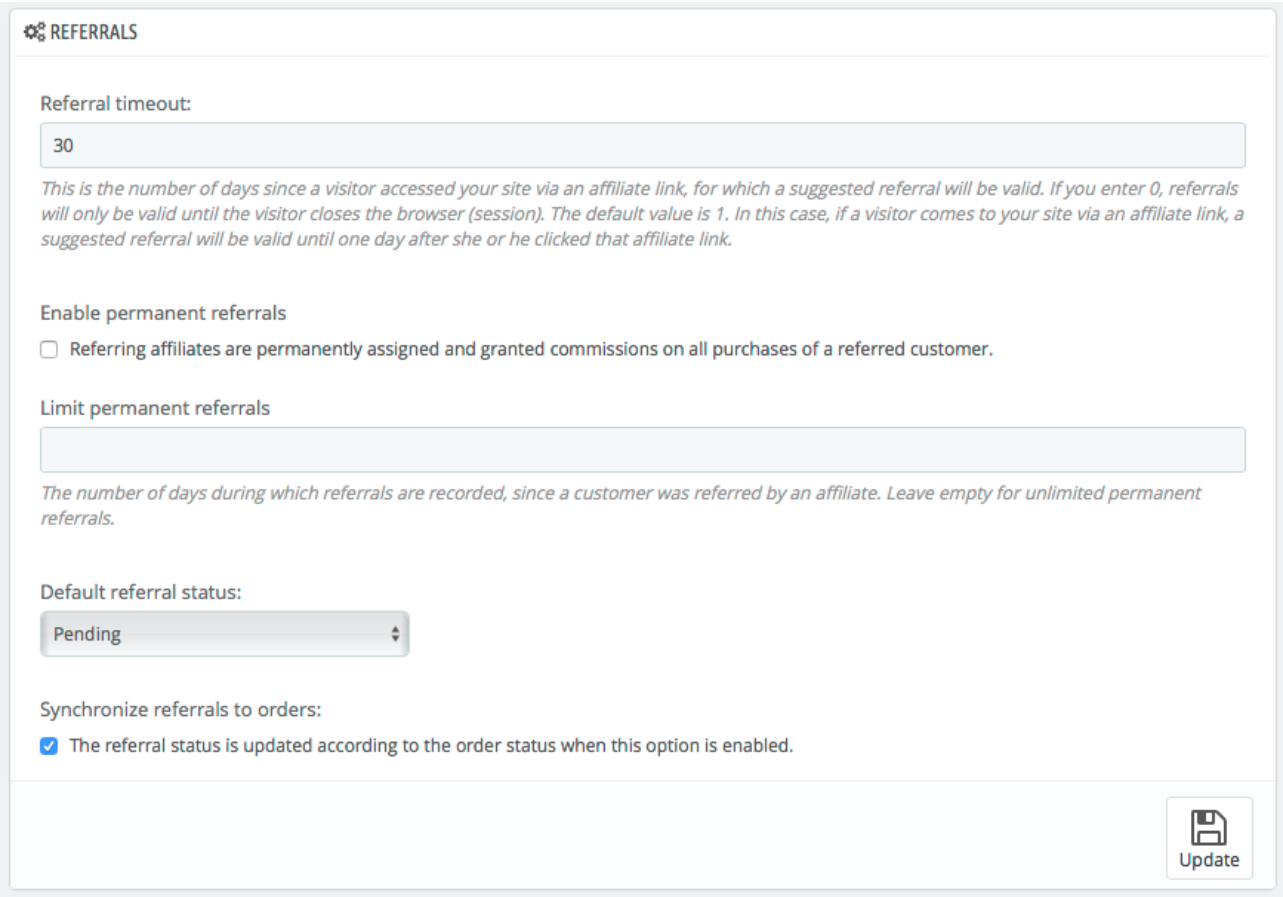
Referrals

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



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.

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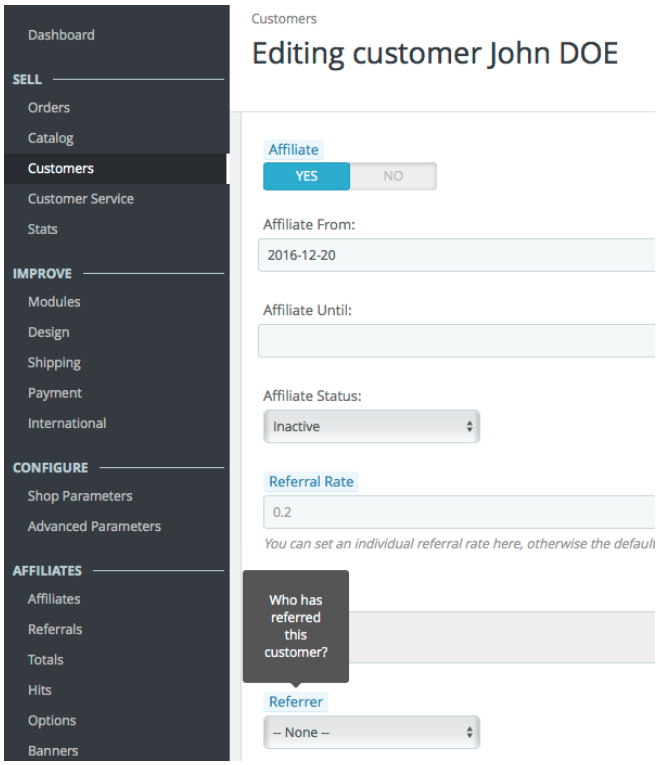
Limit permanent referrals

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).



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.

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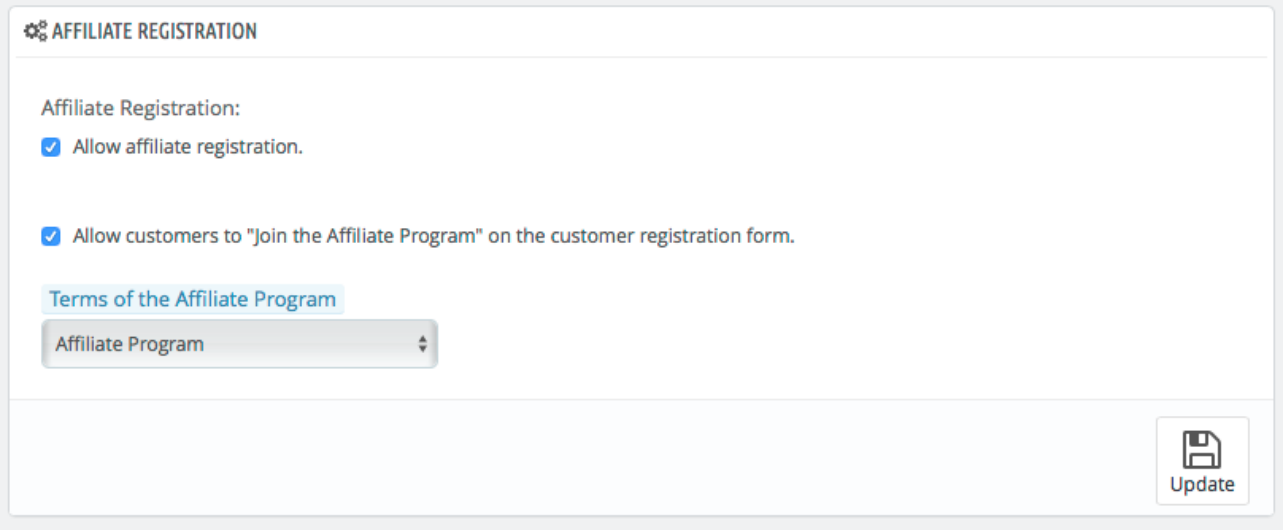
Affiliate Registration

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.

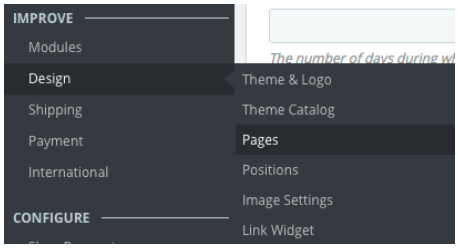
This section also provides a convenient option to determine the page with your affiliate program's terms and conditions, so that it is presented to new affiliates for acceptance while they sign up.



- 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

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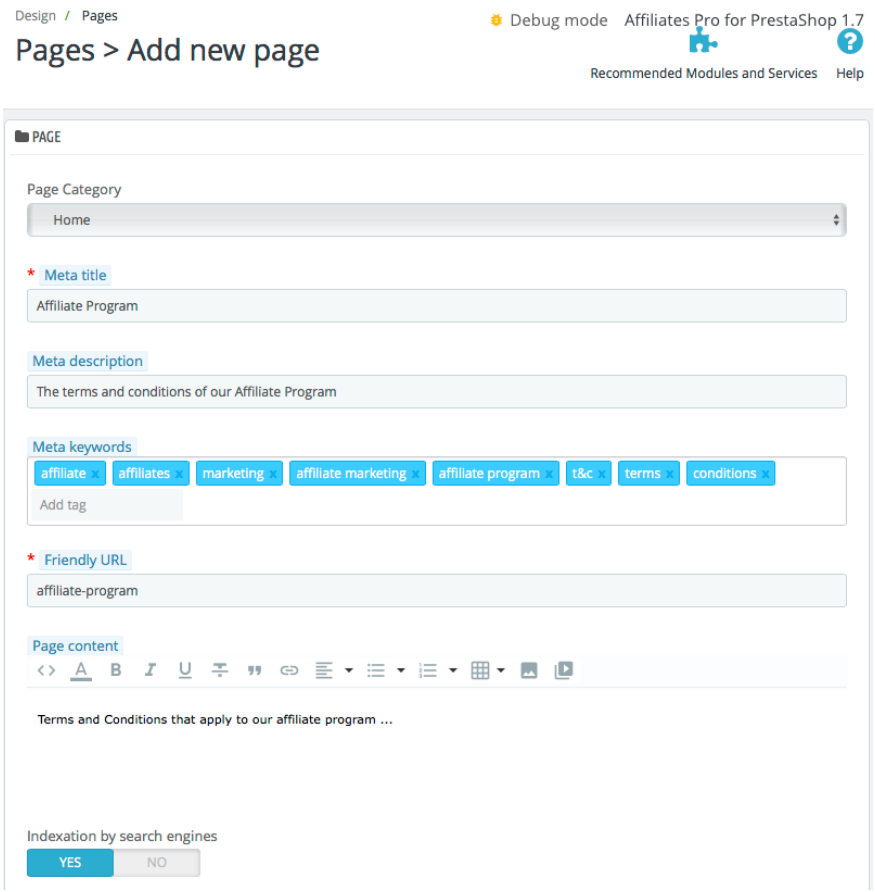
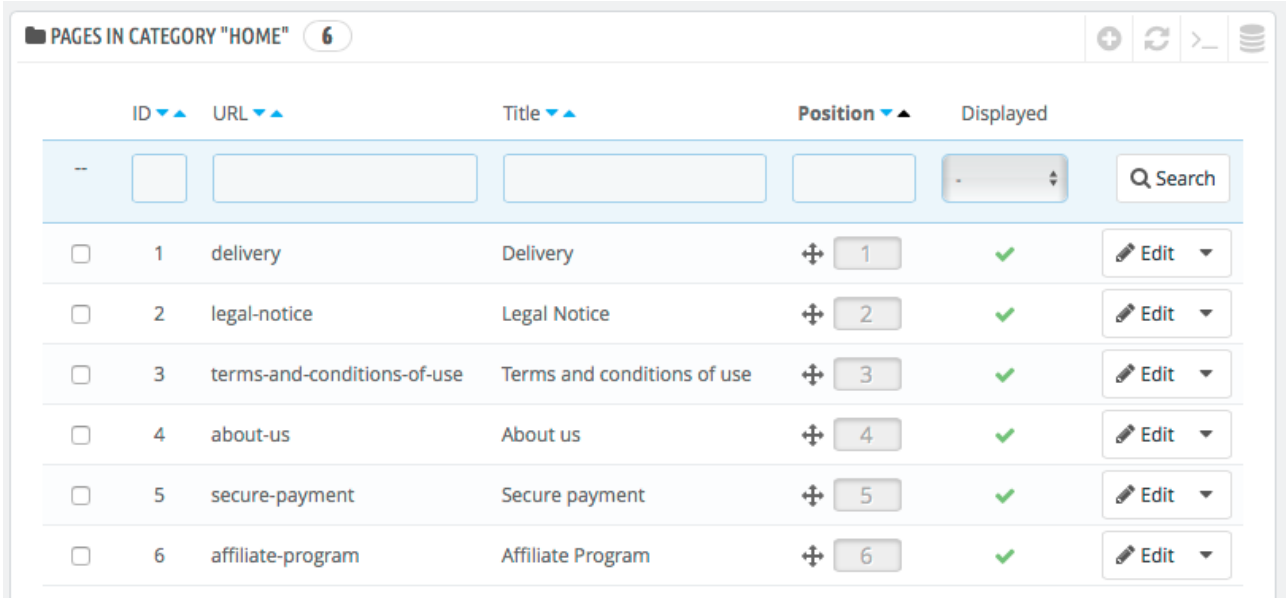
Go to **Improve > Design > Pages** and click Add new CMS page - this will lead you to a form where you will give the page a convenient title and input the terms and conditions of your affiliate program as the page content.



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



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

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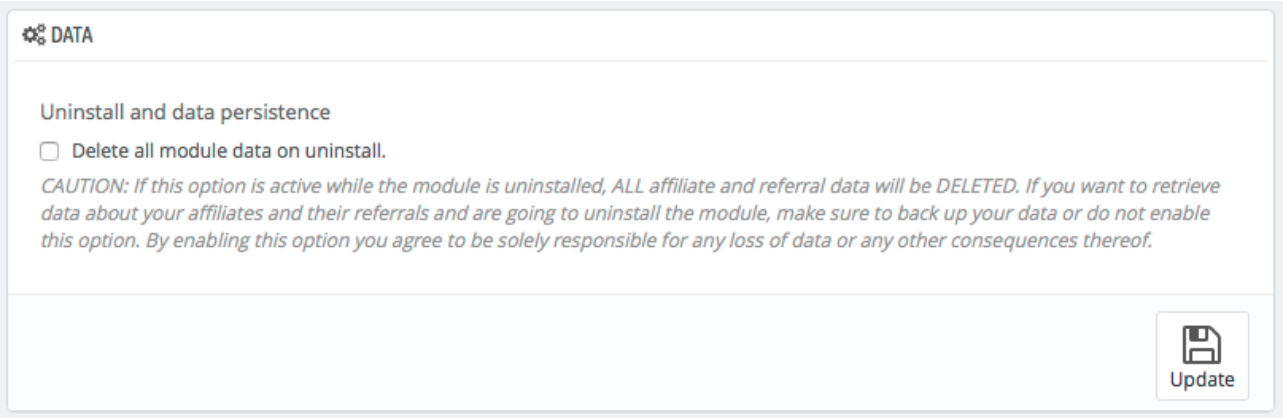
Deleting Data

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.



