

AffiliPartnerCS Complete Customer Reference

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Audience: Store owners, administrators, finance staff and partners.

About this reference

AffiliPartnerCS lets a WooCommerce store manage partner applications, verified member benefits, affiliate referrals, commissions, reviewed payouts and partner workspaces. This reference explains the full configuration and operation of the plugin for store owners, administrators, finance staff and partners.

Use the contents and feature index to find a setting or task, then follow its requirements, controls, results and recovery steps. The companion Master Technical Reference provides exact field, storage and interface contracts for technical administrators and developers.

What's new in 1.3.9

Release 1.3.9 follows release 1.3.8. **Connect your own AI.** Claude, ChatGPT or another AI app can read your program's results and records and prepare changes that wait for your approval, through WordPress's Abilities API and MCP, without any AffStackDev service; **Review with AI** recommends a decision on a partner application from your own criteria; partners can connect their own AI to their own workspace. Everything is off until you switch it on (see [AI and MCP](#)). **Your own application questions:** up to 10 questions of your own on the partner application form, kept with each application as asked (see [Your own questions](#)). The paragraphs below describe 1.3.8, 1.3.7, 1.3.6, 1.3.3 and the launch release 1.3.0.6a.

Release 1.3.8 follows release 1.3.7. **Four new features, each off until you switch it on.** **Partner landing pages:** a page you assign to a partner counts every visit as a visit through that partner's affiliate link, with no link or code (see [Partner landing pages](#)). **The partner's discount through their links:** a shopper who arrives through a partner's link or landing page gets the partner's public coupon in the cart by itself, and the sale counts as a coupon sale (see [The partner's coupon through their links](#)). **Lifetime customers:** the later orders of a customer a partner brought are credited to that partner when nothing else credits them (see [Lifetime customers](#)). **An email for each new commission:** partners can be told about every commission a sale earns them (see [Email notifications](#)). The paragraphs below describe 1.3.7, 1.3.6, 1.3.3 and the launch release 1.3.0.6a.

Release 1.3.7 follows release 1.3.6. **Sales keep counting during a license hold.** While your AffiliPartnerCS license is on hold, an order that came through a partner's affiliate link, or through a member session that began before the hold, keeps its partner, and its commission is created once the license is active again (see [Affiliate links and sale attribution](#)); before, such an order was not credited to anyone, also not later. Partner coupons and payouts still wait for the license. **Your email settings are used throughout:** your partners' **Contact Support** button writes to your **Support Email**, and the notices of a new partner message and of a team seat request go to your **Admin Notification Email** (before, all three used WordPress's administrator address). The paragraphs below describe 1.3.6, 1.3.3 and the launch release 1.3.0.6a.

Release 1.3.6 follows release 1.3.3 and includes 1.3.4 and 1.3.5. **Every partner has a working authentication key.** Earlier releases saved a partner created by hand or by approving an application without a usable key, so verified-member pricing could never verify it. Updating gives each partner saved that way a new key once, without an email, and the integration status Not Connected; for a self-hosted connection, install the new key on the partner's server (see [Create a partner manually](#)). **See where a partner came from.** For staff who can open Applications, a partner record shows the application it was approved from, with **View Original Application**, or says it was added by hand, and **Active Partners** has an **Application** button next to **Manage** for partners created from an application. **AI proposals.** Changes your AI assistant proposes through AffStackDev AI can be approved and applied in WordPress again, and two plans proposed together can both be applied. **Payouts.** PayPal and Stripe Connect are offered to partners only while their connection under **Reviewed Provider Payouts** is enabled (a partner who chose one without it was left out of every payout batch); partners see your instructions for each

payout method; adjustments, bonuses, clawbacks and corrections are listed without an order number, rate or hold. Also: Access & Teams, Partner Messages, Tax Compliance, Multi-tier Network and Infrastructure are linked at the end of the workspace's tab bar; a commission rule saved with **Enable this rule** unticked is saved switched off; a partner's Affiliate section shows the attribution window set under Marketing; dates and times follow your site's time zone and format; staff roles carry their AffiliPartnerCS names; **Add Partner Manually** lists only plans of the matching type and calls its coupon field **Direct Member Coupon**; the partner list's **Test** button appears only for staff allowed to manage keys; and on hosts that add their own style for plain buttons (GoDaddy's site designer does), the application form's and the partner workspace's buttons keep their look. The paragraphs below describe 1.3.3 and the launch release 1.3.0.6a.

Release 1.3.3 follows the launch release 1.3.0.6a. It repairs payouts by check: when a partner's payout details were saved, the mailing country was lost, and a partner who had chosen **Check** was never included in a payout batch (the plugin answered that a complete mailing name and address are required). Payout details are now stored as entered. **If a partner chose Check before this release, ask them to open their payout details and save them once more**, or save them yourself on the partner's record; their payable commissions are then included in the next batch. Other payout methods were not affected. It also corrects five things found while writing the help pages: the affiliate link shown on **Codes & Coupons** now records visits and sales (it used an older link form that nothing read: give partners the link shown now); analytics are kept for the number of days saved under **Analytics Retention** (they were cut at 730 days); saving the program settings no longer changes the affiliate self-referral option, which the form does not show; **Close** in partner messages works with an empty reply box; and the application review and manual adjustment forms say that review notes are emailed to the applicant and that a negative adjustment needs its order. With WordPress debugging on, AffiliPartnerCS's own pages no longer make WordPress log a notice when the Suite shows them. The guide built into the plugin describes the current release, and version numbers have three parts from this release on. Everything else in this section came with 1.3.0.6a.

Release 1.3.0.6a was the AffStackDev launch release of AffiliPartnerCS; WordPress showed it as version 1.3.0.6.1. It contains every change since 1.3.0.5.

Store credit stays in the commission base. The part of an order a customer pays with AffStackDev Store Credit stays in the commissionable merchandise, net of tax and reduced by refunds, instead of counting as a discount (see [Merchandise base and examples](#)).

Commission rules apply everywhere. Per-item commission exclusions and capped bases also apply to [Advanced Commission Rules](#) and to refund recalculation, and a fixed commission needs a positive commissionable merchandise base.

Every self-referral is recorded. Each blocked self-referral order records its own alert in [Review self-referrals and unusual activity](#); before, only the first such alert on the site was kept.

Reactivation restores coupons. Reactivating a suspended partner restores the partner coupons the suspension disabled (see [Suspend, reactivate or terminate a partner](#)).

AI partner creation. Creating a partner through the reviewed AI actions accepts a blank website, and a rejected or interrupted notification is reported as partial; recovery never creates the partner again or resends the email.

Quieter logs. WordPress 6.7 and later no longer log "translations loaded too early" notices for AffiliPartnerCS.

Your license and updates. Each AffiliPartnerCS license covers one live (Production) site and one test copy of it; an installation set to Staging, Development or Local uses the license's staging place. Packages with more sites include one license per site. AffStackDev Suite needs no license key of its own: it unlocks while AffiliPartnerCS

holds its license. Download AffiliPartnerCS and the Suite from **My Account → Downloads** on affstackdev.com; after activation, WordPress offers new releases through [protected plugin updates](#).

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Installation, product access and merchant roles

AffiliPartnerCS manages the partner program inside WordPress and WooCommerce. Install it on a site with WordPress 6.9 or later, PHP 7.4 or later and WooCommerce 10.0 or later. Keep WooCommerce active: without it, AffiliPartnerCS shows a dependency notice and its merchant workspace does not start. Its optional shared Commerce Core connection has higher server requirements, explained in [Commerce connections](#).

AffStackDev Suite can place the workspace inside a shared administration shell. AffiliPartnerCS keeps ownership of its records and actions. You can use the standalone workspace when the compatible Suite route is unavailable, unless your product license expressly requires a licensed Suite runtime. A connection label does not by itself approve an order, reward or payout.

Where services run

Normal storefront browsing loads the services needed for shopping and partner benefits. Administration, the partner account area, API requests and background workers load additional services when needed. Opening a product screen does not authorize its actions; each action still checks the merchant's permissions, current license and relevant record.

The WordPress Plugins list provides **Settings** and **License** links when WooCommerce is active. These links open the usable Suite or standalone workspace automatically. Privacy callbacks remain registered even when product commerce is unavailable.

Choosing merchant access

Administrators and shop managers receive all AffiliPartnerCS merchant permissions when the product's role setup runs. You can also assign one of its dedicated WordPress roles. These merchant roles are separate from partner-organization membership and do not make someone a program partner.

Role	Intended access
AffiliPartnerCS Manager	Complete product administration.
AffiliPartnerCS Analyst	View the program, export data and view the audit log.
AffiliPartnerCS Finance	View financials, manage payouts, export, view audit records and manage partner messages.
AffiliPartnerCS Integrations	View the program, manage integrations/authentication secrets and view audit records.
AffiliPartnerCS Support	View the program and manage partner messages.

An account can have permission to view a page without permission to save a particular control. WordPress permission to update plugins is also separate from permission to manage the product's settings. The technical capability matrix lists the exact permissions for delegated administration.

Activate and maintain the product license

Open **AffiliPartnerCS → License**, or the product's **License** area in Suite. The screen separates **Product license**, **Suite availability**, **Enforcement** and **Integrity** so you can distinguish a license problem from a shell connection or modified-file warning.

Initial activation and permitted features

The initial configuration provides a 72-hour activation window while no readable active or pending installation token exists. Activate the product before that window ends. This initial window is separate from the temporary connection allowance after a successful license check, and it does not enable protected update downloads.

An accepted AffiliPartnerCS license works independently of Suite. AffStackDev's current plans do not require a Suite license, and the Suite needs no key of its own: it unlocks while AffiliPartnerCS holds its license, and **Suite availability** then reads **Unlocked by your licensed AffStackDev plugin**. A license can restrict particular feature areas. The License screen shows any server policy codes so support can identify the applied terms.

If licensing needs attention, normal **Retention-first** enforcement retains records and allows supported reading, exports, diagnostics and recovery while holding new value-changing work; sales still keep their partner and get their commission once the license is active again ([sale attribution](#)). A **Read-only policy** keeps permitted reads but blocks changes. **Hard lock on license failure** restricts normal product surfaces more strictly. **Kill switch active** blocks normal product operations immediately. Recovery, export, privacy and lifecycle tools still have their own permission and safety checks. A license expiry or hold does not delete program records or disable WordPress/WooCommerce.

Financial recovery remains distinct from a new payment. Reconciling a payment already submitted or closing records for confirmed Store Credit does not authorize a second payout. Use the existing recovery controls for that original transaction.

Use the License screen

You need product-settings permission or WordPress administrator settings access. The **Installation** panel shows the product, plan, environment, installation ID, stored site address and service host. The **Validation** panel shows

the last accepted check, last attempt, next automatic check, offline deadline, term deadline and last error. Dates are UTC. An overdue next check is marked as due on an eligible visit or scheduled run.

1. Enter the **Complete AffiliPartnerCS license key** in the password field. The product sends it for activation and does not retain the complete key.
2. Select the site's **Environment**: Production, Staging, Development or Local. The choice is locked while an installation credential exists.
3. Choose **Activate license**. The result returns to this screen with a completion or attention message and a short code.
4. If a pending activation is shown, choose **Check now** before entering another key. The activation form remains disabled while that pending token needs recovery.

