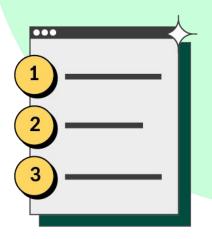


# Introduction to Impact

Everything you need to know to start using Impact.



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#### Introduction

Shopify uses Impact to maintain and grow our affiliate program. Impact allows us to easily provide affiliates with the tools they need to refer new merchants to Shopify.

In this guide, we'll review how to get started with Impact as well as some of the most frequently asked questions new affiliates have.

Don't see your question answered here? Check out the Impact <u>Help Center</u> for additional resources, or submit a ticket to the Impact team by logging into your account and selecting the "Help" button in the bottom right corner of your Dashboard.

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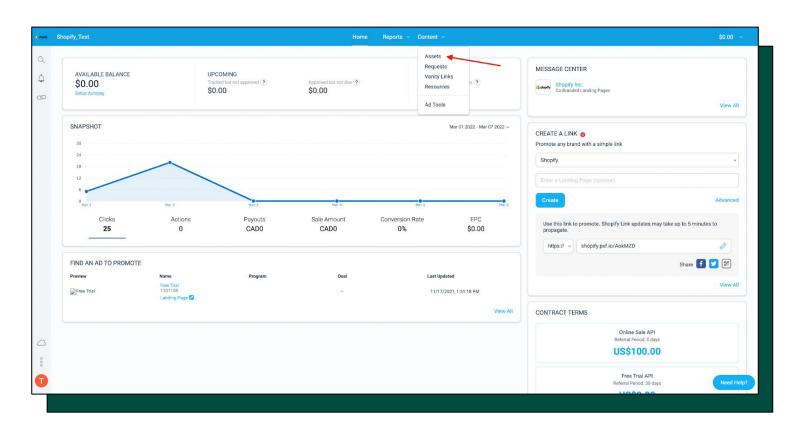
## **Getting Started**

Once you've <u>applied</u> and been approved to join Shopify's affiliate program, you'll receive an acceptance email containing next steps.

First, log into your <u>Impact account</u> using the same username and password you used to submit your application.

Upon logging into your account, you will land on the Impact home screen - otherwise known as your Dashboard. For a full overview of the Impact user interface, click <u>here</u>.

From your Dashboard, select Content from the navigation bar at the top then click Assets.

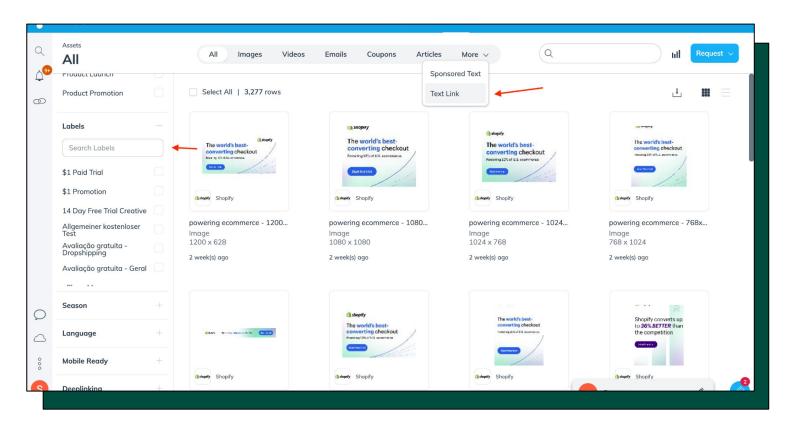


03

## **Using Shopify Referral Assets**

Upon landing on the assets page, you'll be shown a variety of referral URLs and creative assets that have been uploaded by our team. Each of these referral assets has been tested to ensure they drive strong conversion value. We highly recommend using a Shopify provided asset when creating new content for your audience.

Filter by label to sort through the thousands of creative assets and referral URLs we offer. Label definitions can be found on the next page.



#### ? Referral URL Labels and Definitions:

Label	Definition
General Free Trial	Landers that are not specific to any one kind of merchant.
Dropshipping Free Trial	Landers specifically for leads interested in Dropshipping.
Makers Free Trial	Landers for leads interested in making their own products.
Print on Demand Free Trial	Landers for prospective merchants interested starting a Print on Demand business.
Point of Sale Free Trial	Landers specifically for leads interested in Shopify Point of Sale.
Pricing Free Trial	Free trial lander featuring information on Shopify plans and pricing.
Free Tools	Free tools to help new merchants get started. These landers should not be used to capture free trial sign-ups.
Migrate	Landers that help new merchants migrate from another platform to Shopify.