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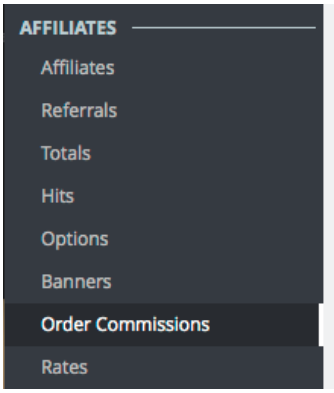
Configuring Commissions.

Setting Order Commissions

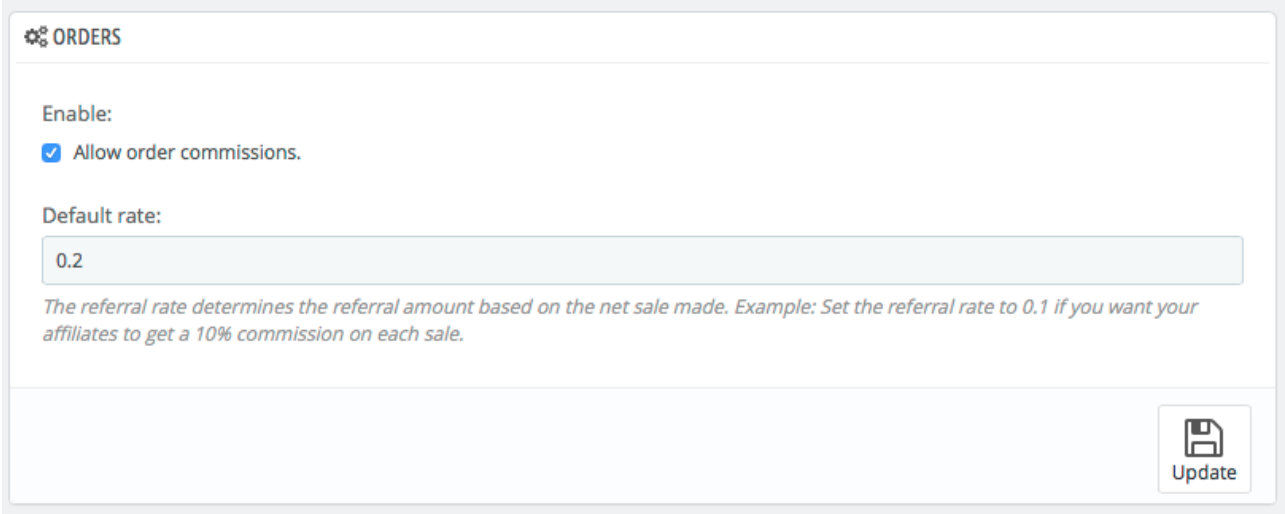


This is where you will enable the most common case for an affiliate program, allowing affiliates to earn commissions on orders they refer.

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.

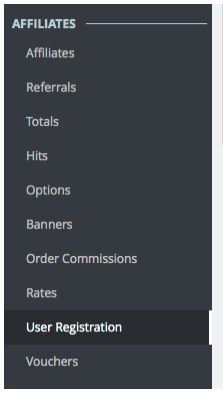
Click the **Update** button to save the settings.



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.

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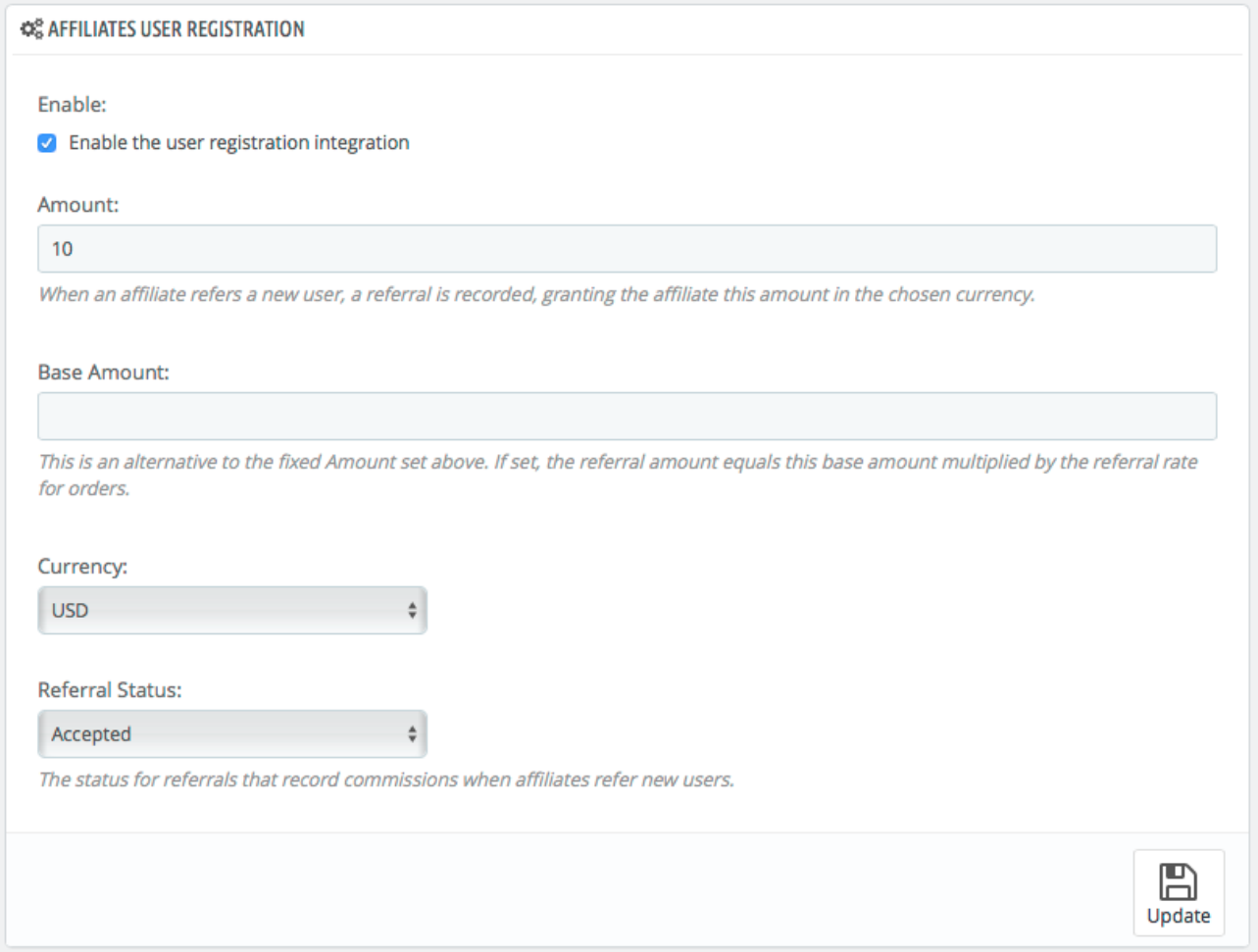
Also note that if both this user registration and order commissions are enabled, when a new customer signs up and places an order there will be two referrals. One for the fact that the customer has registered on your site, and another for the order that the new customer has placed.

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.



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.

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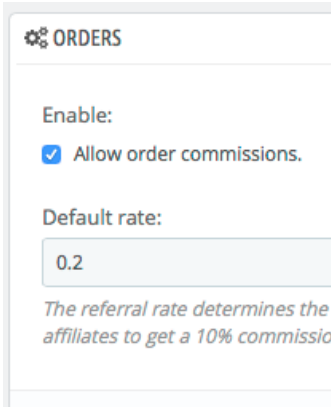
Rates

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**.



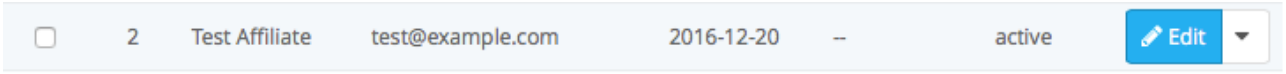
This rate applies by default to any referral calculation based on net order amounts.

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 · USD 100 = USD 20.

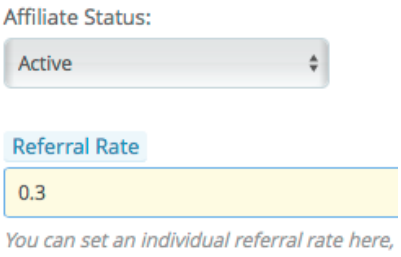
Individual Rates

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.



In the field **Referral Rate** you will see the default rate unless you have already changed it there. Here you can input another value if desired. For example, if you want to grant 30% commissions to a specific affiliate instead of the 20% from our general example, simply input the value 0.3 in the field and remember to hit **Save**.



If you have set an individual rate for one or more affiliates, you will see an appropriate entry also under **Affiliates >**

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

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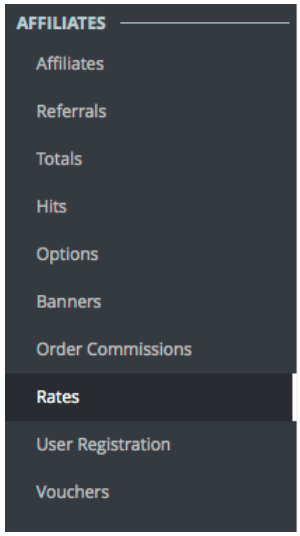
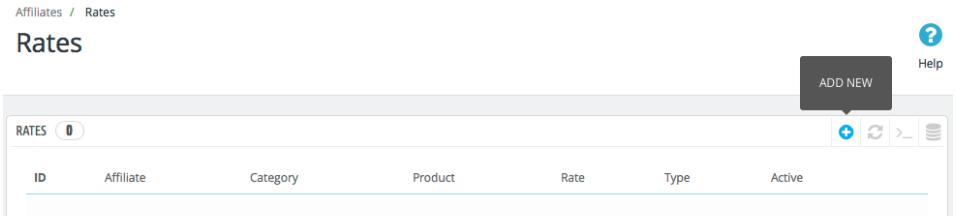
Rates per Product, Category and Affiliate



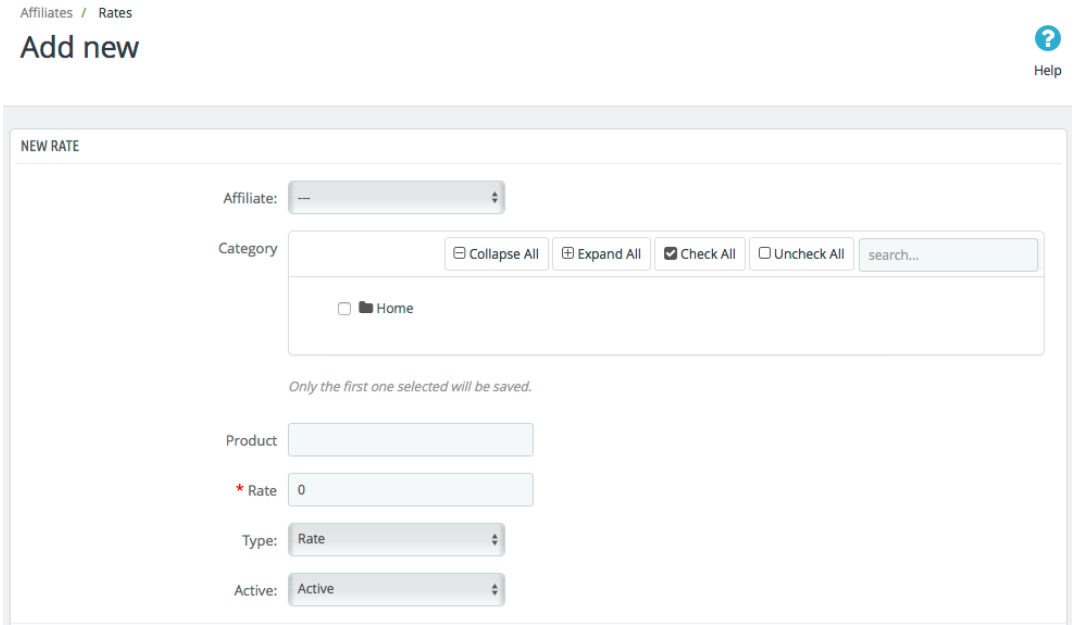
Besides the default rate used to determine the commissions for affiliates, we also have the option to use different rates for some products, per product category, per affiliate as shown above or even combinations of these.

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

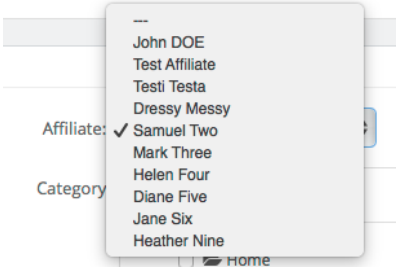
To review and define specific rates, go to Affiliates > Rates. You will be presented with a table that shows defined rates if any, and where you can create new rates, edit or delete existing ones.



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.



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.



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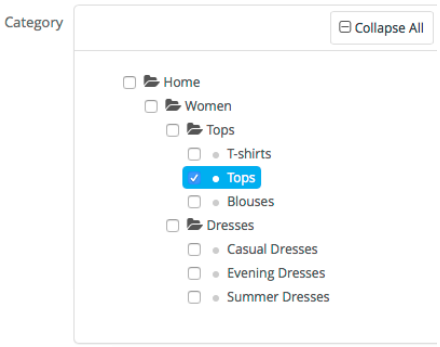
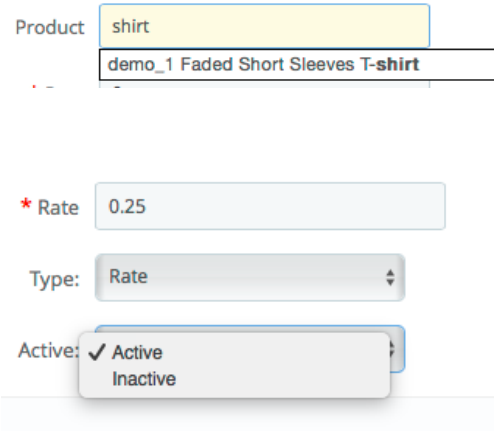


In the **Category** field you can choose one category. The commission rate for products in that category then applies instead of the default rate.



