

Start Guide

This page will help you get started 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.

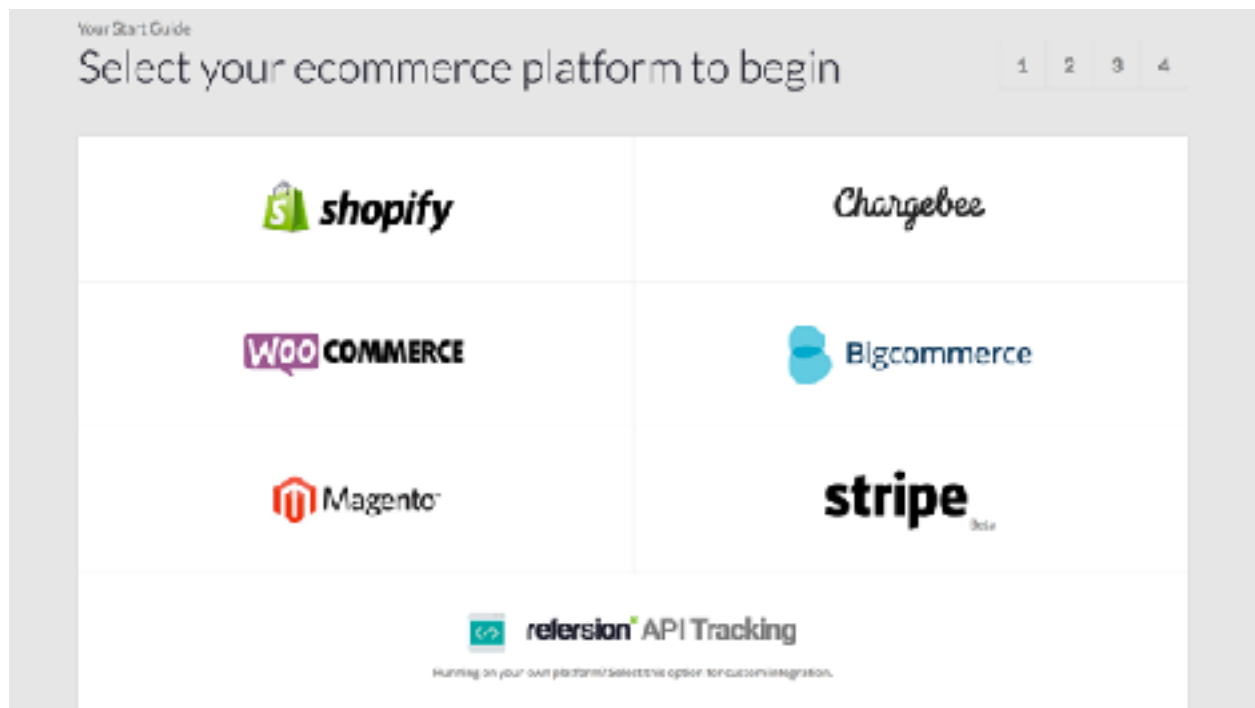
There are three types of **Conversion Triggers** that offer additional ways to track affiliate orders. Affiliates can have unique **coupon codes** that are associated to them, they can have **customer emails** associated to their account, or use **SKU Triggers** to be credited when specific products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

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

If you prefer learning by watching, check out this video on youtube: <https://www.youtube.com/watch?v=mAQUjP3nUTc&feature=youtu.be>

First, Connect Your Online Shop!

After registering for Refersion, choose your eCommerce platform and connect the Refersion app. We have integrations with many of the big eCommerce platforms, making integration a breeze. If you are having any issues, please [get in touch!](#)

