CCBill Affiliate User's Manual

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WMS

Affiliate Admin System

Affiliate Login

To log in to the Affiliate Admin, enter your **Affiliate ID**, **Username**, and **Password** in the appropriate fields and click **Submit**.

To retrieve a forgotten password, click the **Forgot Password?** link and follow the on-screen instructions.

Manage Programs

You can use the program management area to review the programs you currently belong to, refer other affiliates to a program, generate link code for programs, override program settings, modify your notification settings for a program, or remove your membership from programs.

To make changes to your program preferences for a program you currently belong to:

1. Use the **Program Lookup** element to locate programs you belong to.
2. Click on the program you wish to manage.
3. Click **View Details** to make changes to a program.
    - View the specifics of the program in the **Program Details** element.
    - Change the link direction in the **Override Program** element.
    - Modify communication settings in the **Email Notifications** element.
    - Make a referral in the **Refer Affiliate** element.
    - Use the **Generate Link Code for Program** element to retrieve HTML code for your site.
4. Click **Save**.

To unjoin a program:

1. Use the **Program Lookup** element to locate programs you belong to.
2. Click the box next to the program(s) you wish to unjoin.
3. Click **Unjoin Selected Programs**.

Element Descriptions

Program Details

1. Click to highlight the program (selecting the checkbox will not activate the **View Details** option).
2. Click **View Details**.

The **Program Details** element lists the following program attributes for the selected program:

Section 1:

- **Program Name**. The name of the program.
- **Description**. A detailed description of the program.
- **Program URL**. The URL that referred sales will go to.
- **Start & End Date**. The start and end date for the program.
- **Invitation Method**. The type of invitation being used for the program.
- **Program Report Options**. The reporting options that the sponsor has afforded the affiliate.
- **Categories**. What categories are tagged to the program.
- **Consumer Tracking**. The method chosen by the program owner to track consumers.
- **Unique Click Tracking**. The Unique Click Tracking options chosen by the program owner.
- **Keywords**. The keywords that the program owner has associated with the program.
- **Consumer-Affiliate Linking Allowed**. Determines if a consumer remains linked to an affiliate after an initial referred sale is made. Should a referred consumer purchase another service from the program at a later date the affiliate will receive credit for that sale if this option is set to "Yes". They will not receive credit for later sales if it is set to "No".
- **Link Persistence Timeframe**. The amount of time an affiliate remains linked to a referred consumer in a Consumer-Affiliate Linking scenario. The timeframe can be anywhere between one WEEK and one year .
- **Affiliate Auto-deactivate**. The amount of time allowed between referred sales before an affiliate is removed from a program.

Section 2:

- Payout basis (Sales or Clicks)
- Pay rate
- Affiliate Redirect status
- Affiliate Referral status
- Referral Payout
- Payout Time
- Fee Split status

Sections 3 and 4:

Sections 3 and 4 list the Program Assets, Marketing Material, Promotions, and Bonuses some of which allow you to view further information by selecting an item and clicking **View Details.**

Override Program

The Override Program element allows you to redirect traffic from one program to another. Complete the following fields:

1. Enter search terms to locate the program, and then click Lookup.
2. Click to select a program and choose View Details.

Email Notification Options

You may choose to opt out of all emails from sponsors or you may pick and choose the emails notifications that you wish to receive. In this section checking the box next to **Opt out of all sponsor emails** will have the effect of removing you from all of the email events listed below. Alternately, you can select the items you do not wish to receive email notifications for by clicking to check the box next to the item to opt out of:

- **New Sales**. Receive email notification of all new sales.
- **Rebills**. Receive email notification of all rebills.
- **Refunds**. Receive email notification of all refunds.
- **Chargebacks**. Receive email notification of all chargebacks.
- **Returns**. Receive email notification of all returns.
- **Voids**. Receive email notification of all voids.
- **Subscription Cancellation**. Receive email notification of all cancellations.
- **New Marketing Material**. Receive email notification when the sponsor adds new marketing material.

Refer Affiliate

If you wish to refer another affiliate to a sponsor's program:

1. Enter the **WMS - Affiliate ID** or **Email Address** in the appropriate fields.
2. Click **Add**.
3. Enter notes in the **Note** field. These notes will be seen by the affiliate you are referring and can be used to tell the other affiliate why you are referring them.
4. Click **Refer Affiliate**.

Generate Link Code for Program

Use this area to generate link code for your program in order to place the link on your site. You should generate link code when you first sign up for a program. After that, you only need to generate the code again if you make changes to anything in this element.

1. Enter the **Redirect URL** and the **Custom Tracking Parameter Value** in the appropriate fields, if applicable.
2. Enter the **Name** and **Value** of any **Additional Tracking Parameters** in the appropriate fields (this allows you to create your own pass-through values).
3. Click **Add More Parameters** if you need more fields for use in the **Additional Tracking Parameters** element.
4. Click **Generate Code**.

Account Profile

The Account Profile area gives you the ability to make changes to your account information and configuration. To make changes:

1. Make any appropriate changes to your personal account information in the **Account Details** element.
2. Edit any program-related options in the **General Configuration** element.
3. Click **Save**.

Element Descriptions

Account Details

The Account Details area shows you the information that CCBill currently has for your account. You may make changes here to editable information. Some information, however, requires a signed request. Account change forms are located at Fill out the appropriate form and fax it to 480.449.8801 or email it to contractadmin@ccbill.com.

No changes are saved until you click the **Save** button at the bottom of the page.