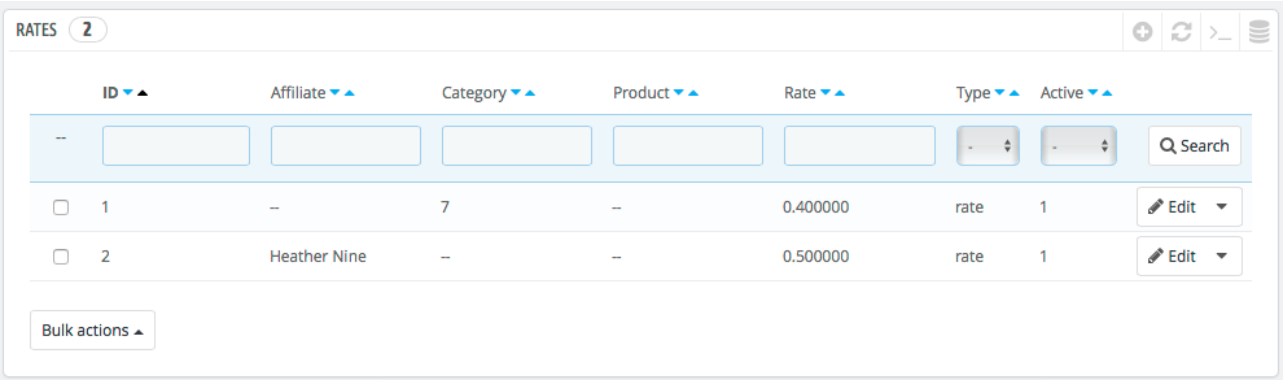
The **Product** field allows you to define a rate for a specific product. Input part of the product's name and suggestions will show up. Choose the desired product from the suggestions that appear.

Input the desired commission rate in the **Rate** field. For example, you could input 0.1 to grant 10% commissions based on the conditions chosen for this rate.

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.



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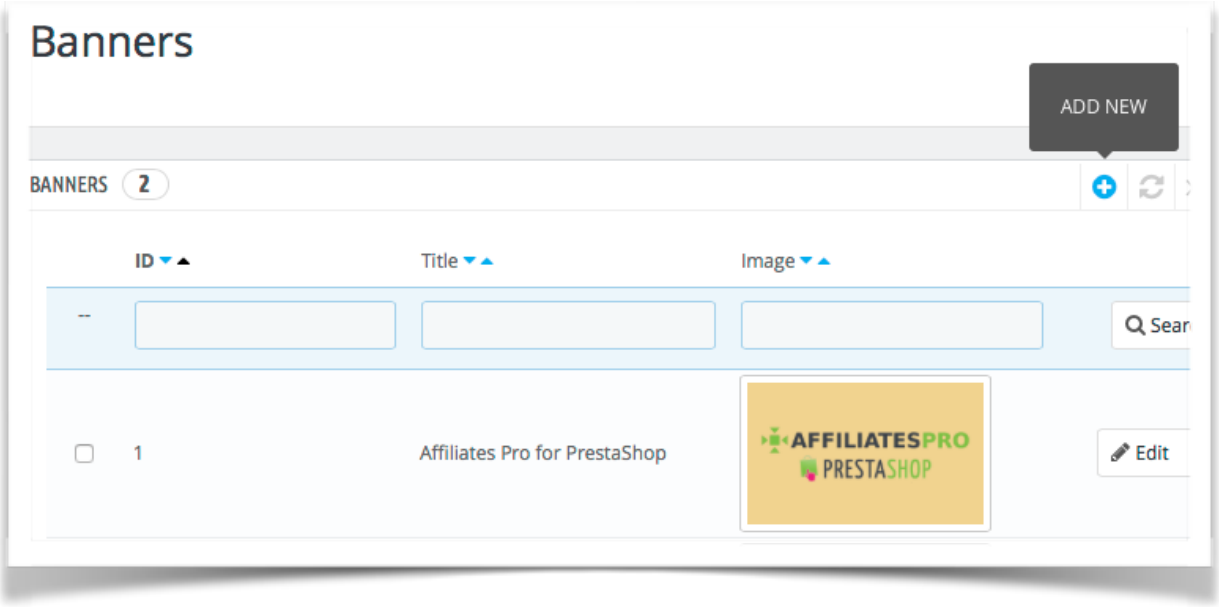
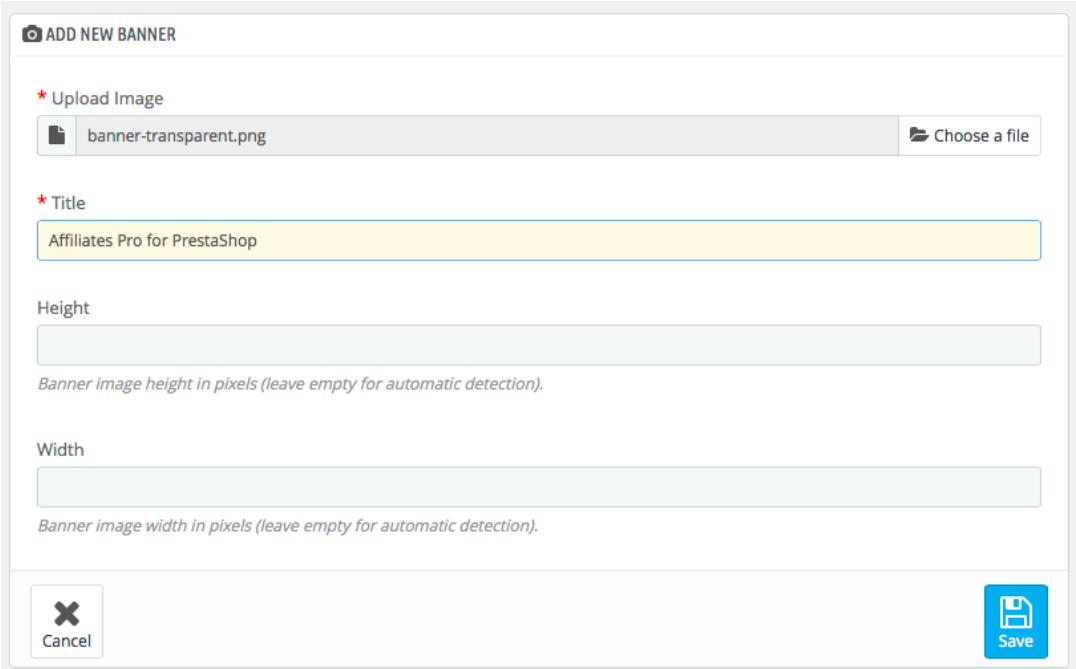
Banners

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



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.



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

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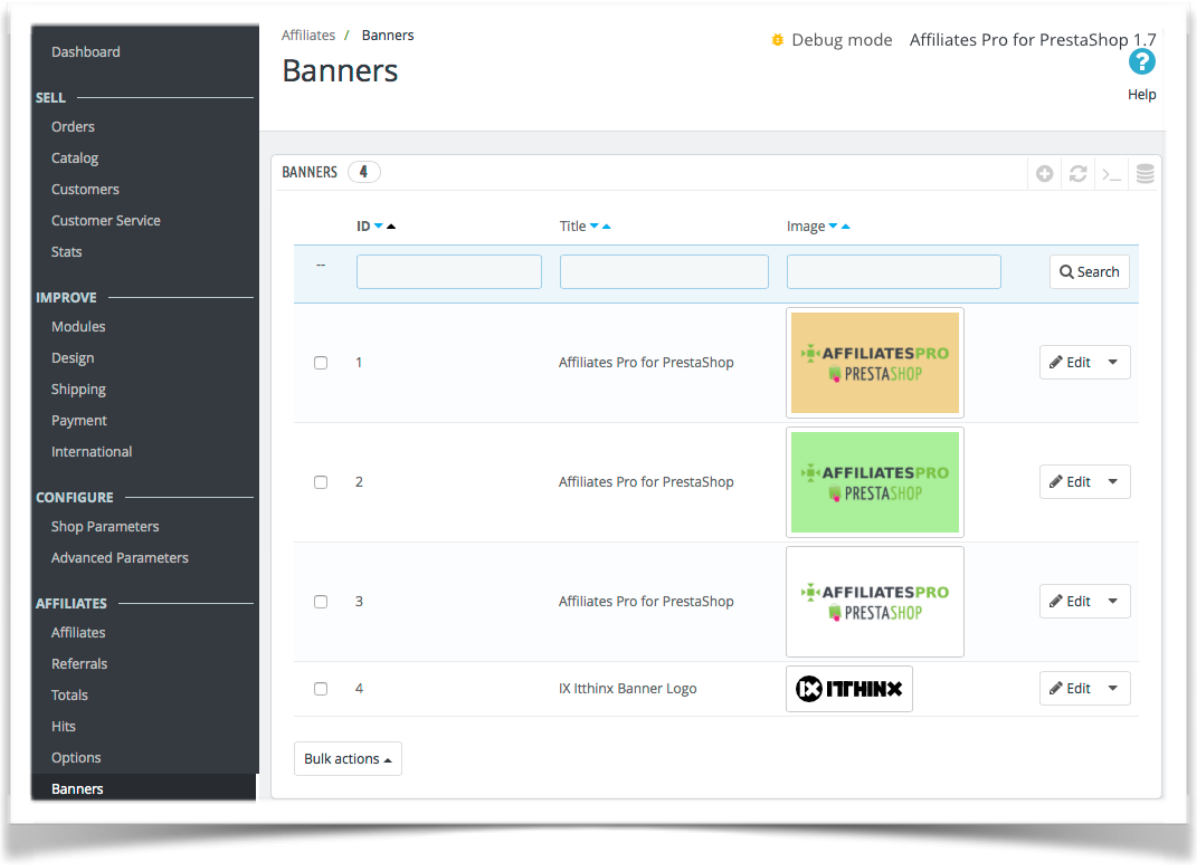

All the banners uploaded are also displayed in the Affiliate Area. Affiliates can use the HTML code displayed for each banner to include it on their web sites. Here's an example from an affiliate area showing a big and a small banner image along with the HTML that affiliates would use to embed it on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

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Discount Codes

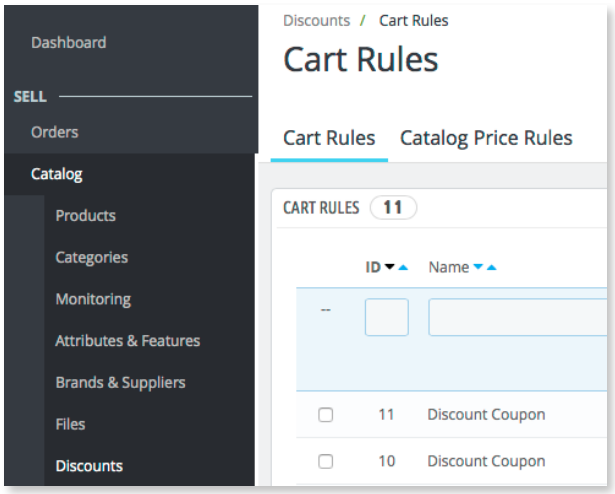
Generating Discount Codes or Vouchers

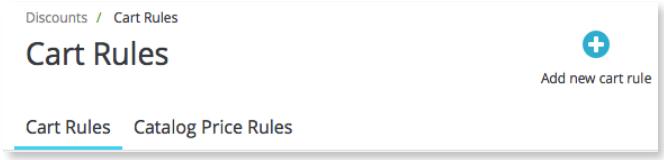
Discount codes or Vouchers are assigned to affiliates to credit them with a commission for each purchase the code is applied to.

One or more vouchers can be assigned to an affiliate.

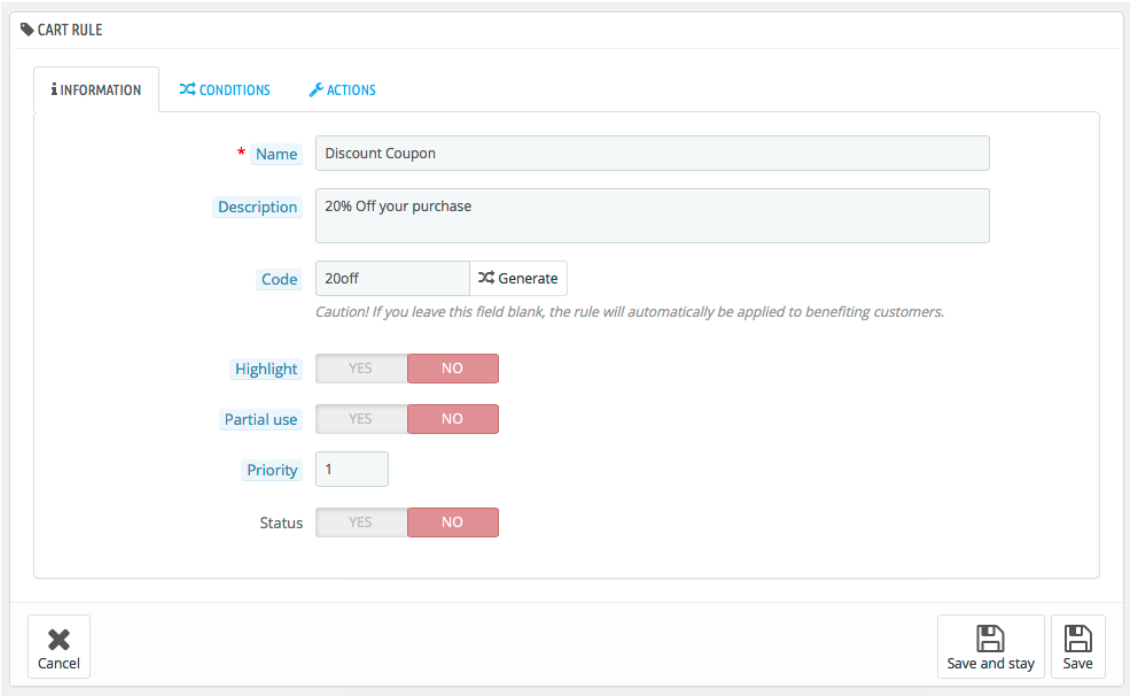
To generate vouchers you must first create a cart rule.

Go to **Sell > Catalog > Discounts > Add New Cart Rule**.





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.