## ② Creative Asset Labels and Definitions:

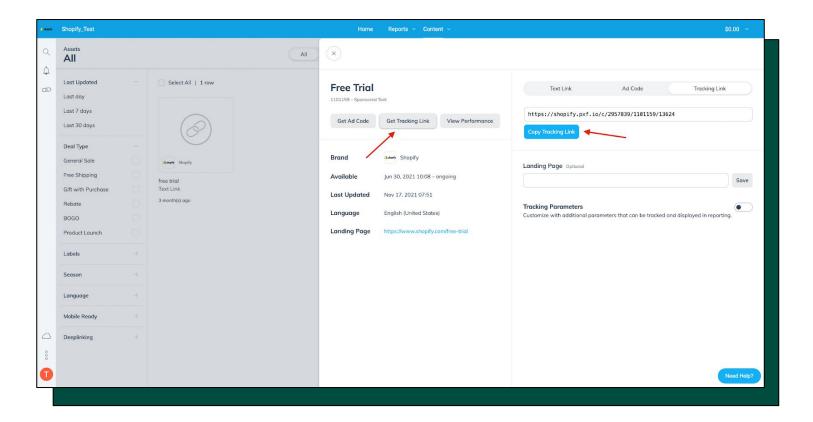
Label	Definition
POS	Creative assets to help you promote Shopify Point of Sale.
Makers Creative	Creative assets designed to appeal to merchants who make their own products.
<b>DropShipping Creative</b>	Creative assets for merchants interested in DropShipping.
Start Your Online Store Creative	General Shopify branded creative assets.
\$1 Paid Trial	Assets designed to help you promote Shopify's 3 month paid trial.
<b>Bookings Products</b>	Creative assets designed to help you attract merchants interested in building a bookings business on Shopify.
Digital Products	Assets designed to attract merchants who are interested in selling digital products on Shopify.
Shopify Logos	Shopify logos in various different formats and styles.
Subscriptions Products	Assets designed to attract merchants who are interested in selling subscription products on Shopify.

Once you've chosen an asset, select Get Ad Code if you would like to add the link to your website using HTML or Iframe. If you prefer to link directly, select Get Tracking Link then click Copy.

\*Pro tip: be sure to grab the referral URL specific to your country. Using a referral URL in your native language will increase your conversion rate.

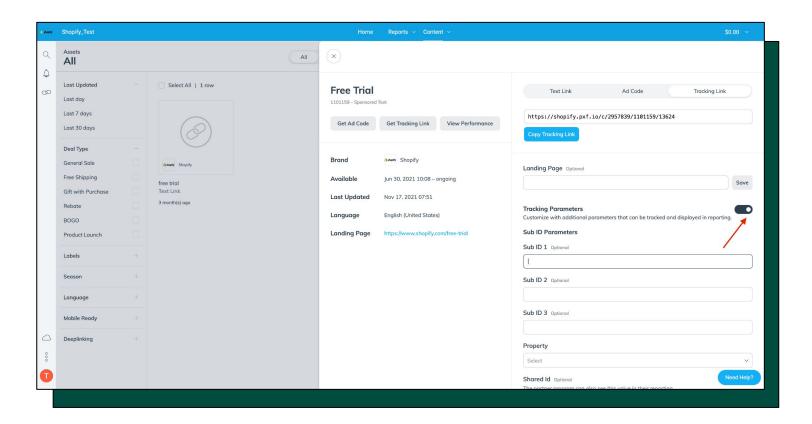


The code or link you copy is unique to your Impact account; all referrals submitted using this link will be attributed back to you.



If you if you plan to use the same referral link in several different places, be sure to add Sub IDs to track the performance of each individual placement. The performance of each placement can be viewed by Sub ID's when reviewing reports in Impact. To do this, toggle on Tracking Parameters when copying an existing asset's tracking link or code. For more information on Sub IDs, click <a href="here">here</a>.

See our <u>Impact Reporting guide</u> for more information on reports.

