

Affiliate Manager

This module lets you run a multi-level Affiliate Program for your Miva Merchant store. It boasts many options not present in Miva Merchant's built-in feature.

The Concept...

This module provides the functionality and interface for an affiliate program with restrictive options. The [Affiliate Login Manager](#) is an add-on module, allowing affiliates to log in to view their stats.

Note about compatibility with other modules: This module will integrate with our template modules, or with any other module that supports OpenTokens – the module's functionality can be called into store pages using tokens.

This module uses tokens. [A primer on tokens can be found here.](#)

Accessing the Module...

After installing the module, click on the **System Extension** link in your Miva Merchant Admin, and click on the **Affiliate Manager** link in the right-hand screen. This is where you will make all configurations for the module.

Setting Options...

When you first access the module's admin, you will be presented with the Affiliates listing screen. This is where you will later access registered affiliates and their information. By clicking the **Options** link, you can set all the options for the module.

mikeWorks Affiliate Manager
[documentation] [support]

Affiliates | Process Payouts | Options | Held Orders
Listing | Add Affiliate

id code name company basis url new hits new orders period last type per hit paid link tot. hits Search:

Delete	Active	Send	ID	Code	Name	Company
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First, we need to setup the Options for the module. **Click the Options link at the top of the screen.**

Options:

Here you can configure all the default settings for the module.

Enable module?

This option enables the Affiliate Manager module. Left unchecked, your store will not utilize its features.

Redirect to URL:

When an affiliate link is clicked, you can actually send the customer to another page in the store, or even a supporting page, such as your site's index.html page. This allows you to specify which page a shopper should first see after the affiliate becomes associated with the shopping session.

Retention period:

This is the time, in hours, the shopper is associated with the affiliate. If a shopper clicks an affiliate's link, navigates the store, but doesn't purchase until the following day, the retention period set will determine whether or not the affiliate will get credit for the sale.

Once the retention period expires, the affiliate will not get credit for any order placed by the shopper unless the shopper once again uses the affiliate's link to access the store.

NOTE: Putting a zero in this box will result in no affiliate credit for the sale.

Retention for # orders:

You can limit how many orders per shopper for which the affiliate can receive credit. Entering a zero here will give the affiliate credit for as many orders placed by the shopper during the set retention period. This setting, however, does take precedence over the retention period. So if you put a two here, the retention will be broken after two orders are placed, regardless over the number of hours you have set above.

Affiliates | Process Payouts | Options | Held Orders
Options | New Affiliate Sign-up

Enable module?

Redirect to URL:

Retention period (hours):

Retention for # orders:
(0=unlimited)

New referrals break retention?

Track Hits?

Multiple levels?

Track Orders?

Multiple levels?

New referrals break retention:

If checked, any new referrals will override any existing affiliation. If a shopper comes through Affiliate A's link, then later comes through Affiliate B's link, then Affiliate B will get credit for the sale. If you do not check this box, Affiliate A will receive the credit until the retention period (in orders or hours) is broken.

Track Hits?

The module can log each hit that occurs for each affiliate. In this respect, the "hit" is recorded when the shopper first visits the store as a result of a referral. Additional visits to the store during the retention period will not be recorded.

Multiple Levels?

If checked, the different ranks of credit will also be recorded. This is used if you setup tier-level affiliates and want the second rank (or third rank, etc.) to get credit for the hits.

Track Orders?

Affiliates can earn credits per order, if you so desire. This option will log the count of orders for each affiliate.

Multiple Levels?

If checked, the different ranks of credit will also be recorded for second, third, etc. ranks of affiliates.

Use separate store settings?

You can configure special headers and footers, colors and images (for buttons) for each affiliate. This is useful when you want to co-brand the site based on which affiliate referred the customer.

When checked, if you configure any affiliate with specific settings, then those settings will take precedence.

Process text for tokens?

If checked, then any tokens used when configuring an affiliate's specific headers and footers will be processed as tokens. If left unchecked, the tokens used will be displayed as text. Thus, if you plan to use tokens (including OpenTokens) to customize individual headers and footers, check off this box.

Use Separate Store Settings?	<input type="checkbox"/>
Process text for tokens?	<input type="checkbox"/>
Associate with Customer id?	<input type="checkbox"/>
"permanent" (ignore retention period)?	<input type="checkbox"/>
Hold status for these payment modules:	<input type="checkbox"/> VC Simple Payment <input checked="" type="checkbox"/> Paypal Web Accept <input checked="" type="checkbox"/> Purchase Order Plus <input checked="" type="checkbox"/> OpenUI™ Look & Feel <input type="checkbox"/> Verisign Payflow Pro (PaymentNet)
When calculating subtotal for payouts include:	
tax:	<input type="checkbox"/>
shipping	<input type="checkbox"/>

Associate with Customer id?

You can associate specific customers with affiliates. This is useful when a certain customer was referred by an affiliate and you want to make sure that affiliate continues to get credit regardless of whether or not the customer goes through the affiliate's link.

Permanent:

By default, the association will stay in force, regardless of any retentions, unless the customer clicks on another affiliate's link. You can override this and make the association permanent so the initial affiliate will always get credit for the customer's purchases regardless of any other actions.

NOTE: The association is based on the customer's login.

Hold status for these payment modules:

Each payment module assigned in the store will be listed. Check off any payment methods where the affiliate should not get credit for the sale until you've verified payment has been made. If you accept e-checks via PayPal or checks and money orders, you'll likely want to check those off so the affiliate won't get commissions until the payment has cleared the bank.

When calculating subtotal for payouts include:

You can grant commissions on the tax and shipping paid on the order. Most sites would not check these off as credit is normally only made on the actual purchased items.

Affiliate Defaults

In this section you'll setup the defaults for affiliates. These defaults can be overridden by individual affiliate configurations.

Labels for Fields:

You can create up to four additional fields to collect and store "backend" info on each affiliate. You could use these to collect Tax ID numbers, special code information, etc. By default, the fields and their content will display on the Affiliate's information screen (if using the Affiliate Login module), but you can opt to keep them from displaying to the affiliates themselves.

<i>Affiliate Defaults</i>	
Label for field1:	<input type="text" value="Field 1"/>
Label for field2:	<input type="text" value="Field 2"/>
Label for field3:	<input type="text" value="Field 3"/>
Label for field4:	<input type="text" value="Field 4"/>

The Labels here will be the actual label for the field (i.e. Tax ID:, Classification:).