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

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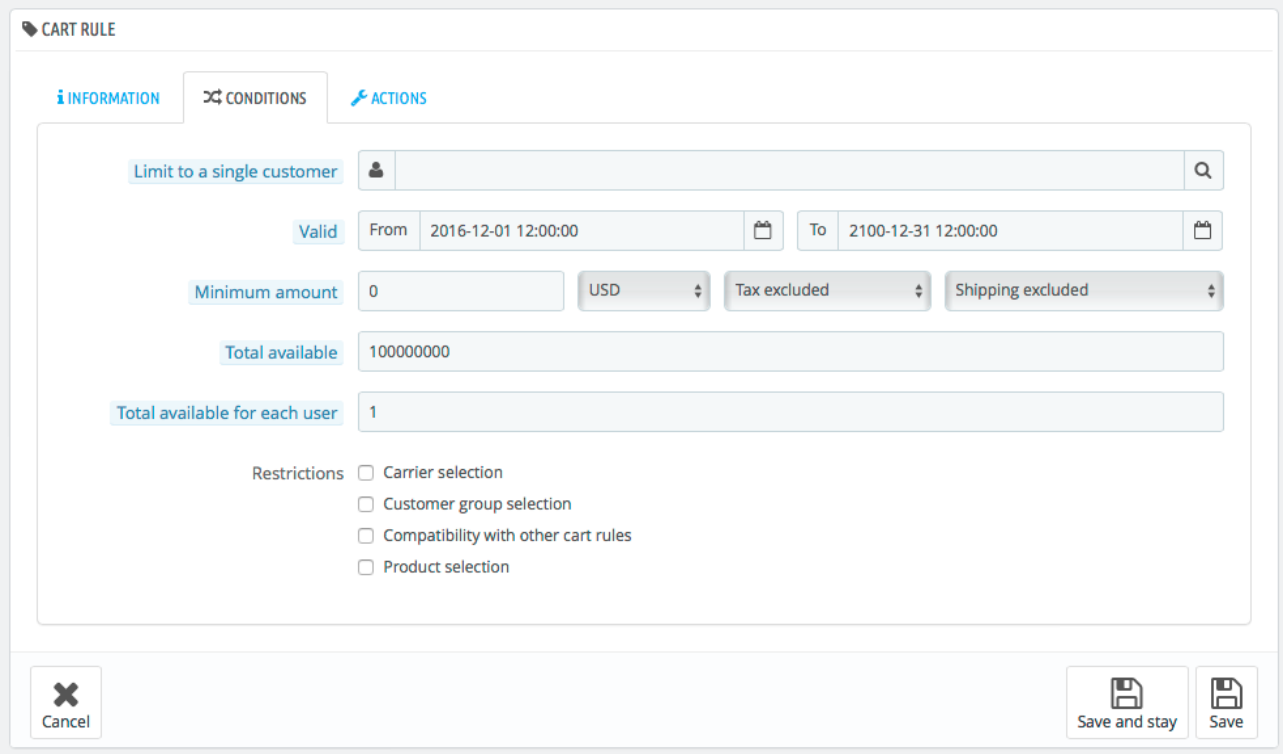
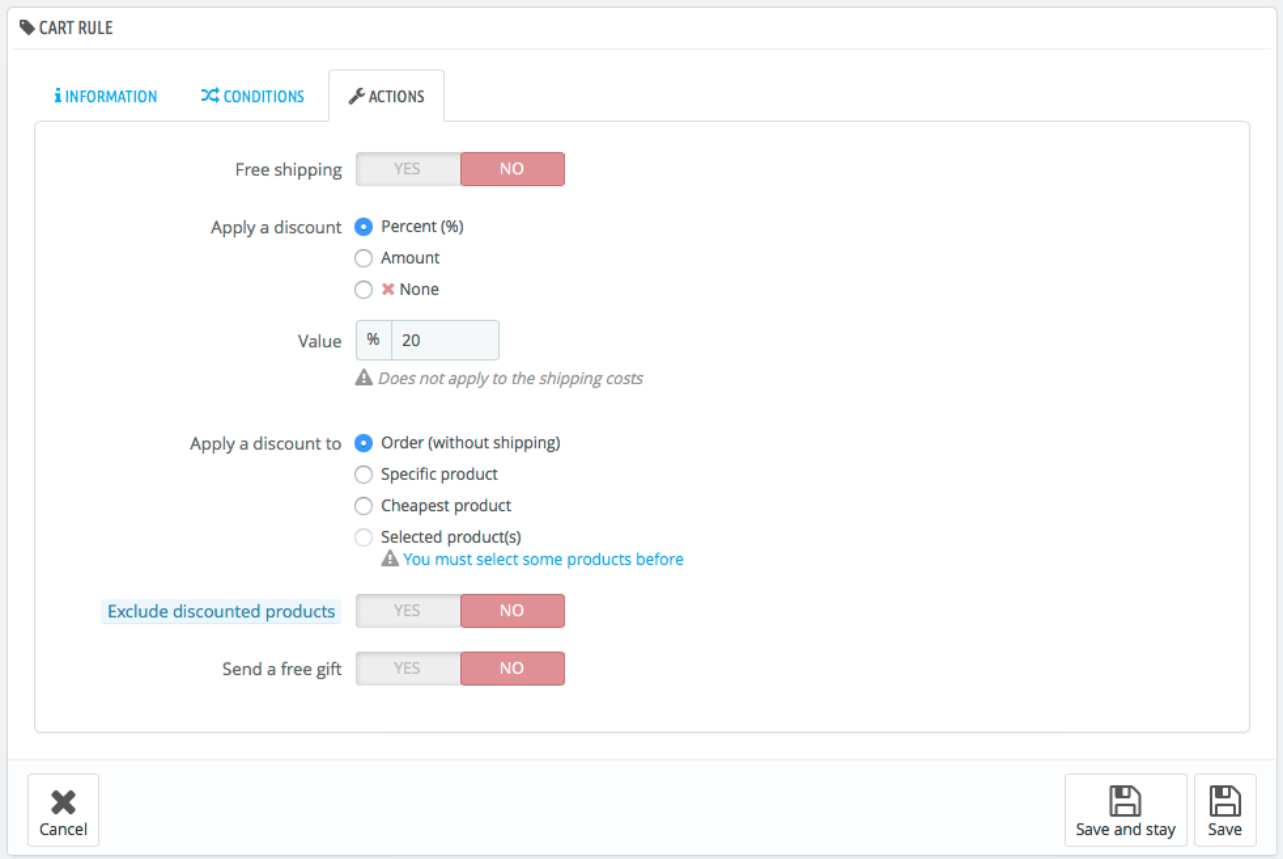
Disable the cart rule **Status** (select NO) as this cart rule is a template to generate affiliates' vouchers and shouldn't be made available as a valid discount in general.

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.





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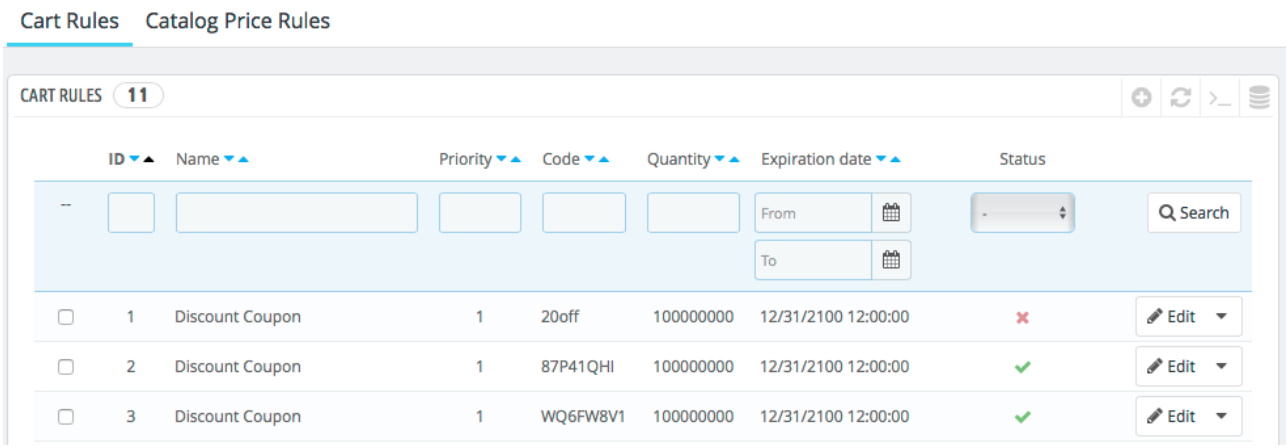
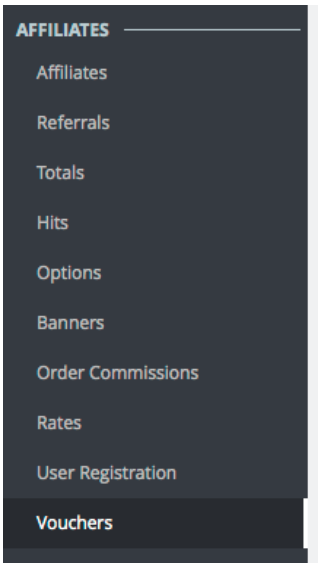
The validity conditions should be appropriate so that your affiliates can use them to promote your store and refer customers efficiently. Here we choose ridiculously high limits for the fields **Valid … To** and **Total available**, to make sure that referred customers can virtually always use them.

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.



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:

1. 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.

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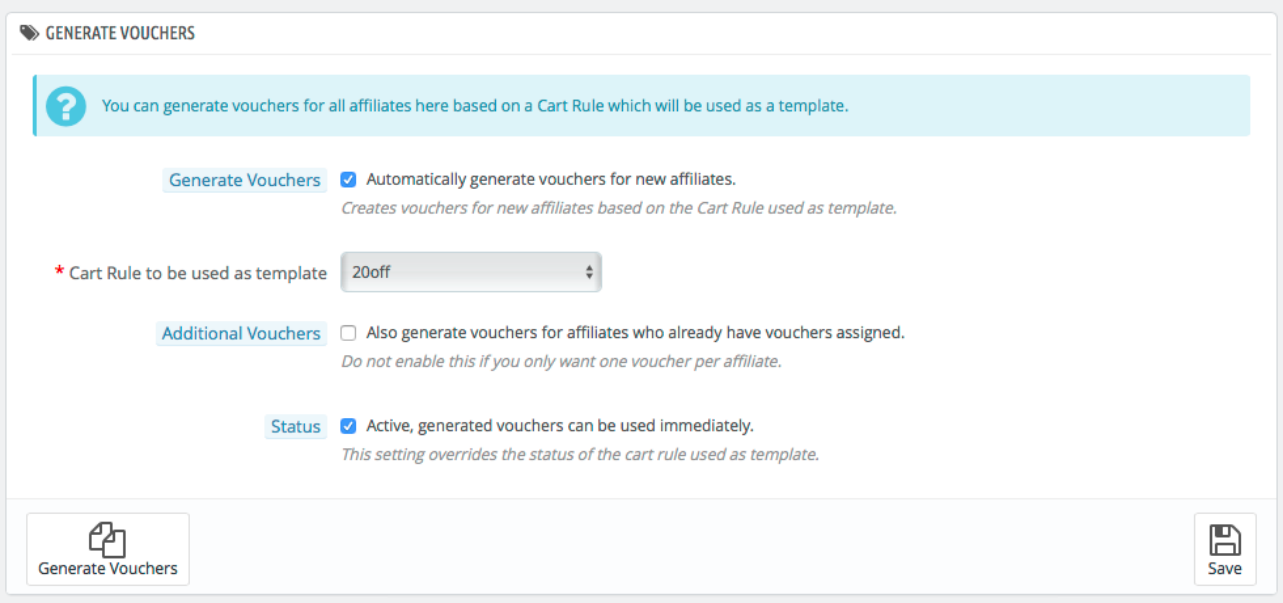
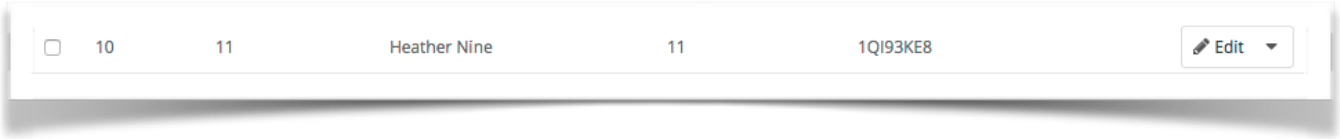


In the example below, Affiliate #11 was assigned a voucher with the selected cart rule (see the next section for a more complete view of generated vouchers).



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.

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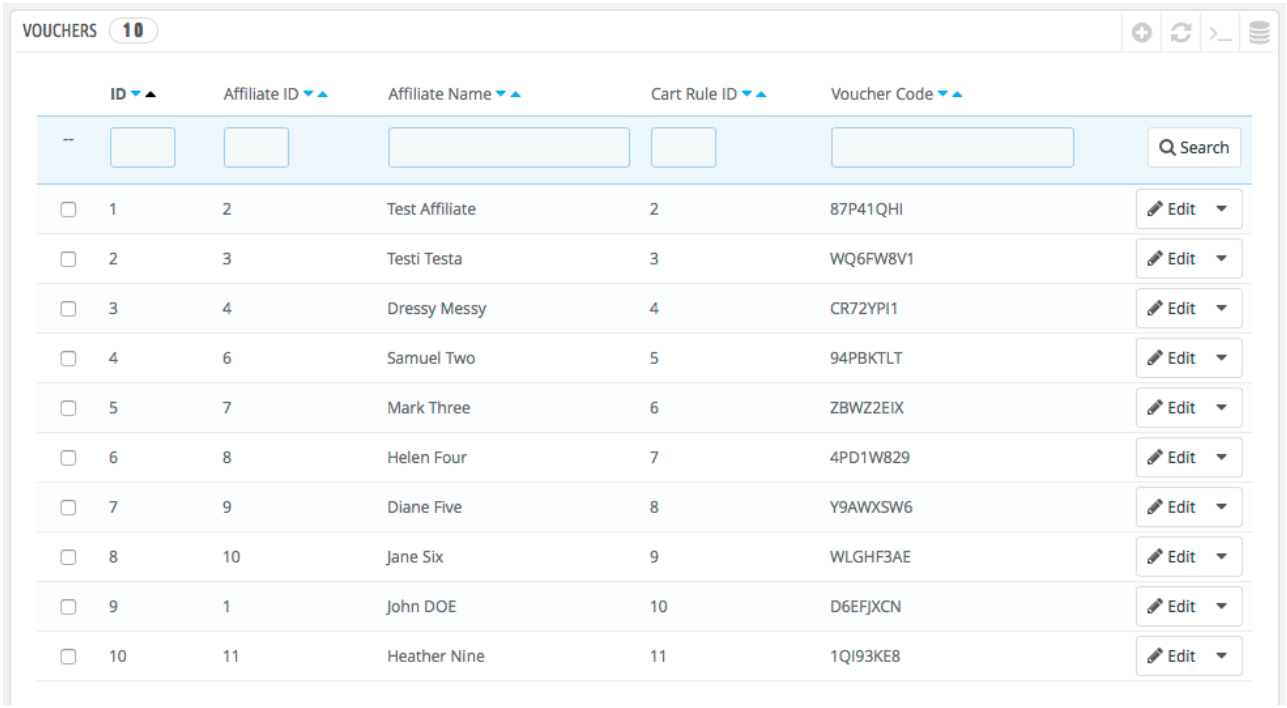
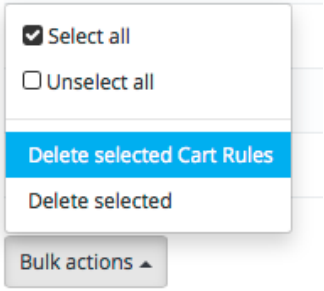
Vouchers Overview

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.