Check now refreshes the accepted license or resolves an uncertain activation/deactivation. **Verify critical files now** refreshes the local integrity result. These actions do not remove business records.

To release an active site's license slot, open **Release this site activation**, select **I understand this releases the remote activation slot**, and choose **Deactivate license on this site**. The slot is treated as released only after the service confirms the operation. Partner, commission, payout, Store Credit, WooCommerce and WordPress data remain. Reactivation requires a valid complete product key.

Site moves and protected credentials

After activation, AffiliPartnerCS stores an encrypted installation token tied to the installation identity, stored site address, service address and WordPress security salts. It uses the server's supported cryptography; activation stops if secure credential storage is unavailable. The complete activation key is not saved in the license settings.

A changed site address or changed cryptographic binding can cause **Site identity changed** or **License credential needs recovery**. Keep the existing installation details and resolve the migration with your administrator or support. This screen does not provide a reset-identity or reconnect wizard. Entering another key is not a substitute for repairing a mismatched stored site identity. On a subdomain of a licensed site, enter the purchase's subdomain key in the same activation form; the license service gives that subdomain one of the purchase's paid subdomain places while the main site's license is active.

Recover an interrupted license action

An activation request can succeed remotely even if its response is lost. The product saves its pending encrypted token before sending the request, so **Check now** can recover the same installation. Do not repeatedly submit complete keys while a pending token is displayed.

An interrupted deactivation is retried as the same deactivation operation. Until confirmation, do not assume the remote slot is free. A busy-operation message means another licensing operation holds the short-lived lock; wait briefly and reopen the License screen. If a replacement candidate is rejected, the product can retain and check the older active installation instead.

Connection retries and accepted deadlines

The product normally validates about every 12 hours, with a small timing variation. An accepted license can continue during a temporary service outage for up to 72 hours from the last accepted validation, ending earlier when its authorized term or grace period ends. Failed retries do not extend either deadline. A definitive server rejection holds the installation until a later accepted validation restores permission.

Automatic checks have a four-second connection timeout and spaced retries: about 15 minutes, then an hour, then at most six hours between attempts. An explicit **Check now** permits a longer connection attempt. Repeatedly reloading a page does not reset the stored retry delay.

Understand license statuses

Status	What to do
Activation required	Enter the complete product key before the initial window ends.
Site identity changed	Resolve the stored/current address mismatch before activating.
License credential needs recovery	Restore the expected site/security configuration or ask support to review the existing installation.
Activation recovery pending	Use Check now to resolve the saved pending token.
Site deactivated	Activate again with a valid key when ready.
License needs attention	Review the displayed error and license entitlement; a server denial needs a later accepted check.
Validation required	Use Check now ; a token exists without accepted current validation.
System clock needs attention	Correct the server clock, then validate again.
License validation expired	Restore the connection or entitlement and check again; the accepted deadline has passed.
Licensed — term grace	Review renewal/term arrangements before the shown grace deadline.
Licensed — connection grace	Restore the connection before the earlier applicable deadline.
Licensed	The installation has accepted current validation.

A suitable administrator visit or ordinary browsing can recover an overdue check even if scheduled jobs or loopback requests fail. This fallback excludes carts, checkout, account actions, APIs and mutations. It runs after the frontend response where the host supports that. Only one compatible AffStackDev product uses the fallback in a given request, so other due products can recover on later visits. A fully cached page that never runs WordPress cannot perform a check; an idle site still needs an administrator visit, manual check or functioning scheduler.

Review changed critical files

Package integrity checks the listed licensing and value-transfer files, normally using a result cached for 24 hours. **Verify critical files now** performs a fresh check and lists up to twenty changed paths. A product-version change also triggers a new check.

Critical files match is a local integrity result. **Changes detected** means listed files are missing or differ from the package's expected hashes. Restore the authentic distribution if those changes are unintended, then verify again. Retention-first mode reports the change; hard-lock policy can turn it into an execution hold. The check does not repair files or delete data. Keep customizations outside the signed plugin distribution.

Install protected plugin updates

The installed product checks signed releases through WordPress. Enable or disable automatic updates for AffiliPartnerCS in **WordPress → Plugins**. Manual and automatic updates use the same protected download and verification path; the product does not turn automatic updates on for you.

Prepare and check for updates

In **License → Protected updates**, review the readiness message and trusted-release-key count. You need an accepted product license and the service's protected-update authorization, plus PHP Sodium and ZipArchive on the host. The initial activation window or another product's license cannot provide download access.

If the screen says **Waiting for protected update authorization**, first use **Check now** under Validation. If the host is missing Sodium or ZipArchive, ask the host to enable them. A missing trusted release key requires restoring an authentic product package. Once ready, select **Check for plugin updates**, then install an available version from WordPress Plugins. The check button requires WordPress permission to update plugins.

The screen retains the last update-check time and whether the product is up to date, an update is available, or the check needs attention. The displayed error code helps support identify the failing boundary.

What happens during a protected update

WordPress receives release details and a nonsecret package selector. At download time, the product obtains a fresh protected grant for that exact release. Its installed token is used only by its own client; Suite credentials and the complete activation key are not placed in WordPress update metadata.

Checks are normally cached for 15 minutes, including failed checks, to avoid repeated requests. The explicit update-check button refreshes them. Only newer stable releases are offered by this updater. The current server's required WordPress, PHP and WooCommerce versions must be met before installation proceeds.

File verification and local changes

The client verifies the signed release identity, exact archive bytes, every included file and the unpacked plugin source before replacing files. A mismatched product, invalid signature, changed offer, denied grant, unsafe archive or altered signed file stops that protected update.

If the currently installed release has signed proofs, its listed files must still match them. Review local modifications before replacement; restore authentic files or use an authorized administrator's deliberate package-replacement recovery. Existing unsigned installations can enter the signed update path through its first signed replacement. Neither a file-warning message nor a failed update repairs the installation automatically.

Automatic-update notices

An available update or failed automatic attempt can appear on the dashboard, Plugins, Updates and product workspace. The notice offers **Open plugin updates** and **Review AffiliPartnerCS License**. It does not contact the release service just to display the notice.

Follow the reason shown: repair host file permissions, refresh the license/connection, meet required platform versions, or review modified files. If WordPress restored the previous version after an error, contact support before retrying. If WordPress could not restore it, inspect Plugins and seek support before attempting another update. A later successful replacement clears an older resolved failure; a failed-rollback warning remains for review.

Installing, upgrading and removing the product

Install and activate the package through WordPress Plugins with WooCommerce active and the stated platform requirements met. Activation creates or upgrades the program's database, adds staff permissions and schedules its background work. An ordinary update also runs the necessary schema check even if the plugin was already active. Existing partners, applications, plans, commissions, payouts and settings are retained. Review **Infrastructure → System Status** and **Diagnostics** if the database version does not reach the expected version or a repair reports a problem.

Upgrades also repair organization owner access from each partner's linked primary user, fill missing legacy payout snapshot values and preserve multiple financial adjustments for an order. A failed schema or required repair leaves the upgrade pending for another attempt. Installing or upgrading does not perform a factory reset.

Choosing sample data

After installation, choose **Load Sample Data**, **Leave As-Is**, or **Remove Sample Data**. Samples are not inserted just by activating the plugin. Existing records with matching identities are preserved. The sample registry identifies records actually created by the sample operation; use the documented [sample-data controls](#) when removing them.

The verified click-back sample illustrates a 10% member discount and 1.5% partner commission. The hybrid sample adds a 7% public discount with 3% commission and a 5% affiliate commission. They use example domains and begin suspended, so they are examples to inspect rather than live connected partners. Existing sample coupon codes can prevent duplicate sample partners from being created. Real coupon and program eligibility checks still apply.

Deactivation and uninstall choices

Deactivating the plugin stops its scheduled activity and preserves program records and settings. It does not release a remote license slot: use **License → Deactivate license on this site** when you intend that release.

Uninstall normally retains data. It still removes product background jobs, staff roles/capabilities and temporary runtime data. Reinstalling can rebuild those permissions and use the retained program records. If scheduled work cannot be removed safely, uninstall stops with a visible message; resolve the queue issue before trying again.

If you explicitly choose the delete-data uninstall mode, uninstall permanently removes product tables, settings and local licensing information. WordPress users and pages, and WooCommerce orders, customers, products and coupons remain. Assigned or plugin-created public pages are left for manual review; their product assignment/ownership markers are removed. Shared Commerce Core records are retained independently because other products can use them. Local deletion does not confirm remote license deactivation. The complete storage reference is in the technical manual.

Background jobs and paused work

The product normally uses WooCommerce Action Scheduler for queued work and falls back to WP-Cron where the scheduler is unavailable. System Status shows the driver, pending/failed work and next scheduled runs. Queuing a job does not make a commission, payout or benefit eligible; each service checks its own permissions and records before acting.

Repeated scheduling coordinates matching work so a pending job is not deliberately duplicated. A running job can schedule its next continuation or retry. Existing older cron events are removed only after replacement is scheduled. Deactivation and uninstall remove the product's queued activity while preserving the records described above.

When Diagnostics identifies paused work, review the underlying failure and use **Infrastructure → Maintenance → Restart Paused Background Work** with maintenance permission. Do not create a replacement financial record merely to bypass an interrupted job. The [maintenance chapter](#) explains what the restart can resume, and the finance chapters explain settlement recovery.

Using Suite with AffiliPartnerCS

When a compatible, accessible AffStackDev Suite is available, AffiliPartnerCS appears within Suite and keeps its usual product permissions and controls. Its summary widget links to the product and shows applications, active partners and payout attention. The standalone product menu is hidden while Suite owns navigation; existing product bookmarks remain usable.

If Suite is absent or cannot provide the route to your account, AffiliPartnerCS uses its own administration route. Suite remains optional; AffStackDev's current plans do not require a Suite license. Suite access alone does not authorize partner changes, payments or protected updates.

Suite's enhanced-workspace preference can suppress the product's optional browser navigation without overwriting the product's saved preference. The product's **Standard view** link provides a per-page fallback. Changing the host menu does not transfer ownership of commissions, payouts or credentials to Suite.

Commerce connections and retained shared records

The bundled Commerce Core connects compatible local commerce products. It needs 64-bit PHP 8.1 or newer in addition to the product's WordPress/WooCommerce requirements. The products select one compatible shared runtime, so installing several compatible products does not load several competing copies. Hosting Core does not select which product owns a business feature or grant that product a license.

Open **Infrastructure → System Status → Commerce connections** for the common runtime, host/version and shared-interface availability. If it reports conflicting copies of the same version, reinstall matching authentic product releases. If a previously configured provider is missing, restore its supported integration: shared benefits that cannot be verified stay on hold. An available runtime is only one prerequisite; the connected product must also support and permit the operation.

Audience and business-account eligibility

Connected products can distinguish consumer and business-account eligibility using a fresh decision from the account owner. Core binds that decision to the current shopper and cart context and gives it a short lifetime. Changing user, cart contents, shipping or tax context can require another decision. A missing, conflicting or expired answer does not establish a new consumer promotion.

A store without an audience provider does not become a business-account store simply because Core is installed. Once an audience provider has been configured, removing it does not silently make previously restricted shoppers eligible. Older B2B information can retain a known exclusion, but a fresh compatible reader is required to grant eligibility. When several audience owners or pricing callbacks compete, resolve the integration conflict rather than treating the hold as an ordinary discount setting.