Commissions Levels

Here's where you signify the payout options for affiliates. Again, these are defaults, and each can be overridden for specific affiliates if necessary.

	primary	2nd	3rd	4th	5th	6th	7th	8th
Percentage payout:	5.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Per purchase payout:	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Per product payout:	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Per hit payout payout:	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

If you are not using multi-level affiliate tracking, then all numbers should be entered into the **primary** column. The 2nd, 3rd, etc. columns are for multi-level (or tier-level) affiliates. For example, if Affiliate A referred Affiliate B and you want to pay Affiliate B for sales led by Affiliate A, you would enter the commission amounts for Affiliate A in the primary column, and Affiliate B's calculations go in the 2nd column. And if Affiliate B was referred to you by Affiliate X, and you want to pay Affiliate X as well, but X's info in the 3rd column.

The actual Affiliate whose link is used to enter the site is always the primary affiliate.

There are four ways you can offer commissions, and you can use one, some or all of these as a basis of paying affiliates for leads.

Percentage payout: This is the percent commission the affiliate will receive based on all approved products ordered. Enter this as a number. For 5% enter 5.00 (not .05, which would equal 1/20th of a percent).

Per purchase payout: This would be a payout for each order placed. Enter this as a number. If you wanted to payout \$1 for each order placed, enter 1.00.

Per product payout: You can payout based on the number of approved items purchased. This is a dollar amount, so for \$1 for each product you would enter 1.00

Per hit payout: You can opt to pay affiliates for each unique visitor who uses the affiliate's link. Not many stores offer this option any more because of false hitting of the store. Enter this as a number, in respect to dollars. So if you wanted to pay 10-cents for each unique hit, you would enter .10.

Referral & Signing Bonus Discounts

You can offer a discount to customers coming through either all or specific affiliates. Here you would set the default. If you only want to offer discounts when shoppers come through a specific Affiliate, do not configure it here, as this will, by default, affect all affiliates.

Referral Discount:	<input type="text" value="0.00"/>
discount as a percentage?	<input checked="" type="checkbox"/>
discount per product?	<input type="checkbox"/>
text for discount:	<input type="text" value="Referral Discount"/>
use price group instead?	<input type="checkbox"/>

The discount can be offered as a dollar off or as a percentage. You can also opt to discount per product, or utilize a price group to determine the discount structure.

Why would you offer such discounts?

If you have a high-end affiliate and want to offer it's visitors an additional 10% off automatically (without a coupon) then this method can be used.

You can also offer your affiliates a **signing bonus discount**, so they can save money on their first order placed after becoming an affiliate. This discount can be a dollar amount or percentage, and can be calculated on the entire order or per product.

Payout Options

Payouts can be made based various pricing configurations:

List price: this is the price that is in the Price field in the store for each product, regardless of whether or not the customer is in any price groups.

Cost: this uses the product's cost field as a bases of calculating commissions.

Payout Basis:	<input type="text" value="price paid"/>
Payout Period:	<input type="text" value="1"/> <input type="text" value="day of every 3rd month"/>
Min. subtotal for credit:	<input type="text" value="0.00"/>
Include tax & shipping?	<input type="checkbox"/>
Use affiliate store settings?	<input type="checkbox"/>

Price paid: this calculates commissions based on the actual price paid for the product.

Profit: this calculates commissions based on the profit that's calculated between the product's cost and price fields.

Payout period:

Here's where you set how often affiliates will be paid. Enter a number in the field to signify the day, then select the period from the list.

Minimum subtotal for credit:

Enter the dollar amount (without the \$) an affiliate must earn before payment will be made.

Include tax and shipping?

If the affiliate earns commission on tax and shipping, you can opt to include that commission amount in the calculation of the minimum subtotal.

Use affiliate store settings?

If you want to configure different a payout basis and period for each affiliate, check off this box.

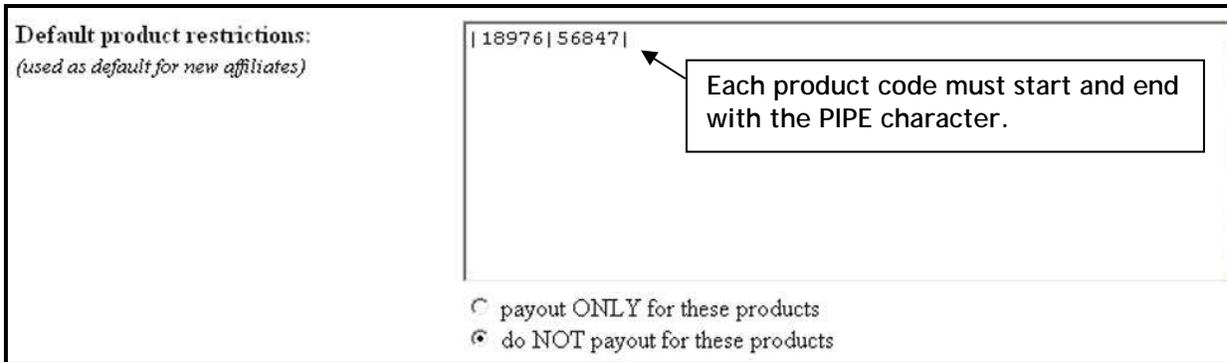
Paying with Gift Certificates:

If you are using the [Gift Certificate Manager](#) module, you can payout commissions with a Gift Certificate (akin to offering store credit).

Note that if you plan to offer higher rates when receiving payouts with Gift Certificates, you'll want to generate them manually.

Product Restrictions

You can restrict products and configure them so affiliates will not be paid a commission on specific products, or that affiliates will only earn commissions when specific products are purchased.



The screenshot shows a form titled "Default product restrictions: (used as default for new affiliates)". It features a text input field containing the product code "|18976|56847|". A callout box with an arrow points to the vertical pipe character, stating "Each product code must start and end with the PIPE character." Below the input field are two radio button options: "payout ONLY for these products" (which is unselected) and "do NOT payout for these products" (which is selected).

This is a default setting, so if you need to set different restrictions for some affiliates, you can do so when editing those affiliates.

To set restrictions you enter the product CODE of any items. Each code must start and end with the PIPE character as a delimiter – the PIPE character is the | (vertical line) that's above the enter key on most keyboards.

