CCBill WMS 2.1 User's Guide

Table of Contents

Web Marketing Service (WMS) 5

Web Marketing Service (WMS) 5

Reports 6

Programs 18

Promotions 31

Bonuses 35

Marketing Materials 40

Program Invitations 45

Email Affiliates 45

Affiliate Details 50

General Configuration 52

Page Views 56

Web Marketing Service (WMS)

Web Marketing Service (WMS)

Welcome to the new CCBill Web Marketing Service (WMS). The WMS system is intended to replace the Affiliate system with a more robust marketing service that provides you with expanded and enhanced functionality, a clean and powerful user interface, and new reports.

Sponsors can create programs using any of the three standard program models:

- Pay per sale
- Revenue sharing
- Pay per click

Sponsors can configure both basic and advanced settings for their programs using the following customizable settings:

- **Payout** how much money will be paid to an affiliate and under what circumstances
- **Assets** what sponsor products are included into the program
- **Affiliate Rules** how affiliates may join the program and what rules apply to them
- **Consumer Tracking** how the program determines one consumer from another for reporting and payout purposes
- **Click Tracking** how the program counts affiliate traffic sent to the program

Promotions

Sponsors can create promotions for their programs. Promotions allow sponsors to override the payout settings for a program for a period of time. Each promotion can only apply to one program, and can only apply to affiliates who are members of that program.

Bonuses

Sponsors can create bonuses for their Pay Per Sale programs. Bonuses allow sponsors to configure new payout settings, on a tier system, to be paid out in addition to the program's payout settings for a period of time. Each bonus can apply to one program, and can only apply to affiliates who are members of that program.

A bonus can be set up to payout using a tiered, multi-level payment table based on one or more of the following:

- New sales of program assets
- Rebills of consumer subscriptions of previously sold assets
- Cumulative dollar amount of revenue the affiliate has generated in the program

Marketing Materials

Register and categorize many different types of marketing material; affiliates can easily search for and locate your marketing materials with this new categorization system. Material types include (but are not limited to):

- Banners and ads
- Consoles
- Videos or other media files
- Whitepapers
- Brochures
- Hyperlinks

Trackers and Additional Page Views

Configure additional traffic monitoring tools; either based on their own marketing material (called a Tracker) or by counting views of a particular web page (called an Additional Page View).

Affiliate Invitation System

Invite affiliates to join their programs or add affiliates who have requested to join your program. WMS allows for bidirectional initiation of program affiliations.

Campaigns

Configure campaigns to track the performance of programs or individual pieces of marketing material.

Program Management and Email System

Edit their programs on the fly to modify affiliate payouts and click tracking methods.

Determine notification types and methods for pre-determined events such as changes in payout settings and changes in program status .

Affiliate Management

Take action against affiliates, such as removing them from programs , in the event that the affiliate negatively impacts the program or is no longer desirable to the sponsor.

Reports

View tracked ad views (impressions), marketing material clicks (raw and unique), and additional page views.

View reports for transactional information, payout information, sales statistics, ad views, clicks, and additional page views.

Reports

Reports (WMS)

Many reports are available for you to keep tabs on your Web Marketing Service configurations. The reports currently available are:

- **MM Performance Breakdown by Type**: Used to track marketing material performance, broken down by marketing material type.
- **Trackers/Marketing Materials**: Used to monitor trackers, marketing materials, and page views.
- **Referring URLs**: Allows sponsors to view referring URL details.
- **Affiliate Productivity**:
- **Top Assets**: Displays the top performing assets for a selected time period.
- **Affiliate Summary Breakdown**:
- **Retention Stats**: Displays statistical retention data for consumer memberships in a sponsor's program(s); allows viewing membership retention stats over a specified time period, including the transactional data behind their retention statistics (how many rebills occurred, how many refunds occurred, and so on).
- **Top Programs**: Provides a high level overview of the performance of a sponsor's programs.
- **Top Affiliates**: Used to view general identifying and transactional information about affiliates.
- **Affiliate Overview**: Provides general productivity data for affiliates and bridges to more detailed transactional and traffic data for specific affiliates and their referred affiliates.
- **Sales Per Click**: Provides sales data based on affiliate clicks.
- **Asset Performance**: Displays the affiliate's top performing assets for a selected time period.

Running Reports

To run any WMS report:

1. In the Admin, click **WMS**.
2. Choose the **Reports** Tab.
3. Click on the name of the report that you wish to run.

Report Queue

When report data is great or the system is very busy a report may take a while to load. A circular animation will appear that lets you know that the system is still working. Beneath this animation are two buttons: **Add to Queue** and **Cancel**. Adding the report to the Queue will continue to generate the report so that you may view it later. Cancelling will terminate the process.

Top Affiliates

Top Affiliates Report is used by sponsors to view general identifying and transactional information about all of their affiliates.

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. Select the checkboxes next to the columns you wish to have displayed from **Show/Hide Columns**.
3. Click **Search**.

Available Columns

- **Raw.** Total clicks, including unique and non-unique, generated by the affiliate.
- **Unique.** Total unique clicks generated by the affiliate.
- **New Sales.** Total new sales referred by the affiliate.
- **Rebills.** Total rebills referred by the affiliate.
- **Gross.** Gross amount made from affiliate referrals.
- **Affiliate Amount.** Total revenue generated by the affiliate.
- **Returns.** Returned check totals.

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.

Retention Stats

This report displays statistical retention data for consumers' membership for the sponsor. This report will not display any data unless the following criteria are met:

- An entire month must pass with the program set active before you can view this report.
- This report can only be generated for previous months, never the current month.

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. Select the checkboxes next to the columns you wish to have displayed from **Show/Hide Columns**.
3. Click **Search**.

Available Columns

- **Members Data -** When checked the following columns display:
    - Active Members - Contains the number of members with active subscriptions in the program(s) selected during the date range.
    - Total Members: This column contains the total number of members, irrespective of status, in the all of the sponsor's programs.
    - Average $ Per Member: This column displays the average gross per consumer, calculated as: total gross earnings from consumer memberships for the selected date range/program(s)/asset(s) divided by the number of active subscriptions.
- **Rebills** - When checked the following columns display:
    - **Avg Rebill #** - Average count of rebills per consumer membership for the selected date range/program(s)/asset(s); calculated as the number of rebills divided by the number of active memberships.
    - **Avg $ Per Rebill** - Average dollar amount of rebills per consumer membership for the selected date range/program(s)/asset(s); calculated as the total dollar amount of rebills divided by the total count of rebills.
- Refunds: When checked, the following columns display:

    - **Avg Refund #** - Average count of refunds made in the date range/program(s)/ asset(s) selected; calculated as the total number of refunds divided by the total number of active memberships.
    - **Avg Returns $** - Average dollar amount of the returns made in the date range/program(s)/asset(s) selected; calculated as the total dollar amount of returns divided by the total count of returns.
- **Chargebacks** - When checked, the following columns display:
    - Avg Chargeback #: The average number of chargeback returns within the initial search parameters; calculated as the total count of chargebacks divided by the total number of active memberships.
    - Avg Chargeback $: This is the average dollar amount of each chargeback return within the initial search parameters; calculated as the total dollar amount of chargebacks divided by the total count of chargebacks.
- **Voids** - When checked, the following columns display:
    - **Avg Voids #** - The average number of voided transactions within the initial search parameters; calculated as the total count of voids divided by the total count of active memberships.
    - **Avg Void $** - This is the average dollar amount of each voided transaction within the initial search parameters; calculated as the total dollar amount of voids divided by the total count of voids.
- **Returned Checks** - When checked, the following columns display – this box is not checked by default:
    - **Avg Returned Check #** - The average number of returned checks within the initial search parameters; calculated as the total count of returned checks divided by the total count of active memberships.
    - **Avg Returned Check $** - This is the average dollar amount of each returned check within the initial search parameters; calculated as the total dollar amount of returned checks divided by the total count of returned checks.

Breakdowns

Breakdowns allow you to further filter reports by various topics. This report allows you to breakdown by **Affiliate**, **Asset**, and **Date**. This report is generated by clicking the appropriate link in the **Breakdown By** column of the report. These reports typically contain the same data as above with the addition of a column titled with the breakdown topic.

Asset Performance

The Asset Performance report is designed to report the top-performing assets during a specified time-frame. 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.

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.
- **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 #/$.
- **Net**. When checked, a column shall display the total net dollar amount earned by each asset. Net $ is the gross (total receipts)--all returns (Refunds + Chargebacks + Voids + Returned Checks). This box is checked by default.

Column Definitions

- **Breakdown**. Shows options for further breakdown of the report; in this report you have the option to further breakdown the report by **Program**, **Affiliate**, and **Date**. Each report will contain the same columns as this with the addition of a column containing the breakdown information.
- **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.
- **Net $**. The net dollar value of transactions.