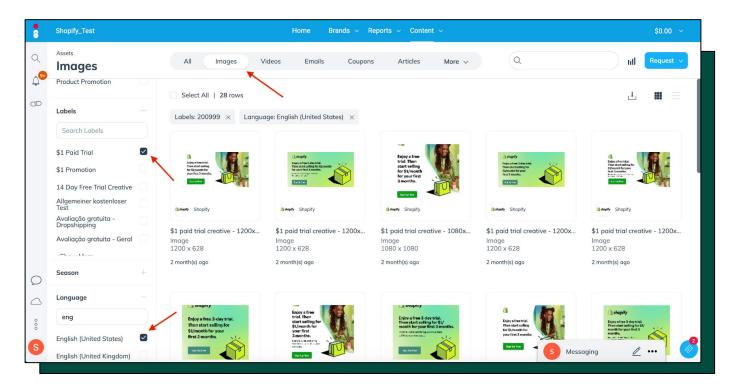


#### **Using Shopify Branded Creative Assets:**

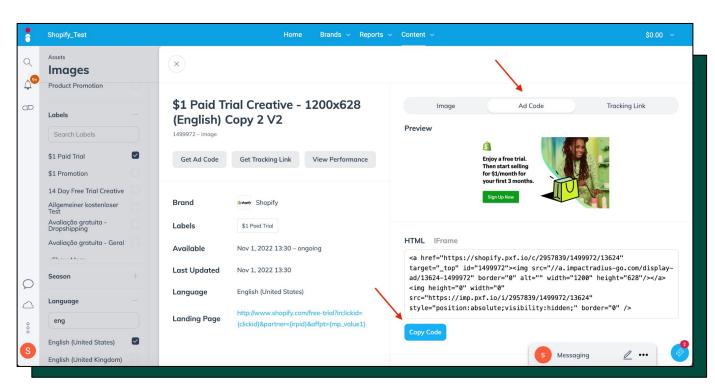
In addition to referral links, you also have access to a library of custom creative which has been designed and tested by our team. To ensure you make the most of our creative assets, follow these steps. From the **Assets screen**:

- 1. Click on **Images** from the navigation bar at the top.
- 2. To narrow down your search, **filter by label and language**.
- 3. Once you've found an asset you'd like to use, click into it and select **Ad Code** from the navigation bar.
- Then, copy and paste the HTML to your site. Using the HTML code will allow you to capture impressions data. This data can be seen in the <u>Shopify Advanced Action</u> <u>Listing</u> report of Impact and used to help you optimize your referral strategy.
- 5. That's it! No need to copy over a tracking link, the HTML you embedded to your site already has this within it.
- If you can't use the HTML code, simply select an asset, click **Image**, then hit **Download**.
- Once you've uploaded the file to your content, return to Impact to copy and paste the tracking link featured on the same screen where you downloaded the file. Embed this link within your image.
- Image files downloaded from Impact do not contain impressions tracking code. This data will not be accessible unless you deploy the HTML code directly to your content.

