



# Program Settings

^ Table of contents

▲ **Blacklist**

▲ **Verification**

## Specific to Zoho Commerce, Shopify, and Wix:

### Verification

Set up verification for signups and purchases

Verify affiliate signups

Cooling Period Details

## Specific to custom-built sites:

### Verification

Set up verification for signups and purchases

Verify affiliate signups

Verify referral signups

Verify purchases

▲ **Payout Settings**

▲ **Cookie Settings**

▲ **Points Expiration**

- ▲ **Attribution Settings**
- ▲ **Program Opt-in Settings**

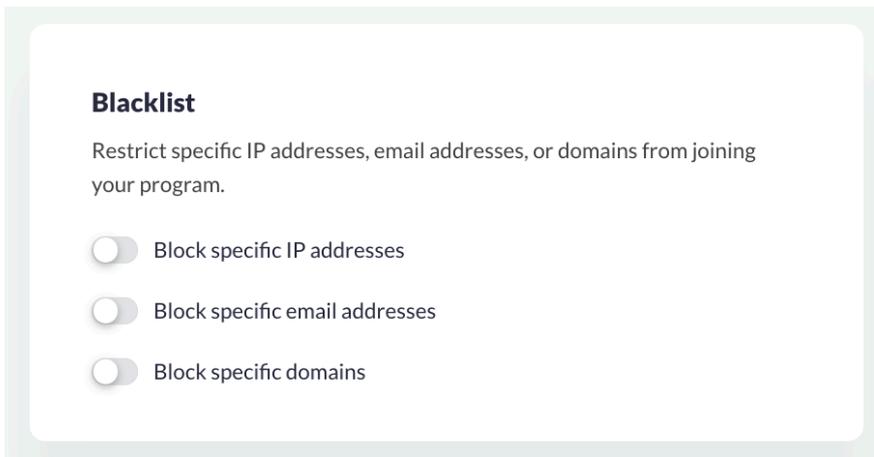
Admins can keep control and secure their program with the multiple in-built features available.

## **Blacklist**

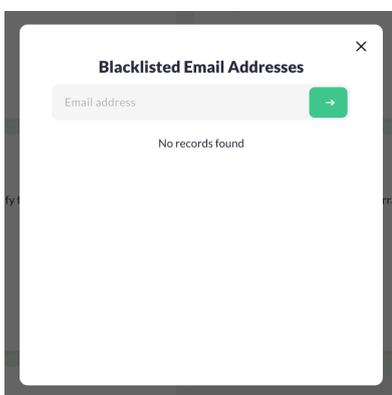
To block specific IP addresses, email addresses, and domains from being a part of your program.

In order to block specific IP addresses/email addresses/domains:

1. Go to **Program Settings**.
2. Under **Blacklist**, click on the toggle for Block specific IP address/Block specific email address/Block specific domain based on your choice.



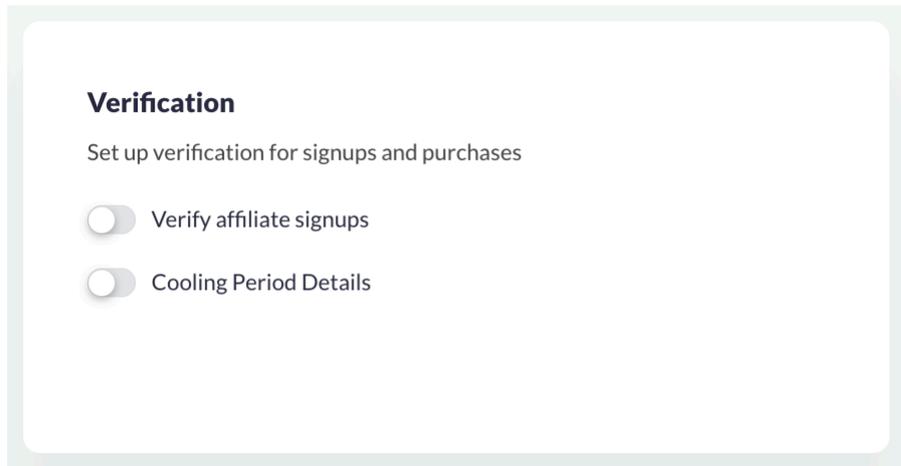
3. In the pop-up, enter the IP address, email address, or domain you want to block.
4. Press **Enter**.



## **Verification**

This helps verify affiliate signups, purchases and set up a cooling period.