Referring URLs

The **Referring URL** report displays the web locations where referrals originated and a count of transactions from the URL. This report also displays the Affiliate who received credit for the referral. The Referring URL is the location that sent the hit to the page.

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. Select the checkboxes next to the columns you wish to have displayed from **Show/Hide Columns**.
3. Click **Search**.

AVAILABLE COLUMNS

- **Subaccount.** The client subaccount number .
- **Affiliate.** The Affiliate account number. Click the Affiliate ID link to open the Affiliate Status area.
- **URL.** The web location that sent the hit to the page. This links to the Affiliate/ Referrer Web site. Only clients who are using the form system can utilize this function.
- **Count.** The number of logged sign ups from the Referring URL. These are equivalent to sales.

The end of the report provides a sum of the total sign ups for the Count column.

AFFILIATE OVERVIEW

The Affiliate Overview Report is designed to provide sponsors with general productivity data for their affiliates, and also a method to easily access more detailed transactional and traffic data for specific affiliates and their referred affiliates.

To run the report:

1. In the Admin, hover over **Reports**, then **By Topic**, then **WMS Affiliate Reports**, then click on **Affiliate Overview**.
2. Choose your start and end date for the date range on the report in the calendar fields, or choose a pre-selected date range from the second radio button's drop-down menu.
3. Choose a Program Type to view data for by selecting **All** or selecting a program type from the list (hold the CTRL key on your keyboard and click to select multiples).
4. Choose a Program to view data for by selecting **All** or selecting a program name from the list (hold the CTRL key on your keyboard and click to select multiples).
5. Choose the report datal grouping in the **Group Results By** drop-down menu.
6. Click **Search**.

Available Columns

- **Affiliate**. Displays the Affiliate Name.
- **Cancellation %**. This is the percentage of the memberships that were cancelled.
- **Refund %**. This is the percentage of the memberships that were refunded.
- **Chargeback**. This is the percentage of memberships that resulted in chargebacks.
- **Submission Ratio**. This is the ratio of the total number of form clicks that occurred for every one form submission that occurred.
- **Average Profit Per Member Last 180 Days**. This is the average revenue that the user earned per member over the last 180 days. (This data is not limited by the date range selected in the initial search)

Marketing Materials/Trackers

Sponsors use this report to monitor trackers, marketing materials, and page views.

To run the report:

1. In the Admin, hover over **Reports**, then **By Topic**, then **WMS Affiliate Reports**, then click on **Trackers/Marketing Materials**.

2. Choose your start and end date for the date range on the report in the calendar fields, or choose a pre-selected date range from the second radio button's drop-down menu.

3. Choose a Program to view data for by selecting **All** or **Search** (the **Search** button brings up the program find).

4. Click to select options in the **Select MM Type** field to narrow the report results by marketing material type, or choose specific marketing material using the **Search**.

5. Choose the Marketing Material grouping in the **Group Results By** drop-down menu.

6. Choose the columns you wish to view data for in the **Show/Hide Columns** area.

7. Click **Search**.

Available Columns

- **Marketing Material Count**. The total count of marketing materials or additional page views included in the report results.
- **Impressions**. The total count of impressions for each marketing material/page view included in the report results (impressions are ad views).
- **New Sales Count**. The total count of new sales attributed to each marketing material or additional page view. New Sales are calculated as (new Single Sales + new Trial sales + new Initial sales).
- **New Sales $**. The total dollar amount of those new sales (New Sales $). New Sales are calculated as (new Single Sales + new Trial sales + new Initial sales).
- **Rebills Count**. The total count of rebills attributed to each marketing material or additional page view (Rebills Count).

- **Rebills $**. The total dollar amount of those rebills (Rebills $).
- **Gross $**. The gross dollar amount earned for sales attributable to each marketing material or additional page view. Gross $ is calculated as (New Sales $ + Rebills $).
- **Affiliate $**. The total dollar amount paid out to affiliates for sales attributable to each marketing material or additional page view. 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 the report).
- **Returns Count**. The total count of returns attributable to each marketing material or additional page view (Returns Count). Returns are calculated as (refunds + returned checks + voids + chargebacks).
- **Returns $**. The total dollar amount of those returns (Returns $). Returns are calculated as (refunds + returned checks + voids + chargebacks).
- **Net $**. The total net dollar amount earned for each marketing material or additional page view. Net $ is calculated as (Gross $ - Returns $).

Sales Per Click

The Sales Per Click report is designed to report the ratio of sales to clicks during a specified timeframe.

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. Select the checkboxes next to the columns you wish to have displayed from **Show/Hide Columns**.
3. Click **Search**.

Available Columns

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..
- **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 #/$.

- **Net**. When checked, a column shall display the total net dollar amount earned by each asset. Net $ is the gross (total receipts--all returns (Refunds + Chargebacks + Voids + Returned Checks). This box is checked by default.

Display Options

- **Impressions**. When checked, a column shall display the total impressions for each program selected. This box is checked by default.

- **Raw**. When checked, columns shall display for the total count of clicks and raw click ratio for each program selected. This box is checked by default.

- **Unique**. When checked, columns shall display for the total count of unique clicks and the unique click ratio for each program selected. This box is checked by default.

- **$ Per Click**. When checked, a column shall display for the dollar amount earned per click.

- **Raw Additional Page Views**. When checked, columns shall display for the total count of clicks on configured additional page views and the raw additional page view ratio for each program selected.

- **Unique Additional Page Views**. When checked, columns shall display for the total count of unique clicks on configured additional page views and the unique additional page view ratio for each program selected.

- **Form Clicks**. When checked, columns shall display for the total count of Join Form clicks and the Join Form click ratio for each program selected. This box is checked by default.

- **Form Submits**. When checked, columns shall display for the total count of Join Form submittals and the Join Form submittal ratio for each program selected. This box is checked by default.

- **Form Approvals**. When checked, columns shall display for the total count of Join Form approvals and the Join Form approval ratio for each program selected. This box is checked by default.

- **New Sales**. When checked, a column shall display for the total count of sales for each program selected. The total sales count is calculated as Trial sales + Single sales + Recurring/Initial sales. This box is checked by default.

Program Performance by MM Type

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. Select the checkboxes next to the columns you wish to have displayed from **Show/Hide Columns**.
3. Click **Search**.

Available Columns

MM Performance by Type

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. Select the checkboxes next to the columns you wish to have displayed from **Show/Hide Columns**.
3. Click **Search**.

Available Columns

All Stats

The following Report Types are available:

- **Show Transactions By Dollar/Quantity** – Displays the e-commerce transactions for an affiliate.
- **Show Conversions By Subscription** – Displays affiliate transaction conversion data and affiliate subscription information.
- **Show Conversions By Trial Subscription** – Displays affiliate transaction conversion data and the affiliate trial subscription information.
- **Show Non-Conversions By Subscription** – Displays when the affiliate transactions stopped prior to recurring and the cancel information for the time period.
- **Show Clicks** – Displays the number of times consumers clicked on an Affiliate's link.

To Set Up an All Statistics Report

1. Select all subaccounts or an individual subaccount and transaction date ranges for the report from the Selection Pane.
2. Click the **Use Affiliate ID** check box to display the **Affiliate ID** field where the affiliate number can be entered to lookup an individual affiliate. If you do not know the affiliate ID, leave the field blank to lookup all affiliates.
3. Click one of the radio buttons under the **Report Type** heading to choose a report category. If a report category is not chosen, then the **Transactions By Dollar/Quantity** will be displayed by default.
4. Click **View Stats** to open the selected report in the Display area.
5. Click the **Affiliate** link under the **Breakdown by** column to display the Affiliate ID and Affiliates columns as shown in the following example:
6. Click the **Affiliate Details** link next to the Affiliate ID to open the Affiliate Status area.
7. Click an **Affiliate ID** link to display the selected Transactions report for the individual Affiliate.

Programs

Programs

A program is created to recruit affiliate to help you sell your product. It must include payout, an asset, and a status. Programs can also be created for future dates and restricted date periods.

It is recommended that you utilize the Create a Basic Program tool whenever possible. The difference between a Basic and an Advanced program is simply in the amount of parameters that you have control over. CCBill defines most of the parameters in a Basic program, but allows you to edit those same parameters in the Create an Advanced Program tool.

In a Basic program, CCBill pre-defines the following parameters for you:

- **Consumer Tracking**
- **Unique Click Tracking**
- **Affiliate Options**
- **Email Options**

Create a Basic Program

To create a Basic Program :

1. Choose the **Program** tab.
2. Click **Create Basic Program**.
3. Select the Account/Subaccount number you wish to create a program for.
4. Click **Select**.
5. Complete the information in the **Program Options**, **Payout Options**, **Affiliate Options**, **Marketing Keywords, Asset Lookup**, **Email Options**, and **Program Status** elements.
6. Click **Save**.