- **Affiliate ID**. Not editable.
- **First Name**. Your first name.
- **Last Name**. Your last name.
- **Name on Check**. Not editable. To make a change, click the **Change Request Form** link and select the appropriate account change form, complete it, and return it to us.
- **Company**. The name of the company.
- **Legal Entity Type**. Not editable. To make a change, click the **Change Request Form** link and select the appropriate account change form, complete it, and return it to us.

- **Username**. Not editable.
- **Phone Number**. The contact number for you.
- **Email**. The contact email address for the account.
- **Time Zone**. The time zone where the company is located.
- **Address (1 & 2), City**. Address information for the company.
- **Region**. Two regions exist, US or non-US. Please select the appropriate region.
- **Country**. Not editable. To make a change, click the **Change Request Form** link and select the appropriate account change form, complete it, and return it to us.
- **State**. The state where the company is located.
- **ZIP Code**. The ZIP code where the company is located.
- **Tax ID**. Not editable. To make a change, click the **Change Request Form** link and select the appropriate account change form, complete it, and return it to us.
- **Passport**. Not editable. To make a change, click the **Change Request Form** link and select the appropriate account change form, complete it, and return it to us.
- **Change Password**. We recommend that you change your password frequently. Please type your new password in this field.
- **Retype New Password**. Please retype your new password in this field.

General Configuration

Your account preferences can be changed or updated in the General Configuration area. Click the check boxes next to items to select them, complete the fields as requested. No changes are saved until you click the **Save** button at the bottom of the page.

- **Sponsor Options**. Use this feature to hide your affiliate information from sponsors or to allow sponsors to view your address information.
- **Email Notification**. You may Opt-out of ALL emails from sponsors by selecting the **Opt out of all sponsor emails** check box. Alternately, you may select the boxes next to the types of emails that you DO wish to receive from sponsors: New Sales, Refunds, Returns, Subscription Cancellation, Rebills, Charge backs, Voids, or New Marketing Material. Email types not checked will not be received.
- **Requested Minimum Payout.** Enter a dollar amount in the field (default=$25.00). This is the amount of revenue that must be reached on your account before CCBill will issue payment. CCBill will issue a check or wire weekly as long as your account has this amount in it. If it does not, the funds will be held until the next payment cycle.
- **Custom Tracking Parameter Name**. Enter the name you wish to use for your custom tracker.

- **Home Page Options**. Select between the Simple and Advanced Dashboard for the Affiliate Admin System.

Reports

Reports (Affiliate)

WMS provides several reports to help you monitor your activity:

- **Asset Performance Report**: Displays the affiliate's top performing assets for a selected time period.
- **Sales Per Click Report**. Reports the ratio of sales to clicks during a specified timeframe.
- **Top Programs Report**: Provides a high-level overview of statistics for the best performing programs.
- **Top Referred Affiliates Report**: Used to monitor referred affiliates.
- **Referring URLs Report**: Used to view general identifying and transactional information about referred affiliates.
- **Conversions Report**: Used to view the total number of sign ups for a specified time period and the overall number of conversions that occurred for these signups.
- **Cancellations Report**: Used to monitor marketing materials and custom parameter tracked pages.

Asset Performance Report

The Asset Performance report is designed to report the top-performing assets during a specified timeframe. To view the report:

1. Choose the report date range:
    a. Enter a start and end date manually or by using the calendar
    b. Chose a pre-existing date parameter:
        - **Today** will show data just for today's activity
        - **Yesterday** will return data for yesterday's activity
        - **This Week** will return data for the current week.
        - **Last Week** will return data for the previous week.
        - **This Month** will return data for the current calendar month.
        - **Last Month** will return data for the previous calendar month.
2. Choose the program you wish to view reporting on from the **Select Programs** drop-down menu.
3. Select the asset groups you wish to view reporting on from the **Select Asset Group** drop-down menu (one or the other is *required*, but you cannot select both).
4. Select individual assets, if desired, in the **Select Assets** drop-down menu.
5. Select the order results are to appear in from the **Rank By** drop-down menu.

*Example: If **Gross** is selected, the assets will be ranked from highest gross revenue earned to lowest gross revenue earned in the report.*

6. Choose what additional data you would like displayed in the report in the **Display Options** area; click to select the desired data.

7. Click **Submit** to view the report.

Rank By Options

- **Gross**. This is the default selection.
- **Sales $**. The dollar value of sales.
- **Sales #**. The number of sales.
- **Unique Ratio**. Selecting this option shall rank the assets based on the higher unique click conversion, where the lower the right side number, the higher the conversion (e.g. 1:2 is higher than 1:250).
- **Raw Ratio**. Selecting this option shall rank the assets based on the higher raw click conversion, where the lower the right side number, the higher the conversion (e.g. 1:2 is higher than 1:250).

Display Options

- **Form Hits**. When checked, columns shall display for the total number of Join Form hits and the Join Form ratio for each asset. This box is checked by default.
- **New Sales**. When checked, columns shall display for the total count and total amount of sales for each asset selected. Sales is defined as Trial Sales #/$ + Single #/$ + Recurring/Initial #/$. This box is checked by default.
- **Rebills**. When checked, columns shall display for the total count and total amount of rebills for each asset selected. This box is checked by default.
- **Gross**. When checked, a column shall display the gross total receipts (dollar amount) earned by the affiliate from each asset. The gross total receipts are New Sales (Trial + Single + Recurring/Initial) + Rebills. This box is checked by default.
- **Affiliate Amount**. When checked, a column shall display the total payout earned by the affiliate for each asset. This box is checked by default.
- **Returns**. When checked, columns shall display for the total count and amount of all negative transactions for each asset. Returns is defined as Refunds #/$ + Chargebacks #/$ + Voids #/$ + Returned Checks #/$.