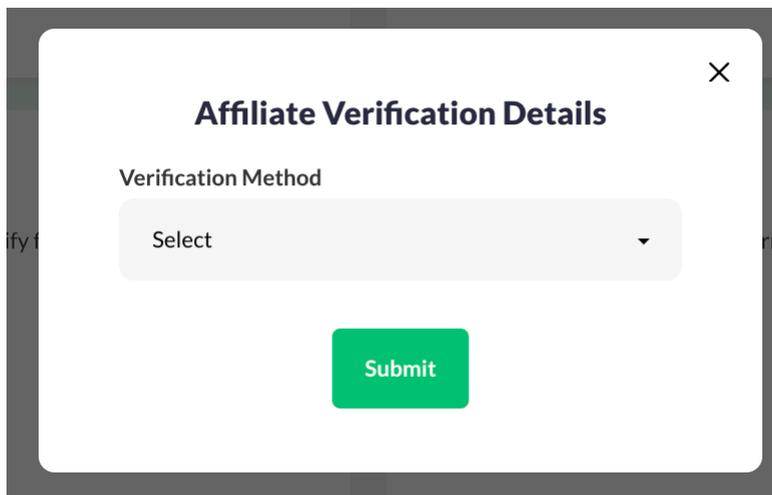
### Specific to Zoho Commerce, Shopify, and Wix:



### Affiliate Signup Verification

To verify new affiliate signups:

1. Go to **Program Settings** in the sidebar.
2. Under the *Verification* tab, click on the **Verify affiliate signups** toggle.
3. In the pop-up, select a method of verification—Manual or API.
4. If you select **API** as your method of verification, enter an API URL where the affiliate or referral signup will be verified.
5. Click **Submit**.



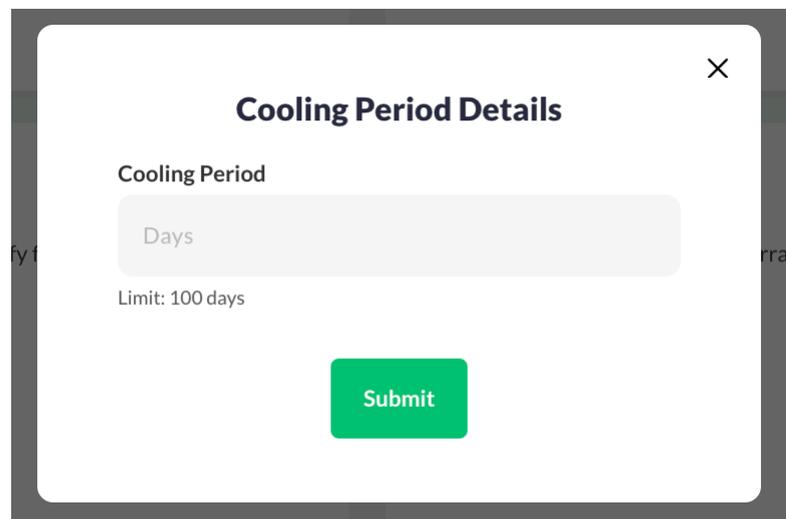
### Cooling Period

Cooling period is a great feature for businesses with a return policy. You can restrict the rewards (commissions and points) from being sent before a set date. After a cooling period is set, the status of the purchase isn't checked immediately after its completion. Instead, it is only verified after the set cooling period is complete. If the

purchase is found to be successful, then the reward is given.

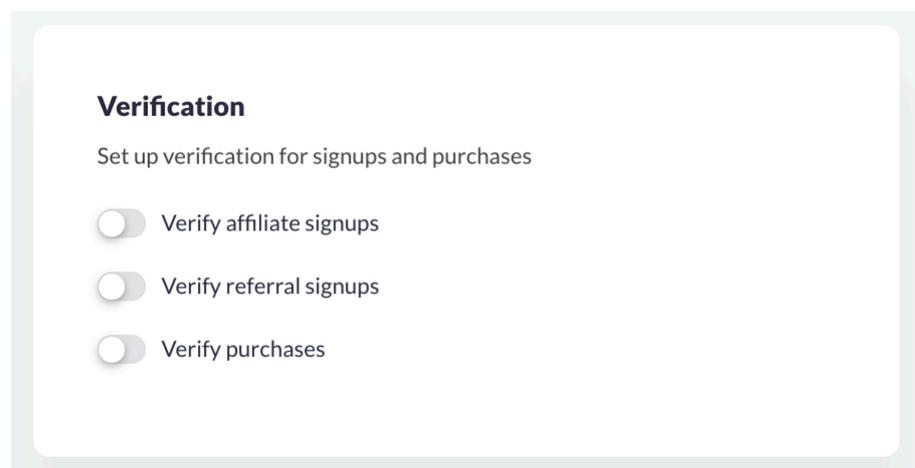
To set up a cooling period:

1. Go to **Program Settings** in the sidebar.
2. Under the *Verification* tab, click on the **Cooling Period** toggle.
3. In the *Days Before Payout* section, enter the number of days after which the verification has to be done.
4. Click **Submit**.



