Affiliate Manual

-For Version 9.3-
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1. Affiliate Module

Users can register as an affiliate to earn money from the website. Affiliate users need to share the affiliate URL through which buyers can register themselves. Further, if the buyer has registered on the website and is purchasing through the affiliate URL, then the respective affiliate will get virtual credits to their wallet as per the settings defined by the admin through the admin console.

1.1 Registration

Users can register as an affiliate by clicking on the ‘Affiliates’ link provided in the footer of the website’s homepage.

Upon clicking the link, the user will be redirected to the ‘Affiliate Registration’ page (Figure 1.1.2). On the registration page, the user needs to fill the multi-tab signup form to create an affiliate account.

**NB:** Nota Bene [Note Well] (N.B., N.b., n.b or NB, Nb, nb) is a Latin phrase, meaning ‘note well’ or ‘take notice’ or ‘please note’. Asterisk (*) next to a form control's label indicates it as 'required'.
A. **Personal Details tab**: As shown in figure 1.1.2, the user must:

- **Username**: Enter the username to be used.
- **Email**: Enter their email address.
- **Name**: Enter their name.
- **Phone**: Enter their contact number.
- **Password**: Setup their password.
- **Confirm Password**: Re-enter their password to confirm.

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*‘I Agree To The Terms & Conditions’ Check-box:* Select the check-box to agree to the terms and conditions.

The user must click on the ‘Register’ button to proceed further with the registration process.

**B. Company Details tab:** As shown in figure 1.1.3, the user must:

- **Company:** Enter their company name.
- **Website:** Enter their website name.
- **Address Line 1***: Enter their personal address.
- **Address Line 2:** Enter their personal address.
- **Country***: Select the residential country.
- **State***: Select their residential state.
- **City:** Select their residential city.
- **Postal Code***: Enter their postal code.

The user must click on the ‘Register’ button to proceed further with the registration process.

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C. **Payment Information tab**: As shown in figure 1.1.4 (a), the user must:

- **Tax ID**: Enter their tax id.
- **Payment Method**: Select the payment method they wish to add.
  
  i. **Cheque**: As shown in figure 1.1.4 (a), the user will need to enter their 'Cheque Payee Method' to add this payment method.

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ii. Bank: As shown in figure 1.1.4 (b), the user will need to enter:
   ➔ Bank Name: The name of the bank in which they have their account.
   ➔ Account Holder Name: The name of account holder.
   ➔ Bank Account Number: The account number of the user.
   ➔ Swift Code: The swift code of the account.
   ➔ Bank Address: The address of the branch in which the user has their bank account.

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iii. **Paypal:** As shown in figure 1.1.4 (c), the user will need to enter their ‘Paypal Email Account’ when selecting this payment method.

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The user must click on the ‘Register’ button to proceed further with the registration process.

D. **Confirmation tab:** As shown in figure 1.1.5, a confirmation message is displayed which also requests the user to verify their email address and only then proceed with login.

![Confirmation tab in Affiliate Registration Form](image)

**NB:** If the admin has activated 'Request Approval' from their end, the registration request of the user as an affiliate will be forwarded. The user will only be able to access their account after admin approval.

1.2 **Login**

The system contains a single login form for all the users including affiliate users. Upon clicking the Sign In option from the top navigation bar, a login

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popup window will be displayed as shown in figure 1.2.1. The affiliate user can login to the system here.

![Login Form]

Fig. 1.2.1: Login Form

2. Dashboard

After successful login, the affiliate will be redirected to Dashboard as shown in figure 2.1. The various sections of this page are elaborated in further sub-modules.

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The top navigation bar includes several icons:

- **User Icon 🔄**: Clicking on this icon, the affiliate will be provided with two buttons as shown in figure 2.2. Clicking on ‘Hi, XYZ’ will navigate the affiliate to ‘My Account’ module. Clicking on the ‘Logout’ button will log the affiliate out of their account.