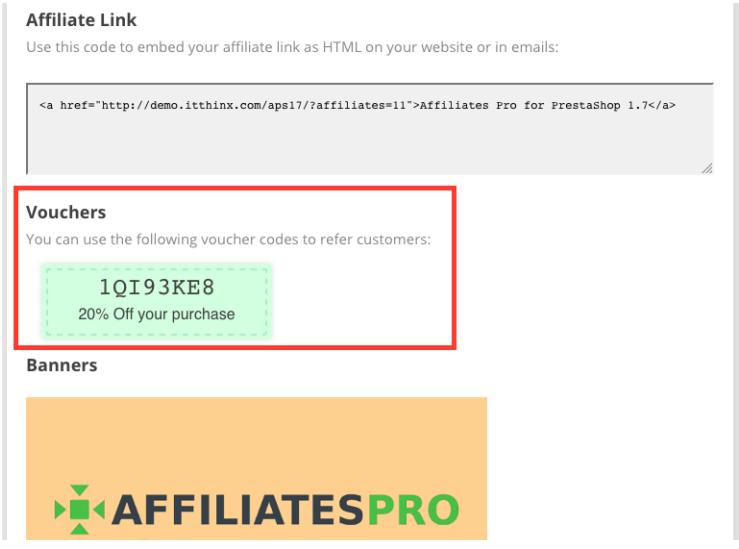


Note that for deletion we have two options, one that allows to delete the assignment and leaves the cart rule intact, and another that allows to delete the cart rule itself.

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).



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IV. Managing Affiliates

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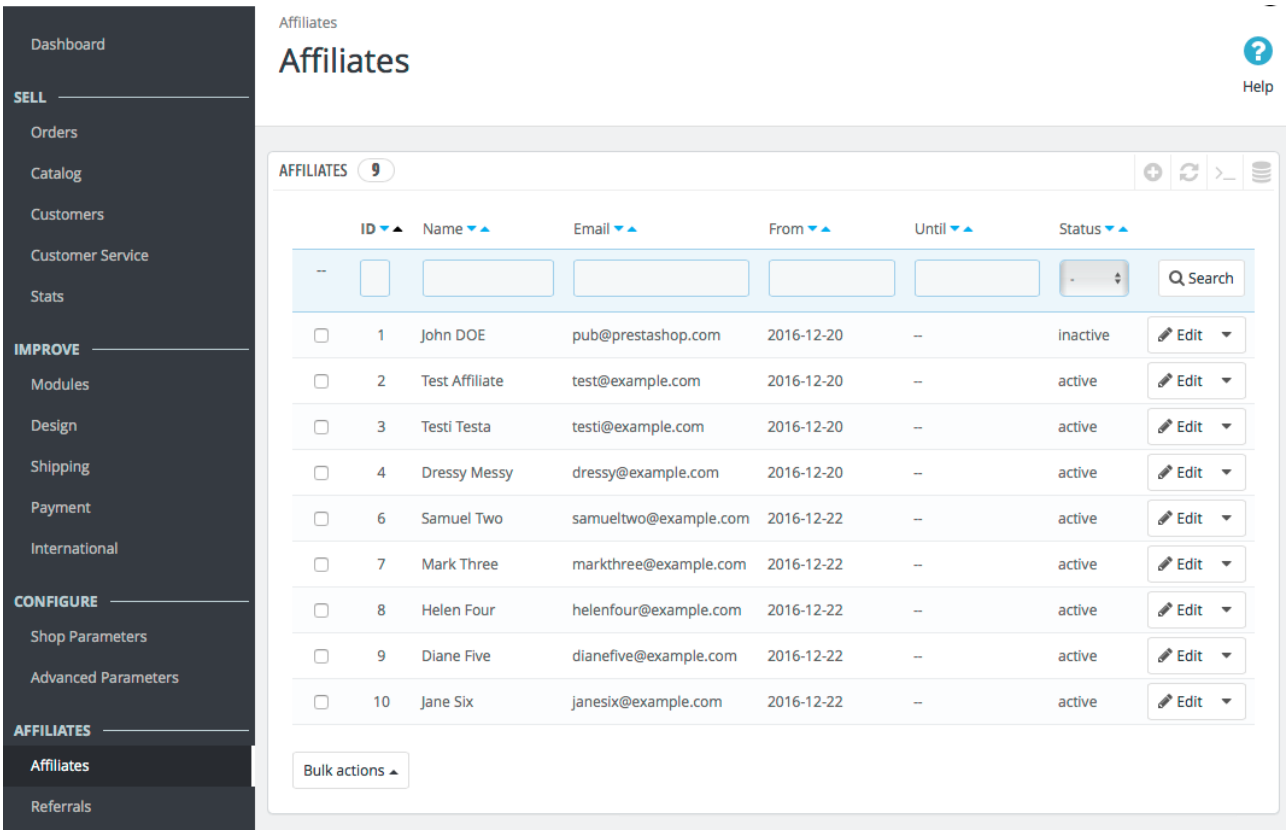
Affiliates Overview

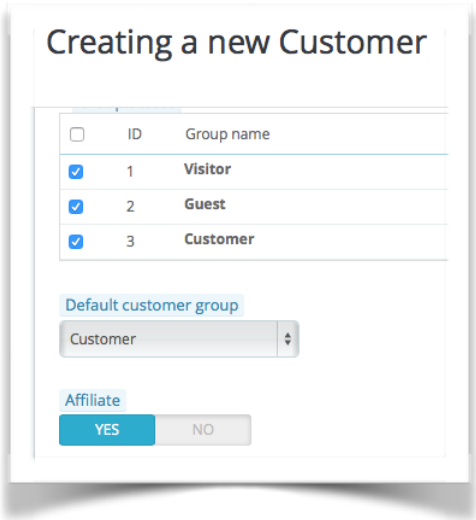
From your site's Dashboard go to **Affiliates > Affiliates**. This section shows the current affiliates.



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.



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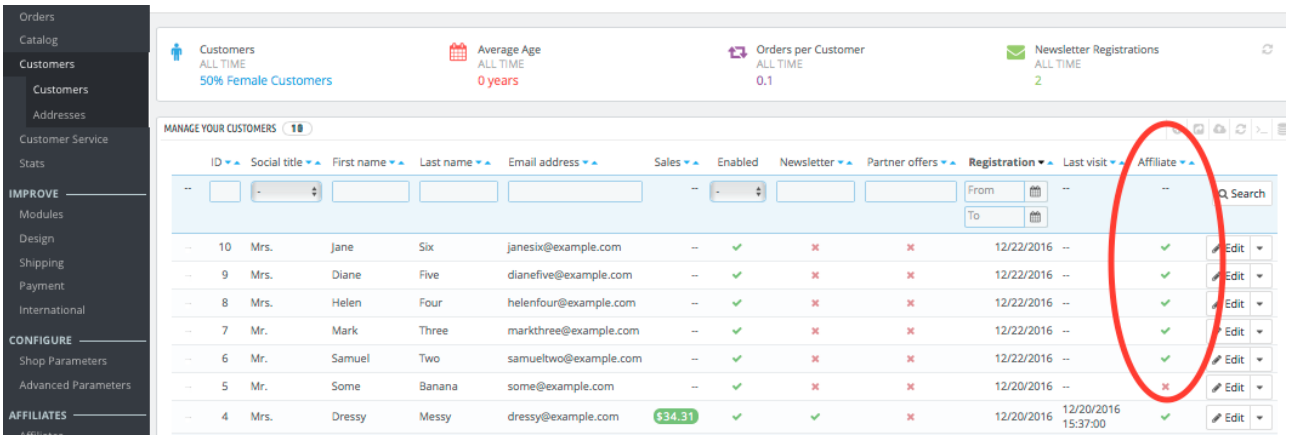
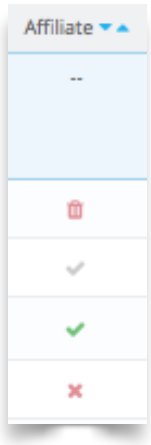
Customers as Affiliates

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



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.



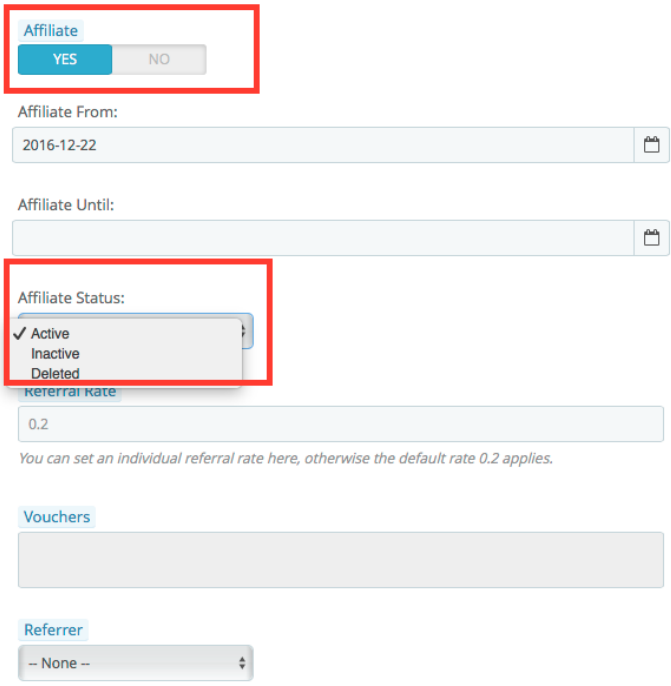
These icons show what affiliate status a customer has:

- 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**.



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V. Affiliate Area

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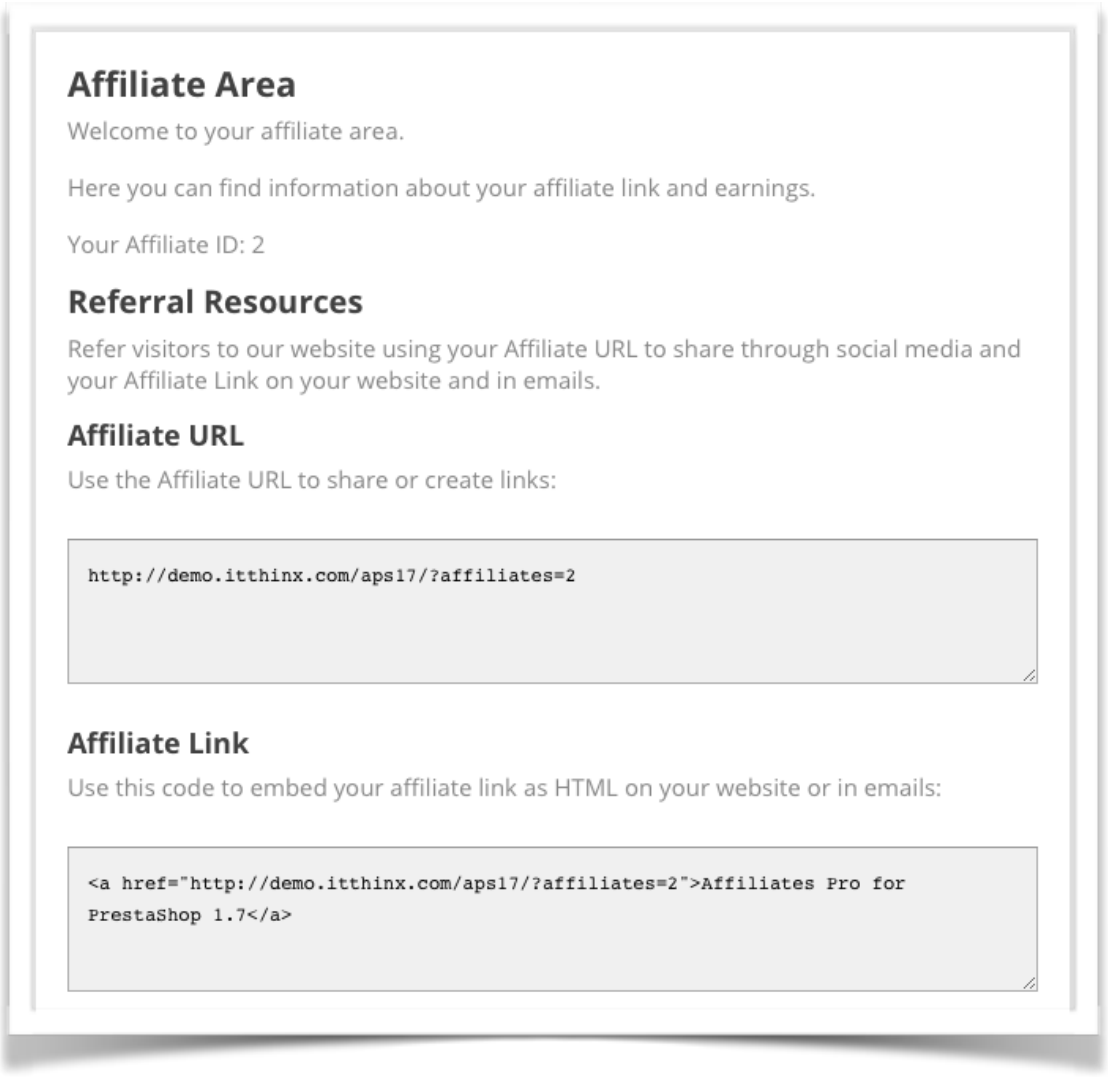
Structure of the Affiliate Area.