A modal window titled "Cooling Period Details" with a close button (X) in the top right corner. The form contains a "Cooling Period" label, a text input field with the placeholder "Days", and a "Limit: 100 days" note below it. A green "Submit" button is centered at the bottom of the modal.

**Specific to custom-built sites:**



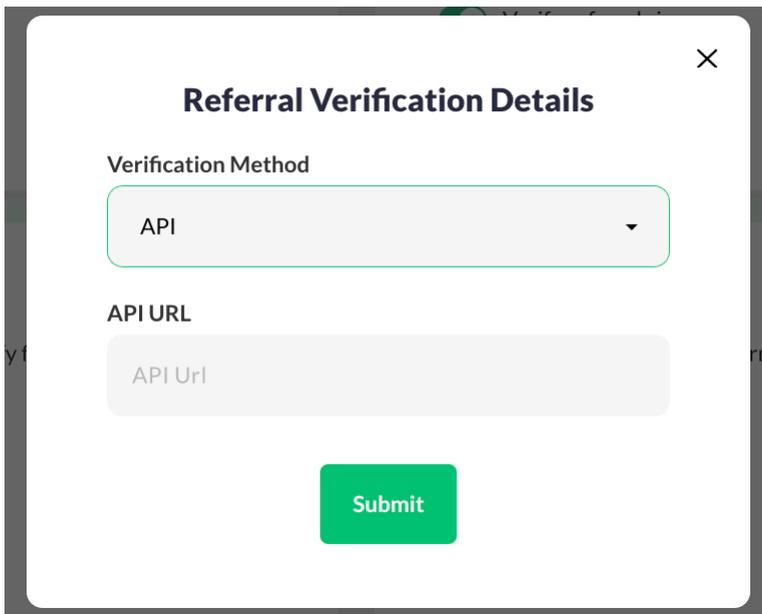
A panel titled "Verification" with the subtitle "Set up verification for signups and purchases". It contains three toggle switches, all of which are currently turned off:

- Verify affiliate signups
- Verify referral signups
- Verify purchases

To verify new affiliate or referral signups:

1. Go to **Program Settings** in the sidebar.
2. Under the *Verification* tab, click on the **Verify affiliate signups** or **Verify referral signups** toggle based on your choice.
3. In the pop-up, select a method of verification—Manual or API.
4. If you select **API** as your method of verification, enter an API URL where the affiliate or referral signup will be verified.

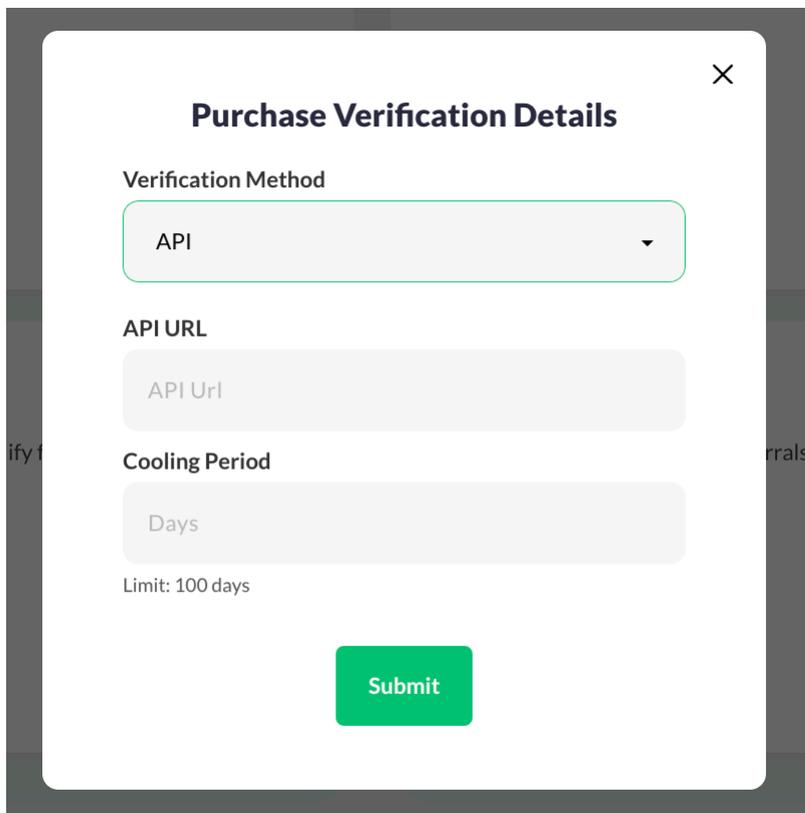
5. Click **Submit**.