Element Descriptions

Program Options

1. Enter the name you wish to give the program in the **Name** field.
2. Enter a description of the program in the **Description** field.
3. Complete the **Program URL** field.
4. Select the categories that you wish the program to appear in the **Select Categories** element.

Payout Options

Choose the **Payout Type** you wish to assign the program from the drop-down menu from the following options, then follow the applicable instructions for each.

Pay Per Sale

The **Pay Per Sale** option provides payment to an affiliate in a percentage or set amount per each referred sale.

1. Choose **Pay Per Sale** from the drop-down menu in the **Payout Options** element.
2. Choose the **Credit Cards** tab to select payouts for credit-card sales.
3. Set payouts for the following items:
   - Pay for Trials
   - Pay for Initials
   - Pay for Trial/Initials (At time of sale or after first rebill)
   - Payout Amount
   - Number of rebills to pay for trial
   - Number of rebills to pay for initial

- o Payout amount/% for rebills

4. Click the appropriate check box in the **Apply Options To** area at the top right to automatically apply these selections to Check and Phone payments, or set up individual options for those payment option s (remember that telephone billing does not allow for rebills, so that option will not be available to you on that tab .

Revshare

The Revshare option allows you to share revenue produced from a sale with the affiliate.

1. Choose **Revshare** from the drop-down menu in the **Payout Options** element.
2. Choose the **Credit Cards** tab to select payouts for credit-card sales.
3. Set payouts for the following items:
   - o Pay for Trials
   - o Pay for Initials
   - o Pay for Trial/Initials (At time of sale or after first rebill)
   - o Payout Amount
   - o Number of rebills to pay for trial
   - o Number of rebills to pay for initial
   - o Payout amount/% for rebills
4. Click the appropriate checkbox in the **Apply Options To** area at the top right to automatically apply these selections to Check and Phone payments, or set up individual options for those payment option s (remember that telephone billing does not allow for rebills, so that option will not be available to you on that tab .

Pay Per Click

The Pay Per Click option allows you to pay your affiliates for every hit that they send to your site, even if the hit does not result in a purchase.

1. Choose **Pay Per Click** from the **Payout Type** drop-down menu.
2. Choose to pay for either **Raw** or **Unique** hits.
3. Choose the amount to pay the affiliate for each hit in the **Click Payout** field.

Affiliate Options

Select your affiliate options from the following:

- o **Affiliate Invitation Method** (Currently not available, will be available with BETA release)

- **Affiliate Inactivity Reminder** (The amount of time without referrals/clicks that a reminder should be sent to the affiliate regarding the program).
- **Affiliate Auto-deactivate** (This tells the system to deactivate an affiliate if they go this long without sending a referral).

Marketing Keywords

Add **Marketing Keywords** to your program. This aids the affiliate when searching for programs to join and helps to sell your program to affiliates. To add a keyword, click the **Add** button, then fill in the field with a keyword. To remove a keyword, highlight it and click **Remove**.

Asset Lookup

Simple Lookup

The Simple Lookup allows you to search for an asset across many categories at one time.

1. Click to select the radio button next to **Simple Lookup**.
2. Enter a keyword in the **Look for** field, or leave it blank to return all results.
3. Select from the drop-down menu one of the following:
    - Asset Group
    - Asset Name
    - Asset Description
4. Click **Lookup**.
5. Highlight the asset to add to the program.
6. Click **Add to Selected**.

Advanced Lookup

The Advanced Lookup lets you search for many different assets in different categories; you may place different terms in all the fields if necessary to narrow down your search.

1. Click to select the radio button next to **Advanced Lookup**.
2. Enter keywords in the **Look for** field next to **Asset Group**, **Asset Name**, and **Asset Description** to narrow your search.
3. Click **Lookup**.
4. Highlight the asset to add to the program.
5. Click **Add to Selected**.

Email Options

Choose the events that trigger emails to affiliates/sponsors from the following:

- To affiliate whenever a new sale occurs
- To sponsor whenever a new affiliate joins program
- Welcome letter to affiliate when they join program

Program Status

Choose the appropriate program status from the following:

- **Active**
- **Active for this time period:** (select start and end date for the program using the calendar)
- **Inactive**

Create an Advanced Program

The **Create an Advanced Program** option allows you more control over your program than the basic program.

To create an advanced program:

1. Enter appropriate information in the **Name**, **Description**, and **Program URL** fields.
2. Choose the categories to add the program to from the **Select Categories** element.
3. Create payouts in the **Payout Options** element.
4. Choose your tracking cookie options in the **Consumer Tracking*** element.
5. Select the tracking options for the program in the **Unique Click Tracking*** element.
6. Choose the program's affiliate options in the **Affiliate Options**** element.
7. Choose keywords in the **Marketing Keywords** element.
8. Choose the asset to associate with the program from the **Asset Lookup** element.
9. Choose notification options in the **Email Options**** element.
10. Select the appropriate status for the program in the **Program Status** element.
11. Click **Save**.

**denotes options not available in Basic program.*

***denotes enhanced options compared to basic program.*

Element Descriptions

Select Categories

The **Select Categories** element is used to categorize your program to make it easier for affiliates to locate your program. You may:

- Choose **Select All** to include your program 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 program in that category.
- Click to select the top-level category to include the program in that category and all sub-categories.

Current Active Programs

The **Current Active Programs** pane is located on the right side of the screen. This list displays your current active programs categorized by payout type. You may hide this pane by clicking the right-pointing double chevron button (**>>**). Restore the pane by selecting the left-pointing double chevron button (**<<**).

Payout Settings

Choose the **Payout Type** you wish to assign the program from the drop-down menu from the following options, then follow the applicable instructions for each.

Payout Based On

Select the appropriate radio button for your chosen payout method, then complete the information requested for the model.

Sales

The **Sales** option provides payment to an affiliate in a percentage or set amount per each referred sale.

1. Choose **Pay Per Sale** from the drop-down menu in the **Payout Options** element.
2. Choose the **Credit Cards** tab to select payouts for credit-card sales.
3. Set payouts for the following items:
    - Pay for Trials
    - Pay for Initials
    - Pay for Trial/Initials (At time of sale or after first rebill)
    - Payout Amount
    - Number of rebills to pay for trial
    - Number of rebills to pay for initial
    - Payout amount/% for rebills
4. Click the appropriate checkbox in the **Apply Options To** area at the top right to automatically apply these selections to Check and Phone payments, or set up individual options for those payment option s

(remember that telephone billing does not allow for rebills, so that option will not be available to you on that tab .

- Pay for Trials
- Pay for Initials
- Pay for Trial/Initials (At time of sale or after first rebill)
- Payout Amount
- Number of rebills to pay for trial
- Number of rebills to pay for initial
- Payout amount/% for rebills

Clicks

The Pay Per Click option allows you to pay your affiliates for every hit that they send to your site, even if the hit does not result in a purchase.

1. Choose **Pay Per Click** from the **Payout Type** drop-down menu.
2. Choose to pay for either **Raw** or **Unique** hits.
3. Choose the amount to pay the affiliate for each hit in the **Click Payout** field.

Consumer Tracking

Choose how long tracking cookies should last before being deleted by entering a number in the **days** field.

Unique Click Tracking

To track unique clicks

1. Select the type of unique click tracking you wish to use:
   - Cookie only-places a cookie on the end-user's computer.
   - IP/BD only-checks the IP address and browser type of the end-user's computer.
   - Cookie and IP/BD-performs both tracking types.
   - Cookie or IP/BD-performs whichever tracking type is most pertinent.
2. Choose the uniqueness period for the cookie or IP/BD tracking.

Affiliate Options

1. Affiliate Click Types
2. Affiliate Invitation Method
3. Affiliate Inactivity Reminder

4. Accept Private Affiliates
5. Affiliate Auto-deactivate
6. Split Fees
7. Allow Blocked Countries
8. Allow Affiliate Redirects
9. Accept Referrers
10. Referrer Payout
11. Payout Timeframe

Marketing Keywords

Add **Marketing Keywords** to your program. This aids the affiliate when searching for programs to join and helps to sell your program to affiliates. To add a keyword, click the **Add** button, then fill in the field with a keyword. To remove a keyword, highlight it and click **Remove**.

Add Assets

Simple Lookup

The Simple Lookup allows you to search for an asset across many categories at one time.

1. Click to select the radio button next to **Simple Lookup**.
2. Enter a keyword in the **Look for** field, or leave it blank to return all results.
3. Select from the drop-down menu one of the following:
    - Asset Group
    - Asset Name
    - Asset Description
4. Click **Lookup**.
5. Highlight the asset to add to the program.
6. Click **Add to Selected**.

Advanced Lookup

The Advanced Lookup lets you search for many different assets in different categories; you may place different terms in all the fields if necessary to narrow down your search.