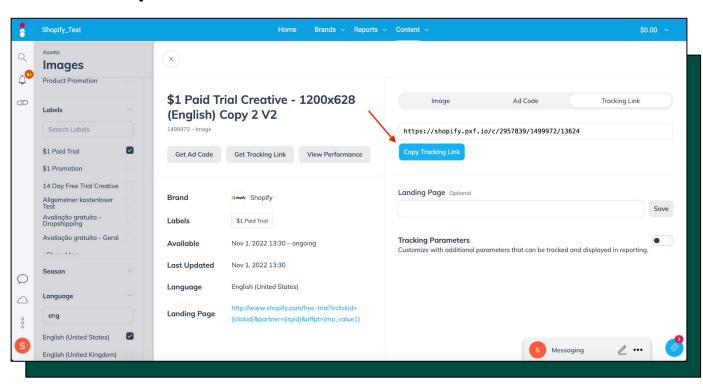
#### Step 1



#### Step 2



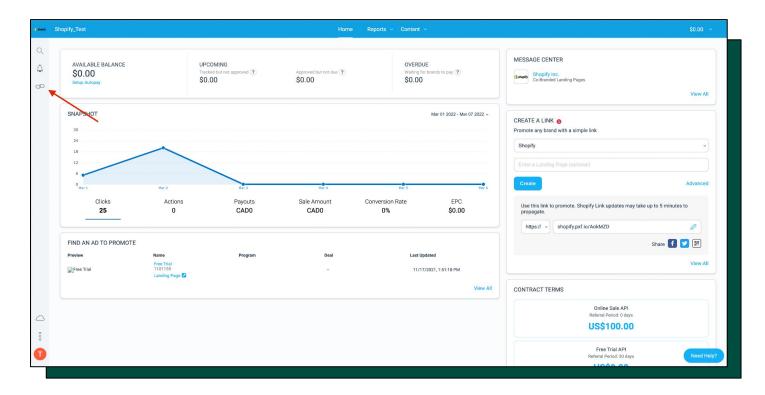
#### Step 3



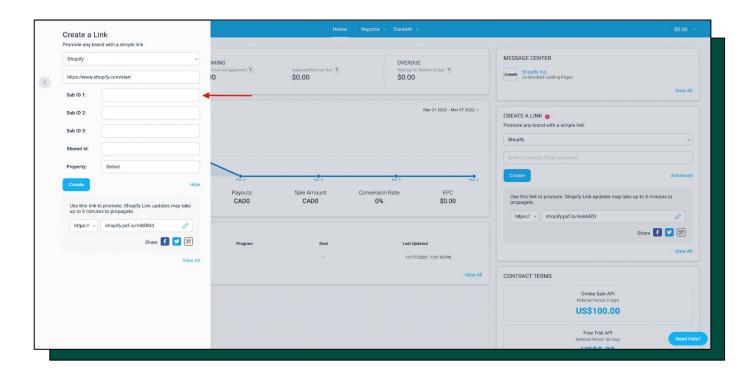
(04)

## **Creating Your Own Referral Assets**

To create your own asset, click the Link icon on the left hand side of your dashboard. If desired, enter a specific landing page URL and select create. If you do not specify a lander URL, your referral link will automatically direct traffic to the <a href="Shopify Free Trial">Shopify Free Trial</a> page.



If you want to share the same referral link in several different places, be sure to add Sub IDs to track the performance of each individual placement. Sub ID's allow you to see the performance of each placement when reviewing reports in Impact. To do this, select Advanced when creating a link.



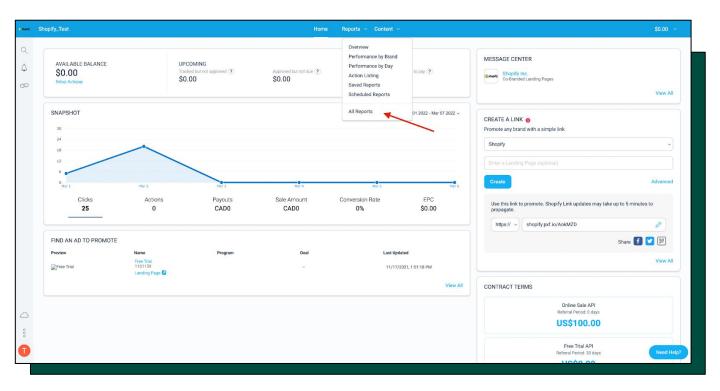
Enter your desired Sub IDs and click create. For more information on Sub IDs, click <a href="here">here</a>.

When applicable, be sure to grab both a referral URL and creative assets before you start promoting. Using Shopify branded creative assets will help to build a cohesive user experience for your audience. Test out various different assets and landers to figure out what resonates best with your audience.

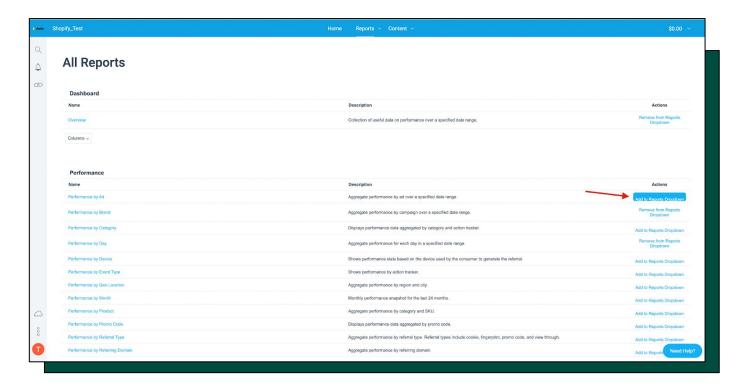
If your content medium does not support both creative assets and a referral URL, feel free to use whichever makes more sense. 05

