

Start Guide

This quick start guide will help you get up and running with Refersion. You'll be up and running in no time!

Refersion helps you track your affiliate sales and calculate the corresponding commissions. Depending on your plan, there are a multiple ways to track affiliate orders: using **affiliate links** or **conversion triggers**.

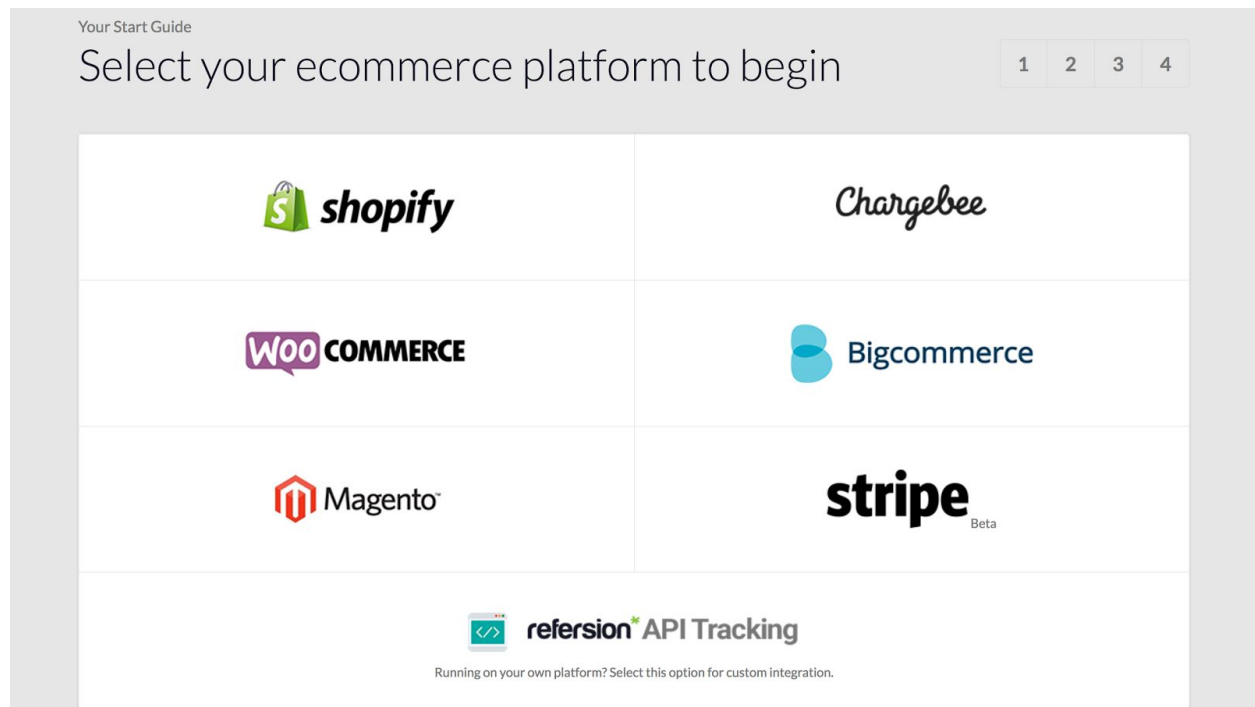
Affiliate links is the most common way to track affiliate orders: a visitor clicks on a link being promoted by an affiliate, and if they make a purchase within a certain time period (also known as the **cookie day period**) the affiliate will be credited for the sale.

There are three types of **Conversion Triggers** that offer additional ways to track affiliate orders. Affiliates can have unique **coupon codes** that are associated to them, they can have **customer emails** associated to their account, or use **SKU Triggers** to be credited when specific products are purchased.

This guide will walk you through the first steps to get your affiliate program up and running!

First, Connect Your Online Shop!