1. Click to select the radio button next to **Advanced Lookup**.

2. Enter keywords in the **Look for** field next to **Asset Group**, **Asset Name**, and **Asset Description** to narrow your search.

3. Click **Lookup**.

4. Highlight the asset to add to the program.

5. Click **Add to Selected**.

Email Options

Choose the events that trigger emails to affiliates/sponsors from the following:

- To affiliate whenever a new sale occurs
- To sponsor whenever a new affiliate joins program
- Welcome letter to affiliate when they join program
    - Affiliate inactivity reminder
    - To affiliate when a rebill occurs
    - To affiliate when a subscription cancels
    - To affiliate when a refund occurs
    - To affiliate when a chargeback occurs
    - To affiliate when a check is returned
    - To affiliate when a transaction void occurs

When the BETA program releases, you will also have the option of using the system default emails for these events or creating your own custom email notifications.

Program Status

Choose the appropriate program status from the following:

- **Active**
- **Active for this time period** (select start and end date for the program using the calendar)
- **Inactive**

Modify a Program

To modify an existing program:

1. Locate the program to modify in either the **Program Lookup** or the **Current Active Programs** element.

2. Click **Modify**.

3. Make desired changes to the program.

4. Click **Save**.

Program Lookup

Simple Lookup

The Simple Lookup allows you to search for a program across many categories at one time.

1. Click to select the radio button next to **Simple Lookup**.
2. Enter a keyword in the **Look for** field, or leave it blank to return all results.
3. Select from the drop-down menu one of the following:
    - Program Name
    - Payout Method
    - Program Description
    - URL
4. Click **Lookup**.
5. Highlight the program you wish to modify.
6. Click **Modify**.

Advanced Lookup

The Advanced Lookup lets you search for many different programs in different categories; you may place different terms in all the fields if necessary to narrow down your search.

1. Click to select the radio button next to **Advanced Lookup**.
2. Enter keywords in the **Look for** field next to **Program Name**, **Payout Method**, **Program Description** and **URL** to narrow your search.
3. Click **Lookup**.
4. Highlight the program you wish to modify.
5. Click **Modify**.

Current Programs

The **Current Programs** element resides on the right side of your screen and lists your programs according to type. You may click the + or - symbols next to the payout type to view the current programs that exist for each type. You may click on one of these programs to select it for modification is you do not wish to use the **Program Lookup** element to locate your program for editing.

Program Options

1. Enter the name you wish to give the program in the **Name** field.
2. Enter a description of the program in the **Description** field.
3. Complete the **Program URL** field.
4. Select the categories that you wish the program to appear in the **Select Categories** element.

Payout Options

Choose the **Payout Type** you wish to assign the program from the drop-down menu from the following options, then follow the applicable instructions for each.

Pay Per Sale

The **Pay Per Sale** option provides payment to an affiliate in a percentage or set amount per each referred sale.

1. Choose **Pay Per Sale** from the drop-down menu in the **Payout Options** element.
2. Choose the **Credit Cards** tab to select payouts for credit-card sales.
3. Set payouts for the following items:
    - Pay for Trials
    - Pay for Initials
    - Pay for Trial/Initials (At time of sale or after first rebill)
    - Payout Amount
    - Number of rebills to pay for trial
    - Number of rebills to pay for initial
    - Payout amount/% for rebills
4. Click the appropriate checkbox in the **Apply Options To** area at the top right to automatically apply these selections to Check and Phone payments, or set up individual options for those payment option s (remember that telephone billing does not allow for rebills, so that option will not be available to you on that tab .
    - Pay for Trials
    - Pay for Initials
    - Pay for Trial/Initials (At time of sale or after first rebill)
    - Payout Amount
    - Number of rebills to pay for trial

- Number of rebills to pay for initial
- Payout amount/% for rebills

Pay Per Click

The Pay Per Click option allows you to pay your affiliates for every hit that they send to your site, even if the hit does not result in a purchase.

1. Choose **Pay Per Click** from the **Payout Type** drop-down menu.
2. Choose to pay for either **Raw** or **Unique** hits.
3. Choose the amount to pay the affiliate for each hit in the **Click Payout** field.

Consumer Tracking

This area allows you to set the expiration time of a consumer tracking cookie. Enter the number of days for which the cookie will be active in the **Tracking Cookie Expiration** field.

Unique Click Tracking

This area allows you to control how unique clicks are tracked for this program. Select one of the following options in the **Unique Tracking Type** field:

- **Cookie only.** Unique clicks will be tracked based on a unique cookie that will be generated when the consumer first visits the page. Subsequent visits by the consumer with the same cookie will not count as unique.

  In the **Cookie Uniqueness Period** field, enter the number of minutes for which the cookie will retain its uniqueness. When this period ends, the cookie will expire, and the next visit from that consumer will be counted as unique.

- **IP/BD only.** Unique clicks will be tracked based on a combination of the consumer's IP address and a browser digest. Subsequent visits by consumers with the same IP address and browser digest will not be counted as unique.

  In the **IP/BD Uniqueness Period** field, select the number of hours for which the IP and browser digest will be considered unique. When this time period ends, the IP and browser digest will no longer be considered unique, and the next consumer visit from that IP address with the same browser digest will be considered unique.

- **Cookie and IP/BD.** Unique clicks will be tracked based on a unique cookie and the IP/BD as explained above.

  Enter the **Cookie Uniqueness Period** and the **IP/BD Uniqueness Period** in the appropriate fields.

- **Cookie or IP/BD.** Unique clicks will be tracked using either the cookie or the IP/BD. For example, if a consumer makes repeat visits using the same IP/BD but a different unique cookie, the click will be counted as unique.

  Enter the **Cookie Uniqueness Period** and the **IP/BD Uniqueness Period** in the appropriate fields.

Affiliate Options

Select your affiliate options from the following:

- **Affiliate Invitation Method**
- **Affiliate Inactivity Reminder** (The amount of time without referrals/clicks that a reminder should be sent to the affiliate regarding the program).
- **Affiliate Auto-deactivate** (This tells the system to deactivate an affiliate if they go this long without sending a referral).

Marketing Keywords

Add **Marketing Keywords** to your program. This aids the affiliate when searching for programs to join and helps to sell your program to affiliates. To add a keyword, click the **Add** button, then fill in the field with a keyword. To remove a keyword, highlight it and click **Remove**.

Asset Lookup

Simple Lookup

The Simple Lookup allows you to search for an asset across many categories at one time.

1. Click to select the radio button next to **Simple Lookup**.
2. Enter a keyword in the **Look for** field, or leave it blank to return all results.
3. Select from the drop-down menu one of the following:
    - Asset Group
    - Asset Name
    - Asset Description
4. Click **Lookup**.
5. Highlight the asset to add to the program.
6. Click **Add to Selected**.

Advanced Lookup

The Advanced Lookup lets you search for many different assets in different categories; you may place different terms in all the fields if necessary to narrow down your search.

1. Click to select the radio button next to **Advanced Lookup**.
2. Enter keywords in the **Look for** field next to **Asset Group**, **Asset Name**, and **Asset Description** to narrow your search.
3. Click **Lookup**.

4. Highlight the asset to add to the program.

5. Click **Add to Selected**.

Email Options

Choose the events that trigger emails to affiliates/sponsors from the following:

- To affiliate whenever a new sale occurs
- To sponsor whenever a new affiliate joins program
- Welcome letter to affiliate when they join program

Program Status

Choose the appropriate program status from the following:

- **Active**
- **Active for this time period:** (select start and end date for the program using the calendar)
- **Inactive**

Promotions

Promotions

A Promotion makes a temporary change to a program's payout. Changes cannot reduce the amount of the payout below that of the program it is promoting.

Click the name of a promotion in the list to view the current settings for that promotion.

Create a Promotion

To create a new promotion:

1. Enter the name of the promotion in the **Promotion Name** field.
2. Enter a description for the promotion in the **Promotion Description** field.
3. Locate and highlight the program to associate the promotion with in the **Program Lookup** element.
4. Locate and select the affiliates to include in the promotion in the **Add Affiliates** element.
5. Choose the payout options for the promotion in the **Promotional Override Payout Options** element.
6. Choose the appropriate status for the promotion in the **Promotion Status** element.
7. Click **Save**.

Element Descriptions

Promotions

The **Promotions** element, located on the right, provides you with a list of all current active promotions. You may choose a promotion from this list to edit or hide the pane by clicking on the chevron icon.

Program Search

Simple Search

The Simple Lookup allows you to search for a program across many categories at one time.

1. Click to select the radio button next to **Simple Lookup**.
2. Enter a keyword in the **Look for** field, or leave it blank to return all results.
3. Select from the drop-down menu one of the following:
    - Program Name
    - Payout Method
    - Program Description
    - URL
4. Click **Lookup**.
5. Click the radio button to select the program you wish to add to the promotion.