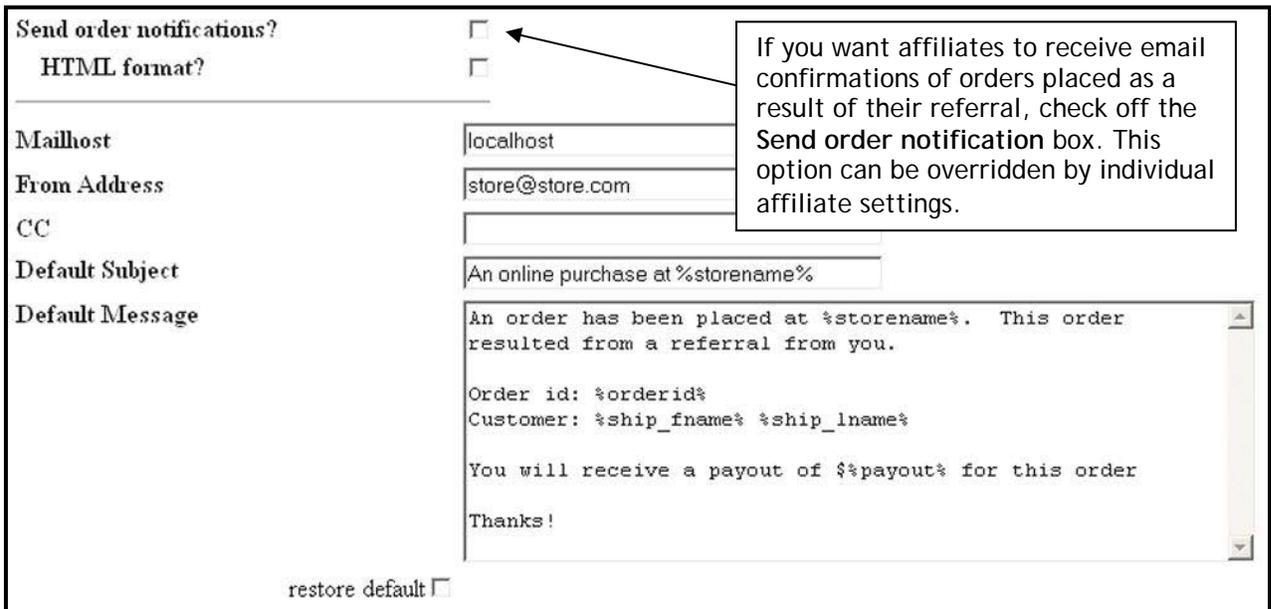
After entering the product codes, choose to either payout ONLY for the items, or to payout for everything EXCEPT those items.

Template Module Options

If you use the [Category Page Templates](#) or [Product Page Templates](#) modules you can actually assign specific templates to be used for category and product pages if the shopper comes to the store via an affiliate link. Keep in mind that these settings can override the current product and category assignments you are using in the store by default. You can also override this setting for individual affiliates.

Emails and Payout Invoices

You can customize emails and invoices for both affiliates and customers.



The screenshot shows a web form for configuring email settings. At the top, there are two checkboxes: "Send order notifications?" and "HTML format?". Below these are input fields for "Mailhost" (localhost), "From Address" (store@store.com), "CC", "Default Subject" (An online purchase at %storename%), and "Default Message" (An order has been placed at %storename%. This order resulted from a referral from you. Order id: %orderid% Customer: %ship_fname% %ship_lname% You will receive a payout of \$\$%payout% for this order Thanks!). A "restore default" button is at the bottom left. A callout box with an arrow pointing to the "Send order notifications?" checkbox contains the text: "If you want affiliates to receive email confirmations of orders placed as a result of their referral, check off the Send order notification box. This option can be overridden by individual affiliate settings."

You can customize emails further by configuring each affiliate's settings.

The affiliate email can include tokens (discussed further) to customize the message. However, the email confirmation will not (and cannot) include a list of all products ordered.

The **payout invoice** can be used to provide the affiliate with an overall report of earnings included during the time period. You can use HTML and tokens to customize the display.

Referral Prompts

It is possible for a customer to arrive at the store and enter the referring affiliate's code, rather than solely rely on linking. You may opt to present an input box so the customer can enter the referring affiliate's code. Some sites do this during the checkout process to give special credit to charities they've setup as affiliates, and others collect this info while customers are shopping from codes given in an advertisement.

Using referral prompts are completely optional, and if you're running a "linking" affiliate program, you may not even use them.

These prompts (a text field and "submit" button) can be placed in various positions in your store. When using the core default layout of Miva Merchant, you can designate exactly where they will appear.

Referral Prompts

Button/prompt Position:

Nav Bar: 1 2 3 4 5 6

Cat. Tree: 7 8 9 10 11 12

Body: 13

@Checkout: 14

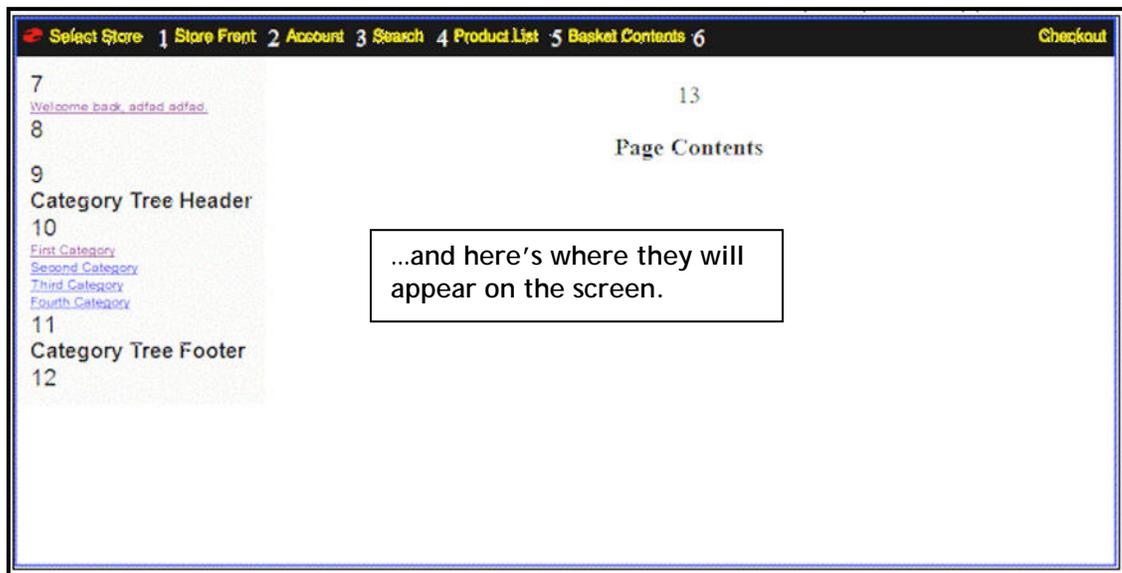
Use the checkboxes to designate where prompts will appear...