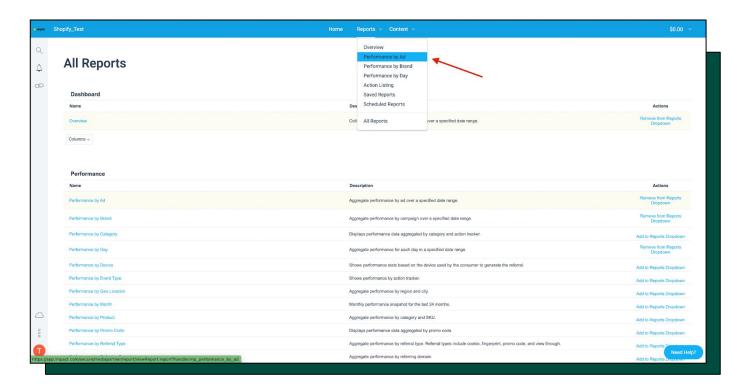
## Reporting 101

Impact allows partners to track their performance based on a range of different data points. To view all available reports, select Reports from the navigation at the top then click All Reports.



For easy access, try saving the reports you review the most. When you do, they'll appear in the drop down menu of the reports tab on the navigation bar.





#### ?

#### **Helpful Reporting Definitions:**

Term	Definition
Clicks	The number of outbound clicks on any asset.
Actions	The number of leads and sales driven.
Action Earnings	Commission earned for qualified leads and sales.
Action Tracker - Free Trial API	A Free Trial that has been submitted.
Action Tracker - Paid Trial API	A Paid Trial that has been submitted.

Term	Definition
Action Tracker - Online Sale API	A Paid Trial which has converted to a <u>full priced</u> plan.
Action Status - Pending	A referral or sale that has not yet met approval criteria and is pending commission.
Action Status - Approved	A referral that has been approved and is considered commissionable.
Action Status - Reversed	An approved referral or sale that has been deemed ineligible for commission and as a result the action status has been reversed.

#### Suggested Reports:

- Overview is the high-level report that summarizes the main performance metrics of your account.
- <u>Performance by Ad</u> shows your aggregate performance for an asset over a specified date range.
- <u>Performance by Month</u>\* shows a monthly performance snapshot for the past 24 months. You can select metrics like Free Trial, Paid Trial, and Online Sale.
- <u>Performance by Day</u>\* shows daily performance snapshot for a selected timeframe. You can select metrics like <u>Free Trial</u>, <u>Paid Trial</u>, and <u>Online Sale</u>.

<sup>\*</sup>These reports will not appear in your standard "All Reports" view, to locate them, scroll to the bottom of the "All Reports" page view and select "Custom Reports".

- Advanced Action Listing shows additional data and intricate per-action data not available in the standard Action Listing report.
- <u>Performance by SubID</u> shows your aggregate performance of your tracking links that have Sub IDs.

For a full list of reports and their definitions, click <a href="here">here</a>.

To make things even easier, schedule a daily or weekly report.

Simply click the email icon in the top left corner of your report.

Select your send frequency, recipients, and choose your desired file type. More details on scheduling reports can be found <a href="here">here</a>.

\*Pro tip: working with a team? Include multiple emails in your scheduled report to keep everyone on the same page and to stay on top of your performance.



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## **Getting Paid**



#### **Commission Timeline**

Learn about the key milestones and criteria required to earn commission for your referrals. The flowchart below will give you an overview of the stages each referral must move through in order to be eligible for commission.



#### STEP 1

#### Free Trial Sign Up

A referral signs up for a free trial. Currently Shopify offers a 3 day free trial, however this is subject to change. Review our <u>pricing page</u> to see our latest offer.



#### STEP 2

#### \$1 Paid Trial

After the free trial period has ended, the referral then enters the paid trial period. Currently, the paid trial period is 1 month long, and requires merchants to pay \$1. Review our <u>pricing page</u> to see our latest offer.



#### STEP 3

#### **Full Price Plan Selection**

After the paid trial period has ended, a referral must then select a full price Shopify plan: Basic, Shopify, or Advanced. At this point, your referral is now considered eligible for commission.



#### STEP 4

#### **Locking period**

After selecting a full price plan within a given month, the referral is then subject to a 21 day locking period during the following month. During this time, the Impact team reviews each referral to ensure they have met the criteria required to be eligible for commission.



#### STEP 5

#### **Payment**

Upon exiting the locking period, your referral is then eligible for payment. Payments are issued 1 day after the locking period has ended and can be withdrawn via your Impact account. For more information on how to withdraw earnings, see our Introduction to Impact guide.