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.



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

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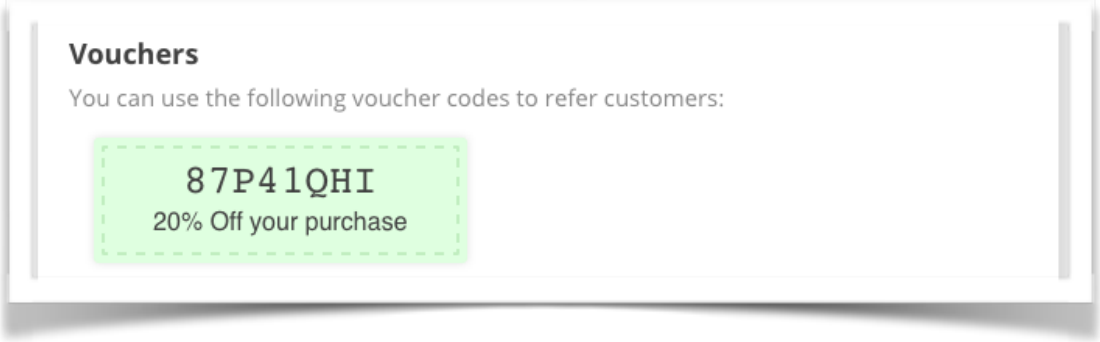
the referrer. Please also review the section on Social Sharing below for further information, as this way of producing affiliate links is not part of the Affiliate Area itself.

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.

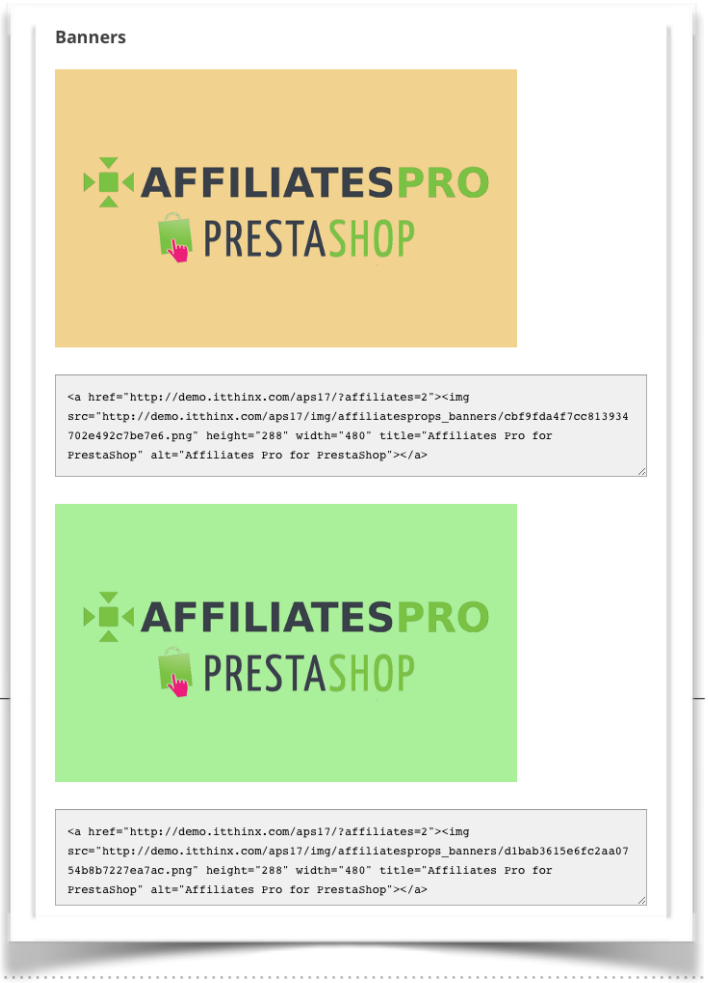
Banners

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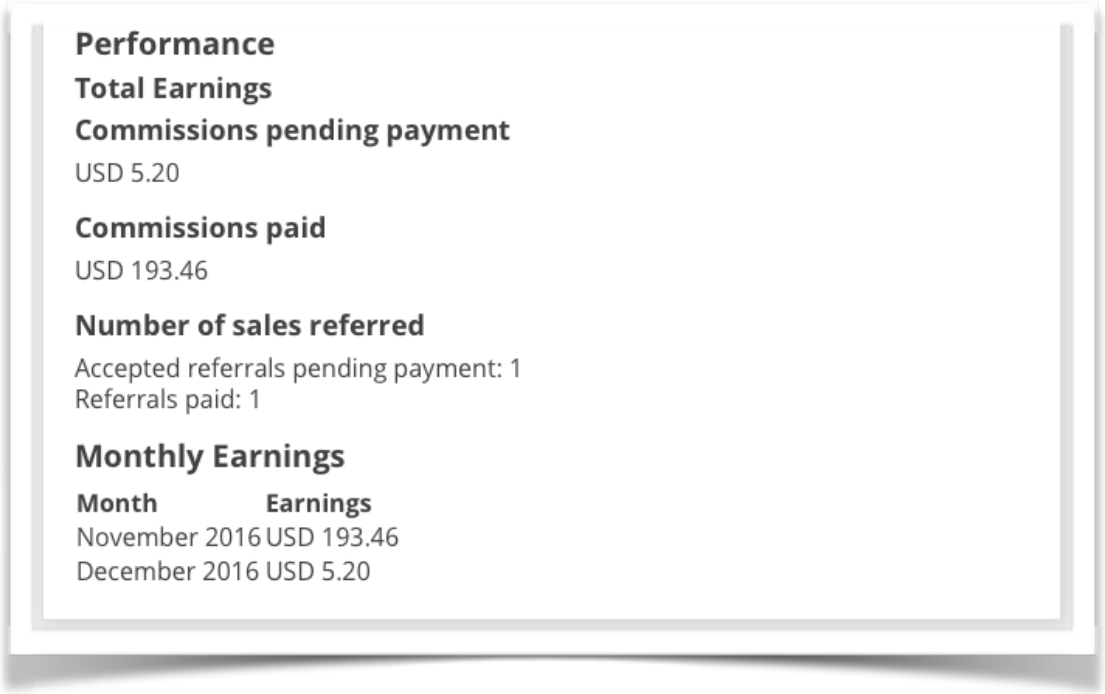
commissions paid for the full affiliate lifetime. It also includes the number of sales referred and number of referrals that are pending payment, as well as those that have already been paid.



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

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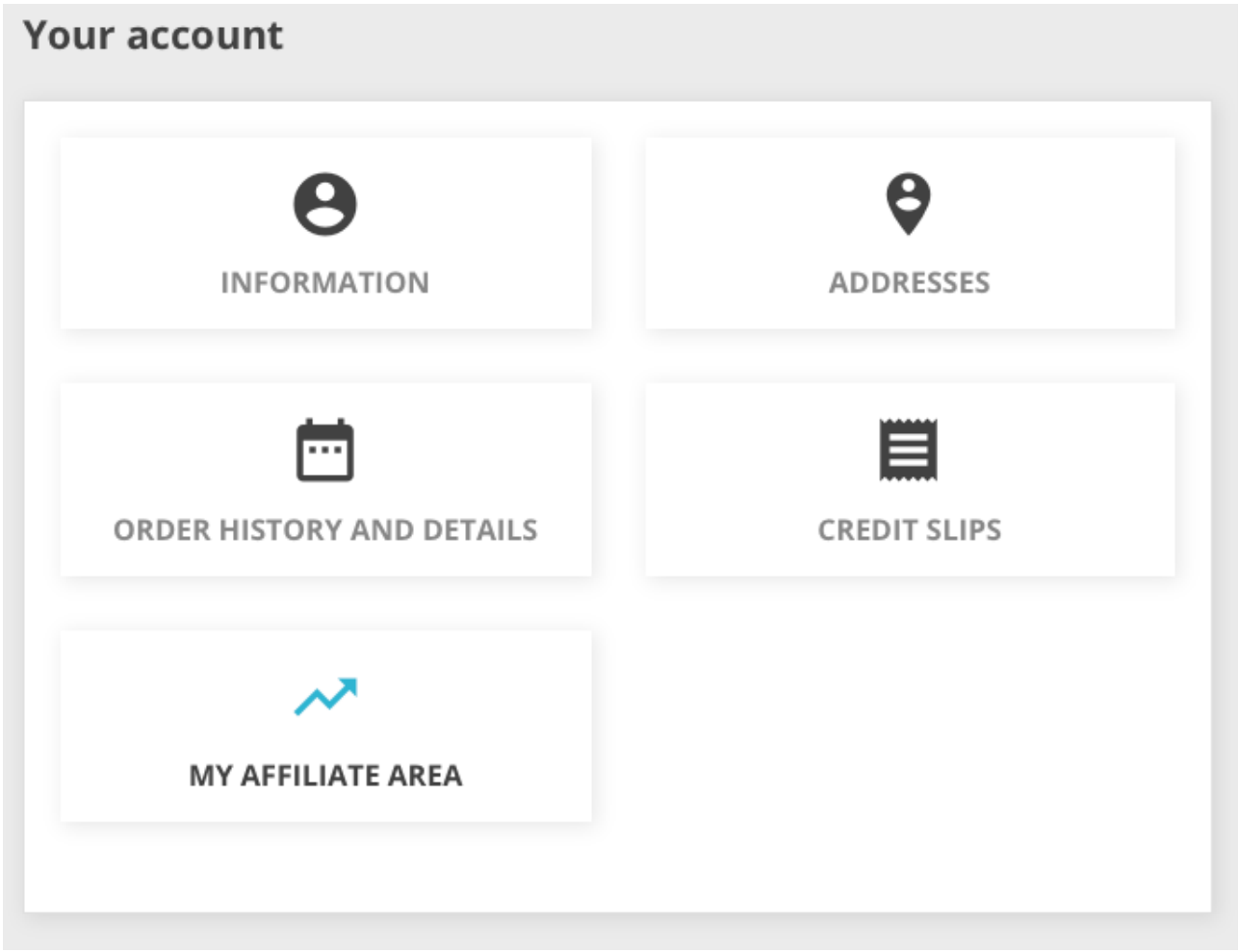
My Account Integration

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.



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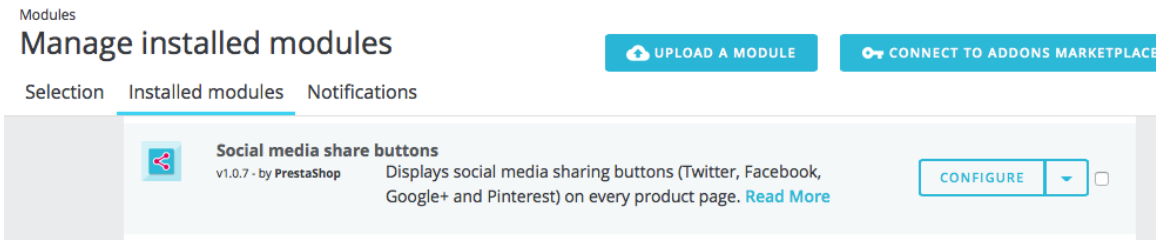
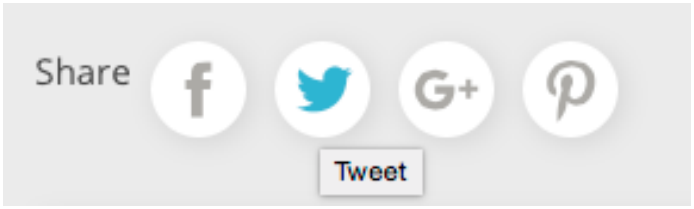
Social Sharing

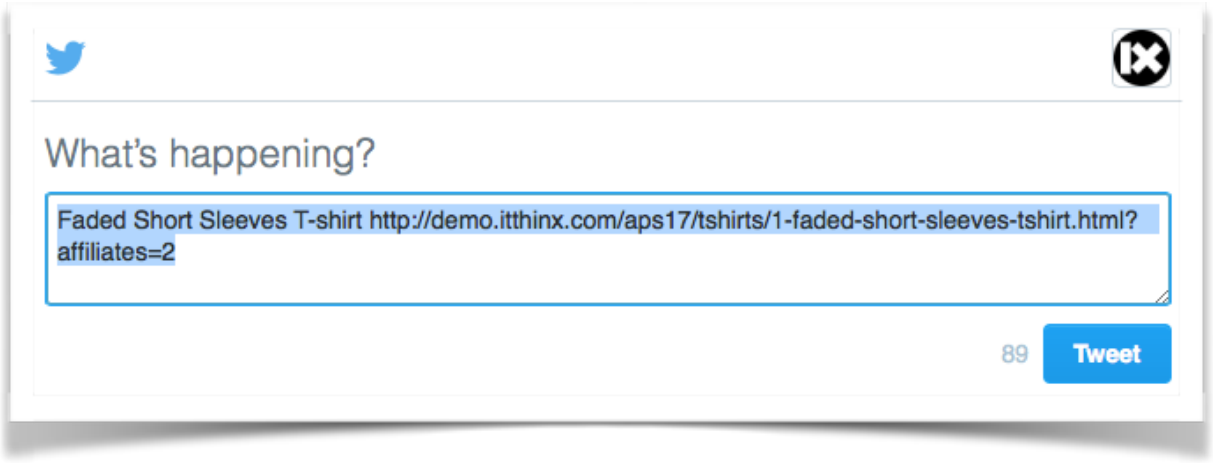
To promote products through social channels like *Facebook, Twitter, Google+* and *Pinterest*, the affiliates can use the share buttons provided by the Social Media Share module.





These buttons appear on each 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.



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.

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VI. Affiliate Commissions and Payment

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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 transactions. This includes commissions on referred orders and commissions on referred customers.

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.