Shared line information

Core can preserve an optional identity and relationships for cart/order lines and describe which product supplied their commercial facts. This information does not change prices by itself. Licensed or otherwise protected lines remain subject to their owning product's restrictions.

When Commerce Bridge supplies the existing line identity, Core reads it without rewriting it or creating a competing identity. An unavailable protection provider or inconsistent line relationship can hold the affected operation. If checkout asks you to refresh a shared cart line, refresh the cart and review the product connection; do not assume old cart evidence is current permission. Technical integrations can inspect the exact line contracts.

Accepted order context

Compatible owners can supply an accepted order-context record at checkout. Core preserves that decision with the order and its line mapping. Later refunds, account changes or removal of a provider do not rewrite the accepted history. The record describes the accepted order; it does not authorize a new payment or reward.

If publication of that record is interrupted, Core retains the intent and prevents another uncertain write. An authorized integration can finalize only a projection that is already confirmed to match. Follow an order-context review message before retrying payment. A current account classification must not replace the historical order decision.

Shared features and uncertain outcomes

A shared feature has one saved definition and a currently selected product that supports its complete meaning. The preferred compatible owner is used when ready; otherwise a supported alternative may be selected. Disabling or archiving a definition pauses its use. If no ready product supports it, the definition stays retained and the affected benefit is held.

A status screen's stored owner is the last selection, not a promise that an operation will run. Availability, license permission and the saved definition are checked again at the operation. Existing work awaiting reconciliation blocks changes to that definition.

When an operation's outcome is uncertain, keep its original reference and use the owning feature's documented reconciliation path. Core does not repeat a pending effect simply because time passed. A confirmed completed result is reused. Explicit recovery of a confirmed "not applied" result requires fresh proof of nonapplication, unchanged definition/context and the original receipt/reference; the previous attempt remains recorded. The connected product must support that recovery path. Creating another reference is not a substitute for resolving the first outcome. See [customer referrals](#) for the actual feature controls and the technical coordination contract for integration-only operations.

Retiring a policy owner

Removing a business-policy or protection provider requires more than disabling a plugin if other products still expect its decisions. Compatible owner/Suite controls can prepare proof that no live policy remains, finish retirement after that provider is absent, or cancel it using the saved revision. Preparation expires after five minutes if it is not accepted. Returning providers must confirm cancellation before resuming their own authority.

This process does not erase history, silently clear expectations or turn an unknown shopper into an eligible consumer. AffiliPartnerCS itself does not add a generic retirement editor to its Infrastructure screen. Use the relevant product's supported controls; the technical retirement contract defines the conditions.

Store Credit checkout connection

Core can discover the compatible Store Credit checkout participant without invoking it. B2B coordinates the shared checkout transaction; Store Credit owns reservation and ledger verification. A registered connection does not prove that credit is available or that a particular checkout is ready. Missing, conflicting or unavailable participants hold the dependent operation rather than falling back to an unverified reservation.

Core status and downloads through Suite

AffiliPartnerCS's own Infrastructure screen supplies the compact Commerce connections status. A compatible Suite also provides **Settings → Commerce Core → Shared records and technical details**, subject to commerce-management permission. There you can inspect Foundation, Audience connection, Order records, Audience providers and Shared feature owners. The shared-record list shows the first 25 records; larger technical reports use the documented paginated integration interface.

Download status report downloads connection/status information. **Download order record** additionally requires a valid Order ID with a readable Core record. These downloads do not change the order. If there is no readable record, the screen reports that fact instead of creating one. Keep order reports within authorized support channels because they contain stored order-context information.

Navigating the merchant workspace

Open **AffiliPartnerCS** from WordPress administration, or its product page in Suite. The main workspace offers Dashboard, Applications, Active Partners, Partner Plans, Commissions, Financial Controls, Commission Rules, Marketing, Codes & Coupons, Payouts, Change Requests, Integrations, Signup Page, Settings and License. Access & Teams, Partner Messages, Tax Compliance, Multi-tier Network and Infrastructure have their own screens, linked at the end of the same tab bar. Your assigned permissions determine which links and actions appear.

Partner administration, finance, payout, integration, messaging and configuration permissions are separate. An application link does not authorize a payout, and access to a status summary does not authorize its underlying detail screen. A **License policy hold** explains why a feature is unavailable and links to License. Restore the relevant permission or license condition before retrying.

The header names the current area, links to applications from Dashboard or back to the program dashboard from standalone screens, and offers **Standard view** while browser enhancement is enabled. Status badges use their written labels as well as color. Dates and times follow the site's date and time format (Settings → General). Platform choices describe the partner's platform; choosing one does not install its connector.

Reading dashboard summaries

Dashboard cards show pending applications, active partners, pending payout, open fraud alerts, pending changes, connected integrations, failed webhooks and system warnings. **Open** and **View** links take you to the related area. Partner Status and Commission Pipeline break out their states. Recent payout, risk and audit panels show up to eight entries each.

Counts can remain cached for 45 seconds, while the lightweight system-health summary can remain cached for five minutes. Dashboard warnings are not the full Diagnostics scan. If a total is unexpected or a database read is failing, use **Infrastructure → Diagnostics** and the relevant detail screen.

The Pending Payout card combines pending commission amounts and displays the store currency; it is not a currency-conversion report. Use currency-specific commission and payout records when reconciling money. Recent payout rows show their own recorded payout currency. Missing partner names appear as **Unknown partner** and warrant reviewing the record relationship.

Selectors can show a bounded set or searchable pages of choices. Use the search/page controls provided by the owning screen when the desired enabled plan or product is not in the first page. A selector read-error message means the choices could not be read safely; retry after resolving the database issue.

Enhanced view, mobile controls and unsaved changes

The optional enhanced merchant workspace improves navigation and layout. The partner dashboard has its own independent presentation preference. Neither setting changes program records, permissions or financial rules. **Standard view** returns the current page to normal server navigation without changing the saved preference; it is useful when an enhanced page cannot load.

On compact screens, **Current section** replaces the tab bar with a dropdown. Wider tables scroll within their own area; follow **Swipe table horizontally** to see hidden columns. Panels with an arrow can collapse or expand. Their collapsed state is remembered in that browser when local storage is available, not in the program's records.

Ordinary read-only links and filter forms can update the workspace in place. Save forms, financial actions, downloads, secret reveals and record-specific actions use their normal server requests. The enhanced layer does not autosave. If you edit a form and then leave, the browser asks whether to discard unsaved changes. Cancel to stay and save, or confirm to leave. Back and Forward participate in the same protection, including supported Suite navigation.

Only the latest successful navigation replaces the workspace. If the enhanced response fails or cannot be safely used, a message opens the standard page. Loading indicators and screen-reader announcements report progress; the new heading receives focus after navigation where appropriate. Reduced-motion settings suppress the progress animation. The complete page remains server-rendered when JavaScript enhancement is disabled.

The partner account area retains WooCommerce's actual account links in a **My account** disclosure. Disabling its enhanced skin leaves the base layout and active theme presentation; it does not remove the partner's authorized account actions.

Infrastructure controls

Open **Infrastructure** for Documentation by default. Available tabs are System Status, Diagnostics, Logs, Staff Access, Offboarding, Webhooks, REST API, Exports, Email Tools, Documentation and Maintenance. Each tab requires the relevant permission; the program-view permission alone does not reveal all infrastructure tools.

System Status

Review product/license/database versions, platform availability, HTTPS/permalinks, missing schema items, webhook count, background queue and scheduled times. **Not scheduled** identifies a missing scheduled run. **Open Full Diagnostics** opens the more detailed scan. Commerce connections and customer-referral status appear below the general table and explain dependent integrations.

A missing table, column/index or schema-read error calls for investigation or the relevant repair, not deletion of financial records. The [diagnostics chapter](#) explains each check and its implications.

Diagnostics

Diagnostics & Integrity Scan runs when this tab opens and shows passed, warning and critical totals. Each row gives the result, check, message and support code. **Run Scan Again** repeats the read-only scan.

Run Safe Repair Bundle performs the specific repair bundle described in [Maintenance](#). After success it returns here and runs another scan. It does not automatically delete orphan financial history. Review any remaining warnings instead of assuming the repair makes every relationship valid.

Logs

Check **Enable operational diagnostic logging for troubleshooting**, then **Save Logging Setting** when detailed operational logs are needed. The screen shows whether it is enabled, the WooCommerce source and current request ID. **Open WooCommerce Logs** opens the host log viewer; search for **affilipartnercs**.

When logging is enabled, **Write Test Log Entry** helps confirm that WooCommerce accepts a diagnostic entry. A failure message requires reviewing logging availability before relying on it. Turn operational logging off when finished. Financial ledger, payout attempts, provider references, fraud and audit records remain independently retained. WooCommerce controls diagnostic log retention and deletion; the [logging chapter](#) explains redaction.

Staff Access and Offboarding

Staff Access explains role purposes. It is a reference screen; use **Access & Teams** to assign or remove staff access. The complete roles and permissions are described in [merchant roles](#).

In **Offboarding**, select the partner, choose **Suspend**, **Reactivate**, or **Terminate Permanently**, and enter the required Reason before **Apply Partner Status Action**. The selector shows up to 500 partners with their current status. Review the selected organization carefully. Suspension/reactivation/termination preserve historical financial records and apply the specific restrictions described in the accounts offboarding chapter. A failed action displays its reason and must not be treated as a completed status change. This screen does not delete a partner's accrued liability.

Webhooks

To add an outbound integration, enter a descriptive **Name**, its **HTTPS URL**, and the **Events** to send. No event is selected initially. **Enabled → Deliver selected events** starts checked; then use **Add Webhook**. The receiver must implement the documented webhook verification.

The Endpoints table shows each URL, enabled state, failure count, last HTTP result and whether a secret is configured. The add form does not edit an existing endpoint, and this screen has no separate enable/disable control for an existing row. **Delete** removes the endpoint through the service; review the endpoint before clicking because that button has no additional confirmation prompt.

With secret-management permission, **Reveal Secret** opens a restricted page. **Reveal and Copy** reveals/selects the value and copies it when the browser allows it. Put it in the receiver's server-side configuration, then use **Return to Webhooks**. Keep the value out of browser code and public content.

Rotate Secret asks for browser confirmation and immediately invalidates the former secret. Update the receiver before further deliveries. If rotation or storage fails, follow the displayed error rather than assuming the receiver has the new value.

Recent Deliveries shows Event ID, Endpoint, Event, Status, Attempts and HTTP. This is a history view, with automatic retries governed by the webhook service; it has no manual retry button. See [webhook operation and recovery](#) for delivery outcomes and limits.

REST API

The REST API tab lists the principal status, partner, application, commission, payout and partner-status endpoints. It uses normal WordPress authentication and permissions; it does not generate a separate product API key. External integrations can use WordPress Application Passwords over HTTPS with the appropriate staff account. The technical REST reference supplies exact requests and errors.

Exports

Choose **Export ... CSV** for the required resource. Download permission is checked again when the file is requested. Downloading does not change the source records. The [export chapter](#) lists the resources, fields and failure behavior. A failed export should be retried after the underlying issue is resolved, not treated as an empty dataset.