Column Definitions

- **Breakdown**. The presence of a breakdown column indicates that there are various ways to display the data contained in the report, in this case by Program (the **Program** option is only available if there are more than one programs included in the report) and by Date. Breaking the report into these detailed reports will contain the same columns as below with the inclusion of a **Program Name** column in the Program breakdown report.

- **Asset Name**. The name of the asset.
- **Asset Desc**. A description of the asset.
- **Form Hits**. The total number of Join Form Hits for the asset.
- **Form Ratio**. The ratio of New Sales hits to Join Form Hits for the asset.
- **New Sales #**. The number of new sales for the asset (Trials+Single+Recurring).
- **New Sales $**. The dollar value of new sales for the asset (Trials+Single+Recurring).
- **Rebills #**. The number of rebills that occurred for the asset.
- **Rebills $**. The dollar value of rebills that occurred for the asset.
- **Gross**. The gross total receipts (New Sales [Trials+Single+Recurring] + Rebills) for the asset.
- **Affiliate Amount**. The total amount earned by the affiliate for the asset.
- **Returns #**. The total amount of negative transactions for the asset.
- **Returns $**. The dollar value of negative transactions for the asset.

Top Programs

To run the report:

1. Choose the **Date Range** for the report:
    - The first radio button allows you to use a calendar to manually select the dates for your search.
    - The second radio button allows you to choose a pre-created date range from the drop-down menu.
2. Click to select the **Program Type** to search.
3. Select the checkboxes next to the columns you wish to have displayed from **Show/Hide Columns**.
4. Click **Search**.

Available Columns

- **Number** - The numerical ranking of each affiliate listed.
- **Affiliate** - The name of the affiliate.
- **Raw** - The number of raw clicks made on the affiliate's links.
- **Unique** - The number of unique clicks made on the affiliate's links.
- **New Sales** - The total count of new sales and the total amount of revenue generated by those sales.
- **Rebills** - The total count of rebills and the total amount of revenue generated by those rebills.

- **Gross** - The gross revenue that the affiliate generated in the selected time-frame.
- **Affiliate Amount** - The gross payout the affiliate earned for the selected time-frame.
- **Returns** - The number of returns and total dollar amount of the returns.

Top Referred Affiliates

The Top Referred Affiliates report is used by affiliates to view general identifying and transactional information about their Referred Affiliates, and to evaluate their Referred Affiliates' performance.

To view this report:

1. Choose the **Date Range** for the report:
   - The first radio button allows you to use a calendar to manually select the dates for your search.
   - The second radio button allows you to choose a pre-created date range from the drop-down menu.
2. Click to select the **Program Type** to search.
3. Choose your grouping in the **Group Results By** field.
4. Select the checkboxes next to the columns you wish to have displayed from **Show/Hide Columns**.
5. Click **Search**.

Available Columns:

- **Rank**. Contains the numerical indicator of how the referred affiliate has performed for the program(s) they were referred to by the user for the selected date range with #1 indicating the highest performing referred affiliate. The ranking is based on "Referrer $".
- **Referred Affiliates**. Contain the referred affiliates' names, except where listed as **Private**. The Affiliate ID displays on mouse-over.
- **New Sales**. Total count of new sales generated by each referred affiliate, and the total dollar amount of those new sales. New Sales are calculated as (new Single Sales + new Trial sales + new Initial sales).
- **Rebills**. Total count of rebills attributed to each referred affiliate (Rebills Count), and the total dollar amount of those rebills (Rebills $).
- **Gross $**. The gross dollar amount of sales attributed to the referred affiliate in the selected date range. Gross $ is calculated as (New Sales $ + Rebills $).
- **Affiliate $**. The total dollar amount paid out to each of the user's referred affiliates in the selected date range. The Affiliate $ is calculated based on affiliate payouts with a status of Pending, Paid, or Affiliate on Hold. Affiliate payout dates are bound to the transaction date for the transaction that caused the affiliate payout to be earned (If a sale occurs on June 22, its payout date is also June 22 for purposes of displaying on this report).
- **Referrer $**. the total dollar amount that the user (the referrer) was paid out for each referred affiliate's sales in the selected date range, according to their respective programs referrer payout %.

- **Returns**. The total count of returns for each referred affiliate's sales (Returns Count), and the total dollar amount of those returns (Returns $). Returns are calculated as (refunds + returned checks + voids + chargebacks).

Affiliate Referring URLs Report

The Referring URLs Report allows affiliates to evaluate their traffic and sales based on the URLs that they are referred from.

To run the **Affiliate Referring URLs** Report:

1. Choose the **Date Range** for the report:
    - The first radio button allows you to use a calendar to manually select the dates for your search.
    - The second radio button allows you to choose a pre-created date range from the drop-down menu.
2. Click **Search**.