To view the status of your referrals, log into your Impact account and select Reports  $\rightarrow$  Action Listing from the drop down menu. Filter your report by the action types below to see which step each of your referrals is at in the commission timeline. For a full overview of Impact reporting, see our Impact Reporting guide.

Step name	Reporting Action Type
Step 1	Free Trial API action
Step 2	Paid Trial API action
Step 3	Online Sale API action

Impact requires a minimum balance of \$10 USD (or the approximate equivalent in your local currency) before you can withdraw your account balance. Once you reach the minimum balance amount, you can withdraw your account balance and send it to your bank account or PayPal account.

To ensure you are paid out on time, follow these steps:

#### 1. Submit Your Tax Documents.

Select Balance in the top right hand corner then Tax Documents from the drop down menu. If you have already submitted a tax form previously or don't see this option, you can skip to the steps below.

Note: Impact will ask you to verify your phone number before moving to the next step.

#### 2. Add a Payment Method.

Select the three dots from the bottom corner of the left side navigation menu, then click settings. Scroll to the bottom of the menu and select Bank Account. Add your bank account information (or PayPal account information) depending on your country.

#### 3. Set your Payout Scheduling

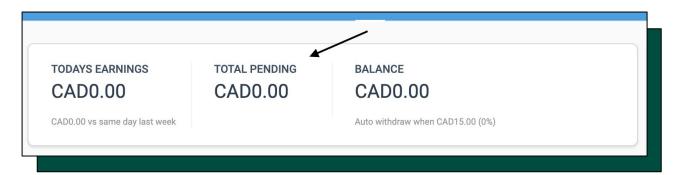
Select "Pay me when my balance reaches threshold" and insert an amount. The minimum threshold for Autopay is USD 10 (or the equivalent in your local currency).

If you prefer to be paid on a bi-weekly basis, select a fixed date of the month instead.

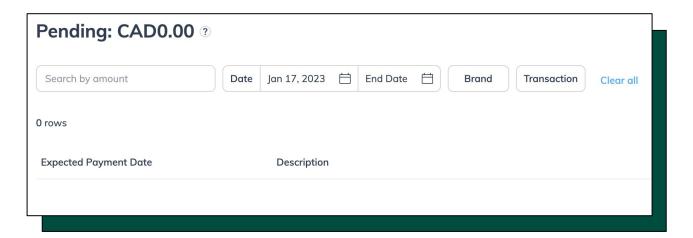
#### 4. Select Save to securely save your info.

For more information on how to add a bank account, or information regarding Tax Documents click <a href="here">here</a>.

To see a summary of your earnings, click earnings is by click on the **Pending box** at the top of your dashboard.



You will be redirected to the **Pending screen** where you can see details on upcoming payments, their descriptions, and payment amounts.



To see information on past payments, return to your dashboard and select the **Balance box**. This will allow you to see past payment dates, descriptions, and amounts.

For more information, visit the **Impact Help Center**.

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## Program Compliance

Shopify's affiliate program will be monitored for compliance, per our <u>contract terms</u>. Please ensure you have the appropriate email set up within Impact to receive any violations for both Content Compliance and Search Compliance. For instructions on how to address violations and set up the appropriate notifications, please refer to the following links within your Impact account:

- Manage Tasks as a Partner
- Configure Notifications as a Partner
- Configure Search Compliance Notifications

#### **Conclusion**

Impact has everything you'll need to get started as a Shopify Affiliate. If your question hasn't been covered in this guide, refer to the FAQ section below or reach out to the Impact team by submitting a ticket from your dashboard.

In addition to leveraging all that Impact has to offer, we highly recommend visiting the <u>Growth Center</u> to fine tune your content strategy. We've created a series of guides and play books to help affiliates of all levels maximize their earning potential. New resources are published regularly, <u>sign-up for updates</u> to stay on top of what's new in the Shopify affiliate program.

07

FAQ

#### What is the Shopify Affiliate Program?

The Shopify Affiliate Program includes entrepreneurs, educators, influencers, and content creators who inspire and teach their audience about entrepreneurship with Shopify. It also includes others who refer their entrepreneurial audience to Shopify.

The program is free to join, and allows you to monetize your audience and earn commissions from each new Shopify merchant referral. As an affiliate, you can earn a commission for each user who signs up for a paid plan with your unique affiliate tracking link.