Email Tools

Available controls depend on your role:

- **Send Test Email** requires settings permission. The Email address defaults to the store administrator's address; enter a valid destination and send. WordPress sends a short store-identification test.
- **Resend Partner Invitation** requires messaging permission. Enter the existing **Partner ID**. The partner must have an available email address. Sending the invitation does not approve the partner or grant a new seat.
- **Resend** for a payout requires payout permission. Enter **Payout Batch ID** and choose **Payout Ready** or **Payout Paid**. Choose the notice that matches the real batch state: the tool does not verify that selection against the batch's status and does not mark a payment paid.

A send failure may indicate disabled notification settings, an unavailable recipient or WordPress mail failure. A success message records acceptance by the sending layer, not proof of inbox delivery. Notification rules are described in [notifications](#).

Documentation

Open **AffiliPartnerCS → Infrastructure → Documentation** for the **Complete Customer Reference** and **Master Technical Reference**. Use **Download Markdown** beside the desired reference. The download is plain-text Markdown and retains its .md filename; it can be read in a text or Markdown viewer. Existing older documentation links resolve to the appropriate canonical reference.

If the file cannot be found or read, restore the complete plugin package and retry with an authorized account. The download control only serves the bundled reference selected by that link.

Maintenance and factory reset

Use each maintenance control for its stated problem:

Control	Intended result
Repair / Rerun Database Schema	Reapply the current product schema and required repairs.

Control	Intended result
Repair Scheduled Tasks	Restore the product's expected scheduling.
Restart Paused Background Work	Resume the specific paused work supported by the maintenance service.
Flush Partner Rewrite Rules	Refresh the product's URL routing rules.
Backfill Missing PC- Commission IDs	Restore missing partner-safe commission references.
Clean Expired Operational Data	Remove expired operational data within the documented retention scope.
Run Complete Safe Repair Bundle	Run the combined safe repairs and return to Diagnostics.
Optimize AffiliPartnerCS Tables	Optimize only the product's custom tables; use low traffic because a host may briefly lock them.

Review [maintenance scope and limits](#) before choosing an operation. A failure displays an error instead of a success audit. Some service steps may already have completed; inspect Diagnostics before repeating an operation.

Factory Reset AffiliPartnerCS is a separate permanent deletion operation, visible only to an administrator allowed to manage and activate plugins as well as run maintenance. It deletes the product's business records, secrets and settings, then rebuilds an empty current schema. It preserves WordPress users/pages and WooCommerce orders, customers, products and coupons. To run it, type **DELETE AFFILIPARTNERCS DATA** exactly and check the acknowledgment before submitting. An incorrect confirmation deletes nothing. Use it only when that full deletion is intended; it is not required for an ordinary upgrade or repair.

Storage and integration reference

AffiliPartnerCS keeps program records separately from ordinary WordPress users, pages and WooCommerce orders. Installation creates and repairs its required tables; license deactivation and the normal retain-data uninstall preserve program history. A factory reset or deliberately configured delete-data uninstall removes the product records described in the removal controls. Back up the site before deliberate deletion. Technical administrators can use the complete database reference when planning backup, migration or support work.

Supported local integrations can read commerce context, register their own authority, preserve order evidence and coordinate a shared operation. These are developer interfaces, not additional merchant buttons. They enforce the same ownership, current authorization and recovery restrictions described above. The complete function reference identifies each supported entry point and its detailed contract. A successful connection check does not itself execute a reward, credit, payout or checkout reservation.

Understanding recovery messages

Use the screen's plain-language status first. If support asks for a code, copy the nonsecret code and the action that produced it; never include your complete license key, installation credential, webhook secret or downloaded authorization token. The technical error lookup explains exact licensing, update, storage and integration codes.

What happened	What to do
License check could not connect	Restore the site's outbound secure connection and use Check now . Existing temporary permission lasts only until its displayed deadline.
Activation or deactivation is uncertain	Use Check now to recover the saved operation. Avoid starting another activation while recovery is pending.
The site identity or encrypted credential changed	Have the site administrator resolve the migration or credential recovery. Repeatedly entering a key does not repair an inconsistent stored identity.
Another action is already running	Let it finish, then retry. Do not open repeated concurrent submissions.
Download, signature or package verification failed	Refresh the available update and obtain an authentic complete package. If installed files changed, review those changes before restoring the distribution.
Hosting storage or required PHP support is unavailable	Ask the host to restore the named extension, writable temporary storage, database or filesystem access, then retry.
A commerce provider or shared owner is missing or conflicting	Restore one compatible owner with current permission. Retained records remain available, but they do not authorize a replacement value transfer.
A shared operation or order record needs reconciliation	Preserve its original business reference and use the owning product's supported recovery. An uncertain outcome must not be treated as permission to repeat an award or payment.
A selector cannot load its records	Resolve the displayed database/service problem and reload; the error is not confirmation that no records exist.

Sample-data identity conflicts preserve the existing partner or coupon. Resolve the conflict deliberately if you need a sample; the setup action does not overwrite a real record to make the example fit.

Review applications

Open **AffiliPartnerCS → Applications** to review organizations that submitted the public application. An application is a request to join. Approval creates or links a partner record; plans, coupons, account access and community verification still need their own setup. The public form, its optional questions and submission rules are described in [Apply to the program](#).

The list shows 50 applications per page. Use All, Pending, Approved, Needs More Info or Rejected to narrow the list. Cards show Pending Review, Approved, Needs More Info and Total. Each row contains the organization/site, platform, approximate members, applicant name/email, status, submitted time and Review. Review opens the full application, including website, platform, member estimate, community description, extra notes, contact name/role/email and any submitted Other Platform, Phone, Partnership Interests, Promotion/Use Plan, Current Partners/Programs or Estimated Traffic/Referrals answers, and the answers to [your own questions](#).

Review also shows possible matching applications or partners. Check those records before creating a second organization. Domain matching examines a bounded recent set and the existing-partner domain warning does not reliably find every bare domain, so no warning is not proof that the organization is new. Check the email, linked account and partner list too.

Review control	What it does
Admin Notes	Saves review notes. When the status changes, these notes can be included in the applicant email; write them as communication the applicant may receive
Approve & Create Partner	Approves the application and creates a partner if one is not already linked. You need permission to manage partners and authentication secrets
Create Partner Record	Appears when an already approved application has no partner
Manage Partner	Opens the existing linked partner instead of creating another
Request More Information	Changes the application to Needs More Info and can notify the applicant
Mark Pending	Returns the application to Pending for further review
Reject	Asks for confirmation, then records rejection and can notify the applicant

There is no Withdraw button in this review screen. Changing an application's review status does not suspend or delete an existing partner. Approved, rejected and more-information decisions record the reviewer/time; returning to Pending retains earlier review history. Changing notes without changing status does not send a status-change email.

After saving, reload the application and confirm both status and linked partner. A partner may have been created even if a later review save failed. Continue with that partner rather than submitting the conversion again without checking. For confidential partner history use **Private Notes**, not application Admin Notes. Email delivery also depends on your [notification settings](#).

Manage partner records

Open **Active Partners** to manage the registry. The list includes configured, pending, suspended and terminated records; its name does not limit the list to active partners. It shows 50 partners per page. Status can be All statuses, Pending Setup, Active, Suspended or Terminated. Integration can be All integrations, Connected, Not Connected or Failed. Choose Filter to combine them or Reset to clear them. Cards show Total Partners, Pending Setup, Active and Connected. Rows show name, domain, platform, Partner ID, direct coupon, status, integration, onboarding and Manage/Application/Test actions; **Application** appears for a partner created from an application and opens that application.

Manage opens a partner's section tabs. Under the partner's name the record shows where it came from: the application it was approved from, with its number, the date it was sent and **View Original Application**, or **Added by hand, without an application**. Save changes with **Save Partner** in the section you edited before leaving it. The sections are Settings, Profile, Programs, Performance, Affiliate, Pricing, Authentication, Analytics, Integration, Account & Invitation, Private Notes and Delete. Authentication is available only to staff authorized to manage authentication secrets. Editing a plan through a link opens that plan's own editor; it does not save a changed selection in the partner form.

Onboarding Status checks whether an account is linked, a program is configured, a required verified-member integration is connected, and the partner is Active. Its short labels include Needs account link, Needs program setup and Needs verified integration. A Ready label alone does not prove a coupon exists, all shopping restrictions are met or payouts are configured. Review the individual checks and warning messages.

Create a partner manually

Use **Add Partner Manually** when an organization does not need to submit the public form. You need permission to manage partners and authentication secrets.

Field	How to use it
Partner Name	Required organization name
Website URL	Full community/site address; its host supplies the initial Partner Domain
Platform	Describes the partner site; selecting a platform does not install a connector
Description	Optional introduction for the member-pricing landing page
Partner Contact Email	Email used to find/create the dashboard account and send an invitation
Contact Name	Optional contact/display name
Store Account	Defaults to Create account if missing, otherwise link existing. You can instead link an existing email account only, or choose Do not link an account yet
Verified Member Plan	Optional enabled Verified Member Pricing plan
Public Coupon Plan	Optional enabled Public Coupon plan
Affiliate Plan	Optional enabled Affiliate plan
Direct Member Coupon	Existing WooCommerce coupon code for verified members
Public / Social Coupon	Optional existing public coupon code
Affiliate Links	Starts off; enable only with an appropriate Affiliate Plan
Shared Authentication Key	Optional at creation; finish key setup from Authentication as explained below
Invitation	Starts checked; sends a welcome/invitation email when an account is linked and a contact email is available

Choose **Create Partner**. The partner receives a generated Site ID and a separate public Affiliate ID. A verified-member program starts Pending Setup until verification connects it. A coupon/affiliate-only configured program can start Active without community verification. A partner with no program starts Pending Setup. A newly created account receives WordPress's normal password-setup message; the plugin does not send a password or authentication secret in its welcome message.

The authentication key. Creating a partner, by hand or by approving an application, saves a secure authentication key for it, or the value entered in **Shared Authentication Key**. Staff allowed to manage authentication secrets see it with **Authentication → Reveal Existing Key**. For a self-hosted adapter, install that key on the partner server. For managed Discourse, keep this key at the merchant and pair the separate DiscourseConnect Provider secret using the [managed setup](#). A successful signed verification establishes Connected. Releases before 1.3.5 saved new partners without a usable key and with no integration status; updating to 1.3.5 or later gives each such partner a new key once, without an email, and the status Not Connected.

An email already linked to a partner cannot be assigned through the manual creation flow. If creation fails after a WordPress account was created, that account and its password-setup email can remain. Check for it and link the existing account on retry. Do not create a second email account to work around an uncertain result.

Edit settings and the public profile

Settings contains the following controls:

Control	Effect and restrictions
Enabled	Enable this partner integration. Clearing it and saving suspends an ordinary partner; checking it for a suspended partner reactivates through the lifecycle workflow. It does not undo termination
Partner Name	Required name used in screens and member-pricing messages
Partner ID	Required unique lowercase Site ID. Changing it requires updating the connector; old links/sessions using the former ID stop resolving
Partner Domain	Registry domain, such as <code>example.com</code> . It is independent of the Profile's Home URL after creation
Platform	Choose Discourse, XenForo, Invision Community, WordPress, WooCommerce Memberships, BuddyBoss, MemberPress, phpBB, vBulletin, Custom Website / Application or Other / Not Sure
Linked WordPress Account	Select the dashboard owner, or No account linked to remove owner access without deleting the WordPress user

Use **Find a WordPress Account → Search Accounts** with at least two characters of a name, username or email. Up to 20 matching accounts are loaded, and the current linked account remains available. Select the owner in Linked WordPress Account and save. An account with an active seat at another organization cannot become this owner. Changing owners removes the former owner's active Owner seat and activates the replacement; unrelated WordPress accounts and historical seat records remain.