Available Columns

- **Date**. The date range for which the report was run.
- **Referring URL**. Displays for each referring URL that referred clicks/sales in the date range selected. Each URL shall be click-able to link to the actual referring URL.
- **Details**. A link to the Detailed URL Report for each referring URL.
- **Sponsor Unique Clicks**. The total count of sponsor unique clicks for each referring URL. Uniqueness is defined as Consumer ID + Participation ID + Sponsor Marketing Material ID + Referring URL for Sponsor Unique Clicks.
- **Sponsor Unique Ratio**. The ratio of Sponsor Unique Clicks to sales for each Referring URL, with the sales reduced to 1.
- **Form Hits**. The number of hits the join form received from each referring URL.
- **Form Hits Ratio**. The ratio of join form hits to sales for each referring URL, with the sales reduced to 1.
- **New Sales #**. The total count of new sales attributable to each referring URL. New Sales # is defined as Trials # + Single sales # + Initials #.
- **New Sales $**. The total dollar amount of new sales attributable to each referring URL. New Sales $ is defined as Trials $ + Single sales $ + Initials $.
- **Gross**. The total dollar amount of all new sales plus rebills attributable to each referring URL in the selected date range.
- **Affiliate Amount $**. The total amount of affiliate payout earned for clicks/sales sent through each referring URL.
- **Net $**. The dollar amount of the gross for each referring URL, less the total returns for the same URL.
- **Raw**. Displays data columns for both the total number of Raw Clicks for each referring URL, and the Raw Click Ratio for each referring URL, with the sales for the raw click ratio reduced to 1.
- **Form Submits**. Displays data columns for both the total number of Form Submits for each referring URL and the Form Submit Ratio for each referring URL. The Form Submit ratio is the ratio of join form hits to join form submittals, with the form submittals reduced to 1.

- **Approvals**. Displays columns for both the total numbers of submitted Form Approvals for each referring URL and the Approval Ratio for each referring URL. The Approval Ratio is the ratio of join form submittals to join form approvals, with the approvals reduced to 1.
- **Rebills**. Displays columns for both the total number of Rebills (Rebills #) for each Referring URL, and the total dollar amount of Rebills (Rebills $) for each Referring URL.
- **Returns**. Displays columns for both the total number of Returns (Returns #) for each referring URL, and the total dollar amount of Rebills (Returns $) for each referring URL. Returns is defined as Chargebacks #/$ + Refunds #/$ + Check Returns #/$ + Voids #/$.

Conversions

The **Conversions** report details the total number of sign ups for a specified time period and the overall number of conversions that occurred for these signups.

Conversions occur when a consumer's account changes its billing status from initial to recurring, trial to rebill, rebill to second rebill, etc.

1. Select all subaccounts or an individual subaccount and the billing dates from the Selection Pane.
2. Under the Options heading, click the **Trials only** check box to review the subscription trials in the report.
3. Click **Apply Changes** to display the Conversions report.

Available Columns

- **Trial/Initial Signups #**. The total count of trial and initial sales (subscription sales which billed for the first time) credited to the affiliate in the date range selected.
- **Trial/Initial Signups $**. The total dollar amount of trial and initial sales credited to the affiliate in the date range selected.
- **Rebill 1#**. The total count of subscription sales credited to the affiliate, made in the selected date range, which processed their first rebills successfully.
- **Rebill 1%**. The total % of all subscription sales credited to the affiliate, made in the selected date range, which processed their first rebills successfully.
- **Rebill 2#**. The total number of subscription sales credited to the affiliate, made in the selected date range, which processed their second rebills successfully.
- **Rebill 2%**. The total % of subscription sales credited to the affiliate, made in the selected date range, which processed their second rebills successfully.
- **Rebill 3#**. The total number of subscription sales credited to the affiliate, made in the selected date range, which processed their third rebills successfully.
- **Rebill 3%**. The total % of subscription sales credited to the affiliate, made in the selected date range, which processed their third rebills successfully.
- **Rebill 4 Plus#**. The total number of subscription sales credited to the affiliate, made in the selected date range, which processed their fourth rebills successfully.
- **Rebill 4 Plus%**. The total % of subscription sales credited to the affiliate, made in the selected date range, which processed their fourth rebills successfully.
- **Affiliate Gross Per Member**. The total of all gross affiliate amounts for subscription sales that originated in the reports selected Date Range, divided by the total count of those subscriptions. This is defined as the

affiliate amount from trials, initials, singles, and/or rebills. It does not include any subtractions (chargebacks, etc.).

- **Average Rebill Per Member**. The total number of rebills for all subscriptions that originated in the report's date range divided by the total count of those subscriptions.

Affiliate Cancellations Report

This report allows Affiliates to monitor the termination of subscriptions that they have referred to sponsors and received payout for.

To run the **Affiliate Cancellations Report**:

1. From the **Affiliate Admin**, hover over **WMS**, then choose **Cancellations** from the fly-out menu.
2. Choose the **Date Range** for the report:
    - The first radio button allows you to use a calendar to manually select the dates for your search.
    - The second radio button allows you to choose a pre-created date range from the drop-down menu.

1. Select your preference in the **Group Results By** drop-down menu:
    - **None**.
    - **Program**. Groups the affiliate's cancellations by Program.
    - **Cancel Date**. Groups the affiliate's cancellations by cancellation date.
    - **Reason**. Groups the affiliate's cancellations by cancellation reason.
    - **Country**. Groups the affiliate's cancellations by country.
2. Click **Search**.

Available Columns

- **Cancellations**. The total count of subscription cancellations for subscriptions credited to the affiliate in the selected Date Range. The cancellations count can be broken out using Group By options.
- **Cancellations %**. The percentage of all of the affiliate's subscriptions that were canceled in the selected Date Range (shown to two decimal places).

Invitation Queue

Program Invitation Queue

The Program Invitation Queue allows you to monitor your outgoing invitations and manage your incoming invitations.