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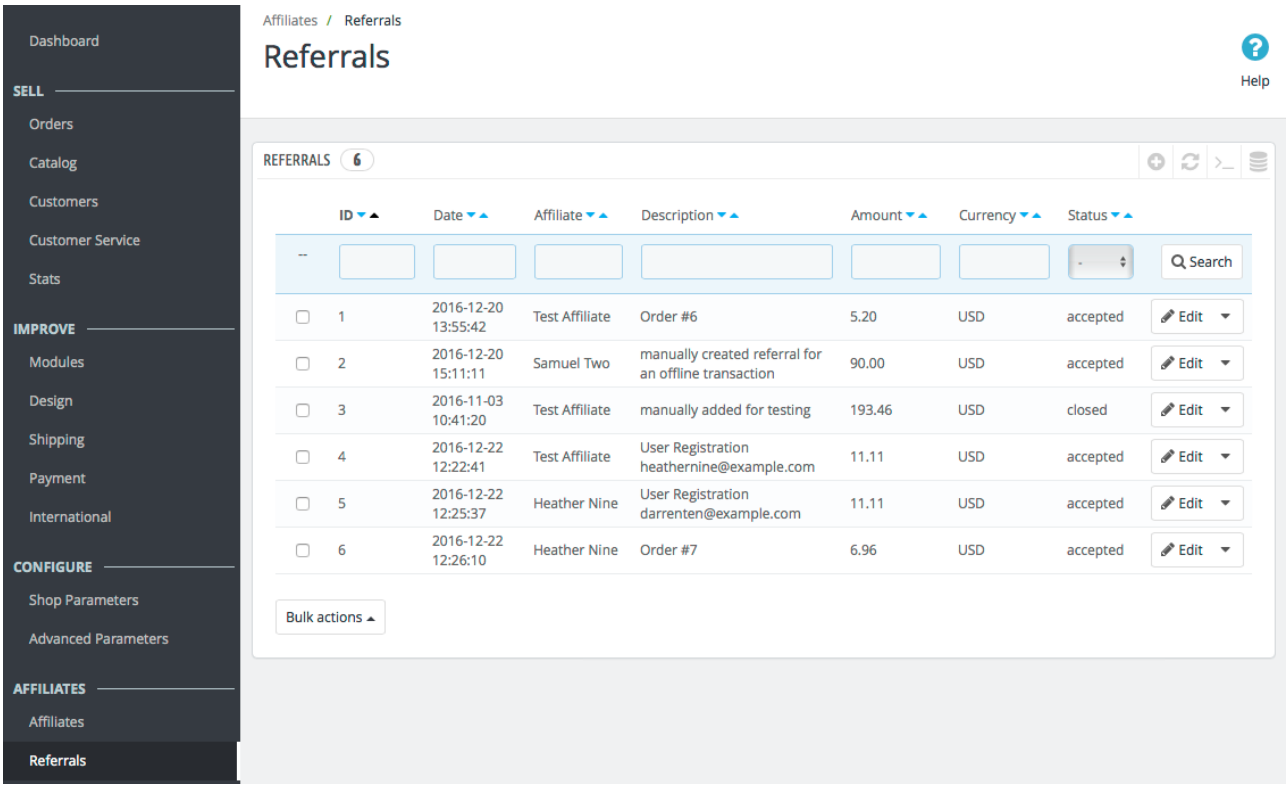
Referrals Overview

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**.



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.

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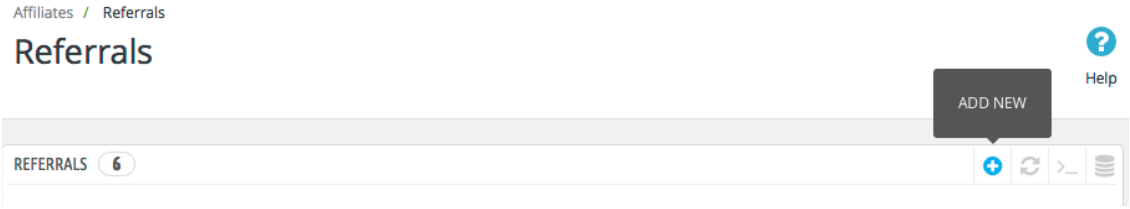
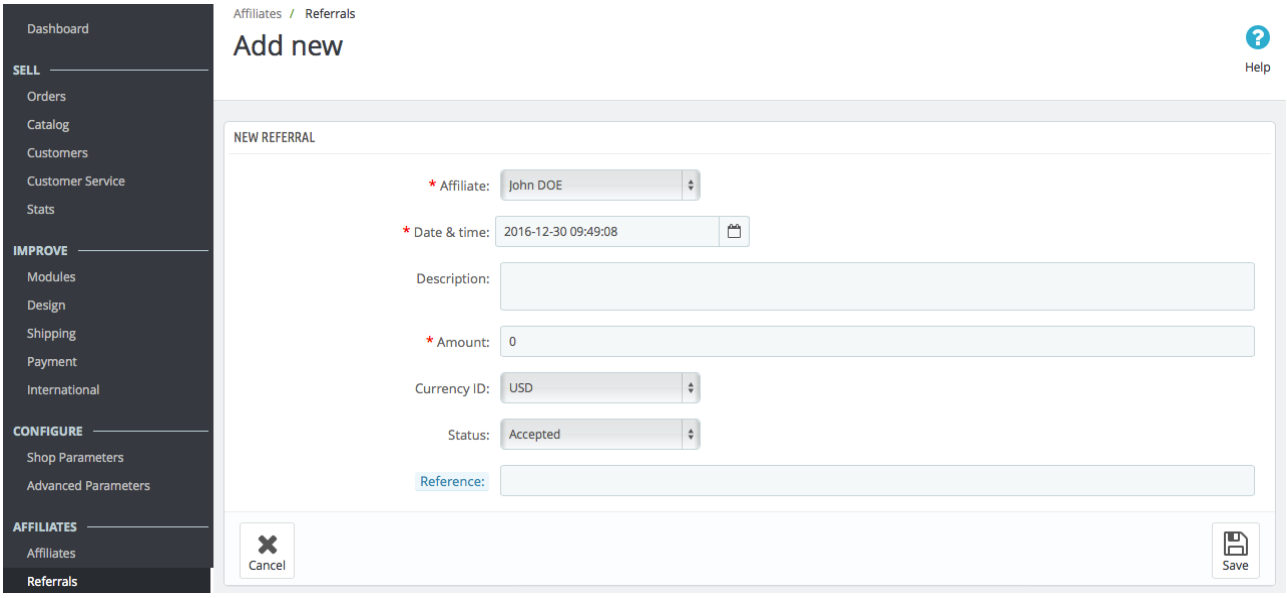
Manual Referrals and Review

Referrals can also be added manually in this section.



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.



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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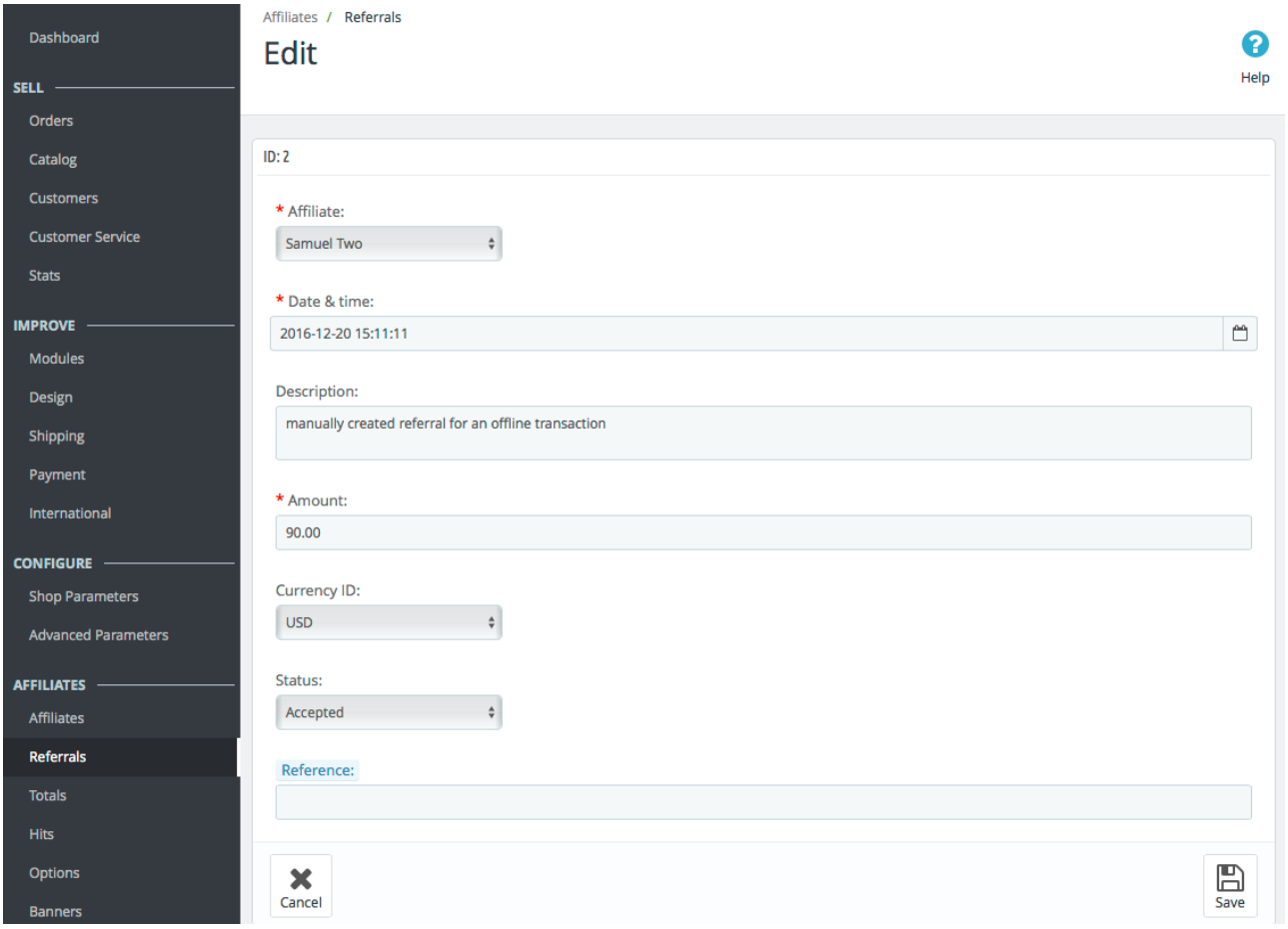

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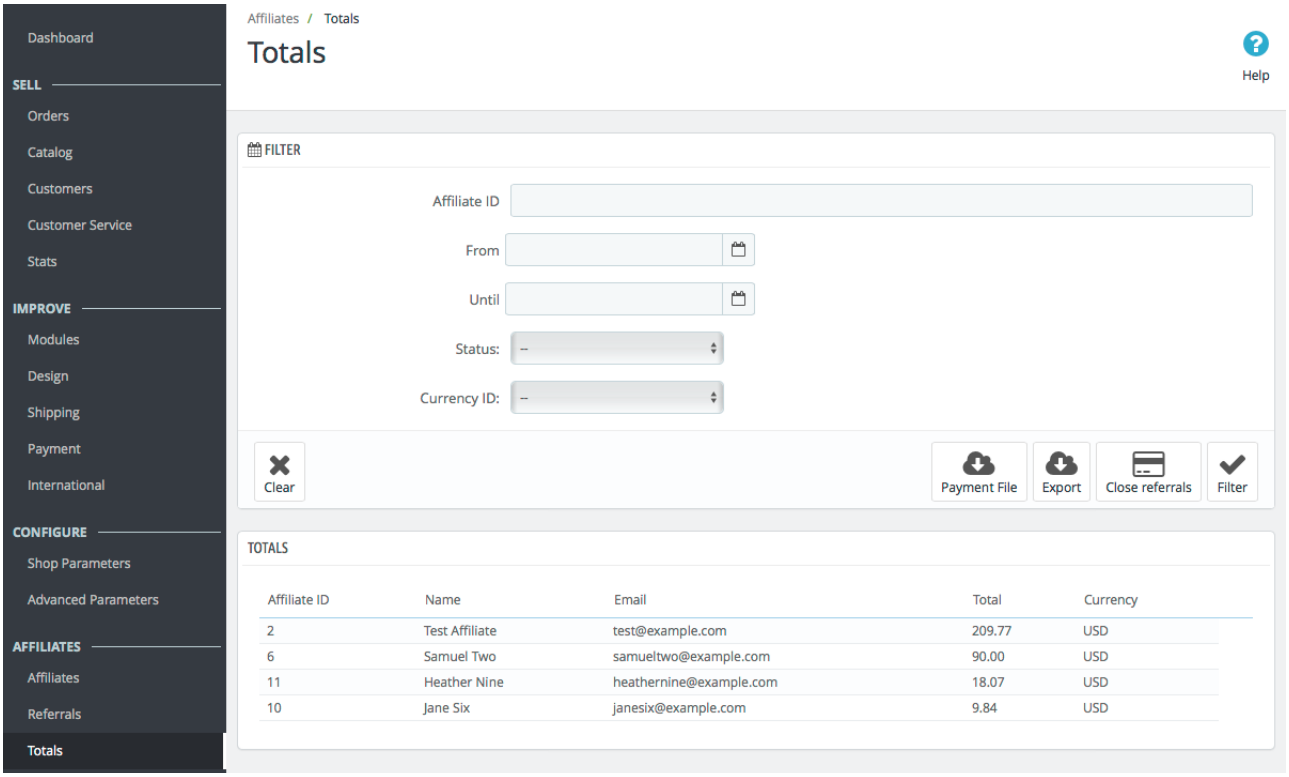
Accumulated Commission Totals

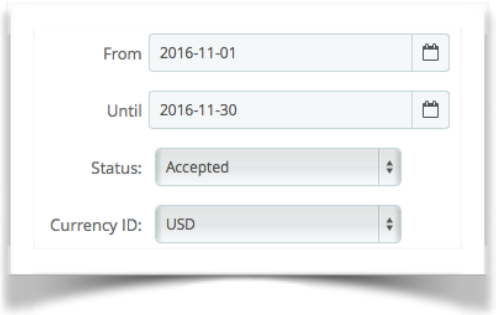
The **Totals** section is used to obtain the necessary reports that allow us to manage our affiliate payments.



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.

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.