After registering for Refersion and installing the Refersion Magento Connector, choose Magento and follow the Getting Started guide. If you are having any issues, please [get in touch!](#)



Then customize your site branding

Add your brand's name and logo. They'll be used in emails to affiliates, the affiliate registration page, and your Refersion dashboard

Customize your site branding

1

2

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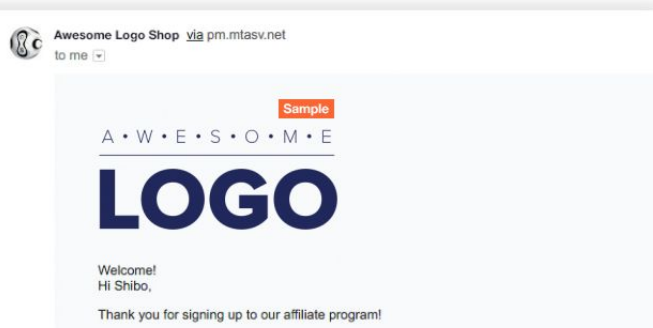
4

What is your Brand Name?

Your shop's name and logo will be used in emails to affiliates, the affiliate registration page and your Refersion dashboard.

Upload your brand Logo

Logo will be proportionally resized to 250 x 100 px.



Did you know...

You can rerun this checklist later to make changes or update content.



And how your commission should be calculated.

Add your store's domain. This is where your affiliates should be directing their customers, and should be your **top level domain**, not your ecommerce store (e.g. <http://yourbrand.com>)

Next up is deciding what the commission total should include. Most merchants choose not to include shipping and tax in the commission total, and to subtract any discounts. Also choose if your tax is included in the price of your products (typical of non-US shops). Choosing YES will discount the VAT amount from the total before calculating commission percentages.

Finally, be sure to select your currency! We support multiple currencies, a full list can be found [here](#).

Adjust your shop settings



Your store's URL

This is the domain where your affiliates should send customers to buy. If you want to setup more than one domain on this account, please get in touch with us after.

What should your commission total include?

Shipping and handling

Tax

Discounts (Subtract)

Does your product pricing include tax (e.g., VAT)?

In which currency do customers purchase?

We will use this currency to display all of the metrics on your dashboard.

Example Commission Calculation:

Item 1	5.99
Shipping & Handling	1.87
Tax	0.89
Discounts	-1.98
Total	4.01
5% Commission	2.99

Set Your Commission Offers

Create your first offer! Name your offer (only visible to you) and set the commission type and amount. Remember that you can have different offers for different affiliates, and you can always edit this later. Refersion support three types of offers:

- **Percent of Sale:** most common, calculates a percentage of sale to credit the affiliate
- **Flat Rate:** credit the affiliate a set amount either per order or per item (per order or per item can be set later from the Offers page)
- **Tiered Commission:** not available on this page, but can be set later from the Offers page

You can also show **advanced settings** and enter offer terms and the cookie day period. We *highly* recommend you complete the offer terms section and provide more detail about your offer.

Your Start Guide

Set your affiliate commission offer

✓ ✓ 3 4

Name your offer

Refersion Offer

Offers detail commission structure and terms for affiliates. One offer can have multiple affiliates registered and you can have unlimited offers.

What type of commission? **Percentage amount** **Automatically approve commissions?**

Percent of Sale 20 No

+ Show me the advanced settings

Get Fancy With Your Registration Page

Saving the best for last! Customize your affiliate registration page by choosing text, link, and background colors that best suit your brand.

Design your affiliate registration page



Customize colors of your public affiliate registration page.

Your public registration page is where users can register for your program to become an affiliate. You can also embed this page within your web site. It is a good idea to customize the colors on this page so that it fits better with your brand. You'll see a preview below as you change colors automatically.

Text Color Link Color Background Form Background

Preview ↓

refersion*

Already registered? [Login](#)

Program Application		Commission & Business Details	
First Name *	Last Name *	Conversion action	Online purchase with processed valid payment
<input type="text"/>	<input type="text"/>	Cookie days	60 day(s)
Email *	<input type="text"/>	Commission type	Percent of Sale
Password *	<input type="password"/>	Base commission	20.00%
.....		Additional terms	For each month your referral

That's it! You're ready to start using Refersion!

What's Next:

- [Run a test order](#)
- [Recruit affiliates!](#) (YouTube) See some tips & tricks for getting affiliates to signup to your affiliate program
- [Embed](#) the registration into your site