The image shows a modal window titled "Referral Verification Details" with a close button (X) in the top right corner. Inside the modal, there is a "Verification Method" dropdown menu with "API" selected. Below it is an "API URL" text input field with the placeholder text "API Url". At the bottom center of the modal is a green "Submit" button.

To verify purchases:

1. Go to **Program Settings** in the sidebar.
2. Under the *Verification* tab, click on the **Verify Purchases** toggle.
3. In the pop-up, select a method of verification, either Manual or API.
4. If you select **API** as your method of verification, enter an API URL where the purchase will be verified.
5. In the *Days Before Payout* section, enter the number of days after which the verification has to be done.
6. Click **Submit**.



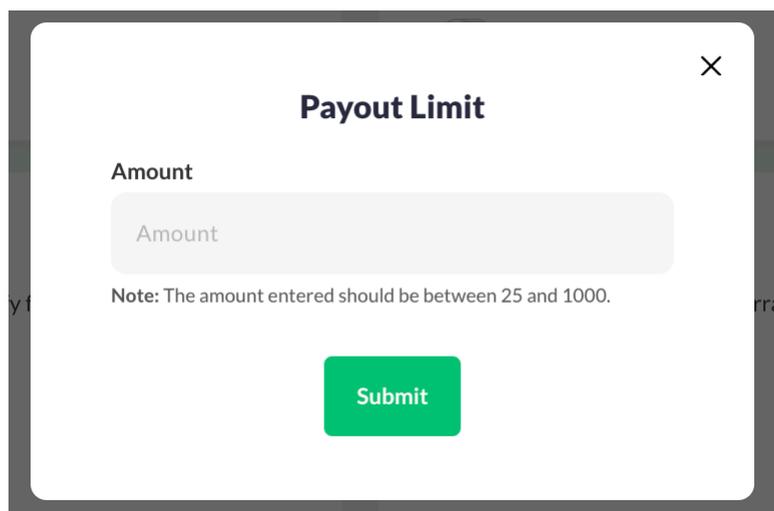
The image shows a modal window titled "Purchase Verification Details" with a close button (X) in the top right corner. Inside the modal, there is a "Verification Method" dropdown menu with "API" selected. Below it is an "API URL" text input field with the placeholder text "API Url". Underneath is a "Cooling Period" text input field with the placeholder text "Days". Below the input fields, there is a note "Limit: 100 days". At the bottom center of the modal is a green "Submit" button.

## Payout Settings

To set a minimum amount to qualify for an affiliate's payout, set a payout limit.

### To set a payout limit:

1. Click **Program Settings** in the sidebar.
2. Go to **Payout Settings**, enable **Set payout limit** toggle.
3. In the pop-up, enter your desired amount.
4. Click **Submit**.



The image shows a modal window titled "Payout Limit" with a close button (X) in the top right corner. Below the title, there is a label "Amount" above a text input field. The input field contains the placeholder text "Amount". Below the input field, there is a note: "Note: The amount entered should be between 25 and 1000." At the bottom center of the modal, there is a green button labeled "Submit".

## Cookie Settings

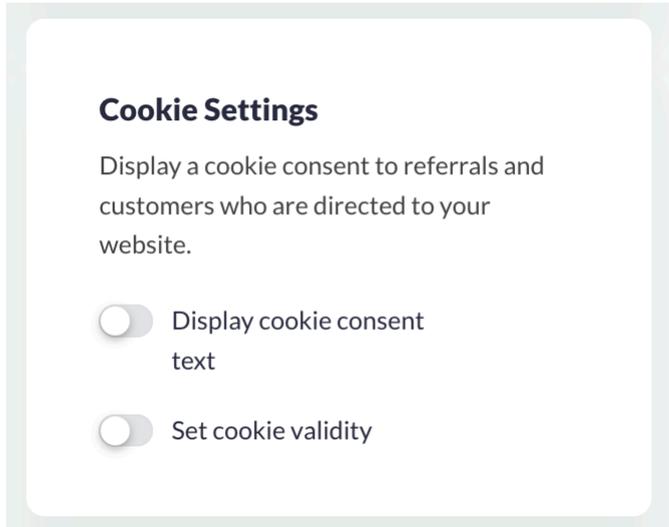
To display a cookie consent message to referrals and customers while they visit your website for the first time and when they proceed to opt-in for the loyalty program respectively.