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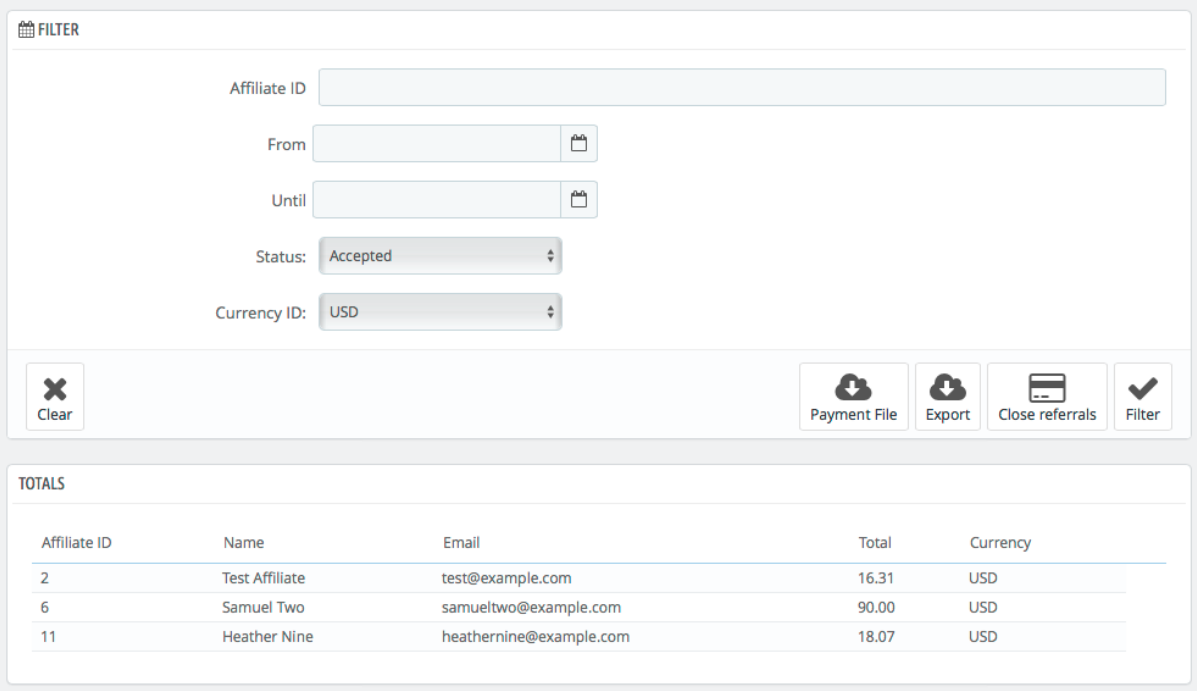
Paying Affiliates - Obtaining a Payment File

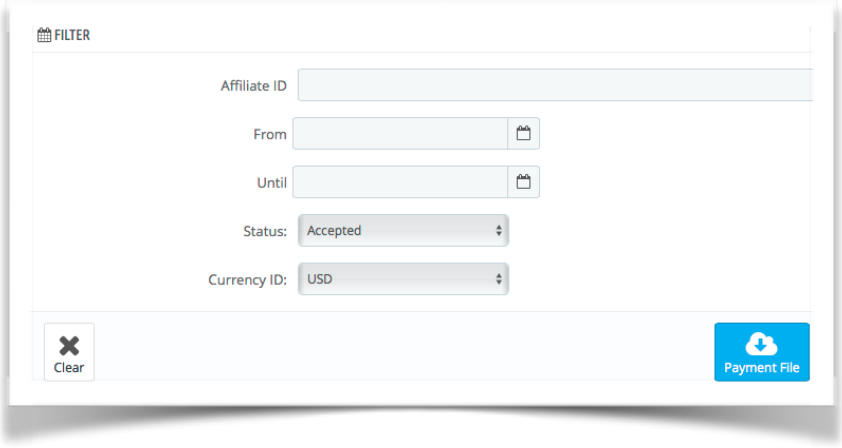
To pay your affiliates their commissions or referral earnings, you can use the Payment File button to generate a CSV file of affiliates and their totals. This file can be used to send mass payments via PayPal (for business accounts that have this feature enabled - you need to contact PayPal if this option 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.



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.

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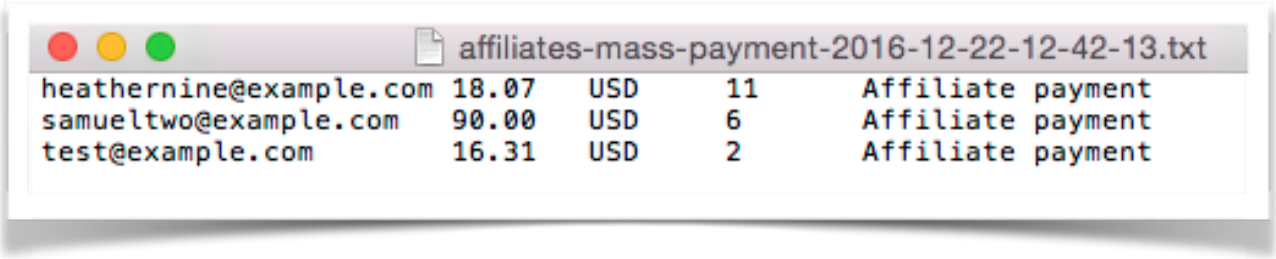
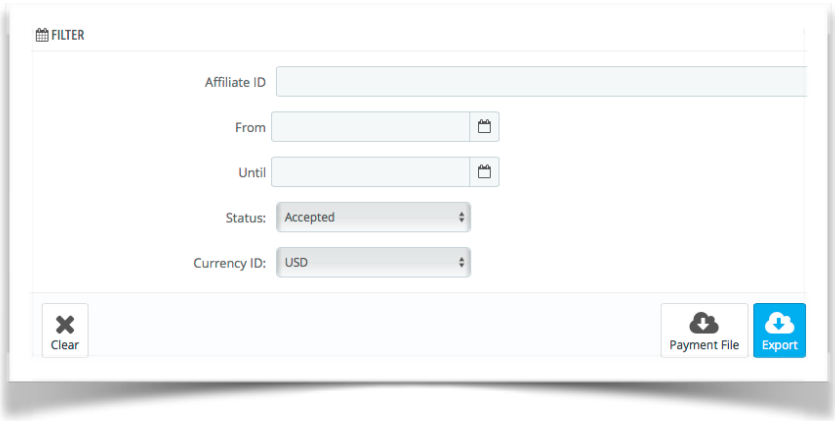
The generated payment file contains one line per entry, holding the email address, the amount, the currency, the affiliate's ID and a line item description.

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

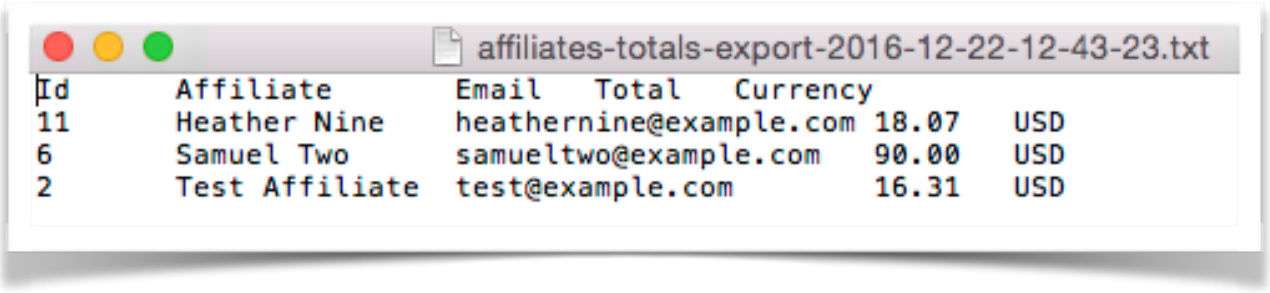


Exporting Totals

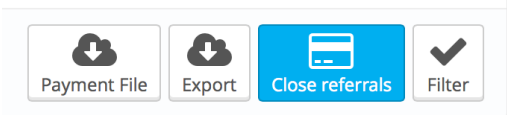


Affiliates Pro for PrestaShop allows to export the totals and produce reports for your records. Use the **Export** button on the **Totals** screen to obtain your report according to the current filters set.

The file that is generated will provide a column header and the following values separated by tabs for each entry: the affiliate's ID, the affiliate's name, the email address, the total commission amount and the currency.



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.

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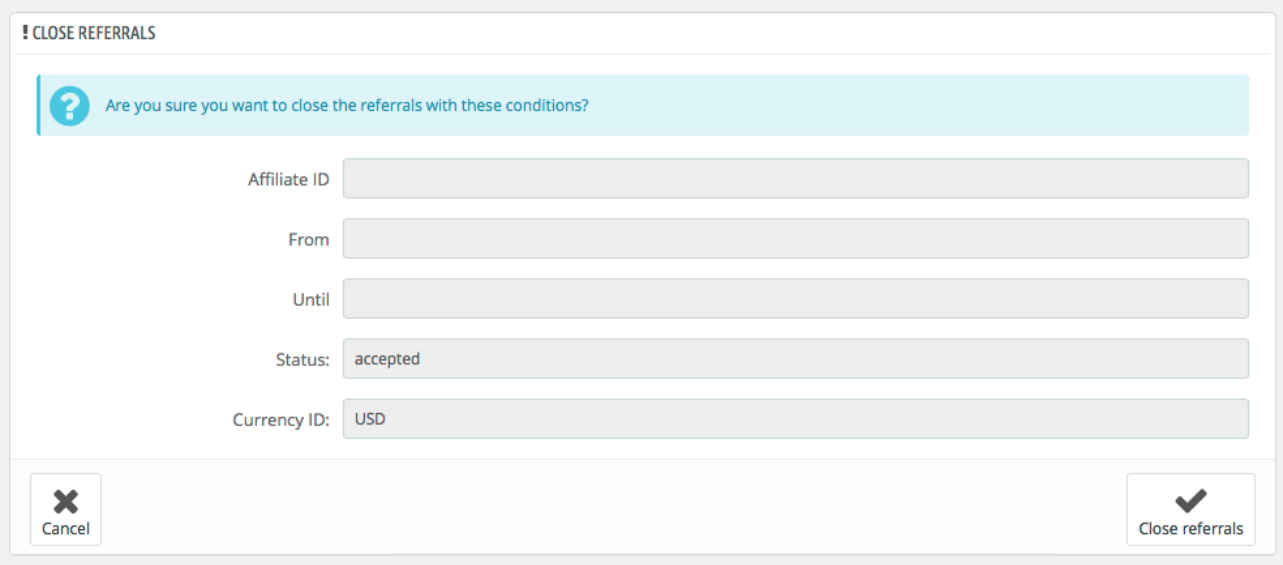
Important: Closing referrals means that the accepted referrals have been paid to the affiliates. Before the referrals are closed, you will be presented with an overview of conditions covering the referrals that are about to be closed/marked as paid. Please note that this cannot be undone (unless you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



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.

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VII. Clicks or Hits

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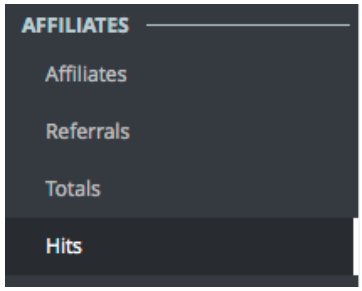
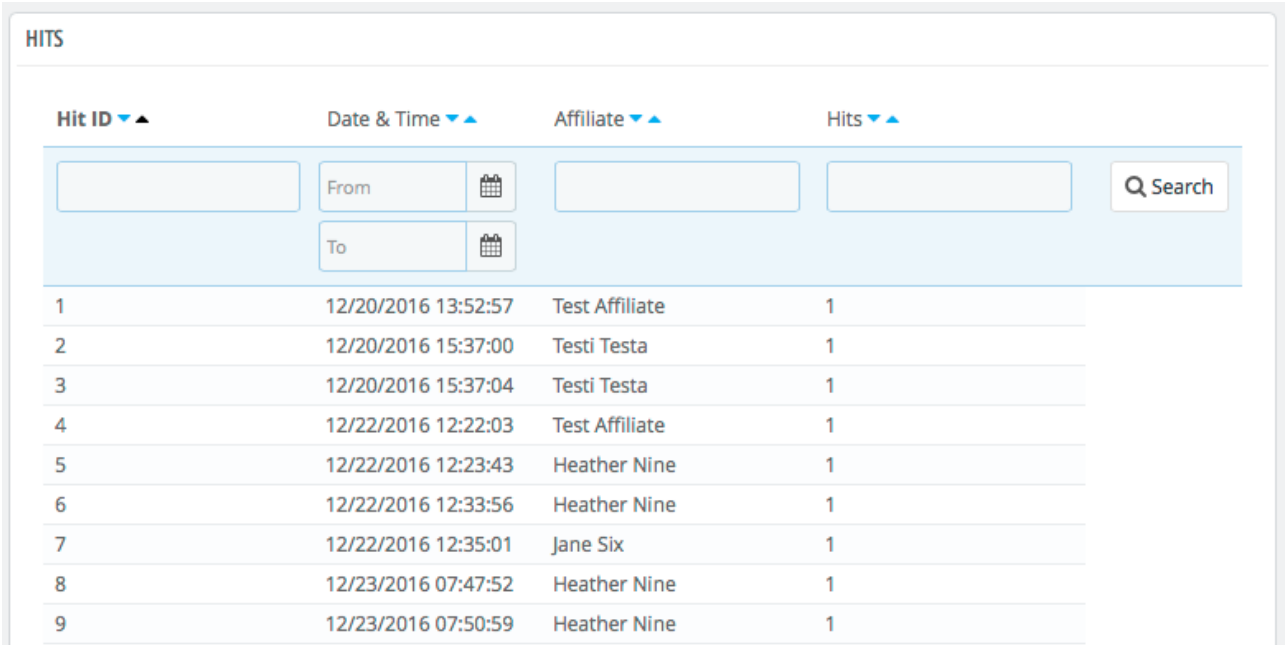
Hits on Affiliate Links

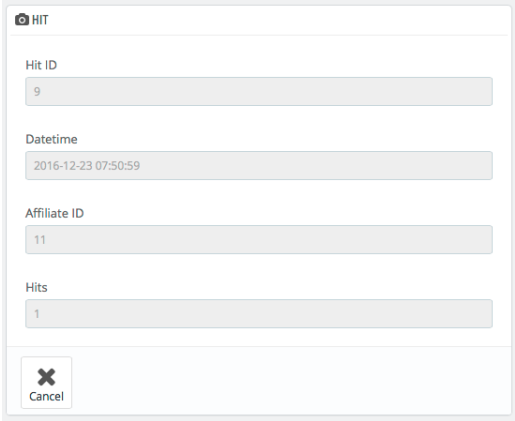


Under Affiliate > Hits you can see the list of incoming hits from clicks or other requests on affiliate links.

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



You can click a hit to see the detail.



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**).

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VIII. Support and Troubleshooting

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Contacting Support

You can contact our Support Team by sending an email or you can post a support ticket at https://addons.prestashop.com/en/customer-support.php. 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**.

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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.

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