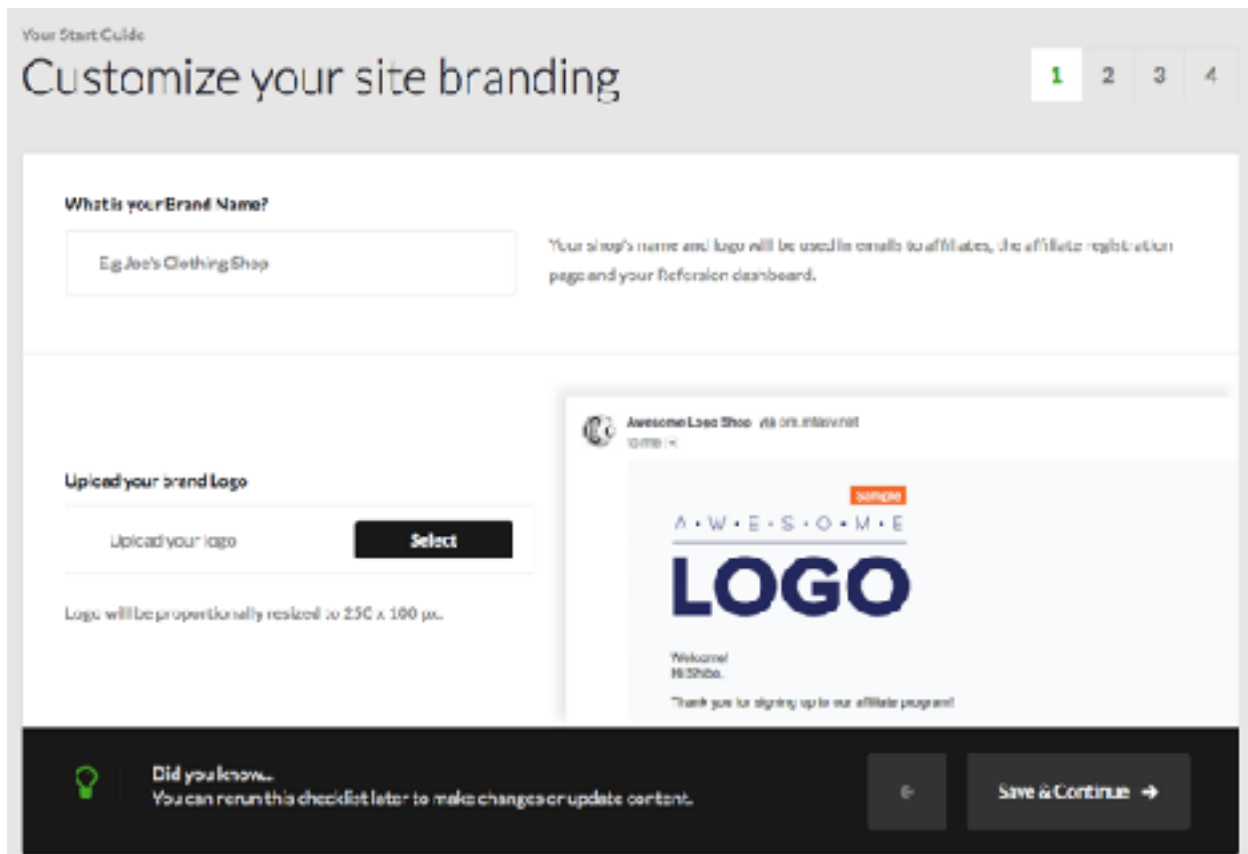


Detailed guides for each platform can be found below:

- **Shopify**
- [WooCommerce](#)
- [Chargebee](#)
- [Stripe](#)
- [Bigcommerce](#)
- [Magento](#)

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



The screenshot shows a web interface titled "Your Start Guide" with a sub-header "Customize your site branding". A progress indicator at the top right shows steps 1, 2, 3, and 4, with step 1 highlighted. The main form is divided into two sections. The first section, "What is your Brand Name?", has a text input field containing "Eg.Joe's Clothing Shop" and a note: "Your shop's name and logo will be used in emails to affiliates, the affiliate registration page and your Refersion dashboard." The second section, "Upload your brand logo", features an "Upload your logo" button and a "Select" button. Below this, it states "Logo will be proportionally resized to 250 x 100 px.". To the right, a preview of the branding shows a logo for "Awesome Leo Shoe" with the text "A · W · E · S · O · M · E" and "LOGO" in large blue letters. Below the preview, it says "Welcome! Hi Shiba. Thank you for signing up to our affiliate program!". At the bottom, a dark bar contains a lightbulb icon, the text "Did you know... You can rerun this checklist later to make changes or update content.", a back arrow, and a "Save & Continue" button with a right arrow.