Navbar prompt setup:

```
<font color="red">%error%</font> Enter referral code: %  
prompt|10|% %button%
```

Navbar button image:

Navbar button alt:



You can also customize how the prompts are displayed, using HTML and tokens. And you can further designate different layouts for different locations (if using more than one location).

Cat. tree prompt setup:	<pre>%error%
Enter referral code: %prompt 10 %button%</pre>
Cat. tree button image:	<input type="text"/>
Cat. tree button alt:	<input type="text" value="submit"/>

The prompt setup is the text and field layout. In our example, we use the label "Enter referral code:" you could use any words you like. But there are two things you need to include – the field with it's button and the %error% token.

You can use a graphic as the submit button for the referral code, or use a standard gray form submit button, with customized text if you wish.

You can also customize a message to appear if the referral is good (affiliate found) or bad (affiliate not found).

Affiliate Signup Page

It's up to you if you want anyone to apply to become an affiliate, or if you want to only manually create affiliates yourself.

The **New Affiliate Signup** section gives you control over how the affiliate signup page is displayed to visitors. You can reach this area by clicking the **Options** link in the module's admin.

New Affiliate Sign-up

Enable feature?	<input type="checkbox"/>	<p>The Enable feature box must be checked off if you want visitors to signup - if you want to manually create only approved people, then you can turn this option off (and skip the entire configuration of this screen).</p>
Automatic approval?	<input type="checkbox"/>	
Sign-up page title:	<input type="text" value="New Affiliate Sign-up"/>	
Show cat tree?	<input type="checkbox"/>	
Template for generated codes:	<input type="text" value=" key "/>	
character types:	<input type="text" value="numbers and letter"/>	
number of characters:	<input type="text" value="8"/>	
Button/link Position:	Nav Bar: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 Cat. Tree: <input type="checkbox"/> 7 <input checked="" type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 Body: <input type="checkbox"/> 13	
Show link	<input type="radio"/> before referral prompt <input checked="" type="radio"/> after referral prompt	
<hr/>		
Navbar button setup:	<input type="text" value="%button%"/>	
Navbar button image:	<input type="text"/> 	
Navbar button alt:	<input type="text" value="Become an affiliate"/>	
<hr/>		
Cat. tree button setup:	<input type="text" value="%button%"/>	
Cat. tree button image:	<input type="text"/> 	
Cat. tree button alt:	<input type="text" value="Become an affiliate"/>	

Enable feature?

In order to allow others to signup as an affiliate, you need to enable this feature. This will allow visitors to apply to become an affiliate through the store.

Automatic approval?

You can automatically approve anyone who signs up. If you want to manually approve or reject any affiliates, leave this box unchecked.

Sign-up page title:

This is the title of the application page, and it will appear in the title bar in the browser.

Show cat tree?

To show the category tree on the signup page, check off the box.

Template for generated codes:

When a customer submits their application to be an affiliate, whether or not you have the "Automatic approval" option set, OR if you manually enter a new affiliate information through the admin interface and leave the affiliate "code" field blank, the module will automatically generate an affiliate code. The "template for generated codes" will be used to generate that code.

You can have any text you want appear in the code and the token |key| will be replaced with a randomly generated key. The length of that key can be configured by setting the **number of characters** and whether to use "number and letters", just "numbers", or just "letter" can be configured by selecting the appropriate "character types".

For example, if you wanted the code to be of the form "bobsplace-|key|% and have the key composed only of 5 numbers, you would enter bobsplace- into the "template for generated codes", select "numbers" in the "character types" field, and enter 5 in the "number of characters" field.

Button/link position:

The module can display a Signup link that takes the visitor to the affiliate signup page. You can control where it's displayed and whether it is displayed before or after the referral prompt box (if you are using it).

You don't have to use the option of checking off a location. You can also hard-code an HTML link to the signup page (see: Customization Tips).

You can also configure the button links for the navigation bar and/or category tree, use your own signup graphic, or use a standard gray form submit button for the link.

Headers and Footers:

You can create custom headers and footers for the Customer Account Login or Create Account screens. The module utilizes the standard LOGN and ACNT screens – which are the same ones used when customers who are not registering to become affiliates use to login or create customer accounts. However, if these screens are accessed via the Sign up link, these alternate headers and footers will be used.

Why?

In order to become an affiliate, the visitor must first have a customer account. Affiliate profiles are tied to customer accounts, so if someone tries to sign up as an affiliate, he/she will be prompted to either login or create a customer account first.

The Main Signup Template

You have total control over the layout of the sign up page. You can use HTML and tokens to customize what is collected and how it looks on the screen.

Main Page:

Standard tokens and code are already included, but you may want to modify this template. See the section on Tokens for further info on what can be used here.

“save” button image:

You can upload a custom graphic for the SAVE button the visitor would click to become an affiliate.

“save” button alt:

You can also enter alternate text to be displayed when the mouse is held over the graphic. If you do not upload a graphic, this text will be used to create a standard gray form submit button.

Error message for “missing fields”:

You can customize the error displayed if required fields are not completed.

Main page:	<pre> <center>%error%</center>
 %ship_fname% %ship_lname%, please fill out the information below:

 <table> <tr><td> Url of your site: </td><td> %url 40 % </td></tr> <tr><td colspan="2"> Were you referred to us? If so, enter the referral id or affiliate code: <tr><td> &nbsp;%&nbsp;%&nbsp;%&nbsp;%referral ID: </td><td> %referralid 04 % </td></tr> <tr><td> &nbsp;%&nbsp;%&nbsp;%&nbsp;%referral code: </td><td> </pre>
"save" button image:	
"save" button alt:	Submit
Error message for "missing fields":	Some required fields were not filled out

Success page:

You can customize the message displayed when the form has been submitted.

Activation Emails:

You can customize an email to be sent to the affiliate if the application has been approved.

Send notification of new affiliate?

You can opt to send an email to yourself or someone else when someone has applied to become an affiliate.

Send activation notice?	<input checked="" type="checkbox"/>
Activation Subject	Your affiliate application has been approvec
Activation Message	<pre> Your application to become an affiliate at %storename% has been approved.

 Place this link on your site to refer customers to us:

 %affiliate_link%
 </pre>
Send notification of new affiliate?	<input type="checkbox"/>
Send in html format?	<input type="checkbox"/>
Send to:	store@store.com
Send from:	store@store.com
cc:	
Notification Subject	A new affiliate has signed up
Activation Message	

Working with Affiliates

Once you have the module configured, we recommend you test the settings by creating a dummy affiliate and testing links and even placing an order or two to verify the proper commissions are being applied.