Advanced Search

The Advanced Lookup lets you search for many different programs in different categories; you may place different terms in all the fields if necessary to narrow down your search.

1. Click to select the radio button next to **Advanced Lookup**.
2. Enter keywords in the **Look for** field next to **Program Name**, **Payout Method**, **Program Description** and **URL** to narrow your search.
3. Click **Lookup**.
4. Click the radio button to select the program you wish to add to the promotion.

Add Affiliates

Choose the affiliates to add the promotion to from the following selections:

- All current affiliates in this program
- Current active affiliates
- Current affiliates with new sales traffic in the last ____ days

- **Selected affiliates** (this option requires you to search for affiliates and add them manually.

Simple Lookup

The Simple Lookup allows you to search for affiliates across many categories at one time.

1. Click to select the radio button next to **Simple Lookup**.
2. Enter a keyword in the **Look for** field, or leave it blank to return all results.
3. Select from the drop-down menu one of the following:
    - Active Name
    - Affiliate ID
4. Click **Lookup**.
5. Click to select the affiliate(s) you wish to add.
6. Click **Add to Selected**.

Advanced Lookup

The Advanced Lookup lets you search for many different programs in different categories; you may place different terms in all the fields if necessary to narrow down your search.

1. Click to select the radio button next to **Advanced Lookup**.
2. Enter keywords in the **Look for** field next to **Affiliate Name** and **Affiliate ID** to narrow your search.
3. Click **Lookup**.
4. Click to select the affiliate(s) you wish to add.
5. Click **Add to Selected**.

Promotional Override Payout Settings

Enter the amount that you wish to pay for the Payout Type in the available field. The current payout options are listed under the **Current Payout Options** column; enter the promotional payouts in the **Override Payout Options** column.

Promotion Status

Set the status for the promotion to Active, Inactive, or set it to start and end on future dates.

Modify a Promotion

To modify an existing promotion:

1. Locate the promotion that you wish to modify in the **Promotion Search** element and click it to highlight.
2. Click **Modify**.

3. Make any necessary changes to the name or description of the promotion in the **Promotion Details** element.

4. Make changes to the affiliate makeup of the promotion in the **Affiliates** element.

5. Make any necessary changes to the payout options of the promotion in the P**romotional Override Payout Options** element.

6. Change the status of the promotion in the **Promotion Status** element if necessary.

7. Click **Save**.

Element Descriptions

Promotions

The **Promotions** element, located vertically on the right, provides you with a list of all current active promotions. You may choose a promotion from this list to edit, or hide this element by clicking the chevron (**>>**) icon.

Promotion Lookup

1. Select the radio button next to **Promotion** or **Program** to indicate where to perform the search.

2. Enter the name of the program or promotion in the field.

3. Click **Look-up**.

4. Click to highlight a program and choose **Modify** to make changes to it; click **Inactive** in the Status column to turn on the promotion immediately.

You may also deactivate a promotion from this area. Simply click the **Active** checkbox to clear it, then confirm your selection in the pop-up confirmation element.

Promotion Options

The **Promotion Options** element allows you to make changes to the **Promotion Name** or **Promotion Description**.

Program Details

You may view detailed information about the program in the **Program Detail** element. Click to select the program you wish to view, then click the **View Details** button at the bottom left of the element.

Add Affiliates

Modify the affiliates to add the promotion to from the following selections:

- All current affiliates in this program

- Current active affiliates

- Current affiliates with new sales traffic in the last ____ days

- **Selected affiliates** (this option requires you to search for affiliates and add them manually

Promotional Override Payout Options

Make any necessary changes to the amount that you wish to pay for the Payout Type in the available field. The current payout options are listed under the **Current Payout Options**, column, enter the promotional payouts in the **Override Payout Options** column.

Promotion Status

Set the status for the promotion to Active, Inactive, or set it to start and end on future dates.

Bonuses

Bonuses

A **Bonus Program** rewards referrers at certain levels that you set up to encourage greater traffic from referrers to your site.

Create a Bonus

A Bonus program rewards referrers at certain levels that you set up to encourage greater traffic from referrers to your site.

To create a bonus:

1. Enter the name for the new bonus in the **Bonus Name** field.
2. Enter a description in the **Bonus Description** field.
3. Look up and select the program to link the bonus to in the **Program Lookup** element.
4. Select the **Affiliates Options** to associate with the program.
5. Choose the Payout Options to apply to the bonus in the **Payout Options** element.
6. Choose the status for the bonus in the **Bonus Status** element.
7. Click **Save** to save the bonus.

Element Descriptions

Program Lookup

Simple Lookup

The Simple Lookup allows you to search for a program across many categories at one time.

1. Click to select the radio button next to **Simple Lookup**.
2. Enter a keyword in the **Look for** field, or leave it blank to return all results.
3. Select from the drop-down menu one of the following:
    - Program Name
    - Payout Method

- Program Description
- URL

4. Click **Lookup**.
5. Highlight the program you wish to modify.
6. Click **Modify**.

Advanced Lookup

The Advanced Lookup lets you search for many different programs in different categories; you may place different terms in all the fields if necessary to narrow down your search.

1. Click to select the radio button next to **Advanced Lookup**.
2. Enter keywords in the **Look for** field next to **Program Name**, **Payout Method**, **Program Description** and **URL** to narrow your search.
3. Click **Lookup**.
4. Highlight the program you wish to modify.
5. Click **Modify**.

Affiliates Options

The **Affiliates Options** element allows you to set your affiliate preferences for the bonus. The following options are available to you:

- **Automatic Invitation**. Selecting this checkbox will have the effect of inviting all affiliates into the bonus that you are creating.
- **Send Bonus To**. Choose a radio button to identify which affiliate status to include in the bonus offer:
  - All affiliates in the program
  - All *active* affiliates in the program
  - All affiliates with new sales in a certain day range (enter a numerical value for days)
- Select individual affiliates to invite to the bonus:
  1. Use the simple or advanced lookup to provide a list of affiliates.
  2. Click to select the box next to the affiliate name in the resulting list.
  3. Click **Add to Selected** to add them to the bonus (review the already added affiliates on the **Selected** tab).

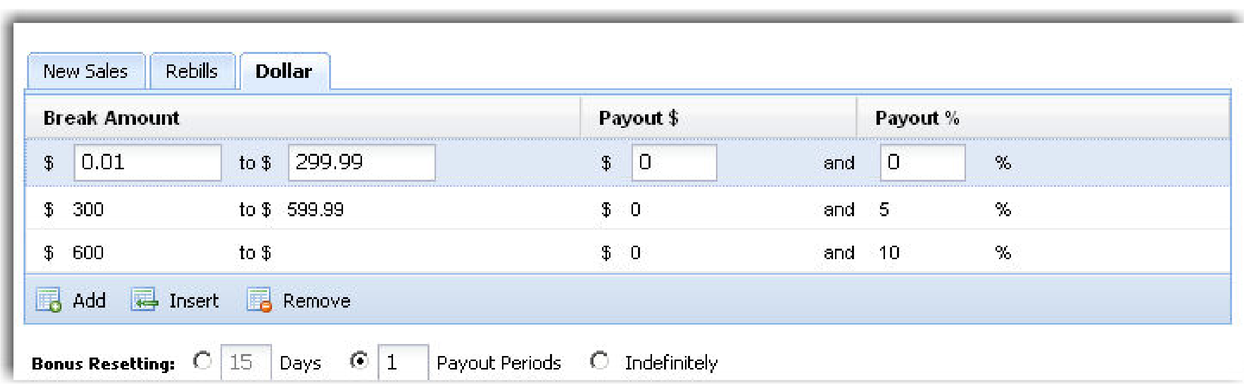
Payout Options

The **Payout Options** element allows you to set the break amount for your bonus. Break amounts allow you to incrementally increase your payouts to referrers based on volume of referrals.

WARNING: Setting up bonuses incorrectly can result in overpayment. If you would like assistance with setting up these options, please contact client support.

1. In the **Payout Options** element, choose the tab for **New Sales**, **Rebills**, or **Dollar**.
2. Click **Add**.
3. Edit the default numerals in the **Break Amount** column, if necessary.
4. Enter a dollar amount in the **Payout $** column if you choose.
5. Enter a numeral in the **Payout %** column if desired.
6. Click **Insert**.
7. Choose the time period for the bonus to reset to zero from the following options:
    - **Days** (fill in number of days).
    - **Payout Periods** (fill out number of periods, with a payout period being from Monday to Sunday).
    - **Indefinitely** (the bonus payout never resets).

Example: My program offers a 50% payout on referred new subscriptions. When an affiliate sends me a total of $300 in referred new sales in a pay period, I wish to offer a 5% bonus. Additionally, I'd like to offer a 10% bonus on all sales over $600. To see the field entries for this scenario, click here.