Profile contains Partner Home URL, Login URL, Logo URL and Description. Home URL is the community destination. Login URL is the partner login destination. Logo URL is the full address of an image; the plugin displays the referenced image rather than uploading one here. Description is plain multiline text shown to unverified visitors. These fields may be left empty. Login and Visit buttons appear only when the assigned verified plan enables Click-Back and the corresponding destination is present.

Settings, Programs, Affiliate and Pricing saves can update the partner's readiness state. A verified plan needs Connected integration before the partner becomes Active through those saves. At least one plan, coupon or enabled affiliate program counts as configured. Suspended and terminated states remain subject to lifecycle rules. A save to one section does not update unsaved fields in another; if two administrators edit the same fields, the later save takes effect.

Account & Invitation helps link an owner or resend onboarding. Contact Email starts from the application when available, otherwise the linked user. Contact Name is optional. Choose one of these Account Actions, then **Link/Create Account & Send Invitation**:

- **Link existing account with this email** requires an unassigned existing account.
- **Create account if missing, otherwise link existing** creates a customer login only when needed.

- **Send invitation only; do not change linked account** is the appropriate choice for an already linked owner.

The first action is selected initially. Attempting to link the already linked owner again can be rejected as an existing partner account; use Send invitation only. If email sending fails after linking succeeds, verify the linked owner and retry only the invitation. Authentication keys are never emailed.

Create and maintain Partner Plans

Partner Plans define reusable expected discounts and commissions. WooCommerce controls the actual coupon discount at checkout. Assigning or editing a plan does not create a coupon or silently change its amount/restrictions.

Open **Partner Plans**. The list shows up to 500 plans, with Total Plans, Enabled, Partner Requestable and Verified Member Plans counts for that list. Rows show name/ID, program type, expected discount, commission, Click-Back, partner-requestable status, enabled status and Edit/Duplicate. Choose **Add Partner Plan**, fill the fields, then **Create Partner Plan** or **Save Partner Plan**.

Control	Choices, default and effect
Plan Name	Required reusable name
Plan ID (slug)	Optional for a new plan; blank generates an ID from the name. IDs must be unique
Program Type	Verified Member Pricing (new default), Public Coupon, Affiliate or Hybrid
Expected Customer Discount	Percentage Discount, Fixed Cart Discount or Fixed Product Discount; starts 0. Percentage cannot exceed 100; negative values are treated as 0. This is the intended structure, not a checkout change
Partner Commission	Percentage or Fixed Amount Per Qualifying Order; starts 0. Percentage cannot exceed 100; negative values become 0
Click-Back	Starts off. Allows unverified visitors to see community login/visit links on the merchant landing page when verification is required
Partner Can Request	Starts off. Marks the enabled plan as available to requestable-plan readers; it does not let a partner directly assign itself a plan
Enabled	Starts on. Turning it off retains the definition/history and removes it from normal new assignment choices
Copied From	None—Independent, or another plan. Records the source relationship; it does not create ongoing synchronization
Internal Notes	Optional plan notes

The amount inputs move in 0.01 steps. A percentage is a rate; a fixed commission is per qualifying order, not per item. Full calculation and rule precedence are described in [Commissions](#). Verification is required for Verified Member Pricing and not for Public Coupon/Affiliate. Hybrid preserves its stored verification setting; there is no verification checkbox in this editor. The three partner assignment slots require their matching specific type, so Hybrid is not selectable as a substitute for one of them.

Duplicate makes an independent copy, initially named “<plan name> Copy”, preserving commercial settings and enable/requestable flags. Edit the copy and save the intended name and terms. Changing the original later does not update copies.

Optional sample data contains four examples: Verified Member—No Click-Back (10% expected discount/3% commission), Verified Member—Click-Back (10%/1.5%), Public/Social Coupon Example (7%/3%), and Affiliate Example (0%/5%). These are examples, not automatically assigned terms. They are enabled and requestable when seeded. Review or replace them before using them for a real program.

Delete Partner Plan asks for confirmation and is allowed only without references. Assigned partners, commissions, orders, commission rules, performance tiers, saved base plans and copied plans can prevent deletion. Missing/unreadable history also blocks it. Disable a used plan instead of deleting records needed to explain past activity. After a validation error, reopen/check the editor and enter any unsaved changes again; the error redirect does not preserve the draft.

Assign programs and configure member pricing

Open a partner's **Programs** section and choose its Verified Member Plan, Public Coupon Plan and Affiliate Plan independently. Each slot offers only enabled plans of its matching type and Disabled/No Plan. **Edit Selected Plan** opens that plan; **Create New Plan** opens plan creation. Save Partner to store the selections. The current-plan summary helps you compare expected discount, commission and Click-Back. A disabled or incompatible plan is rejected when saved.

The manual creation screen's three selectors also offer only enabled plans of their type. A Hybrid plan cannot be saved into a verified/coupon/affiliate slot. **Change Request History** shows when the partner's last change request was approved, which starts the request cooldown; direct merchant plan or profile changes do not start it.

Coupon / Plan Configuration Warning identifies a missing code, code without a plan, missing plan, nonexistent WooCommerce coupon, discount type/amount mismatch or expired coupon. Correct the affected plan/coupon relationship. WooCommerce still determines checkout eligibility, including product restrictions and other coupon rules. Use [Codes & Coupons](#) to create or attach actual coupons.

Pricing contains three fields:

Control	What to enter
Direct Member Coupon	Existing protected WooCommerce coupon code used after membership verification
Public / Social Coupon	Optional public code for social media, newsletters and similar promotion
Session Length	1–365 days; new partners start at 30. Applies to new verification sessions

Saving a coupon code here does not create it or prove that it can discount the current cart. A direct member coupon requires a valid verification session for the matching partner. Manually entering that protected coupon without membership verification produces an exclusive-members discount message. A session for another partner is insufficient. All ordinary WooCommerce restrictions still apply.

A valid verified session automatically attempts to apply its direct coupon when a cart is available and commerce eligibility allows it. Recognized direct coupons from other partners are removed first. The plugin suppresses the

new success message for successful automatic application, while preserving earlier success notices and failed-coupon errors. Clearing verification removes recognized protected partner coupons from that browser's cart. Public coupons follow their own [coupon and attribution rules](#).

Verification is quiet until the exact partner coupon actually reduces a nonempty eligible cart. Then a small lower-corner message says "<partner> member discount applied." It appears once for that verification, uses the partner's name, adapts to a light/dark page and has a close button when JavaScript is available. Without JavaScript the message remains readable, with no inactive close button. Closing it does not remove the discount. Empty carts, missing/ineligible coupons, zero savings and free-shipping-only discounts do not trigger it. If savings first appear in a dynamically updated cart, the notice can appear on the next ordinary page view. Cart/checkout totals are the authoritative savings display.

Changing Session Length does not shorten or extend sessions already issued. The verification belongs to the browser; it is separate from a WordPress login. Another browser or an expired session must verify again through the community.

Affiliate links and automatic tier control

Affiliate contains **Enable affiliate links for this partner**, the read-only **Affiliate ID** and attribution-window information. Enable links only after assigning an enabled Affiliate Plan in Programs. The panel warns when links are enabled with no plan. Disabling links prevents new attribution and hides the partner link generator; it retains the ID and historical reports. The public Affiliate ID begins AFF - and differs from the internal numeric partner ID and integration Site ID.

Attribution Window shows the window saved under [Marketing attribution settings](#), one setting for every partner (30 days at the start). The affiliate cookie is consumed after a successfully paid order or expires at the end of that window.

Performance shows Current Tier, Last evaluated and **Lock this partner to the current tier**. Locking prevents automatic upgrades/downgrades; merchant plan edits remain available. Unlocking and saving an existing tier can reevaluate its assignments immediately. If a save says the performance-tier base snapshot could not be updated, the partner fields may already be saved: review the actual plans before retry. Review plan assignments after deleting a tier as well. Full tier rules and restoration behavior are in [Bonuses and automatic tiers](#).

Connect and verify member access

A community connector verifies membership on the partner site and sends a short-lived signed signal to the store. A self-hosted adapter needs the effective merchant/store URL, the partner's Site ID and the saved Shared Authentication Key. Managed Discourse uses the merchant-hosted bridge: its partner HMAC key stays at the merchant, the forum pairs a separate DiscourseConnect Provider secret, and the browser component receives only public settings. A platform selection alone does not establish this connection. Follow the supported [community integration instructions](#) for the actual adapter.

In **Authentication**, the key field starts blank so an existing secret is not exposed in the editor. Blank means keep the saved value. **Generate New Key** fills an unsaved secure key; **Save Partner** makes it active. If you already entered a new value, generating another asks before replacing it. If secure generation is unavailable in the browser, use a browser that supports it or enter a securely generated value. Leaving without saving does not rotate the key.

Use **Reveal Existing Key** when authorized. The restricted page provides a masked read-only field and **Reveal and Copy**. It is audited. If browser copying fails, select/copy the revealed value manually. Use **Return to AffiliPartnerCS** when finished. For a self-hosted connection, install this key only in the partner's server-side adapter, never in public browser code or an invitation email. Changing it stops new assertions using the old value until the adapter matches. In managed Discourse mode this key remains merchant-side; do not copy it into the forum's browser component or confuse it with the separate DiscourseConnect Provider secret. Existing unexpired verification sessions are not revoked by key rotation; use suspension when you need to stop current partner verification access.

A new partner already has its key (see [manual creation](#)). Open **Integration**. It shows Site ID, Authentication URL, Member Pricing URL, signature method and payload reference. **Test Verified Signal** creates a short-lived merchant-side request. It opens a verification session and marks the integration Connected, but it does not test the connector installed on the partner website. It excludes this test from traffic totals and the one-time applied-discount notice. Reload the Integration page before retrying an already used or expired test link.

The **Test** button in the partner list makes the same check for staff allowed to manage authentication secrets. Then test the complete connection using an ordinary store/product link on the partner website: once while logged in there and once while logged out. A connector's dedicated test button can intentionally target Member Pricing; ordinary links verify normal destination routing.

Visitor state	What happens
Correct signed verified-member visit	Continues to the chosen store page, creates a secure browser session, and attempts the protected coupon when an eligible cart exists
Correct signed unverified visit, Click-Back off	Clears previous verification in that browser and continues to the chosen store page without protected pricing
Correct signed unverified visit, Click-Back on	Clears previous verification and opens the partner's Member Pricing landing page
Invalid, expired or reused signal	Grants no benefit, clears previous verification and returns to Member Pricing
Suspended, disabled, rejected or terminated partner	Verification is refused

The store must use HTTPS for verified sessions. Signals expire quickly and can be used only once. A new community link is the normal recovery for an expired/reused request. Repeated failures require checking the exact Site ID/key, both server clocks, the configured public store origin, same-store destination and session storage/cookies. A Connected badge only means an accepted signal saved the integration state; a later cookie/session problem can still prevent pricing. Detailed failure reasons are in the technical authentication reference.