Creating Affiliates via the Admin

To manually create an affiliate in the Affiliate Manager admin area, click the **Affiliates** link, then on **Add Affiliate**.

If you want to send an activation email to the affiliate when you actually add him/her, check off the Send Email box.

Affiliate code:

You can create an affiliate code here if you wish. If you leave it blank, one will be auto-generated based on the settings you configured previously.

Customer Login:

An affiliate must have a customer account record. Here you need to enter the actual customer login.

Referred by:

If this affiliate was referred by another affiliate, you need to enter the ID of that affiliate. The ID can be found in the listing of affiliates, and it's a set number. The ID is NOT the code.

Redirect to URL:

If you want to have the visitor redirected to a special page when coming through this affiliate's link, you can enter that url here. Otherwise, the default (if any) will be used.

Fields 1, 2, 3, and 4:

If you customized labels for these fields, you will see the labels instead (such as TAX ID).

Send Email?	<input checked="" type="checkbox"/>
Affiliate code:	<input type="text" value="XYZ"/>
Customer Login:	<input type="text" value="TINARAY"/>
Referred by (affiliate id):	<input type="text"/>
Redirect to URL:	<input type="text" value="http://www.store.com/index.html"/>
First Name:	<input type="text" value="John"/>
Last Name:	<input type="text" value="Doe"/>
Email address:	<input type="text" value="john@xyz.com"/>
Url of site:	<input type="text" value="http://www.xyz.com"/>
Company:	<input type="text" value="XYZ Associates"/>
Phone 1:	<input type="text" value="555-555-5555"/>
Phone 2:	<input type="text"/>
Fax:	<input type="text"/>
Address:	<input type="text" value="152 Smith St"/>
City:	<input type="text" value="Runsford"/>
State/province:	<input type="text" value="OH"/>
Zip/postal code:	<input type="text" value="01111"/>
Country:	<input type="text" value="United States"/>
Field 1	<input type="text"/>
Field 2	<input type="text"/>
Field 3	<input type="text"/>

To allow for automatic referring from one affiliate to a new one, the primary affiliate will want to use a link like this:

`http://www.yourdomain.com/Merchant2/merchant.mvc?Screen=AFFIL&AFFIL=primaryaffiliate'scodegoeshere`

This will auto fill the Referred By box with the referring affiliate, so they can obtain credit on orders in a tier-leveled program.

Additional Options:

You can opt for this affiliate to receive email notifications of purchases (and whether or not they should be in HTML format).

Send purchase notification?	<input type="checkbox"/>
Receive emails in HTML format?	<input type="checkbox"/>
Use Affiliate store settings?	<input type="checkbox"/>

And, if you are customizing headers/footers, etc. for this affiliate, you will need to check off Use Affiliate store settings?

The remaining options on this page allow you to either use the module's default settings (found under OPTIONS), or override those with any new configurations you make. To override any settings, uncheck the Use Default Values box and then configure as needed.

Editing Affiliates

To edit the settings for an affiliate, click the **Affiliates** Link (and, if necessary, click on **Listings**), then click the link for the affiliate you want to edit.

You can change anything except for the Affiliates referral link to the store.

Viewing Affiliate Statistics

To view the statistics for a specific affiliate, you'll need to enter the affiliates edit area.

The following links are available for viewing:

Due – the amount due to the affiliate at this time

Paid – the amount of previous payments to the affiliate

Orders – a listing of the affiliate's orders

On the Orders screen you will see the order number, order date, the payout (commission earned) and the rank (1 means primary). If an order is canceled, deleting it here will remove the commission from the affiliate's totals.

Hits – if you've opted to track hits, you can view the number of hits an affiliate is responsible for. Remember that these are unique visits, so if you're testing an affiliate link repeatedly, multiple hits will not be recorded unless you used different browsers or computers, or clear your cookies.

Display by:	<input type="radio"/> Day	<input checked="" type="radio"/> Week	<input type="radio"/> Month	<input type="radio"/> Year	<input type="text" value="5"/> / <input type="text" value="12"/> / <input type="text" value="2005"/>
Show:	<input type="radio"/> Paid	<input type="radio"/> Unpaid	<input checked="" type="radio"/> All		
Fields:	<input checked="" type="checkbox"/> Rank 1	<input type="checkbox"/> Rank 2	<input type="checkbox"/> Rank 3	<input type="checkbox"/> Rank 4	<input type="checkbox"/> Rank 5
Delete	Rank 1				
<input type="checkbox"/>	02/27/2005 - 03/06/2005	135			
<input type="checkbox"/>	02/20/2005 - 02/27/2005	120			
<input type="checkbox"/>	02/13/2005 - 02/20/2005	247			
<input type="checkbox"/>	02/06/2005 - 02/13/2005	304			
<input type="checkbox"/>	01/30/2005 - 02/06/2005	199			
<input type="checkbox"/>	01/23/2005 - 01/30/2005	67			

Totals are grouped by week, and you can also view specific details by opting what to show and display, including all ranks of affiliates.

Customizing the Store Based on Affiliates

You can customize the store's headers/footers, etc., based on the affiliate. In order to do this, you must be sure to check off Use Affiliate store settings for the affiliate. When you click update, you'll see three new links for the affiliate:

Headers & Footers

You can customize just about anything necessary for the store; some sites even co-brand their sites with their affiliates.

- Here you can customize:
- The Store Front Welcome Message (which is the SFNT screen)
- Order Thank You Message (appears on the invoice screen)
- Global Header and Footer (handles the header/footer around the entire site.)
- Category Tree Header and Footer
- All other headers and footers displayed in the store.

You can use HTML and tokens here (make sure **process text for tokens** is checked off under the module's options), thus totally customizing the layout, color scheme, and more.

Fonts & Colors

You can customize all the default font faces and sizes used by Miva Merchant, as well as all the colors for text, backgrounds and alternating lists.

Images and More

You can upload custom graphics for all the store's buttons (add to basket, remove, update, etc.), put special code between the <HEAD> </HEAD> and <BODY> </BODY> tags, control pagination customer account links.

Special Tokens

You can also use special tokens for customizing the affiliate's "store." Token usage is discussed in a bit.

Paying Affiliates

While the module won't mail the check, it will give you payout invoices to use – and they are based on your settings for the module or the affiliate.

When you click the Process Payouts link, you'll see a list of any affiliates who have money due them. Click on the affiliate's link to see a list of all orders, commissions earned, as well as a total amount due.