Bonus Status

Choose the status for the bonus, making it active now or some point in the future, or inactive. If choosing a date range, you must complete both the start and end date. The start date cannot be earlier than the current date, and the end date must be after the start date.

Modify a Bonus

To modify a Bonus:

1. Use the **Bonus Lookup** tool to locate the bonus that you wish to modify.
2. Edit the name and description of the bonus in the **Modify Bonus Options** element.
3. Verify the program specifics in the **Program Detail** element.
4. Make any changes to the affiliate options in the **Modify Affiliates** element.
5. Make changes to payouts in the **Modify Payout Options** element.
6. Update the status of the bonus in the **Bonus Status** element.
7. Click **Save** to save your changes to the bonus.

Element Descriptions

Bonus Lookup

Simple Lookup

The Simple Lookup allows you to search for a program across many categories at one time.

1. Click to select the radio button next to **Simple Lookup**.
2. Enter a keyword in the **Look for** field, or leave it blank to return all results.
3. Select from the drop-down menu one of the following:
    - Program Name
    - Bonus Name
    - Bonus Description
4. Click **Lookup**.
5. Highlight the bonus you wish to modify.
6. Click **Modify**.

Advanced Lookup

The Advanced Lookup lets you search for many different programs in different categories; you may place different terms in all the fields if necessary to narrow down your search.

1. Click to select the radio button next to **Advanced Lookup**.
2. Enter keywords in the **Look for** field next to **Program Name**, **Bonus Name**, and **Bonus Description** to narrow your search.
3. Click **Lookup**.
4. Highlight the bonus you wish to modify.
5. Click **Modify**.

Modify Bonus Options

The **Modify Bonus Options** element allows you to change the name and/or description of the bonus. Make any necessary changes in the appropriate fields.

Program Detail

The **Program Detail** element describes the name, payout method and description of the program that the bonus is associated with.

Modify Affiliates

The **Modify Affiliates** element allows you to change your affiliate preferences for the bonus. The following options are available to you for editing:

- **Automatic Invitation**. Selecting this check box will have the effect of inviting all affiliates into the bonus that you are creating.
- **Send Bonus To**. Choose a radio button to identify which affiliate status to include in the bonus offer:
    - All affiliates in the program
    - All *active* affiliates in the program
    - All affiliates with new sales in a certain day range (enter a numerical value for days)
- Select individual affiliates to invite to the bonus:
    - Use the simple or advanced lookup to provide a list of affiliates.
    - Click to select the box next to the affiliate name in the resulting list.
    - Click **Add to Selected** to add them to the bonus (review the already added affiliates on the Selected tab).

Modify Payout Options

The **Modify Payout Options** element allows you to make necessary changes to your bonus payout tiers. For details on break amounts, see the **Create a Bonus** topic.

Bonus Status

Here you may edit the status for the bonus, making it active now or some point in the future, or inactive. If choosing a date range, you must complete both the start and end date. The start date may be earlier than the current date (but may not be edited to be so), and the end date must be after the start date and the present date.

Marketing Materials

Marketing Materials

The **Marketing Materials** area allows the sponsor to associate self-produced banner ads, videos, and other marketing items with categories and programs so that it's easy for affiliates to locate the material for promotion of the sponsor's site.

Marketing Materials are always hosted on the client site and CCBill does not provide space to upload this material. Before setting up your marketing materials you will need to place the material in a folder on your site and make it accessible so that affiliates can access the files for download or linking.

Register Marketing Materials

To register new marketing materials:

1. Enter the name in the **Marketing Material Name** field.
2. Enter a thorough description of the marketing material in the **Description** field.
3. Enter the full location of the marketing material in the **Marketing Material URL** field.
4. Enter the location of the marketing material library in the **Marketing Material Library - File or URL** field.
5. Select the categories to place the marketing material in from the **Select Categories** element.
6. Choose the type of marketing material from the **Marketing Material Types** field.
7. Locate and select the program to associate the materials with in the **Program Lookup** element.
8. Choose the appropriate status in the **Marketing Material Status** element.
9. Click **Save**.

Element Descriptions

Select Categories

The **Select Categories** element is used to categorize your program to make it easier for affiliates to locate your marketing materials. You may:

- Choose **Select All** to include your program 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 Types

Use the **Marketing Material Types** element to identify the format of your marketing material. The following categories are available for this identification:

- Ad
- Banner Ad
- Console
- Video
- Free Hosted Gallery
- Whitepaper
- Brochure
- Image
- HTML Template
- Mailer
- URL
- Other

Enter descriptive notes about the marketing material such as colors, fonts, resolution, size, quality, and so on. Affiliates use this information to determine what marketing material they are going to utilize, so be as descriptive as possible.

Program Lookup

Simple Lookup

The Simple Lookup allows you to search for a program across many categories at one time.

1. Click to select the radio button next to **Simple Lookup**.
2. Enter a keyword in the **Look for** field, or leave it blank to return all results.
3. Select from the drop-down menu one of the following:
    - Program Name

- Payout Type
- URL

4. Click **Lookup**.
5. Click to select the program to add the marketing material to.
6. Click **Add to Selected**.

Advanced Lookup

The Advanced Lookup lets you search for many different programs in different categories; you may place different terms in all the fields if necessary to narrow down your search.

1. Click to select the radio button next to **Advanced Lookup**.
2. Enter keywords in the **Look for** field next to **Program Name**, **Payout Type**, and **URL** to narrow your search.
3. Click **Lookup**.
4. Click to select the program to add the marketing material to.
5. Click **Add to Selected**.

Marketing Material Status

Choose the status for the marketing material, making it active now or some point in the future, or inactive. If choosing a date range, you must complete both the start and end date. The start date cannot be earlier than the current date, and the end date must be after the start date.

Modify Marketing Materials

To modify existing marketing materials:

1. Locate the marketing material that you wish to edit in either the **Marketing Material Lookup** or the **Marketing Material** element.
2. Click **Modify** (screen will refresh).
3. Make any changes to the base options of the marketing material in the **Modify Marketing Material Options** element.
4. Edit the category in the **Select Categories** element.
5. Make any appropriate changes in the **Marketing Material Types** element.
6. Adjust the programs assigned to the materials in the **Program Lookup** element.
7. Adjust the status in the **Marketing Material Status** element.

Element Descriptions

Marketing Material Lookup

Use the **Marketing Material Lookup** element to search for existing marketing material that needs to be edited or modified.

1. Select the radio button next to **Marketing Material** or **Program** to indicate where you want the lookup to look.
2. Fill in the **Marketing Material Name** field, if known.
3. Choose the **Marketing Material Type** from the drop-down menu.
4. Click **Lookup**.
5. Click to highlight the marketing material that you wish to edit in the **Look-up Results** area.

Modify Marketing Material Options

Use this element to make any necessary changes to the **Marketing Material Name**, **Description**, **URL**, and/or **Library** information.

Select Categories

The **Select Categories** element is used to edit the categories that the marketing material shows up in when searches are performed. Browse the categories just as you would browsing a file or directory, clicking the + or - symbols to open and close the folders and selecting the check box next to the categories that you wish the marketing material to appear in.

Marketing Material Types

Use the **Marketing Material Types** element to adjust the format of your marketing material. The following categories are available for this identification:

- Ad
- Banner Ad
- Console
- Video
- Free Hosted Gallery
- Whitepaper
- Brochure
- Image
- HTML Template
- Mailer
- URL

- o Other

Enter descriptive notes about the marketing material such as colors, fonts, resolution, size, quality, and so on. Affiliates use this information to determine what marketing material they are going to utilize, so be as descriptive as possible.

Program Lookup

Simple Lookup

The Simple Lookup allows you to search for a program across many categories at one time.

1. Click to select the radio button next to **Simple Lookup**.
2. Enter a keyword in the **Look for** field, or leave it blank to return all results.
3. Select from the drop-down menu one of the following:
    - Program Name
    - Payout Method
    - Program Description
    - URL
4. Click **Lookup**.
5. Highlight the program you wish to modify.
6. Click **Modify**.

Advanced Lookup

The Advanced Lookup lets you search for many different programs in different categories; you may place different terms in all the fields if necessary to narrow down your search.

1. Click to select the radio button next to **Advanced Lookup**.
2. Enter keywords in the **Look for** field next to **Program Name**, **Payout Method**, **Program Description** and **URL** to narrow your search.
3. Click **Lookup**.
4. Highlight the program you wish to modify.
5. Click **Modify**.

Marketing Material Status

Choose the status for the marketing material, making it active now or some point in the future, or inactive. If choosing a date range, you must complete both the start and end date. The start date cannot be earlier than the current date, and the end date must be after the start date.