Member Pricing has three presentations. With a valid session it shows the partner's logo when supplied, “<partner> Member Pricing Is Active” and **Shop <store>**. That heading confirms verification; the coupon must still produce an eligible discount. Without a session but with a recognized partner link, it shows the partner description and instructions to follow a new eligible store link while signed in to the community. **Log in to <partner>** and **Visit <partner>** appear only when Click-Back is enabled and their URLs are configured. With no recognized partner it shows a generic participating-community explanation. A valid existing session takes

precedence over a different partner named in the page URL. Member-access and member-pricing pages are marked not to be indexed/followed by search engines.

Team seats and store staff access

A partner owner uses a linked WordPress/WooCommerce account. Additional organization seats are optional and start disabled. They do not grant WordPress administration privileges. Store staff roles are managed separately.

Organization role	What the member can do while the partner is operational
Owner	View reports; manage team, profile, payouts, tax and marketing; send messages and disputes
Administrator	The same organization actions as Owner, except the Owner seat cannot be replaced/removed through team controls
Finance	View reports; manage payouts/tax; send messages and disputes
Marketing	View reports; manage marketing; send messages
Analyst	View reports and send messages

Suspended and terminated organizations retain view-only access; operational actions are unavailable. Additional-seat enablement still applies to nonowners. Disabling extra seats immediately blocks all nonowner seats without deleting their records; the Owner remains linked.

Merchant staff with partner-management permission open **Access & Teams**. Under **Partner Organization Seats**, find the organization, check **Enabled**, and choose **Save**. This table shows 25 organizations per page and their active members. Existing records are preserved when you turn it off. Enabling does not automatically approve pending requests.

With extra seats enabled, eligible partners see **Organization Team** in their dashboard. It lists member names/emails, roles, status and pending requests. Owners/Administrators can enter **Email**, choose **Role**, and select **Request Invitation**. The role choices are Administrator, Finance, Marketing and Analyst; Administrator is initially selected, so choose deliberately. The store must approve every request before access is granted. Requests for an already active member or an email already awaiting approval are rejected. If saving reports that its result could not be verified, check the pending list or ask the store before submitting again.

The merchant reviews **Pending Partner Invitation Approvals** in Access & Teams. Each row shows organization, email, requested role, requester/time and **Approve/Reject**; 50 requests appear per page. Approval requires additional seats still enabled. It uses the existing email account or creates one, activates the requested role and sends access instructions; a new account also receives WordPress password setup. A user already active at another organization cannot be approved. Rejection records the decision and emails the address. A reviewed request disappears from the pending list; reload before retrying an uncertain approval. Email failure does not undo committed access.

Owners/Administrators can **Update** a nonowner's role or **Remove** the seat. Removal retains history and does not delete the WordPress account. The Owner seat must be changed by the merchant using Linked WordPress Account. Retained removed rows can still appear in the list; changing their role does not restore access. Request a new invitation and obtain merchant approval to restore such a seat. Removing your own Administrator seat

ends your own organization access. Partners cannot cancel a pending invitation from this screen; contact the merchant to reject it.

Store Staff Access grants separate product responsibilities to store personnel. An administrator with WordPress permission to promote users must make these changes; a Shop Manager's full product access alone does not authorize role grants. Enter Email, select Role, then **Grant / Update Access**. A missing account is created and receives password setup. Existing product staff roles are replaced with the selected role, while unrelated WordPress roles remain.

Store role	Intended responsibilities
AffiliPartnerCS Manager	Full AffiliPartnerCS access
AffiliPartnerCS Finance	Financials, payouts, messages, exports and audit
AffiliPartnerCS Support	Messages and disputes
AffiliPartnerCS Analyst	Read-only reporting, exports and audit
AffiliPartnerCS Integrations	Integrations, webhooks, authentication keys and audit

The staff table lists names, emails and assigned product roles. **Remove AffiliPartnerCS Access** removes all dedicated product staff roles from the email account; it does not delete that account, remove unrelated WordPress roles or revoke access inherited from Administrator/Shop Manager. A valid Role selection is still required by the form even for removal. Staff grants/removals and organization seat changes are recorded in audit history. The exact access map is in Merchant permissions.

Request and approve profile changes

Partners with Owner or Administrator profile permission can request changes from their dashboard when requests are enabled and the organization is operational. A request is reviewed before it changes the public profile. It is not a self-service plan switch.

The form shows **Change request status**. By default a partner can submit one pending request at a time and must wait 90 days after an approved change before submitting the next. The store can change this interval or set it to 0; 0 removes the wait but still permits only one pending request. Rejected requests do not start a new cooldown. The next eligible date is shown when a wait applies. A status-read error blocks submission until the store can safely confirm the state.

The form contains **Partner Name**, **Partner Home URL**, **Login URL**, **Logo URL**, **Description**, and **Message / explanation**. Existing values fill the first five fields. Edit what should change and choose **Submit Change Request**. A message-only request is allowed. Leaving everything unchanged and the message empty is rejected. Empty fields are treated as proposed empty values, so do not clear a value unless you want the merchant to remove it. No plan, owner-account or security-key field is changed by this form.

After submission the request waits for merchant review and another request is blocked. There is no partner withdrawal/cancel control. Contact the store if you need the request rejected or clarified. If the result says it could not verify the saved request, do not submit a second one until its status has been checked.

Merchants open **Change Requests**. The list shows Pending, Approved, Rejected and Total counts and 50 rows per page, with partner, requester, status, submitted date and Review. Review displays **Current** and **Requested** values for all five fields and the partner's message. Current is the profile snapshot taken at submission. It may

differ from today's record if someone edited the partner afterward. Compare with the current partner before approving so you do not overwrite a later correction.

Pending reviews offer **Admin Notes**, **Approve & Apply Changes**, and **Reject**. Notes can be emailed to the partner; they are not a confidential private-note field. Approval applies the submitted fields and starts the cooldown, including a message-only approval. Reject asks for confirmation, leaves the profile unchanged and does not start a cooldown. Reviewed requests display their status, review time and retained notes; they cannot be reviewed again through the pending form. Manual merchant profile/plan edits do not automatically start this request cooldown.

If approval reports a transaction/save error, reload both the request and partner before retrying. A completed review sends the relevant notification when available. Enabling/disabling requests and setting the interval are covered under [Program settings](#).

Keep private partner notes

Open **Manage → Private Notes** to append an internal history entry. Enter **Private partner note** and choose **Add Private Note**. A nonempty note is required. The list shows the author, date and text, newest first, 25 per page. Notes are not shown in the Partner Dashboard or sent as a notification.

These notes have no edit/delete controls. Add a follow-up correction when needed. They remain attached to the partner and prevent deletion of that historical record. This is the appropriate location for internal partner commentary; application and change-request Admin Notes can be emailed externally.

Read the partner Analytics panel

Open **Manage → Analytics** and select **7 days**, **30 days**, **90 days** or **12 months**. The default is 30 days. Short ranges use daily chart buckets; 12 months uses monthly buckets and a 365-day summary.

Area	Information shown
Verified Member Pricing	Verified Member Visits, Verified Member Orders, Verified Member Sales, Visit → Order Conversion, Member Discounts Given and Verified Commissions
Traffic chart	Verified Member Visits alongside Unverified Landing Views; each bar's title retains its date/month and both counts
Click-Back	Unverified Landing Views, Actual Click-Back Clicks and Click-Back Rate
Public / Social Coupon	Public Coupon Orders, Public Coupon Sales, Customer Discounts Given and Public Coupon Commissions
Affiliate Links	Link Clicks, Unique Affiliate Visitors, Affiliate Orders, Affiliate Sales, Visitor → Order Conversion and Affiliate Commissions; shown when affiliate links and a plan ID are configured
Top Affiliate Destinations	Up to five linked destinations and their click counts when data is available
Creative Performance	Creative name/ID, orders and sales when data is available
Combined Partner Performance	Total Attributed Orders, Total Attributed Sales and Total Partner Commissions

Repeated unverified views/click-backs are deduplicated within the analytics service's browser/partner windows. Unique affiliate visitors use the effective affiliate attribution window; the cookie is consumed after a successfully paid order. Graph labels are thinned for longer ranges, while each column retains its values. No-traffic periods can display an empty chart message. Rates are shown to one decimal place.

Use these screens to understand program activity, not as a replacement for the financial ledger or currency-specific reconciliation. Aggregated totals have their own cache, order-status and currency limitations. See [Analytics and reporting](#) for the exact reporting rules.

Suspend, reactivate or terminate a partner

Use **Infrastructure → Offboarding** for an explicit lifecycle action. Choose **Partner**, choose **Action** (Suspend, Reactivate or Terminate Permanently), enter a required **Reason**, then choose **Apply Partner Status Action**. You need partner-management permission. The partner selector lists up to 500 records with their current status. A busy operation can require retrying after another owner/financial/lifecycle action completes.

Suspend stops verification, affiliate activity and marketing links, and disables linked coupons. The plugin remembers the prior affiliate/integration/link state for reactivation. It preserves accrued financial obligations and moves them to manual review. The partner retains view-only access to reports/history. Clearing Enabled in the partner's Settings and saving invokes the same suspension workflow with an automatic editor reason.

Reactivate restores the remembered affiliate/integration/link state and eligible coupon state. A verified program with no restored connection returns to Pending Setup; otherwise it can become Active. If there is no saved suspension state, affiliate activity is not assumed to have been enabled and missing link settings are not reconstructed. Checking Enabled for a suspended partner invokes this workflow. Reactivation does not release held liabilities for payment: finance must review them and follow the normal settlement process.

Terminate Permanently changes the partner to Terminated/Revoked, rotates its key and disables future verification, affiliate links, marketing links and coupons. It retains all historical obligations and records. The ordinary Reactivate action refuses a currently terminated record; do not use termination for a temporary pause.

Lifecycle updates and their later coupon/liability steps can partially complete. If an error says the partner was suspended, reactivated or offboarded but another step failed, inspect the current state, resolve that dependency and retry the intended operation. Do not assume everything rolled back. Do not delete an accrued liability or send replacement payment to work around a lifecycle error. [Retained liability review](#) explains the separate review and settlement steps.

Delete Partner is a different action in the Manage → Delete tab. It asks for confirmation and removes only an unreferenced partner record; it does not delete the original application or WordPress user. Deletion is blocked by history or relationships, including orders, coupons, commissions, payouts, audits, authentication logs, changes, notes, fraud records, bonuses, marketing, payout/tax profiles, seats/invitations, messages, network relationships, commission rules or saved tier plans. A single owner seat or private note is enough to retain the record. Unreadable history also blocks deletion. Suspend or terminate a used partner rather than trying to remove the evidence behind its activity.

Account operations and recovery reference

The plugin's integration services can read and update partner/application/plan records under the caller's authorization; there is no hidden customer editor for every stored field. The technical service reference specifies supported fields, sanitization, lookup limits and safe error-aware readers for developers.

For routine recovery, reload the detail screen and check what persisted before repeating a create, invitation, review or lifecycle action. A WordPress account can exist after a partner-creation failure; owner linking can succeed before invitation email fails; a partner can exist before an application review save finishes; and lifecycle status can change before coupon/liability handling finishes. Continue the unfinished step using the existing record. Retained records and failure messages are more reliable than an old success banner or a cached overview count.