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• **Messages**: This is a shortcut button to access the messaging module. This icon will also display the count of unread messages. Clicking on this button will redirect the affiliate to the ‘Messages’ page as shown in figure 2.3.

![My Messages](image_url)

**Fig. 2.3: ‘My Messages’ Page**

• **Home Icon**: Clicking on this icon will redirect the affiliate to the front-end of the website in a new tab.

• **Dashboard**: Clicking on this icon will redirect the affiliate to Dashboard. Each time the affiliate logs in, they will see the Dashboard as their homepage.

The other sections of dashboard are:

• **Credits**: Total credits earned and the credits earned on current date (in default currency). Clicking on this section will redirect the affiliate to ‘My Credits’ page.

• **Revenue**: Total revenue earned over affiliate user’s timeline and total revenue earned on current date (in default currency). Clicking on this section will redirect the affiliate to ‘My Credits’ page.

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• **Sharing Links:** On the Dashboard area, the Affiliate user can share the Affiliate link by the following methods (refer figure 2.4):
  
  ➔ Copy the invitation link and share the URL.
  ➔ Share the invitation link on Facebook /Email.

![Share And Earn Commission On Every Purchase](image)

![Share On Facebook](image)

![Share On Email](image)

Fig. 2.4: Share The Invitation Link on Various Platforms

• **Referred By Me:** This section displays the list of users that registered on the website using the link shared by respective affiliate. These users will be assigned as the users of respective affiliates. The affiliate will earn commissions for their registration and purchases made through the website. Clicking on 'View All' will redirect the affiliate to ‘My Referral’ page.

**NB:** The commission amount the affiliate will earn for registrations and on purchases are admin-manageable.

• **Transaction History:** The list of latest transaction details made by the affiliate using their wallet will be displayed in this section. Clicking on this section will redirect the affiliate to ‘My Credits’ page.

3. Navigation Menu

3.1 My Referral

This page shows the list of all the users who have registered through the respective affiliate's URL.

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As shown in figure 3.1.1, a search bar is provided on the top of this page along with a few search filters, using which the affiliate can search a particular referral by mentioning their name or email, their status or status of their email verification step.

3.2 My Account

It includes three different tabs.

In the first tab which is ‘My Account’ the affiliate can add or edit their basic details. The affiliate cannot make all the changes repeatedly. Fields such as Username, Email ID, phone number and date of birth cannot be changed once entered. As shown in figure 3.2.1, the affiliate can add and modify following fields:

- **Profile Photo**: Upload/change their profile picture by clicking on the ‘Upload’ button provided below user icon.
- **Full Name**: Enter/modify their full name.
- **Company**: Enter company name.
- **Website**: Enter website name.
- **Address Line 1**: Enter their complete address.

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- **Address Line 2**: Enter their complete address.
- **Country***: Enter the city in which they are located.
- **State***: Enter the state in which they are located.
- **City**: Mention the name of the city in which they are located.
- **Postal Code***: Enter their postal code.

The seller must then click on the “Save Changes” button provided below to save the made changes.

As per the guidelines of **GDPR (General Data Protection Regulation)**, every user has the right to protect their data by collecting, storing, altering,

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erasing or restricting it. Following these guidelines, two buttons are provided for this seller on the top-right corner of ‘My Accounts’ page. They are:

- **Request to Remove My Data**: The affiliate can raise a request to the admin to remove their personal data. When the affiliate clicks on this button, a ‘Truncate Request’ pop-message will appear as shown in figure 3.2.2. The affiliate can click on ‘Yes’ to proceed and ‘Cancel’ to go back.

  ![Fig. 3.2.2: Truncate Request](image)

- **Request My Data**: The affiliate can raise a request to the admin to share their account information. When the affiliate clicks on this button, a pop-up ‘Request Data’ form will appear. The affiliate must enter the reason for making such a request under the ‘Purpose of Request Data’ text-box. To understand the policies of GDPR, the affiliate can click on the hyperlink provided with the message ‘Click Here to Read the Policies of GDPR’. The affiliate must click on the ‘Send Request’ button to submit the request.