To process the payout, check off the Process box and click update. Feel free to record any special notes (such as "paid as store coupon", etc.)

Working with Orders

If a customer cancels an order, chances are you won't want to pay the commission. Since the Affiliate Manager maintains its own databases, you'll want to delete the order from the affiliate's stats screen.

Canceling Commissions

1. In the module's admin, locate the Affiliate and click its link to edit the affiliate.
2. Click the **Orders** link.
3. Locate the order (you can search if you need).
4. Check off the **delete** box.
5. Click **Update**.

Approving Held Orders

Orders that are held due to payment methods will not be applied to the affiliate until they are approved.

1. In the module's admin, click the **Held Orders** link.
2. For any approved orders, check off the **Send/Convert** box.
3. For any unapproved orders (that will never be approved) check off the **delete** box.
4. Click **Update**.

Tokens

This module uses tokens to display specific data.

Following is a list of standard pre-defined tokens used for this module.

NOTE: These are not OpenTokens. They are tokens specific to the Affiliate Manager module and do not require special settings for normal display of information.

Tokens may be added to the module as needs arise. As they are added, this documentation will be updated. Note the date on this documentation to see if updated documentation is available.

Affiliate Signup's Main Page Template

The following tokens can be used in the affiliate signup's main template.

%error%	Displays the error message(s) generated by the submission of the sign-up page
%submit%	Will replace the "save" button image, or by a button using the "button alt" text if no button is configured
%storename%	The store's name (as configured in Miva Merchant).
%storeowner%	The name of the store owner (as configured in Miva Merchant).
%storeemail%	The store's email address (as configured in Miva Merchant).
%storecompany%	The store's company name (as configured in Miva Merchant).
%storeaddress%	The store's address (as configured in Miva Merchant).
%storecity%	The store's city (as configured in Miva Merchant).
%storestate%	The store's state (as configured in Miva Merchant).
%storezip%	The store's zip code (as configured in Miva Merchant).
%storephone%	The store's phone number (as configured in Miva Merchant).
%storefax%	The store's fax number (as configured in Miva Merchant).
%storecountry%	The store's country (as configured in Miva Merchant).
%cust_password%	The customer's account password.
%cust_login%	The customer's account login.
%cust_id%	The customer ID.

%ship_fname%	The customer's Ship-To First Name.
%ship_lname%	The customer's Ship-To Last Name.
%ship_email%	The customer's Ship-To Email Address.
%ship_comp%	The customer's Ship-To Company.
%ship_phone%	The customer's Ship-To Phone Number.
%ship_fax%	The customer's Ship-To Fax Number.
%ship_addr%	The customer's Ship-To Address.
%ship_city%	The customer's Ship-To City.
%ship_state%	The customer's Ship-To State.
%ship_zip%	The customer's Ship-To Zip Code.
%ship_cntry%	The customer's Ship-To Country.
%bill_fname%	The customer's Bill-To First Name.
%bill_lname%	The customer's Bill-To Last Name.
%bill_email%	The customer's Bill-To Email Address.
%bill_comp%	The customer's Bill-To Company.
%bill_phone%	The customer's Bill-To Phone Number.
%bill_fax%	The customer's Bill-To Fax Number.
%bill_addr%	The customer's Bill-To Address.
%bill_city%	The customer's Bill-To City.
%bill_state%	The customer's Bill-To State.
%bill_zip%	The customer's Bill-To Zip Code.
%bill_cntry%	The customer's Bill-To Country.

%note xx yy %	(optional) replaced by a form textarea, xx cols wide and yy rows high. The applicant can enter any note that he wants to provide to you. This data is collected and displayed in the "note" field on the affiliate's configuration screen.
%url xx %	(optional) replaced with a text field xx characters long. Can be used to collect the applicant's URL
%code xx %	(optional) will be replaced with a text field xx characters long. Can be used to have the applicant enter their own affiliate code. If left out (or blank) a code will be generated automatically
%referralid xx 	(optional) will be replaced with a text field xx characters long. Can be used to collect the affiliate id# of the referring affiliate (if any).
%referralcode 	(optional) will be replaced with a text field xx characters long. Can be used to collect the affiliate code of the referring affiliate (if any).
%sendnotice%	(optional) will be replaced with a checkbox. Permits the applicant to select whether or not to receive notification emails for orders
%htmlformat%	(optional) will be replaced with a checkbox. Permits the applicant to select whether or not they want notification emails sent in html format.
%field1 xx %	Displays the input for the Field 1 box (regardless of the label you may have entered, it must be coded here as field1. xx denotes the width of the box and you can optionally add yy to create a textarea. Final token for this would be %field1 xx yy %
%field2 xx %	Same, for field 2.
%field3 xx %	Same, for field 3.
%field4 xx %	Same, for field 4.

You can make some of these fields required by the visitor applying. Some examples are:

%reqfield1|xx|%
%reqfield2|xx|%
%reqfield3|xx|%
%reqfield4|xx|yy|%
%reqnote|xx|yy|%
%requrl|xx|%
%reqcode|xx|%
%reqreferralid|xx|%
%reqreferralcode|xx|%
%reqsendnotice%
%reqhtmlformat%

Invoice Template

The following tokens can be used in the invoice template for the affiliate. This is the affiliate's invoice and not the invoice seen by customers shopping the store.

%cust_id%	The customer's id.
%affiliate_code%	The affiliate's code.
%affiliate_link%	The affiliate's referral link
%referralid%	The affiliate's id#
%referralcode%	The affiliate's code
%affiliate_email%	The affiliate's email address
%affiliate_fname%	The affiliate's first name
%affiliate_lname%	The affiliate's last name
%affiliate_company%	The affiliate's company
%affiliate_phone1%	The affiliate's phone #1
%affiliate_phone2%	The affiliate's phone #2
%affiliate_fax%	The affiliate's fax #
%affiliate_address%	The affiliate's address
%affiliate_city%	The affiliate's city
%affiliate_state%	The affiliate's state
%affiliate_zip%	The affiliate's zip code
%affiliate_country%	The affiliate's country
%affiliate_note%	The affiliate's NOTE field content
%affiliate_start%	The affiliate's affiliate's start date
%affiliate_po_pertyp%	The affiliate's affiliate's payout period (day, week, etc.)
%affiliate_po_pernum%	The affiliate's affiliate's payout "day" (eg. 1 for first of period, 2 for 2nd of period, etc.)

