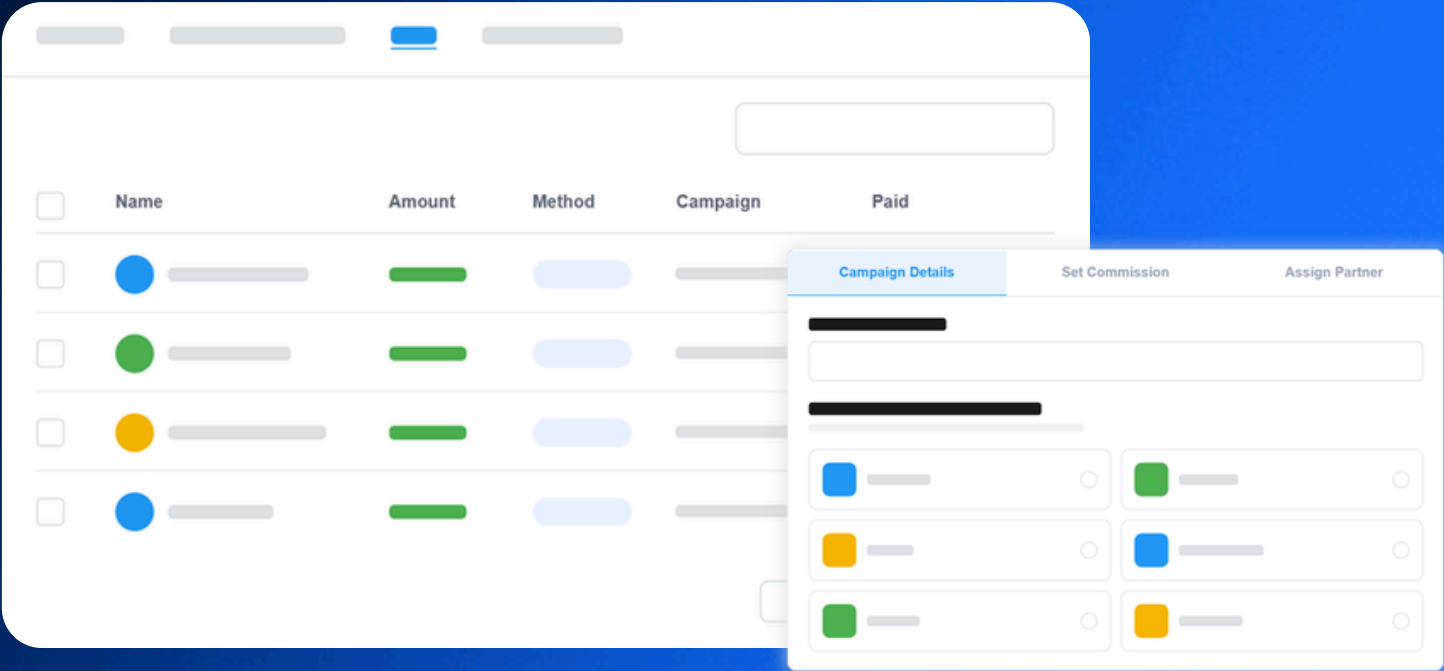


REFERENCE GUIDE

Affiliate Manager

Track, Commission, and Pay Affiliates



Affiliate Dashboard and Metrics

What It Is

The dashboard is your home base in Affiliate Manager. It shows your core numbers, a top 10 leaderboard, and the items waiting on you.

How It Works For Your Business

- Search for Affiliate Manager to reach the dashboard.
- Use the New button for quick actions and the campaign picker to see All Campaigns or one campaign.
- Core metrics show Total Revenue, Total Customers, and Conversion Percentage, with a Conversion Trend graph.
- The Affiliate Leaderboard ranks the top 10 and switches between revenue, commissions, leads, and customers.
- Pending Actions, Recent Affiliate Activity, and Export Sales CSV help you act and report.

Affiliate Dashboard and Metrics – Tips & Guidelines

Tips

- Pick the campaign first, then read the numbers.
- Check Pending Actions at the start of every visit.
- Export Sales CSV when you need a spreadsheet of sales.
- Switch the leaderboard metric to see different winners.

DO

- Start at the dashboard
- Pick the right campaign
- Check Pending Actions
- Export sales when needed

DON'T

- Read numbers without a filter
- Ignore Pending Actions
- Skip the other pages
- Guess which campaign you see

Setup Prerequisites and Products

What It Is

Before a campaign can work, your account needs a few things in place. The key idea is that affiliates need a product on a page to promote.