Incoming

Your Incoming queue contains requests from sponsors to join their programs. To make changes to items in your incoming queue:

1. Click the **Incoming** tab (if not already selected).
2. Click to select an incoming program invitation displayed in the queue.
3. Click **View Details** to see specifics about the program.
4. Accept or decline the invitation by clicking either the **Join Selected** or **Decline Selected** option.
5. Click **Save** to save your choices.

Outgoing

Your Outgoing queue contains invitations that you have sent to other affiliates or sponsors. To view the status of your outgoing requests, or to invite additional affiliates to join the program as well:

1. Click the **Incoming** tab (if not already selected).
2. Click to select an incoming program invitation displayed in the queue.

The **Outgoing Requests** topic will tell you more about the details of the outgoing program request.

Incoming Invitation - View Details

Click on the program name then **View Details** to open the program details screen. The following items are listed in details for an incoming invitation:

View Details

- **Program Name**. The name of the program.
- **Description**. A detailed description of the program.
- **Program URL**. The URL that referred sales will go to.
- **Start & End Date**. The start and end date for the program.
- **Invitation Method**. The type of invitation being used for the program.
- **Program Report Options**. The reporting options that the sponsor has afforded the affiliate.
- **Categories**. What categories are tagged to the program.
- **Consumer Tracking**. The method chosen by the program owner to track consumers.

- **Unique Click Tracking**. The Unique Click Tracking options chosen by the program owner.
- **Keywords**. The keywords that the program owner has associated with the program.
- **Consumer-Affiliate Linking Allowed**. Determines if a consumer remains linked to an affiliate after an initial referred sale is made. Should a referred consumer purchase another service from the program at a later date the affiliate will receive credit for that sale if this option is set to "Yes". They will not receive credit for later sales if it is set to "No".
- **Link Persistence Timeframe**. The amount of time an affiliate remains linked to a referred consumer in a Consumer-Affiliate Linking scenario. The timeframe can be anywhere between one week and one year.
- **Affiliate Auto-deactivate**. The amount of time allowed between referred sales before an affiliate is removed from a program.

SECTION 2:

- Payout basis (Sales or Clicks)
- Pay rate
- Affiliate Redirect status
- Affiliate Referral status
- Referral Payout
- Payout Time
- Fee Split status

SECTIONS 3 AND 4:

Sections 3 and 4 list the Program Assets, Marketing Material, Promotions, and Bonuses, some of which allow you to view further information by selecting an item and clicking **View Details.**

NOTIFICATION EMAIL ADDRESS

This is the email address of the sponsor.

OUTGOING REQUESTS

Clicking on the program name will open the program details for that program. The following items are listed in details for an outgoing request:

PROGRAM DETAILS

- **Program Name**. The name of the program.
- **Description**. A detailed description of the program.
- **Program URL**. The URL that referred sales will go to.
- **Start & End Date**. The start and end date for the program.
- **Invitation Method**.
- **Program Report Options**.
- **Categories**. What categories are tagged to the program.

- **Consumer Tracking**. The method chosen by the program owner to track consumers.
- **Unique Click Tracking**. The Unique Click Tracking options chosen by the program owner.
- **Keywords**. The keywords that the program owner has associated with the program.
- **Consumer-Affiliate Linking Allowed**. Determines if a consumer remains linked to an affiliate after an initial referred sale is made. Should a referred consumer purchase another service from the program at a later date the affiliate will receive credit for that sale if this option is set to "Yes". They will not receive credit for later sales if it is set to "No".
- Link Persistence Timeframe. The amount of time an affiliate remains linked to a referred consumer in a Consumer-Affiliate Linking scenario. The timeframe can be anywhere between one week and one year.
- **Affiliate Auto-deactivate**. The amount of time allowed between referred sales before an affiliate is removed from a program.

Program Payout

In the Program Payout area you will see the amount of money that you will make (in USD$) for sales sent to the program if you should join.

Accept Affiliate Referrals.

Payout %.

Payout Time.

Split Fees with Affiliate. This indicates if the fees that CCBill charges the sponsor for processing will be split with the Affiliate or not. An example would be if fees are to be split on a $25 payout and the fees charged to the sponsor total $5.00, then $2.50 will be deducted from the $25 payout to cover the affiliate half of the CCBill fees.

Assets

This area lists the assets that belong to the program.

Marketing Material

This area allows you to view the marketing material being offered by the sponsor for the program. Simply click the link in the **Details** column to view the marketing material.

Notification Email Address

This is the email address of the sponsor.

Refer Additional Affiliates

To refer additional affiliates to a program fill out the following fields to send an email to that affiliate.

WMS - Affiliate ID. Enter the Affiliate ID for the affiliate you wish to refer.

Email Address. Enter the email address of the affiliate.

Note. Include a note to the affiliate.

Marketing Materials

Affiliate Marketing Materials

The **Affiliate Marketing Materials** function allows affiliates to generate unique Marketing Material IDs that can then be attached to link code for programs and Sponsor Marketing Materials. When a click or sale is made through links with Affiliate Marketing Materials attached, the Affiliate Marketing Material is stored with it.

To add **Affiliate Marketing Materials**:

1. From the WMS menu, choose **Affiliate Marketing Materials**.
2. Enter the **Marketing Material Name**.
3. Enter information about the marketing material in the **Description** field.
4. Enter the **Marketing Material URL**, and test the link.
5. Enter the File or URL location of the **Marketing Material Library**, and test the link.
6. Choose the categories that the Marketing Material belongs to in the **Select Categories** element.
7. Click **Save**.

The Marketing Material ID is provided to you in the confirmation window.