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](#).

Your Store Guide

Adjust your shop settings

2 3 4

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	0.87
Tax	0.89
Discounts	-1.96
Total	4.81
% Commission	3.99

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.

The screenshot shows a web interface for setting an affiliate commission offer. At the top left, it says 'Your Start Guide'. The main heading is 'Set your affiliate commission offer'. In the top right corner, there are four progress indicators: two green checkmarks, a '3' in a white box, and a '4' in a grey box. The form is divided into sections. The first section is 'Name your offer', with a text input field containing 'Refersion Offer' and a small explanatory text: 'Offers detail commission structure and terms for affiliates. One offer can have multiple affiliates registered and you can have unlimited offers.' The second section has three columns: 'What type of commission?' with a dropdown menu set to 'Percent of Sale', 'Percentage amount' with a text input field set to '20', and 'Automatically approve commissions?' with a dropdown menu set to 'No'. At the bottom, there is a button with a green plus icon and the text '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.

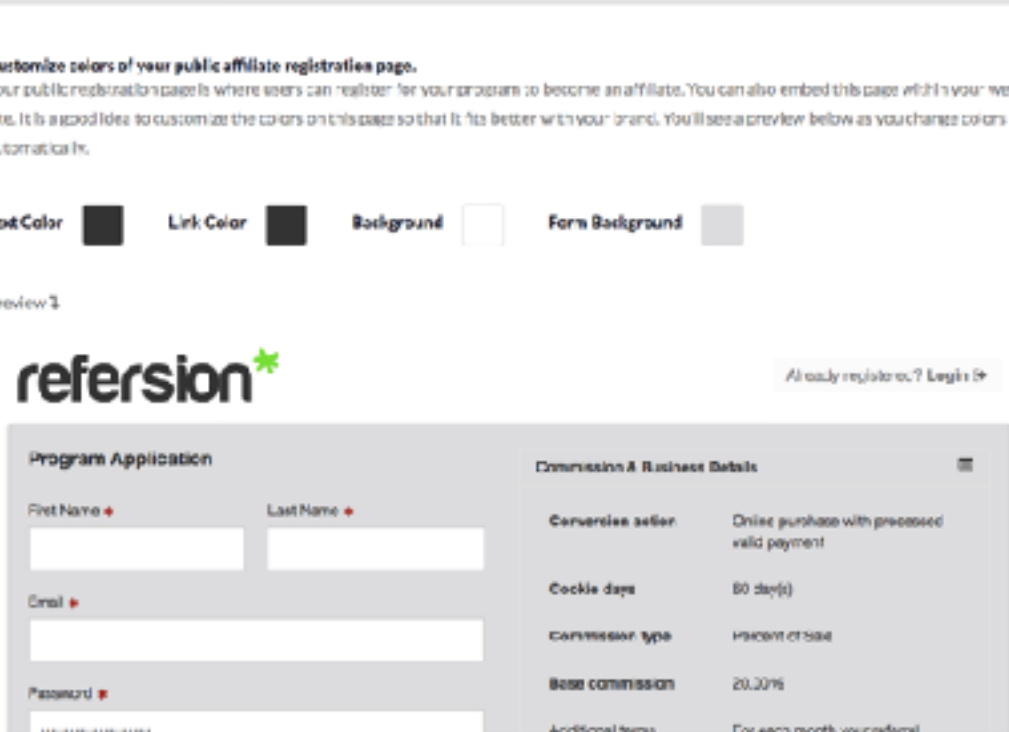
Your Start Guide

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



Commission & Business Details	
Conversion action	Direct purchase with processed valid payment
Cookie days	90 day(s)
commission type	Percent of sale
Base commission	20.00%
Additional terms	For each month your referral

That's it! You're ready to start using Refersion! If you're having any issues or have questions, please email us at helpme@refersion.com

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