How It Works For Your Business

- Search for Stripe Connect and set it up.
- List your product in a funnel, on a website, or in an online store.
- Use forms, surveys, or calendars so the leads your affiliates send are tracked.
- Connect a PayPal Business account if you want to pay affiliates automatically.
- Product sales can run through Stripe, NMI, Authorize.net, or PayPal.

Setup Prerequisites and Products – Tips & Guidelines

Tips

- Finish these before you build your campaign.
- Without Stripe connected, a campaign stays paused.
- Test your lead form yourself before you promote it.
- A branded domain in Business Profile flows into your campaign URLs.

DO

- Connect Stripe first
- List the product on a page
- Add a lead form
- Link PayPal Business

DON'T

- Build a campaign with no product
- Skip lead tracking
- Assume PayPal is connected
- Reuse one product in many campaigns

Affiliate Campaigns

What It Is

A campaign is the container affiliates promote. It holds a source, a landing page, a product list, commission rules, and settings.

How It Works For Your Business

- On the Campaign page, click + Add and choose a source: a funnel, a website, or a store.
- Choose the landing page. Your software builds the campaign URL with a placeholder for the affiliate ID.
- Review the product list, then set commissions and an optional description.
- Assign affiliates, then open Additional Settings for email templates, cookie duration, payout terms, setup fees, and sub-affiliate sign up.
- Publish the campaign, or save it as a draft.

Affiliate Campaigns – Tips & Guidelines

Tips

- A campaign stays paused if Stripe is not connected or no affiliates are added.
- Changing the source changes the referral URL and the old one stops tracking.
- An affiliate can join more than one campaign and gets a link for each.
- Avoid the same product in several campaigns.

DO

- Save as a draft to review
- Tell affiliates about URL changes
- Write a clear description
- Test the campaign URL

DON'T

- Change the source casually
- Publish before checking commissions
- Leave Stripe unconnected
- Overlap products across campaigns

Commissions and Multi-Tier Rules

What It Is

Commissions set what affiliates earn. You can pay per lead or per sale, as a flat amount or a percentage, and you can add tiers.

How It Works For Your Business

- Set a default commission as a flat amount or percentage, then optionally set rates per product.
- Set a custom commission for one affiliate: click Customize on their Active Referral Links, then use the Commissions tab.
- In Advanced commission settings, choose the number of tiers, from 1 to 7. Sub-affiliates need at least 2.
- Turn on Commission Length to stop after a set count of charges, or leave the default to pay until the customer cancels.
- Priority runs product-based first, then variable, then default. Affiliate-level rates win over campaign rates.

Commissions and Multi-Tier Rules – Tips & Guidelines

Tips

- Tiers are changed at the campaign level, not on an affiliate profile.
- Variable commissions can use Two Levels, such as one rate for early charges and another later.
- Cookie duration in Additional Settings decides how long a click counts.
- Custom affiliate rates currently work for funnel or website campaigns.

DO

- Start with a simple default
- Use tiers only when needed
- Check the priority order
- Set cookie duration on purpose

DON'T

- Mix up flat and percent
- Edit tiers on a profile
- Set rates without testing
- Forget recurring charge limits

Adding Affiliates

What It Is

Affiliates are the people who promote your products. You can add them one at a time, in bulk, from contacts, or let them recruit sub-affiliates.

How It Works For Your Business

- On the Affiliates page, click Add, then New Affiliate, enter details, assign a campaign, and Save.
- Click Add, then Upload Affiliate, download the sample CSV, fill it in, upload it, and Save.
- Click Add, then Import from Contacts, choose your contacts, and click Import.
- Sub-affiliates need a campaign with at least 2 tiers. Add them from the parent's Sub-Affiliate tab.
- Turn on auto enroll or a sign up page in Additional Settings. Workflow actions can also add affiliates.

Adding Affiliates – Tips & Guidelines

Tips

- Use the sample CSV so columns match.
- Auto enroll starts only after a successful referred sale.
- A sign up form needs first name, last name, and email.
- Try one test affiliate before a big upload.

DO

- Use the sample CSV
- Assign a campaign
- Test with one person
- Check the Sub-Affiliate tab

DON'T

- Upload without the sample
- Forget campaign assignment
- Add sub-affiliates to a one-tier campaign
- Skip a test run

Affiliate Profile Page and Manual Sales

What It Is

Each affiliate has a profile page that collects their details, stats, links, commissions, leads, customers, payouts, and sub-affiliates.

How It Works For Your Business

- Open an affiliate to see email, join date, parent affiliate, magic link, and stats like revenue and owed payouts.
- Campaign insights filter by active, deleted, or inactive campaigns, and you can assign new campaigns.
- Active Referral Links list each campaign link, and you can customize the referral ID.
- On the Commissions tab, approve, deny, or add commissions. Click Add Sales Manually for offline sales.
- For a manual sale you only enter revenue. The commission is calculated from the campaign rate.