Element Descriptions

Select Categories

The **Select Categories** element is used to categorize your Marketing Material to make it easier to locate in searches. You may:

- Choose **Select All** to include your Marketing Material in ALL categories (not recommended).
- Choose **Unselect All** if you wish to clear your selections.
- Click the **+** (plus) symbol next to categories to drill-down to sub-categories.
- Click to select the check boxes next to individual categories to include the marketing materials in that category.
- Click to select the top-level category to include the marketing materials in that category and all sub-categories.

Marketing Material Type Options

The **Marketing Material Type** element allows you to further identify the marketing material.

1. Select the **Type** from the drop-down menu (Ad, Banner Ad, Console, Video, etc...).
2. Enter any notes about the type in the **Notes** field (pixel size, resolution, etc...)

Marketing Material Status

This element allows you to set the Marketing Material status

- Choose **Active** if you want the Marketing Material to be available immediately.

- Choose **Active for this time period**, then select a date range (from the current date to a future date, no past dates) to have the Marketing Material become active and inactive without your interference.
- Choose **Inactive** if you want to come back and manually activate the Marketing Material later.

Find Affiliate Marketing Materials

To locate Affiliate Marketing Materials load the **Find Affiliate Marketing Materials** flyout menu from the WMS option in the Affiliate Admin.

1. Choose **Simple Search** or **Advanced Search** radio button.
    - **Simple Search** allows you to search for keywords in either **Name** or **Type**.
    - **Advanced Search** allows you to search keywords in both **Name** AND **Type**.
2. Enter the keywords for your search.
3. Choose the **Marketing Material Type** from the drop-down menu to narrow your search, if desired.
4. Click **Search**.

Alternately, you can click **Return All** if you do not want to enter any search variables.

Element Descriptions

Select Categories

The **Select Categories** element is used to narrow your search for Marketing Materials. You may:

- Choose **Select All** to include Marketing Material in ALL categories in your search results (may take a while to load).
- Choose **Unselect All** if you wish to clear your selections.
- Click the **+** (plus) symbol next to categories to drill-down to sub-categories.
- Click to select the check boxes next to individual categories to include the marketing materials in that category.
- Click to select the top-level category to include the marketing materials in that category and all sub-categories.

Search Results

The **Search Results** element displays all of the Affiliate Marketing Material that was returned during your search. There are two functions that can be performed from this element:

1. View Details: Click on a Marketing Material in the search results, then click **View Details**. This will allow you to view the information that you set for the marketing material.

2. View Banners: Click on a Marketing Material in the search results, then click **View Banners**. This allows you to view the Marketing Material Banners (this is not available for other Marketing Material Types).

Link Code Wizard

Link Code Wizard

The Link Code Wizard allows you to generate link code with a variety of parameters as necessary to support your business model. The Link Code that you generate can be either Encrypted or Not Encrypted; your default preference is set, and can be changed, in your Account Profile.

To begin the Link Code Wizard, choose **WMS**, then **Link Code Wizard** from the fly-out menu in the Affiliate Admin.

The Navigation area at the top of the screen shows you where you are in the process and allows you to choose other locations to jump to AFTER you have completed the **Encryption** and **Program** screens.

Your progress will be noted throughout the **Link Code Wizard** in the **Link Code Progress** area located at the bottom of the screen.

Each new variable that you add to the link code will multiply the number of link codes you will be presented with at the end of the process. For example, if you are generating link code for 5 programs with 7 Redirect URLs and 5 Campaigns you will end up with 175 links. This is because link code is generated for each program with each variable combination.

Some things to remember about the Link Code Wizard:

- You can only create a maximum of 1000 link codes.
- Once you have completed the Link Code Wizard and generated the links they are NOT stored in our system for later retrieval. If you leave the Link Code Wizard the link code is lost and regenerated when you return, you must restart the wizard.

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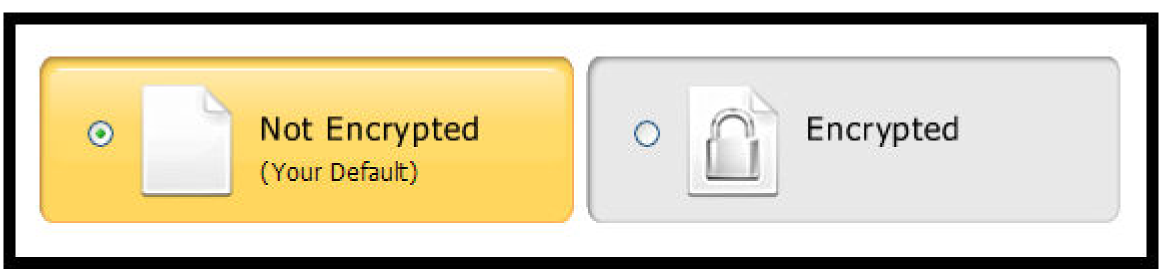
Encryption

The Encryption page is the first screen you land on in the Link Code Wizard process, and one of only 2 screens that are required. This screen allows you to choose the encryption setting for the links that you are about to create.



The default choice will be highlighted in yellow when you arrive at the screen. You may click the opposite option to change to it. Once you have made your encryption choice, click the **Next Step - Select a Program** link at the bottom of the screen.

Program

All link codes must reference a program. The **Program** screen is the second step in the Link Code Wizard, and is the second (and last) required screen. To select the program(s) to include in your link code:

1. List the programs to choose from by clicking the **Return All Programs** button or entering search criteria in the **Search a Program** area on the right and clicking **Search**.