Error details for support

If support needs the exact account-layer code, use the technical error and recovery catalog. It covers applications, plans, owner linking, seats, profile requests, secrets, deletion and lifecycle failures. Include the affected record and visible message; do not include passwords or shared authentication keys.

Affiliate links and sale attribution

AffiliPartnerCS records which partner introduced an order, applies eligible customer discounts through WooCommerce coupons, and calculates professional commissions. These are separate decisions. An affiliate link can track a sale without discounting it. Verification does not guarantee that a coupon will apply. Customer Refer a Friend credit is a separate Store Credit program and does not create an affiliate commission.

Assign the relevant enabled plans in [Partner Plans](#) and the partner's [Affiliate](#) and [Pricing](#) controls. Suspended, disabled, rejected and terminated partners cannot receive new attribution through the normal readers. A partner still marked Pending Setup is not excluded by that label alone; its required codes, plans and switches still matter.

For a checkout order, the normal attribution priority is:

1. The current verified partner session.
2. The first usable public partner coupon attached to the order.
3. The current eligible affiliate link, subject to the self-referral policy. A visit to a partner's [landing page](#) counts as a visit through that partner's link.
4. When [Lifetime customers](#) is on and nothing above credits the order: the partner who brought this customer before.

A higher-priority source wins even when another partner supplied an affiliate link. When [the partner's coupon through their links](#) is on, a link visitor's cart holds the partner's public coupon, so such a sale is credited through rule 2 as a coupon sale. A verified session may be recorded even if its linked coupon did not discount the order. Missing or disabled matching plans can leave attribution without a valid commission structure. A new plan assignment does not rewrite old order snapshots.

Sales keep counting while the license is on hold ([license policy](#)). Checkout still records the partner of an order that came through an affiliate link, or through a member session that began before the hold; partner coupons are refused during a hold. The commission is created once the license is active again, the same as if it had been created at checkout: a completed order starts its return hold from its completion date, and a cancelled, failed or refunded order gets none. Orders you create on WooCommerce's order screen are credited only while the license is active. A hard lock or kill switch records no partner.

Link tracking and the attribution window

Use the marketing link generator to make an affiliate link for a store page. The partner needs affiliate access enabled, its generated affiliate code and an enabled Affiliate plan. Generated links use `mpp_ref`; optional campaign, Sub-ID, creative, saved-link and landing values keep the visit distinguishable in reports. Campaign and Sub-ID accept up to 80 bytes after normalization, landing up to 100; unsupported tracking characters are removed and spaces become hyphens.

The Affiliate Link column in Codes & Coupons shows the partner's plain affiliate link (`mpp_ref`) to the store's home page. The marketing generator makes the same kind of link for any store page and can add campaign and other tracking values. The destination must be an HTTP/HTTPS address on the configured merchant host; the generator treats the same host with or without leading `www.` as equivalent.

On an eligible visit, AffiliPartnerCS records the click, sets the browser referral cookie and redirects to the same destination with tracking parameters removed. A clean address after redirect does not by itself prove the code was accepted: invalid codes are cleaned too.

The default window is 30 days. [Marketing attribution settings](#) lets authorized staff choose 1–365 days and first-click or last-click behavior. Last click replaces the prior eligible referral. First click keeps the existing eligible partner until its browser cookie expires or is cleared; a now-ineligible partner does not block a new referral. Click records can still show later visits even when first-click attribution stays with the original partner.

The cookie is private to normal browser handling, uses HTTPS-only transmission on HTTPS requests, and is not a verified membership credential. Attribution is rechecked against the partner's current affiliate eligibility. A paid-order request clears the referral cookie when that request has access to it, including a paid order attributed by another source. A background payment callback cannot directly clear a cookie from a customer's browser that did not make that request.

Reading an order's retained partner details

Open the WooCommerce order to see the AffiliPartnerCS details panel. It can show Partner, Attribution, Coupon, Affiliate Reference, Campaign, Sub-ID, Creative ID, Landing Attribution, Plan, Customer Discount and Commission. Only fields present on that order appear. Viewing the order does not assign attribution.

The panel preserves the names and plan values recorded when the order was attributed. Advanced commission rules can produce a ledger amount different from the simple plan rate shown here; use Commissions for the actual ledger amount. Normal later visits or coupon changes do not replace an existing partner on the order. Authorized corrections use the dedicated financial workflow.

On an order created in WooCommerce administration, WooCommerce reports a partner coupon as not valid: the consumer check behind partner discounts does not use the administrator's identity and accepts partner coupons only where it can check the shopper. Credit such an order to its partner with **Financial Controls → Manual Order Attribution / Correction**. If attribution already exists but the ledger is missing, a supported administration save gives the commission service another chance to create that original order's row.

Classic checkout and Checkout Blocks both retain order attribution. If an order's saved metadata cannot be verified, downstream work from that attempt is held and logged. Repeated notifications do not mean a second commission was earned; the ledger guards against a second primary commission for the same order.

Lifetime customers

With **Lifetime Customers** switched on ([Marketing](#); off until you switch it on), a partner keeps earning on the later orders of the customers they brought.

- **How a customer becomes a partner's lifetime customer.** When a customer's order is paid (Processing or Completed) and it was credited through a partner's affiliate link, landing page or public coupon, the customer is linked to that partner: by store account, and by billing email so that guest orders count too. Member pricing sessions, corrections and lifetime orders themselves link nobody.
- **Which later orders count.** A later order of that customer that no member session, partner coupon or affiliate link credits is credited to the linked partner. The order's Attribution reads **Lifetime Customer**. An order that another partner's coupon or link credits goes to that partner, and the customer stays linked to the first partner.
- **What it earns.** The partner's current commission for the kind of sale that brought the customer: the partner's Affiliate plan for a link or landing page, its Coupon plan for a coupon. The customer gets no discount from it. Commission holds, refunds, renewals, rules and license holds apply as for every other commission.
- **How long. Lifetime Length** sets the days a link lasts from the first order; 0 means no end. An ended link credits nothing and makes room for a new one: the next paid order credited through a partner links the customer to that partner.
- **When a link goes.** When its first order is refunded in full, cancelled or fails; when you choose **Remove** under **Lifetime Customers** on the partner's record (Affiliate Links section); and when the customer's personal data is erased. The partner's own store account is never linked (unless your store allows self-referrals, [Review self-referrals](#)).

A customer stays with the partner who brought them first. Switching Lifetime Customers off keeps the links but credits nothing and makes no new links until it is on again. Partners see how many lifetime customers they have, never who they are.

Codes & Coupons

Open **Codes & Coupons** with partner-management permission. Administrators and authorized partner managers can manage the relationship. WooCommerce remains the coupon engine, and coupons created here are ordinary WooCommerce coupons available in its full editor.

The overview shows 50 partners per page and their Verified Member Coupon, Public / Social Coupon, Affiliate Code, Affiliate Link and Partner Status. Use **Create / Attach** or select a partner and choose **Load Partner**. The two cards represent the verified-member code and public/social code. A missing native coupon is labelled **WooCommerce coupon missing**; you can create the named code or attach a replacement.

An assigned plan's discount is displayed as a reference. Existing coupons retain their own current WooCommerce settings; changing a plan does not automatically rewrite every linked coupon. New coupons start with the assigned plan's discount type/amount, or Percentage and zero when no plan is assigned. Suggested codes use the partner name/slug plus member or partner, with a suffix when needed.

Create or edit a coupon

Control	What to enter or choose
Coupon Code	A unique nonempty code. Editing this field renames the actual WooCommerce coupon. If the code already belongs to another native coupon, use Attach Existing Coupon instead.
Discount Type	Percentage discount, Fixed cart discount or Fixed product discount.
Amount	Zero or more; percentage cannot exceed 100. The field accepts steps of 0.01.
Description	Optional multiline administrative description.
Individual use only	Enables WooCommerce's restriction on using this coupon with others. Initially off for a new coupon.
Allow free shipping	Enables the coupon's free-shipping flag. A suitable shipping method must still allow it. Initially off.
Exclude sale items	Applies WooCommerce's sale-item exclusion. Initially off.
Minimum Spend / Maximum Spend	Optional native spend restrictions; blank leaves that bound unset.
Usage Limit	Total allowed uses; 0 means unlimited.
Usage Limit Per User	Per-user allowed uses; 0 means unlimited.
Expiration Date	Optional date. The coupon expires at the end of that date as interpreted by WooCommerce. Blank removes the expiry.
WooCommerce Status	Published / Active or Draft / Disabled. New coupons default to Published.

Choose **Create WooCommerce Coupon** or **Save Coupon in WooCommerce**. For product/category restrictions, email restrictions and other native coupon settings, choose **Open Full WooCommerce Coupon Editor** or **Advanced: Edit in WooCommerce**. Existing values are prefilled from that real coupon.

To use a coupon already created in WooCommerce, enter its code under **Attach Existing WooCommerce Coupon** and select **Attach Existing Coupon**. This links the existing coupon without copying it or changing its financial settings. A coupon already linked to another partner or the other role must first be detached there.

Detach from Partner removes the relationship but keeps the real coupon and its current publication status. If the offer should stop entirely, also disable it in WooCommerce. With JavaScript, the button asks for confirmation; the native form still works without JavaScript. You can reattach an eligible existing coupon later. A full WooCommerce editor rename normally updates a metadata-linked partner's code pointer.

Suspended partners and relationship recovery

Suspending or disabling a partner blocks linked coupons even when a visitor knows the code. AffiliPartnerCS drafts its current direct/public coupons and remembers which coupons it disabled. Reactivation restores those recorded statuses; coupons that you had already left Draft are not automatically published. Current product permission is also required for linked coupon benefits.

A successful relationship save must agree in both WooCommerce and the partner record. If a confirmed save fails, the plugin tries to restore the original coupon, or remove a newly created coupon. When the result cannot

be established safely, it quarantines the coupon in Draft and marks the mismatch. Publishing it alone does not bypass that marker.

Follow the result shown on screen:

Notice/result	Action
Original state restored	Reload both the coupon and partner relationship, correct the original problem and save again.
Quarantined in Draft / relationship mismatch	Keep it disabled, verify the intended partner and role, then repair and save the relationship.
Could not safely restore or quarantine	Disable the coupon in WooCommerce immediately and review the audit record before another change.
Coupon missing	Create the intended native coupon or attach the correct existing code.
Already linked elsewhere	Detach the existing relationship before reassigning it.

No success notice means no verified completed relationship. Preserve the original coupon ID and partner identity when resolving an uncertain result.

Business eligibility and protected carts

Partner discounts are consumer offers. When B2B or Commerce Core supplies customer eligibility, AffiliPartnerCS checks that current decision before applying or retaining the coupon. Business/ineligible buyers and an unavailable expected eligibility service cannot gain a partner discount by re-entering its code.

If any cart line is protected, or its protection state cannot be verified, the whole partner coupon is excluded. The supported protection inspection is bounded to 200 cart lines. Cleanup can examine up to 100 applied coupons. The restriction also applies when a previously used integration has been removed: absence does not mean the customer is now eligible. Restore the compatible owner service and refresh the cart.