%affiliate_po_basis%	The affiliate's affiliate's payout basis (price, list, cost)
%affiliate_po1_flat%	The primary affiliate's flat payout rate.
%affiliate_po1_prcnt%	The primary affiliate's payout percentage
%affiliate_po1_hit%	The primary affiliate's payout per hit
%affiliate_po2_flat%	same as above for 2nd rank
%affiliate_po2_prcnt%	same as above for 2nd rank
%affiliate_po2_hit%	same as above for 2nd rank
%affiliate_po3_flat%	same as above for 3rd rank
%affiliate_po3_prcnt%	same as above for 3rd rank
%affiliate_po3_hit%	same as above for 3rd rank
%affiliate_po4_flat%	same as above for 4th rank
%affiliate_po4_prcnt%	same as above for 4th rank
%affiliate_po4_hit%	same as above for 4th rank
%affiliate_po5_flat%	same as above for 5th rank
%affiliate_po5_prcnt%	same as above for 5th rank
%affiliate_po5_hit%	same as above for 5th rank
%affiliate_po_last%	The affiliate's last payout period end date
%affiliate_po_lastpd%	The date the affiliate's last payout was processed
%affiliate_po_paid%	The total payout paid to the affiliate.
%note%	The note for the payout.
%payout%	The payout total
%payoutid%	The id# of payout
%orders%	Replaced with html content of the "Order Template"; once for each order in the payout

Order Template

The following can be used in the customer's order template, which can be viewed by the affiliate.

%orderid%	order id
%cust_id%	customer's id
%ship_fname%	order's ship first name
%ship_lname%	order's ship last name
%ship_email%	order's ship email
%ship_comp%	order's ship company
%ship_phone%	order's ship phone #
%ship_fax%	order's ship fax#
%ship_addr%	order's ship address
%ship_city%	order's ship city
%ship_state%	order's ship state
%ship_zip%	order's ship zip code
%ship_cntry%	order's ship country
%bill_fname%	order's bill first name
%bill_lname%	order's bill last name
%bill_email%	order's bill email
%bill_comp%	order's bill company
%bill_phone%	order's bill phone#
%bill_fax%	order's bill fax#
%bill_addr%	order's bill address
%bill_city%	order's bill city
%bill_state%	order's bill state

%bill_zip%	order's bill zip code
%bill_cntry%	order's bill country
%ordertotal%	order total
%orderdate%	order date

Email Body & Subject

The following tokens can be used in the affiliate order notification email and subject.

%affiliate_code%	The affiliate's code.
%affiliate_link%	The affiliate's referral link
%referralid%	The affiliate's id#
%referralcode%	The affiliate's code
%affiliate_email%	The affiliate's email address
%affiliate_fname%	The affiliate's first name
%affiliate_lname%	The affiliate's last name
%affiliate_company%	The affiliate's company
%affiliate_phone1%	The affiliate's phone #1
%affiliate_phone2%	The affiliate's phone #2
%affiliate_fax%	The affiliate's fax #
%affiliate_address%	The affiliate's address
%affiliate_city%	The affiliate's city
%affiliate_state%	The affiliate's state
%affiliate_zip%	The affiliate's zip code
%affiliate_country%	The affiliate's country
%affiliate_note%	The affiliate's NOTE field content

%affiliate_start%	The affiliate's affiliate's start date
%affiliate_po_pertyp%	The affiliate's affiliate's payout period (day, week, etc.)
%affiliate_po_pernum%	The affiliate's affiliate's payout "day" (eg. 1 for first of period, 2 for 2nd of period, etc.)
%affiliate_po_basis%	The affiliate's affiliate's payout basis (price, list, cost)
%affiliate_po1_flat%	The primary affiliate's flat payout rate.
%affiliate_po1_prcnt%	The primary affiliate's payout percentage
%affiliate_po1_hit%	The primary affiliate's payout per hit
%affiliate_po2_flat%	same as above for 2nd rank
%affiliate_po2_prcnt%	same as above for 2nd rank
%affiliate_po2_hit%	same as above for 2nd rank
%affiliate_po3_flat%	same as above for 3rd rank
%affiliate_po3_prcnt%	same as above for 3rd rank
%affiliate_po3_hit%	same as above for 3rd rank
%affiliate_po4_flat%	same as above for 4th rank
%affiliate_po4_prcnt%	same as above for 4th rank
%affiliate_po4_hit%	same as above for 4th rank
%affiliate_po5_flat%	same as above for 5th rank
%affiliate_po5_prcnt%	same as above for 5th rank
%affiliate_po5_hit%	same as above for 5th rank
%affiliate_po_last%	The affiliate's last payout period end date
%affiliate_po_lastpd%	The date the affiliate's last payout was processed
%affiliate_po_paid%	The total payout paid to the affiliate.
%todaysdate%	Today's date.
%time%	Current time.

%orderid%	The order number.
%cust_id%	The customer's ID.
%ship_fname%	order's ship first name
%ship_lname%	order's ship last name
%ship_email%	order's ship email
%ship_comp%	order's ship company
%ship_phone%	order's ship phone #
%ship_fax%	order's ship fax#
%ship_addr%	order's ship address
%ship_city%	order's ship city
%ship_state%	order's ship state
%ship_zip%	order's ship zip code
%ship_cntry%	order's ship country
%bill_fname%	order's bill first name
%bill_lname%	order's bill last name
%bill_email%	order's bill email
%bill_comp%	order's bill company
%bill_phone%	order's bill phone#
%bill_fax%	order's bill fax#
%bill_addr%	order's bill address
%bill_city%	order's bill city
%bill_state%	order's bill state
%bill_zip%	order's bill zip code
%bill_cntry%	order's bill country

%ordertotal%	order total
%shipping_type%	The shipping description (as generated by the shipping module).
%storelink%	The link to the store front.
%storename%	The store's name (as configured in Miva Merchant).
%storeowner%	The name of the store owner (as configured in Miva Merchant).
%storeemail%	The store's email address (as configured in Miva Merchant).
%storecompany%	The store's company name (as configured in Miva Merchant).
%storeaddress%	The store's address (as configured in Miva Merchant).
%storecity%	The store's city (as configured in Miva Merchant).
%storestate%	The store's state (as configured in Miva Merchant).
%storezip%	The store's zip code (as configured in Miva Merchant).
%storephone%	The store's phone number (as configured in Miva Merchant).
%storefax%	The store's fax number (as configured in Miva Merchant).
%storecountry%	The store's country (as configured in Miva Merchant).
%payout%	The total payout amount.

Affiliate Signup Email

The following tokens can be used in the email notification for the affiliate signup. This list is not complete – please refer to the module's default template for additional information.