Program Invitations

Blocked Affiliate

The **Blocked Affiliate** screen allows you to view the affiliates that have been blocked from your programs (using the **Affiliate Details** screen). To load the report:

1. From the Admin, hover over **Affiliate**, then **(WMS) Sponsors**, then **Program Invitations**, then click **Blocked Affiliates**.

2. Click to highlight an affiliate, then click **View Details** if desired.

No actions (unblocking, etc.) can be taken from this screen.

Program Invitation Status

Check the status of both incoming and outgoing program invitations on the **Program Invitation Queue** page. This page allows you to view the **Program Name**, **Sponsor Name**, **Program Type, Message Type, Request Date, and Status** of all incoming and outgoing program invitations.

Email Affiliates

Email Affiliates

To email affiliates:

1. Choose the appropriate radio buttons in the **Send Email To** and **Select Affiliates By** fields (The choice you make here determines the next two steps):

    a. If you chose *All affiliates from specific programs* in step one, use the **Program Lookup** element to select the program to list affiliates from, then click **Add Selected**.

    b. If you chose *Specific affiliates* in step one, use the **Affiliate Lookup** element to choose the affiliates to email.

2. Use the **Compose Email Message** element to create a new email or load an existing template from the **Email Templates** element.

3. Click **Save** to send the email.

Element Descriptions

Email Templates

Email templates are available for you to use in the **Email Templates** element located on the right side of the screen. Simply click the **+** symbol next to the template category and click to select a template to load. You may then customize the template to your liking.

Program Lookup

Simple Lookup

The Simple Lookup allows you to search for a program across many categories at one time.

1. Click to select the radio button next to **Simple Lookup**.
2. Enter a keyword in the **Look for** field, or leave it blank to return all results.
3. Select from the drop-down menu one of the following:
    - Program Name
    - Payout Method
    - Program Description
    - URL
4. Click **Lookup**.
5. Highlight the program you wish to modify.
6. Click **Modify**.

Advanced Lookup

The Advanced Lookup lets you search for many different programs in different categories; you may place different terms in all the fields if necessary to narrow down your search.

1. Click to select the radio button next to **Advanced Lookup**.
2. Enter keywords in the **Look for** field next to **Program Name**, **Payout Method**, **Program Description** and **URL** to narrow your search.
3. Click **Lookup**.
4. Highlight the program you wish to modify.
5. Click **Modify**.

Affiliate Lookup

If you chose to send to *specific affiliates* in the **Create Recipient List From** area you will be able to use the affiliate lookup tool:

Simple Lookup

The Simple Lookup allows you to search for affiliates across many categories at one time.

1. Click to select the radio button next to **Simple Lookup**.
2. Enter a keyword in the **Look for** field, or leave it blank to return all results.
3. Select from the drop-down menu one of the following:
    - Active Name
    - Affiliate ID
4. Click **Lookup**.
5. Click to select the affiliate(s) you wish to email.
6. Click **Add to Selected**.

Advanced Lookup

The Advanced Lookup lets you search for many different programs in different categories; you may place different terms in all the fields if necessary to narrow down your search.

1. Click to select the radio button next to **Advanced Lookup**.
2. Enter keywords in the **Look for** field next to **Affiliate Name** and **Affiliate ID** to narrow your search.
3. Click **Lookup**.
4. Click to select the affiliate(s) you wish to email.
5. Click **Add to Selected**.

Compose Email Message

The **Compose Email Message** element is a simple-to-use text editor.

1. Enter the subject of the email in the **Subject** field.
2. Enter the email body in the body field.
3. Format the message or insert variables as necessary.
4. Preview the email by clicking on the **Preview email** link at the bottom of the screen.
5. Click **Send** to deliver the email to the recipients.

Text Editor Icon Definitions

- 

Font Selector: Choose the font you wish to use from the drop-down menu.

-  **Bold**: Used to make text bold. You may either highlight existing text then click this icon, or click this icon before typing the text you wish to appear in bold-face.

-  **Italics**: Used to italicize text. You may either highlight existing text then click this icon, or click this icon before typing the text you wish to appear in italic face.

-  **Underline**: Used to underline text. You may either highlight existing text then click this icon, or click this icon before typing the text you wish to appear in underlined face.

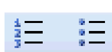
-  **Grow Text** or **Shrink Text**: Used to make text larger or smaller. You may either highlight existing text then click this icon, or click this icon before typing the text you wish to make larger or smaller.

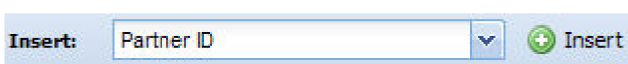
-  **Font Color Selector**: Click this icon to view a color selector that changes the font color. You may either highlight existing text then click this icon, or click this icon before typing the text you wish to appear in the alternate color.

-  **Font Highlight Selector**: Click this icon to view a color selector to choose a highlight color. You may either highlight existing text then click this icon, or click this icon before typing the text you wish to appear highlighted in this color.

-  **Text Alignment Selector**: Use these icons to align the text to the left, center, or right. You may either highlight existing text then click this icon, or click this icon before typing the text you wish to align.

-  **Insert Hyperlink**: Use this icon to insert a hyperlink. First type the display text, then click this icon. When prompted, enter the web address for the hyperlink, then click **OK**.

-  **List**: Use these icons to make a numbered or bulleted list. Click this icon prior to typing the list text.

- 

Insert Variable: Use this link to insert a **Partner ID**, **First Name**, **Last Name**, or **Company Name**. This is useful for adding personalization to mass emails. The variable will be replaced with the proper data when it is sent.

Affiliate Email Address List

To retrieve affiliate email addresses:

1. Choose the programs to retrieve affiliate email addresses from in either the **Program Lookup** or the **Current Active Programs** elements.

2. Click **Add to Selected**.

Email addresses are displayed in the **Email Addresses** element.

Element Descriptions

Program Search

Simple Lookup

The Simple Lookup allows you to search for a program across many categories at one time.

1. Click to select the radio button next to **Simple Lookup**.

2. Enter a keyword in the **Look for** field, or leave it blank to return all results.

3. Select from the drop-down menu one of the following:

    - Program Name

    - Payout Method

    - Program Description

    - URL

4. Click **Lookup**.

Advanced Lookup

The Advanced Lookup lets you search for many different programs in different categories; you may place different terms in all the fields if necessary to narrow down your search.

1. Click to select the radio button next to **Advanced Lookup**.

2. Enter keywords in the **Look for** field next to **Program Name**, **Payout Method**, **Program Description** and **URL** to narrow your search.

3. Click **Lookup**.

Current Programs

The **Current Programs** element lists the available programs for you to select instead of searching for programs in the **Program Search** above. You may select programs from this list by highlighting them. This will cause the program to be listed in the **Search Results** field of the **Program Search** element. You can then click **Add to Selected** to view all of the email addresses.

Email Addresses

This element lists the email addresses of the program you have choose in the **Program Search** element. You may copy these email addresses to use outside of the Admin.

Affiliate Details

Affiliate Details

The **Affiliate Details** area allows you to see detailed information about your affiliate members. Some affiliates, however, may choose to withhold some information from sponsors; if so, the withheld data will not display.

View Affiliate Details

To view affiliate details:

1. Locate the affiliate you wish to view in either the **Affiliate Lookup** or the **Affiliates** element.
2. Click **View Details**.
3. Make any necessary changes in the **Affiliate Details** element.
4. Utilize the **Global Functions** element as necessary.
5. Make any program changes in the **Affiliate Programs** element.
6. Click **Save**.

Element Descriptions

Affiliate Lookup

Simple Lookup

The Simple Lookup allows you to search for affiliates across many categories at one time.

1. Click to select the radio button next to **Simple Lookup**.
2. Enter a keyword in the **Look for** field, or leave it blank to return all results.
3. Select from the drop-down menu one of the following:
    - Active Name
    - Affiliate ID
4. Click **Lookup**.
5. Click to select the affiliate(s) you wish to email.
6. Click **View Details**.

Advanced Lookup

The Advanced Lookup lets you search for many different programs in different categories; you may place different terms in all the fields if necessary to narrow down your search.

1. Click to select the radio button next to **Advanced Lookup**.
2. Enter keywords in the **Look for** field next to **Affiliate Name** and **Affiliate ID** to narrow your search.
3. Click **Lookup**.
4. Click to select the affiliate(s) you wish to email.
5. Click **View Details**.

Affiliates

The **Affiliates** element (located on the right side of the screen) allows you to view the affiliates that belong to each program. Click the **+** sign next to the program to see a list of all affiliates belonging to that program.

Affiliate Details

The **Affiliate Details** element lists available information about the affiliate. The following information about the affiliate that you selected to view:

- **Affiliate ID**
- **First Name**
- **Last Name**
- **Email**
- **Address**
- **Company**
- **Check Name**
- **Member of** (lists how many programs the affiliate belongs to)
- **Allow Affiliate Redirects** (This is the only editable option in this element. Choose **Yes** to allow affiliate redirects, **No** to disallow.)