The second tab is the ‘Payment Info’ tab. In this tab, the affiliate can save their payment related information. These details will be accessed by the Admin in order to make any transactions to their users when they place ‘Withdrawal Requests’.

As shown in figure 3.2.3 (a), the affiliate must choose a particular payment method among:

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- **Cheque**: As shown in figure 3.2.3 (a), the affiliate will need to enter their ‘Tax ID’ and ‘Cheque Payee Method’ to add this payment method.

![Fig. 3.2.3 (a): Selecting ‘Cheque’ in Payment Information tab](image)

- **Bank**: As shown in figure 3.2.3 (b), the affiliate will need to enter:
  - **Tax ID**: Their tax id.
  - **Bank Name**: The name of the bank in which they have their account.
  - **Account Holder Name**: The name of account holder.
  - **Bank Account Number**: The account number of the user.
  - **Swift Code**: The swift code of the account.
  - **Bank Address**: The address of the branch in which the user has their bank account.

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Fig. 3.2.3 (b): Selecting ‘Bank’ in Payment Information tab

- **Paypal**: As shown in figure 3.2.3 (c), the user will need to enter their ‘Tax ID’ and ‘Paypal Email Account’ when selecting this payment method.

Fig. 3.2.3 (c): Payment Information tab in Affiliate Registration Form

The third is ‘PayPal Payout’ details tab (Figure 3.2.4). This tab is highly useful to the Admin since it makes it easy to transfer money to advertisers when

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they place ‘Withdrawal Requests’. It provides the advantage of making virtual transactions directly from within the portal. The process to be followed is also simpler. The affiliate must enter the details of their PayPal account by providing:

- **Email Id**: Enter their valid email id.
- **Paypal Id**: Enter their Paypal Id in this input field.

![Fig. 3.2.4: PayPal Payout](image)

### 3.3 My Credits

List of all the transactions will be displayed on this page. As shown in figure 3.3.1, a search bar is provided above the list using which the affiliate can search for a particular transaction by mentioning keywords, types of transactions or certain time period in the provided filters.

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The top section of this page displays the total balance available in the affiliate's wallet. The affiliate can withdraw their money and transfer it to their personal accounts from this section. To do so, the affiliate must select a payment method of choice from the drop-down list and click on the 'Withdraw' button.

1. If the advertiser chooses the 'Bank Payout' method from the drop-down and clicks on 'Withdraw' button, a 'Request Withdrawal' form will appear as shown in figure 3.3.2. The advertiser must:
   - **Amount to be Withdrawn [Default Currency]**: Enter the amount to be withdrawn.
   - **Payment Method**: Select the payment method from options provided:
     - **Cheque**: Enter details like 'Cheque Payee Name'.

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→ **Bank:** Enter the complete bank account details.
→ **Paypal:** Enter the Paypal account details like ‘Paypal Email Account’.

![Request Withdrawal Form](image)

**Fig. 3.3.2: Request Withdrawal Form for ‘Bank Payout’**

The affiliate must click on the ‘Request’ button to place the request. A ‘Withdrawal Request’ will be forwarded to the admin on approving which the affiliate will receive their money through selected payment modes (Cheque, Bank Account or PayPal).

### 3.4 Update Credentials

An affiliate can update their email address, password and phone number from this section.

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**NB:** Affiliate will need to verify their new email address for changes to take effect in the system. Additionally, to update their new phone number, the affiliate will need to enter the OTP that will be forwarded to the previous contact number.

![Update Credentials](image)

**Fig. 3.4.1: Update Credentials**

### 4. Language & Currency

An affiliate can change the language and currency settings from this section.

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Asterisk (*) next to a form control's label indicates it as 'required.'
Clicking on the icon the affiliate can change default language to be used at both, front-end and back-end. Clicking on the icon the affiliate can change the default currency to be used at both, front-end and back-end.

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