#### What is Impact?

Impact is a trusted third-party affiliate marketing platform where the Shopify Affiliate Program is hosted. Impact provides Shopify affiliates with trusted third-party tracking, real-time reporting, and monthly commission payments.

### What are the different Action Type and Action Tracker values?

Impact is a trusted third-party affiliate marketing platform where the Shopify Affiliate Program is hosted. Impact provides Shopify affiliates with trusted third-party tracking, real-time reporting, and monthly commission payments.

There are two Action Tracker values which will be used to help understand your referral performance: "Free Trial API" Action Tracker and "Online Sale API" Action Tracker:

- Free Trial API a free trial that has been submitted.
- Paid Trial API a Paid Trial that has been submitted.
- Online Sale API a Paid Trial which has converted to a <u>full</u> <u>priced</u> plan.

## What is the difference between Action ID, Action Earnings, Referral Date, Action Date, Locking Date and Scheduled Date?

<u>Action ID</u> - Select the linked Action ID to view details for the action – including the Scheduled Clearing Date. Once an action locks, this date is when you should receive your payout.

<u>Action Earnings</u> - this is the amount that you've earned for driving this action, and will payout on the Scheduled Clearing Date.

<u>Referral Date</u> - this is the date of the referral. For all "Free Trial API" actions, the referral date will be the same as the action date. For all "Online Sale API" actions, the referral date will be the "Free Trial API" action date.

<u>Action Date</u> - this is the date when the action occurred and was tracked by impact.com.

<u>Locking Date</u> - this is the date that the action will lock, and your payout for the action is no longer pending.

NOTE: "Online Sale API" actions lock 21 days after the end of the month they convert in.

<u>Scheduled Clearing Date</u> - the date payouts are set to be transferred from the brand account to the partner account.

NOTE: locked "Online Sale API" actions will be paid 22 days after the end of the month in which they were locked.

#### How often will I be paid?

You can choose between being paid when your balance reaches a certain threshold, or on a bi-weekly basis. To make a selection, click the three vertical dots in the bottom left corner of your Impact Dashboard. Then, select Settings  $\rightarrow$  Bank Account.

The amount of commission you receive depends on the number of Trial Signups ("Free Trial API" and "Paid Trial API") that have converted to a Paid Shopify Subscription ("Online Sale API"). "Online Sale API" is the only payable action.

#### Why have I not been paid yet?

Some of the possible reasons you may not have received your commissions include:

- Your referral has not selected and paid for a qualifying Shopify subscription plan
- You have not yet met the minimum commissions
- The orders you have earned commissions on have not yet locked
- You have not earned any commissions
- You have not yet set up your payment information or tax forms

The payout timelines for all eligible plans are as follows:

#### Basic plan:

- 1. Referral signs up for a free trial (3 days)
- 2. Referral pays \$1/month for 3 months (90 days)
- 3. Referral selects full price Basic plan
- 4. Affiliate Partner eligible for commission
- 5. Actions lock 21 days after the end of the month they convert to a full price plan in
- 6. Approved actions are paid 1 day after they lock

#### **Shopify + Advanced plans:**

- 1. Referral signs up for a free trial (3 days)
- 2. Referral selects full price Shopify or Advanced plan
- 3. Affiliate Partner eligible for commission
- 4. Actions lock 21 days after the end of the month they convert to a full price plan in
- 5. Approved actions are paid 1 day after they lock

### Do I need to change all links to new Impact-generated referral links?

If you were a Shopify Affiliate prior to our migration to Impact, you will need to change every existing referral link in your content. This will ensure your referrals are tracked properly. We are unable to redirect any previous referral links to the Impact-generated referral links.

### Is my referral handle ("ref=") from my Shopify Partner Account still required in the referral link I create?

No, you will not need to include your Shopify Partner Account referral handle ("ref=") in the new referral links you create within Impact. Simply select an existing referral link in Impact using Shopify Suggested Referral Assets, or create your own referral link within Impact by linking to any Shopify landing page.

### My referral link isn't working as expected. What should I do?

If the referral link you've created is not working properly for any reason, submit a ticket to the Impact team by selecting the Help button in the bottom right corner of your Dashboard.

#### Where can I find additional resources?

Check out the <u>Growth Center</u> for additional resources on how to effectively promote Shopify to your audience. Have more questions? Check out the <u>Impact FAQ</u> page for more resources.