Affiliate Profile Page and Manual Sales – Tips & Guidelines

Tips

- You can import an existing transaction instead of typing a new one.
- Add the lead or customer first if they are not in the system.
- Optional date and reference number keep records tidy.
- Leads can be added or deleted by hand.

DO

- Use the profile as home base
- Add manual sales for offline deals
- Customize referral IDs
- Check owed payouts

DON'T

- Type commissions by hand
- Forget to add the customer
- Ignore campaign insights
- Delete leads without checking

Payouts and Payment Methods

What It Is

Payouts are what you owe affiliates. They generate on the 1st of each month with a due date from your payout terms.

How It Works For Your Business

- Payouts in Affiliate Manager has Pending, Approved for Payout, Paid, and Denied Payouts.
- Open the three-dot menu and choose Approve, or use Deny Payout. Move back to Pending reverses an approval.
- For PayPal Auto Payouts, select payouts, click Pay, review, and click Pay Now.
- For bank payments, click Pay, open the Bank tab, download the CSV if needed, then click Mark as Paid.
- Payout terms run NET-7, NET-15, NET-30, NET-45, NET-60, and NET-90.

Payouts and Payment Methods – Tips & Guidelines

Tips

- Review refunds and chargebacks first. They are not reflected automatically.
- Coupons mean the commission uses the discounted amount.
- You need the Pay Affiliate Manager Payout permission.
- Paid records are final and cannot be changed.

DO

- Review before approving
- Mark manual payments as paid
- Check payout permissions
- Confirm PayPal email addresses

DON'T

- Approve without checking refunds
- Forget Mark as Paid
- Edit paid records
- Guess at due dates

Media Library and Settings

What It Is

Media holds files for affiliates. Affiliate Settings controls payout methods and portal switches. Campaign settings cover templates, cookies, and terms.

How It Works For Your Business

- Open Affiliate Manager, then Media, and click Add File.
- Link the file to one campaign or make it available to all campaigns, then save.
- Affiliates can copy links and download files from their portal.
- Go to Affiliate Settings, then Affiliate Portal Settings, then Configure Payout Methods to enable PayPal, bank transfer, or both.
- Portal switches include asking for W9 or W8 forms, requiring a payout method, and masking referral emails.

Media Library and Settings – Tips & Guidelines

Tips

- Affiliates only see payout methods you turn on.
- Save the settings page after each change.
- Link media to one campaign when it fits only one offer.
- Review campaign Additional Settings too.

DO

- Name files clearly
- Enable payout methods
- Save your changes
- Match media to campaigns

DON'T

- Upload without linking
- Hide every payout method
- Forget to save
- Mix files across offers

Affiliate Automations and Workflows

What It Is

Automations let your software act when something happens with an affiliate, such as a new enrollment or sale, so you do less by hand.

How It Works For Your Business

- Trigger: Affiliate Enrolled In Campaign starts a workflow when an affiliate joins.
- Trigger: New Affiliate Sale starts a workflow so you can follow up on sales.
- Actions include Add to Affiliate Manager, Update Affiliate, Add to Affiliate Campaign, and Remove from Affiliate Campaign.
- The action Add Manual Sales For An Affiliate records a sale and lets you choose first or latest attribution.
- Pick the campaign and enter revenue details, then save the workflow.

Affiliate Automations and Workflows – Tips & Guidelines

Tips

- Start with one simple welcome workflow.
- Test with a pretend affiliate.
- Use Update Affiliate to switch someone active or inactive.
- Look in your workflow builder for the exact names.

DO

- Start small
- Test every workflow
- Name workflows clearly
- Review sales actions

DON'T

- Automate before you test
- Duplicate manual sales
- Skip attribution choices
- Forget to save

Key Terms Glossary

Affiliate

A person or business that promotes your product and earns a commission.

Campaign

The set of products, rules, and settings affiliates promote.

Campaign source

Where products are listed: a funnel, website, or store.

Affiliate link

A unique URL that tracks clicks and conversions.

Affiliate ID

A unique code used to track an affiliate's performance.

Default commission

A flat fee or percentage paid across all campaign products.

Attribution

Crediting an affiliate for a sale or lead.

Cookie length

How long a click stays linked to the affiliate.

Sub-affiliate

Someone who works under a primary affiliate.

Affiliate Portal

A personal dashboard where affiliates track their performance.

Magic link

A password-free login option for affiliates.

Payout

The total amount of money an affiliate has earned.

Getting Help

Your software changes over time, so a button or menu may look a little different than described here. If something does not match, check the in-app help for Affiliate Manager and look for the option with the same name.