Global Affiliate Actions

You can choose to block an affiliate ID or remove the affiliate from all of your programs in this element.

Affiliate Programs

This element lists the programs that the affiliate belongs to.

To remove the affiliate from a program:

1. Click the checkbox next to the applicable program.
2. Click **Remove Affiliate from Selected Programs** (click **View Details** to view specific information about that program).
3. Click **Save**.

General Configuration

The **General Configuration** area allows you to set up your affiliate options including linking, reports, countries, and consumer data sharing.

General Settings

The settings on this page enable you to determine how your account interacts with affiliates and your inventory explorer options.

1. Choose the appropriate settings in the **Affiliate Default Options** element*.
2. Edit settings in the **Blocked Affiliate Countries** element as necessary.
3. Make any necessary changes in the **Inventory Explorer Display Options** element.
4. Click **Save**.

**Any settings made here will be overridden by any settings made at a program -level (Create an Advanced Program).*

Element Descriptions

Affiliate Default Options

Choose the default options to use with your affiliate referrals from those below:

- **Report Options**. Click the checkbox next to the report data that you wish affiliates to be able to view on their own reports.
- **Allow Consumer/Affiliate Links**. This determines if an affiliate receives credit for additional purchases made at later dates.
- **Link Persistence Timeframe**. Determines the timeframe in which a consumer is linked to a referring affiliate for future purchases.
- **Consumer ID**. Determines the information that you allow the affiliate to see in regards to referred consumers.

Program Grouping

Select this checkbox to enable **Program Grouping**.

Blocked Affiliate Countries

This element allows you to specify a list of countries from which you will not take affiliates. There are many reasons that you may want to do this, including fraud.

By default, the **Allowed Countries** list contains a list of all countries that we accept affiliates from. The **Recommended Blocked Affiliate Countries** list is a list of countries that CCBill will not accept affiliate referrals from. These countries cannot be removed from the list, but you may add additional countries to it as you wish.

To add additional countries to the list of countries that you will not take affiliates from:

1. Locate the country that you wish to add to the list in the **Allowed Countries** list.
2. Click to highlight that country.
3. Click the right arrow between the two lists to move the country from the allowed list to the blocked list.

You may reverse this process to remove countries from the blocked countries list.

Inventory Explorer Display Options

You may show/hide the inventory explorer by clicking the appropriate checkbox if you wish to display the explorer on that page, or unchecking the box if you do not wish to display the explorer on that page. The following pages contain the Inventory Explorer but allow you to control its display from this page:

- Programs
- Promotions
- Bonuses
- Marketing Materials
- Trackers
- Additional Page Views
- Campaigns (not yet available)
- Affiliates in Programs

Blocked Affiliate Countries

You may choose to block affiliates from certain countries from joining your programs. To block affiliates from a certain country:

1. Click to highlight the country you wish to block in the **Allowed Countries** list.
2. Click the right directional arrow to move that country to the **Blocked Countries** list.
3. Click **Save**.

You remove countries from the blocked list by performing the same operation in reverse.

Trackers

Trackers

Trackers allow a sponsor to track marketing material hosted by the sponsor for reporting and evaluation purposes. Trackers can track clicks, number of sales, and total sales coming from link and banner advertisements. When a consumer clicks advertisements and are redirected to your site, the tracker reports the sales data from the sign up referral.

Create Trackers

To create a **Tracker**:

1. Click to select the radio button next to either **Marketing Material** or **Program URL** to determine the tracker type.
2. Enter the name in the **Tracker Name** field.
3. Enter a description in the **Description** field.
4. Click to select the appropriate item in the **Marketing Material Lookup** element.
5. Select the appropriate status in the **Tracker Status** element.
6. Click **Save** or **Save and Generate Code** as appropriate.

Element Descriptions

Current Trackers

The **Current Trackers** element provides you with a list of all current active trackers. You may choose a tracker from this list to edit.

Marketing Material Lookup

Use the **Marketing Material Lookup** element to search for existing marketing material that needs a tracker added.

1. Select the radio button next to **Marketing Material** or **Program** to indicate where you want the lookup to look.
2. Fill in the **Marketing Material Name** field, if known.
3. Choose the **Marketing Material Type** from the drop-down menu.

4. Click **Lookup**.

5. Click to highlight the marketing material that you wish to edit in the **Look-up Results** area.

Program Lookup

Simple Lookup

The Simple Lookup allows you to search for a program across many categories at one time.

1. Click to select the radio button next to **Simple Lookup**.

2. Enter a keyword in the **Look for** field, or leave it blank to return all results.

3. Select from the drop-down menu one of the following:

    - Program Name
    - Payout Method
    - Program Description
    - URL

4. Click **Lookup**.

5. Highlight the program you wish to modify.

6. Click **Modify**.

Advanced Lookup

The Advanced Lookup lets you search for many different programs in different categories; you may place different terms in all the fields if necessary to narrow down your search.

1. Click to select the radio button next to **Advanced Lookup**.

2. Enter keywords in the **Look for** field next to **Program Name**, **Payout Method**, **Program Description** and **URL** to narrow your search.

3. Click **Lookup**.

4. Highlight the program you wish to modify.

5. Click **Modify**.

Tracker Status

Choose **Active** or **Inactive** for the tracker status.

Modify Trackers

To modify an existing Tracker:

1. Choose the tracker to modify from either the **Trackers Lookup** element or the **Current Trackers** element.

2. Click **Modify**.

3. Make appropriate changes to the tracker in the **Modify Tracker Options** and **Modify Marketing Material Options** elements.

4. Choose the appropriate status for the tracker from the **Tracker Status** element.

5. Click **Save** or **Save and Generate Code**.

Element Descriptions

Current Trackers

The **Current Trackers** element provides you with a list of all current active trackers. You may choose a tracker from this list to edit.

Tracker Search

Use the **Tracker Search** element to locate the tracker that you wish to edit.

Modify Tracker Options

Make any necessary changes to the Tracker Options.

Modify Marketing Material Options

Make any necessary changes to the Marketing Material Options for the tracker.

Modify Program Options

Make any necessary changes to the Program Options for the tracker.

Tracker Status

Choose Active or Inactive for the tracker status.

Page Views

Create Additional Page View

To create an additional page view:

1. Enter the name in the **Additional Page View Name** field.

2. Locate the program to associate the additional page view with in the **Program Lookup** element.

3. Choose the appropriate status in the **New Additional Page View Status** element.

4. Click **Save** or **Save & Generate Code**.

Element Descriptions

Program Lookup

Simple Lookup

The Simple Lookup allows you to search for a program across many categories at one time.

1. Click to select the radio button next to **Simple Lookup**.

2. Enter a keyword in the **Look for** field, or leave it blank to return all results.

3. Select from the drop-down menu one of the following:

   - Program Name
   - Payout Method
   - Program Description
   - URL

4. Click **Lookup**.

5. Highlight the program you wish to modify.

6. Click **Modify**.

Advanced Lookup

The Advanced Lookup lets you search for many different programs in different categories; you may place different terms in all the fields if necessary to narrow down your search.

1. Click to select the radio button next to **Advanced Lookup**.

2. Enter keywords in the **Look for** field next to **Program Name**, **Payout Method**, **Program Description** and **URL** to narrow your search.

3. Click **Lookup**.

4. Highlight the program you wish to modify.

5. Click **Modify**.

New Additional Page View Status

Modify Additional Page View

To modify an existing additional page view:

1. Select the Additional Page View from the **Additional Page Views** element on the right or use the **Additional Page View Lookup** element to locate the appropriate item.

2. Click **Modify**.

3. You may edit the name in the **Modify Page View Details** element.

4. Make any necessary changes to the program in the **Program Lookup** element.

5. Adjust the status in the **Additional Page View Status** element.

6. Click **Save** or **Save & Generate Code**.

Element Descriptions

Program Lookup

Simple Lookup

The Simple Lookup allows you to search for a program across many categories at one time.

1. Click to select the radio button next to **Simple Lookup**.
2. Enter a keyword in the **Look for** field, or leave it blank to return all results.
3. Select from the drop-down menu one of the following:
    - Program Name
    - Payout Method
    - Program Description
    - URL
4. Click **Lookup**.
5. Highlight the program you wish to modify.
6. Click **Modify**.

Advanced Lookup

The Advanced Lookup lets you search for many different programs in different categories; you may place different terms in all the fields if necessary to narrow down your search.

1. Click to select the radio button next to **Advanced Lookup**.
2. Enter keywords in the **Look for** field next to **Program Name**, **Payout Method**, **Program Description** and **URL** to narrow your search.
3. Click **Lookup**.
4. Highlight the program you wish to modify.
5. Click **Modify**.