2. To generate code for only one program, click on that program to select it; hold down the **CRTL** key on your keyboard while clicking on individual programs to select more than one.

After Step 2 you have three choices where to go:

- Choose **Finished? Generate Code Now!** to go straight to the last step in the wizard--the **Link Code** tab.

- Click **Next Step - Add Redirect URL(s)** to continue the wizard in order.

- Choose any tab from the navigation tabs at the top of the screen to jump to that step.

Redirect URL

If the Program(s) you are generating link code for allows it, add a **Redirect URL** on this screen.

1. Click **Add** at the bottom of the screen.

2. Enter the URL to redirect traffic to in the **Redirect URL** column.

3. Enter a description in the **Description** column, if desired.

4. Click **Add** again and repeat steps 1-3 to add further Redirect URLs (highlight a Redirect URL and click **Remove** if you make a mistake).

5. Choose a continuation option:

    - Choose **Finished? Generate Code Now!** to go straight to the last step in the wizard--the **Link Code** tab.

    - Click **Next Step - Add Sponsor Marketing Materials** to continue the wizard in order.

    - Choose any tab from the navigation tabs at the top of the screen to jump to that step.

Sponsor Marketing Materials

The **Sponsor Marketing Materials** screen is the next step in the Link Code Wizard, and allows you to choose the sponsor marketing materials you want to include in your link code. To select the **Sponsor Marketing Materials** to include in your link code:

1. List the marketing material to choose from by clicking the **Return All Marketing Materials** button or entering search criteria in the **Search for Marketing Materials** area on the right and clicking **Search**.

2. Place a check in the box next to each marketing material item you want to add to your link code, or click the box in the column header to select all.

3. Choose a continuation option from these choices:

    - Choose **Finished? Generate Code Now!** to go straight to the last step in the wizard--the **Link Code** tab.

    - Click **Next Step - Add Affiliate Marketing Materials** to continue the wizard in order.

    - Choose any tab from the navigation tabs at the top of the screen to jump to that step.

Affiliate Marketing Material

The **Affiliate Marketing Materials** screen is the next step in the Link Code Wizard, and allows you to choose your affiliate marketing materials you want to include in your link code. To select the **Affiliate Marketing Materials** to include in your link code:

1. List the marketing material to choose from by clicking the **Return All Marketing Materials** button or entering search criteria in the **Search for Marketing Materials** area on the right and clicking **Search**.

2. Place a check in the box next to each marketing material item you want to add to your link code, or click the box in the column header to select all.

3. Choose a continuation option from these choices:

    - Choose **Finished? Generate Code Now!** to go straight to the last step in the wizard--the **Link Code** tab.

    - Click **Next Step - Add Campaign Tracking** to continue the wizard in order.

    - Choose any tab from the navigation tabs at the top of the screen to jump to that step.

Campaign Tracking

To add **Campaign Tracking** information to the link code:

1. Click **Add** at the bottom of the screen.

2. Enter the Campaign Name in the **Campaign Name** column.

3. Enter the site information in the **Site** column.

4. Enter information in the **Placement Info** column.

5. Click **Add** again and repeat steps 1-4 to add further Campaign Tracking parameters (highlight a Redirect URL and click **Remove** if you make a mistake).

6. Choose a continuation option:

    1. Choose **Finished? Generate Code Now!** to go straight to the last step in the wizard--the **Link Code** tab.

    2. Click **Next Step - Add Pass Thru** to continue the wizard in order.

    3. Choose any tab from the navigation tabs at the top of the screen to jump to that step.

Pass Thru

If you have additional parameters that you wish to pass in the link code you can add them in the **Pass Thru** tab.

1. Click **Add** at the bottom of the screen.

2. Enter the pass thru name in the **Name** column.

3. Enter value information in the **Value** column.

4. Click **Add** again and repeat steps 1-3 to add further Campaign Tracking parameters (highlight a Redirect URL and click **Remove** if you make a mistake).

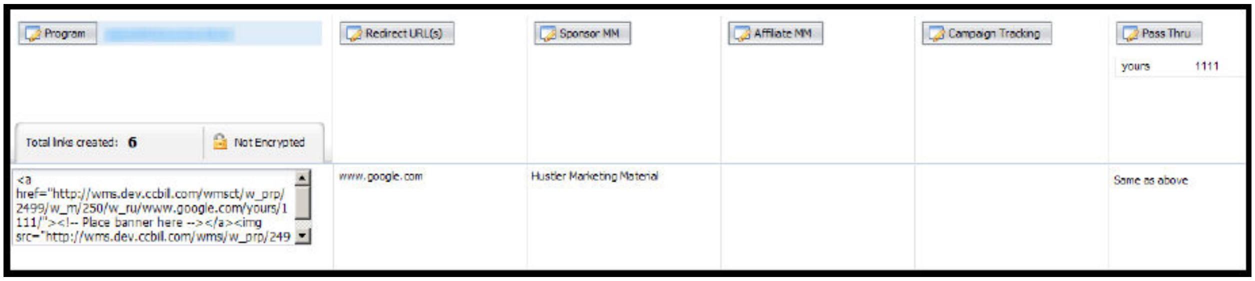
5. Click **Finished? Generate Code Now!** or click the **Link Code** tab to generate link code.

Link Code

When you arrive at the **Link Code** tab it may take a few moments for all of the data to load. Please do not attempt to leave the screen while it loads as your data will be lost.

You can return and edit parameters described in a column by clicking the button at the top of the column.