%affiliate_email%	The affiliate's email address
%affiliate_fname%	The affiliate's first name
%affiliate_lname%	The affiliate's last name
%affiliate_company%	The affiliate's company
%affiliate_phone1%	The affiliate's phone #1

%affiliate_phone2%	The affiliate's phone #2
%affiliate_fax%	The affiliate's fax #
%affiliate_address%	The affiliate's address
%affiliate_city%	The affiliate's city
%affiliate_state%	The affiliate's state
%affiliate_zip%	The affiliate's zip code
%affiliate_country%	The affiliate's country
%affiliate_note%	The affiliate's NOTE field content
%affiliate_url%	The affiliate's Web Site URL.
%affiliate_field1%	Data entered into Field1 (note that you may have changed the label on this field). Use %affiliate_field2% - field3, field4 for corresponding fields.

Troubleshooting Affiliate Manager

This module relies on the configuration settings, and many problems users encounter are based on mis-configuration of the module. Here's some common issues and how to fix them.

The Affiliate is not getting credit for the sale.

First, make sure you don't have the retention hours set to zero, as that would mean no affiliation whatsoever. Also note that many shoppers might take more than an hour to checkout, or even may wait until the next day to actually order. Consider this when you set the retention period.

The "2nd rank" affiliates are not getting the payout that is due to them. Why?

The payout for each rank is taken from the affiliate that is receiving the payout. So if an affiliate is a rank 2 referral, then the payout due is taken from **that** affiliate's payout configuration.

I would like to display the affiliate information, such as the code, in the merchant notification email.

If you're using the OpenUI then you can use the OpenUI's merchant notification to do this. You first need to register Affiliate Manager with the OpenUI.

Go to your store's admin to the "OpenUI Tokens" tab. Click on the yellow "new" icon on the right side. In the "Module code" field enter BROK_AFFILIATES. In the "token" field enter BROK_AFFILIATES (you can actually enter something different here but for the sake of avoiding conflicts with other modules, the code works), then click on "update". You'll see the module listed there with a link under "token codes". Clicking that will bring up a window with the module's instructions for token usage.

To display the affiliate code in the email, you would use the token:

```
%module|BROK_AFFILIATES|token%
```

where "token" can be any of the tokens normally used in the Affiliate Manager (without the leading and trailing %). So to display the affiliate code you would use:

```
%module|BROK_AFFILIATES|affiliate_code%
```

I set specific headers and footers for an affiliate but I'm not seeing the changes when I test it.

First, make sure that you are really associated with the affiliate that you're testing for. Once you have visited the store with an affiliate's link and become associated with that affiliate that association will remain for the full retention period. Subsequently visiting with a different affiliate's referral will NOT change the initial association. So it often happens that during testing you're using one affiliate's link expecting to see the configuration that you provided for that affiliate but you don't see it because you are in fact still associated with the initial affiliate.

You can work around this by setting the retention period very low (and letting it expire), setting the retention to be 1 order and placing an order which will then break the affiliation, or by deleting the htscallerid cookies on your pc for that domain.

Customization Tips

Linking to Signup

You may want to link to the affiliate signup page from the footer of your site, or from a static page. You can do this by hard coding an HTML link in the form of:

```
<a href=http://www.yourdomain.com/Merchant2/merchant.mvc?Screen=AFFIL>click here to  
signup</a>
```

Many sites have a set of terms applying affiliate's need to agree to, so sending applicants to the terms page first is a normal process. You can use the link style above to link to signup from your terms page.

You can also use one of the custom fields if you want to get an actual agreement on the terms. For example, you could code Field 1 as an agreement checkbox:

```
<input type="checkbox" name="Field1" value="yes"> I agree to the agreement
```

If you want to make that checkbox required, you'll need to add the token %reqfield1% in comment tags to the template itself. This will make it required that Field1 have a value (that the checkbox be checked). Since this specific token won't be processed you need to make sure to include the surrounding comment tags, like this: <!--%reqfield%-->

Affiliate Referral Boxes

You can create a static referral prompt box to collect the affiliate's code. This is useful when you need exact placement. Here's a sample form:

```
<FORM METHOD="post" ACTION="http://yourstore.com/Merchant2/merchant.mv?">  
<INPUT TYPE="hidden" NAME="Action" VALUE="REFERRAL">  
<INPUT TYPE="hidden" NAME="Screen" VALUE="SFNT">  
<INPUT TYPE="hidden" NAME="Store_Code" VALUE="storecode">  
<font color="red"></font><br>Enter referral code: <input type="text" name="AFFIL"  
size="10" value=""> <input type="submit" value="submit">  
</FORM>
```

Note that you don't have to call this a referral code. You can use whatever text you wish, such as: Enter Offer Code.

Allowing Affiliates to Link to Products & Categories

The process of affiliates linking directly to products and categories is simple. You can take the URL to a product in your store and just append &AFFIL=XXX to the end of the URL (where XXX is the Affiliate's code).

Example:

`http://www.yoursite.com/Merchant2/merchant.mvc?Screen=PROD&Product_code=XYZ&AFFIL=XXX`

You may want to turn off redirecting for the affiliate. If you'd rather leave that on, you can instruct the affiliate to also append &NR=1 to the URL.

Example:

`http://www.yoursite.com/Merchant2/merchant.mvc?Screen=PROD&Product_code=XYZ&AFFIL=XXX&NR=1`

This will send the shopper, via the affiliate's referral, directly to any page you setup. It will bypass any redirection.

Installing Affiliate Manager

1. In the Miva Merchant Admin Menu, click the ► next to **Modules**.
2. Click **Add Module**.
3. Use the upload button to upload the **BROK_AFFILIATES.mvc** (or .mv if running MM version 4.13 or lower) to the store.
4. Once uploaded, click the **Add** button.
5. Click the ► next to your store's link.
6. Click the **System Extension** link.
7. In the right-hand screen, check off the box next to **Affiliate Manager** and click **Update**.
8. At the top of the screen, click the **Affiliate Manager** link.
9. Enter your license key and agree to the terms.
10. Click **Update**.

Updating/Upgrading List Manager

From time to time updates may be made to fix issues or add more features. To see if there are updates available for this module, you can click the upgrades link in the module's admin at any time. If one is available, you can download the file and follow the instructions on updating the module.

Obtaining Support

Standard support for this module is offered free of charge via the Support Desk. Standard support covers initial installation issues, confliction issues and standard usage of the module.

Some issues may be considered advanced, such as requests that require custom coding or configuration. Services are offered for this type of support or work. Please inquire.

Before contacting support, please double-check your settings against this document, and visit the [Module's FAQ section](#).