To enable the cookie banner:

1. Click **Program Settings** in the sidebar.
2. Under the *Cookie Settings* tab, enable the **display cookie consent text** toggle.
3. In the pop-up, enter the **Consent Text** to be displayed.
4. Click **Submit**.

❗ In case of security, you can also set a cookie validity to limit its presence in the browser. Follow the steps below to enable it.

1. Under the same *Cookie Settings* tab, enable the **set cookie validity toggle**.
2. In the pop-up, enter the number of days until which the cookie must be valid.
3. Click **Submit**.



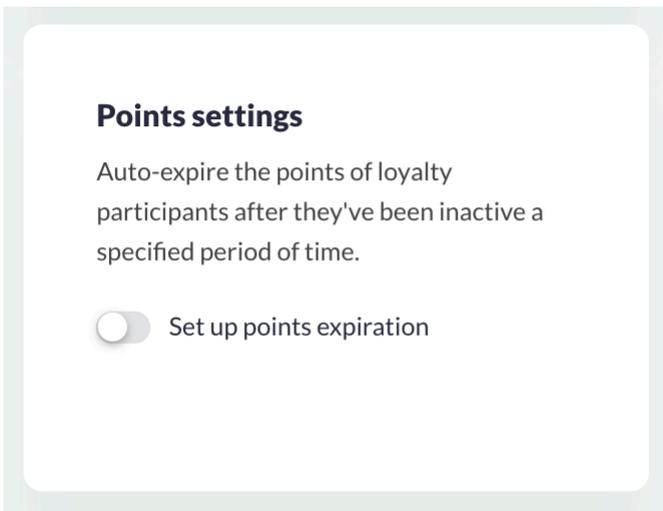
## Points Expiration

You can promote program engagement by setting up for the participants' points to expire automatically after a certain period of inactivity.

To enable points expiration:

1. Click **Program Settings** in the sidebar.
2. Under the *Points Settings* tab, enable the toggle.
3. In the pop-up, enter the **Time Period** after which the points must expire in case of inactivity.

#### 4. Click **Submit**.



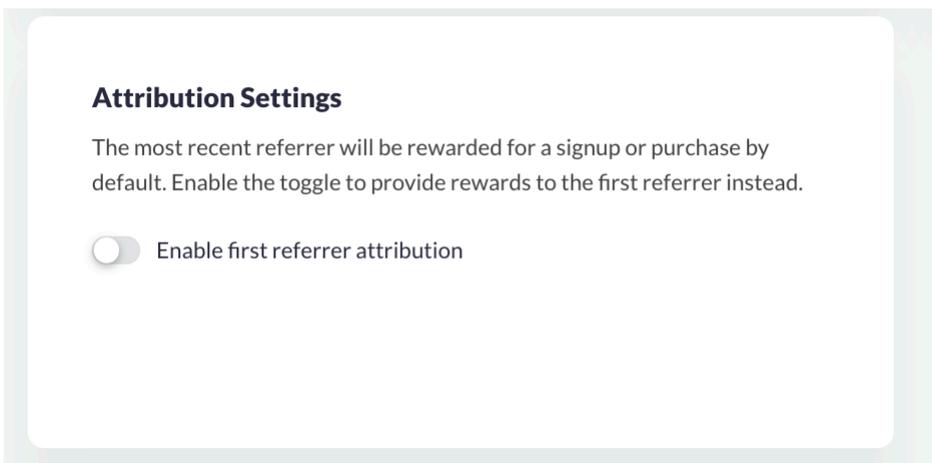
**i** To update any of the settings above, click **Update**, make the necessary changes and click **Submit**.

### Attribution Settings

Common to both the affiliate and loyalty programs, this setting gives you control over whom to reward for successful task completion. If this toggle is disabled (default), the last referrer to initiate the action will be rewarded, or else the first referrer to initiate the action will be rewarded.

To enable first referrer attribution:

1. Click **Program Settings** in the sidebar.
2. Under the *Attribution Settings* tab, click the toggle.



### Program Opt-in Settings

You can automate your loyalty program enrollment flow by enabling automatic opt-in after a customer creates an account on your store or site.

- ① The participant will have complete control over whether to stay in the program, and can leave any time. If they decide to leave, they can do so manually by clicking the **Opt-out from this program** button inside the widget, or [you can do it for them](#) on request.

To enable automatic program opt in:

1. Click **Program Settings** in the sidebar.
2. Under the *Program Opt-in Settings* tab, click the toggle.

### Program Opt-in Settings

Automatically add customers who create an account on your store or site to your loyalty program without having them opt in manually.

Enable automatic program opt-in