The total number of links created are indicated on screen, as is the encryption type used. Directly below that information is your link code.



You may select the link code individually by copying and pasting the information that is in that field. Each field only contains one link code combination. If you have generated a large amount of link codes you may choose to export all of the link codes into separate file. To export the link codes:

1. Click **Export Results** at the bottom of the screen.

2. Select the **Document Type** to download:
    - Excel
    - CSV
    - Plain Text
3. Click **Create Document**.
4. *Choose **Save** in the **File Download** dialogue window.
5. Browse to the location you wish to save the file in and give the file a name (default name is **links.xls, links.csv, links.txt**).
6. Click **Save**.

**These instructions may vary depending upon the operating system and Internet browser you are using. Instructions are for Internet Explorer on Windows XP.*

Why Use the Link Code Wizard?

The following are some sample scenarios (Use Cases) in which an affiliate would use the link code wizard for a specific purpose and how to implement that scenario. This is, by no means, intended to cover every scenario or use for Link Codes, but to give you a starting point to help you figure out how to best use the Link Code Wizard to your advantage.

Use Case 1:

An affiliate has 5 Web sites where they promote "somewebsite.com". The affiliate would like to see which site does better at converting sales. The affiliate will use the same banner and place it on each site, they will then check their reports to see which site generated the most click thrus and had the most sales.

The affiliate follows these steps:

1. Navigates to the affiliate Register Marketing Materials screen and create 5 affiliate marketing materials; one for each site.
2. Navigates to the Link Code Wizard and sets the encryption level.
3. They then select the **Program** tab and select "somewebsite.com" as their program to promote.
4. They then modify the **Redirect URL** tab and enter 1 redirect URL to send all traffic to the same landing page.
5. The affiliate then selects the **Sponsor MM** tab and searches and find the banner they wish to use and select it in the list.
6. On the **Affiliate MM** tab selects all 5 marketing materials they registered in step 1, producing 5 unique link codes.
7. The affiliate navigates to the **Generate Code** screen and selects their 5 link codes individually or display all/export their codes for use at a later date.

Once the affiliate has their unique codes, they can now take the downloaded sponsor banner and their link code and place the links on all 5 of their pages with the same banner. Now when they view their reports they can see which actual site has a higher conversion rate since they can look up the stats for each unique link they generated.

Use Case 2

An affiliate has a single page Web site that they promote "somewebsite.com" at. They have 3 different Ad areas they have set aside on the page and they would like to know which area converts the highest for them. The affiliate needs to generate link code for the same banner and place it in all 3 areas to determine the highest converting area of the page (the one that makes the most sales).

The affiliate follows the below steps to accomplish their stated goals.

1. The affiliate navigates to the Link Code Wizard and sets the encryption level for the link.
2. The affiliate heads to the **Program** tab and selects “somewebsite.com” as their program to promote.
3. They then select the **Redirect URL** tab and enter 1 redirect URL to send all traffic to the same landing page (provides accuracy because all consumers are sent to the same landing page on the sponsor’s side).
4. On the **Sponsor MM** tab the affiliate searches and finds the banner they wish to use and select it in the list.
5. The affiliate then selects the **Affiliate MM** tab and selects 3 different marketing materials.
6. On the **Pass Thru** tab, they enter one set of values to apply to all of their links.

7. On the **Generate Code** screen, they can select any of their 3 link codes individually or display all/export their codes for use at a later date.

Once the affiliate has their unique codes, they can now take the downloaded sponsor banner and their link code and place the 3 links on same page with the same banner. When they view their reports they can see which banner placement had a higher conversion rate or click thru rate.

Use Case 3:

An affiliate has 10 Web sites they promote "somewebsite.com" at. The affiliate would like to see which of their created banners convert more sales. The affiliate will create multiple banners and place them on each site, they will then check their reports to see which site/banner generated the most click thrus and had the most sales.

The affiliate follows the below steps to accomplish their stated goals.

1. The affiliate creates the banners.
2. In the admin the affiliate navigates to the affiliate Register Marketing Materials screen and creates 10 affiliate marketing materials.
3. The affiliate opens the Link Code Wizard and sets the encryption level for the links.
4. On the **Program** tab the affiliate searches and selects "somewebsite.com" as the program to promote.
5. On the **Redirect URL** tab the affiliate enters a redirect URL to send all traffic to the same landing page (provides accuracy by sending all consumers are sent to the same landing page on the sponsor's side).
6. On the **Affiliate MM** tab the affiliate selects all 10 marketing materials they created in step 2, producing 10 unique link codes.
7. On the **Generate Code** screen the affiliate selects any of their 10 link codes individually or display all/export their codes for use at a later date.

Once the affiliate has their unique codes, they can now take their link code and banners and place the links and a different banner on all 10 Web sites. Now when they view their reports they can see which actual site/banner has a higher conversion rate since they can look up the stats for each unique link they generated.

BAD DATA SERVICE

Bad Data Screen is used to inform you that there is incomplete, invalid, or missing data that you are required to supply and maintain on file. If a situation exists where data must be corrected this screen will be displayed and you will not be able to complete any further work until the data is corrected.

Any time the Bad Data Service screen is displayed you will be presented with the following:

- The Field Name where the incorrect data resides
- The current [incorrect] data
- A field in which to enter the correct data
- A description of the problem with the data
- The status

If you know the correct information, complete the screen and click **Save Changes**. If you do not know the data click **I don't know the data** at the bottom of the screen. This action will send an email to the email address on file to notify the administrator of your account to log in and address the problem.