The cart may remove a partner coupon after an eligibility change. If cleanup cannot be verified, checkout asks for a refresh/review rather than silently retaining the discount. Administration order recalculation does not borrow the administrator's consumer identity to grant discounts. Existing order attribution, commissions and earned payout history remain separately controlled.

The detailed audience and line contracts are in Consumer eligibility. Integration status is visible only to authorized staff and does not itself authorize a new financial action.

How professional commissions are calculated

An attributed order can appear as a provisional commission while it is still Pending Payment or On Hold. This gives the partner an order record; it does not make the amount payable. New cancelled, failed, refunded or trashed orders do not create a commission. One original primary ledger row represents each order, with separate rows for any multi-tier earnings.

The order's stored plan/rate is used unless an applicable advanced commission rule overrides it. A missing usable rate structure can leave an attributed order without a commission. Changing a current partner plan does not silently reprice old ledger rows.

Merchandise base and examples

Commissionable merchandise is measured after product/cart discounts and before tax. Shipping and fees are excluded. A merchandise refund reduces the relevant line's remaining value; refunding shipping, tax or fees does not reduce the merchandise base.

Store credit is not treated as a discount for commission. When a customer pays part of an order with AffStackDev Store Credit, that part stays in the commissionable merchandise, net of tax. For example, a 49 plugin with a 10% coupon (4.90) and 20 of store credit has a commission base of 44.10, not 24.10. Refunds reduce the store-credit part in the same proportion as the line.

For merchandise worth 120 after discounts with 20 refunded, the remaining base is 100. A 12.5% commission is 12.50. A fixed 15-per-order commission remains 15 while positive merchandise remains; it does not shrink in proportion to the refund. If no merchandise base remains, the open-hold refund process voids the commission. A fixed commission also requires a positive commissionable merchandise base. An entirely excluded or zero-value order earns no fixed commission.

Amounts use the store's configured currency precision. Each row retains its original currency; this calculation does not convert currencies. A zero-rate plain plan can produce a zero commission row; an advanced rule set with no positive payable amount does not create a payable commission. Custom integrations can exclude or adjust line values through the same documented PHP hooks in standard plans, advanced rules and refund recalculation; those are developer controls, not extra fields in the merchant screen. See Calculation hooks and exact behavior.

The opaque PC-... commission reference is the partner-facing identifier. It is different from the WooCommerce order number. Use it when discussing a partner's commission without exposing the customer's order identifier.

Managed AI service commissions

When AffStackDev AI Gateway 0.1.0.5 is installed with this release, managed AI service is sold at its full listed price. Customer coupons, Dynamic Pricing offers and Free Gifts & BOGO do not discount it; buying it does not qualify for a free gift, and the managed service itself cannot be a gift. Gateway enforces these product rules without changing the store's saved promotion rules.

A partner can earn commission on the first paid month of managed service. A monthly purchase uses that month's merchandise amount. For three months prepaid at \$299 per month, the \$897 payment has a \$299 commission base, so a 10% rate pays \$29.90. Later subscription renewals earn no commission, even when a Partner Plan or Advanced Commission Rule ordinarily pays renewals. A partial merchandise refund reduces the first-month base proportionately while the commission is still adjustable.

The first managed-service commission waits for Gateway to verify the original payment and native AffStackDev subscription. An attributed but unverified payment does not create a commission row. After verification, Gateway asks AffiliPartnerCS to create the ordinary commission once; normal attribution, adjustment holds, multi-tier handling and reviewed payouts still apply. It does not send partner payment.

Install AffiliPartnerCS 1.3.0.5b or newer with the coordinated Gateway release before selling this offer. An older owner cannot prove that advanced and refund calculations respect the same restriction, so Gateway makes its managed-service commission nonpayable. Review any such older row through the existing finance workflow after upgrading. Other products keep their configured commission rules. Native AffStackDev Subscriptions supplies these service payment events; WooCommerce Subscriptions is not required for this offer.

Completion, adjustment holds and payout readiness

Status	Meaning for the merchant and partner
Pending Order Delivery	The order is attributed and provisional; it waits for WooCommerce Completed status.
Commission Pending - Return Hold	The completed order is within its adjustment hold, or the maturity job has not yet updated its status.
Pending Payout	The commission amount is final and ready for the separate payout workflow.
Paid	The commission has been closed with its payment reference and date.
Voided	It is not payable.

The normal **Commission Adjustment Hold** is 30 days, configurable from 0 to 365 in global settings. The hold starts from WooCommerce's Completed timestamp, not the referral click or order creation time. A rule can set its own hold of up to 3650 days. Zero makes the deadline coincide with completion; the scheduled maturity process still moves the row into Pending Payout.

At the deadline, the commission becomes final even if its status still says Return Hold while cron catches up. Pending Payout, Paid, Voided and commissions frozen into a nonvoid payout cannot be reopened by ordinary refund/status updates. An order that has not completed normally remains provisional. Moving an open, unfrozen order back to Processing can return it to Pending Order Delivery.

The hourly maturity process handles up to 500 due return-hold rows per run. It advances applicable source/tier rows together and does not send payment. If rows remain overdue, inspect scheduling and the financial/error logs. Restore the problem and use the supported process on the existing rows; do not create replacement commissions.

Saving a new global hold recalculates rows still in Return Hold that use the global policy and have a completion date, then runs maturity. It does not rewrite rule-specific holds or reopen final rows. Pending Order Delivery rows retain their captured day value until completion. A displayed return-hold row whose old deadline has already elapsed can still be included before maturity changes its status.

Global settings save includes several other settings sections in sequence. If a later section reports an error, earlier sections may already have saved. Reload and inspect the actual values before trying again; an error is not a promise that the entire form rolled back.

Refunds, late cancellation and recovery

WooCommerce controls the customer refund. AffiliPartnerCS adjusts the commission afterward only while its adjustment window remains open. During that window, a full refund or cancelled/failed order can void the commission; a partial merchandise refund recalculates it from the original plan or frozen advanced-rule terms. Related unfrozen tier rewards are adjusted with the source.

After finality, the customer can still be refunded, but the commission is preserved and no automatic partner clawback is created. The order note and audit record explain that result. A later cancellation/failure also preserves a final commission. Paid or payout-assigned tier earnings are protected by their own payout records.

If WooCommerce completed the refund but commission synchronization is busy or fails, the plugin retries the same event up to four times, after 15 seconds, 60 seconds, 3 minutes and 10 minutes. A successful retry records a checked marker and removes remaining retry jobs. Scheduling failure or exhausted retries produces a critical manual-repair record. The customer must not be refunded again just because ledger repair is incomplete.

Keep the original order, refund ID and commission reference. Restore storage/scheduling and reconcile those records. Each retry checks current finality, so an unresolved repair reaching the hold deadline is assessed against that current finality rule. Missing order/evidence, an uncertain write, or a final commission must not be concealed by creating another commission. Authorized corrections and financial adjustments have their own workflow.

Advanced Commission Rules

Open **Advanced Commission Rules** with financial-management permission. Product rules override category rules, category rules override plan rules, and plan rules override global rules. Within the same target type, higher priority wins; an equal-priority tie uses the earlier rule ID. The screen also reports whether WooCommerce Subscriptions is detected.

Use **Find target IDs** and **Search Targets**, then expand **Show available target IDs**. Plans, products and categories are displayed up to 100 each per selector page. Navigate additional pages when needed. Product choices list published/private parent products; use a correct exact variation ID through a supported integration when targeting one directly. Category choices include empty categories. If a selector reports a read error, wait until it is available before saving a rule.

Add Commission Rule control	Meaning
Rule Name	Required descriptive name.
Enable this rule	Initially checked. Unticked, the rule is saved switched off and matches no order. The list has no switch: to stop an existing rule, Delete it; an authorized integration can save a rule switched on or off.
Priority	Default 10, range 0–100000. Higher matters only within equal target specificity.
Target	Global, Partner Plan, Product or Product Category.
Target ID	Use 0 for Global; otherwise a real positive ID of the selected kind. A typed ID is not automatically checked for existence when saved.
Initial / One-Time Commission	Use Partner Plan Rate, Percentage or Fixed Amount; value zero or more, percentage at most 100, input step 0.0001.
Renewal Behavior	Initial / One-Time Sale Only, Every Renewal, First X Renewals or Declining Renewal Commission. Default Every Renewal.
Renewal Commission	The renewal rate source/type and value, with the same bounds as the initial rate.
Renewal Limit	First X needs a positive count; 0 pays no renewals in that mode. For Declining, 0 means unlimited. Every Renewal ignores this limit.
Decline Per Renewal	0–100%, default 0; reduces the starting renewal rate/value geometrically after the first renewal.

Add Commission Rule control	Meaning
Return / Refund Hold Override	-1 uses global; 0 makes the deadline immediate after completion; otherwise up to 3650 days.

Select **Add Commission Rule** to save. The configured list shows up to 1000 rules with status, priority, target, initial/renewal terms and hold. It provides **Delete**, with a browser confirmation when JavaScript is available. There is no native edit button in this list. Deleting a rule stops it from matching future calculations but retains existing commission snapshots. Developer integrations can update a rule by its ID using the supported local service; see Rule API.

Combining rules and calculating renewals

A rule affects its matching merchandise lines. Other positive lines keep the plan rate. For example, a 100 line at a 20% product-rule rate plus an unmatched 50 line at a 10% plan rate earns 25 in total.

A fixed rule pays once per matching rule per order, not once per unit or line. If a fixed 8 rule covers two lines and an unmatched line uses a fixed 5 plan, the total is 13. A fixed amount remains once while at least one of its original eligible lines retains positive value after a refund.

A product rule can match a variation or its parent; those have equal product specificity and use priority/ID to choose between them. A category rule uses directly assigned categories, not automatically every ancestor category. A rule paying zero or excluding renewals does not accidentally erase the plan commission on unrelated unmatched lines.

Declining mode multiplies the starting rate by the remaining percentage each renewal. Starting at 10% with a 20% decline pays 10%, 8%, 6.4% and 5.12% on renewals 1–4. A positive renewal limit stops later numbers. A 100% decline leaves only the first renewal's starting rate.

For mixed-rule orders, the longest nonnegative override among paying matched rules becomes the hold. If an override exists, unrelated plan/global lines do not extend it back to the global hold. Review short overrides carefully when combining them with a longer global period.

Existing commissions retain their original item/rule/rate snapshot. During an open-hold refund, that snapshot is applied to the remaining original items rather than today's edited rules. A deleted or fully refunded item contributes nothing. The screen label **Advanced Rule Snapshot** identifies this calculation source.

Subscription orders and renewals

The integration is for WooCommerce Subscriptions and activates automatically when its supported class/functions are available. One-time rules still work without it. Another product with “Subscriptions” in its name does not automatically satisfy this interface.

The initial order's attribution is copied to the subscription, then to renewal orders. If the subscription has no partner attribution, its original parent order is checked. This preserves the original partner/plan snapshot without depending on a new affiliate click for each renewal.

The ledger shows Initial Subscription or Renewal # with a subscription ID when available. The renewal number is at least one and uses the larger of completed renewal payment count and related renewal-order count. A related unpaid renewal order may therefore affect the sequence; do not assume the displayed number means

exactly that many paid renewals. With multiple related subscriptions, this integration uses the first returned subscription for the commission context.

Renewal payment completion gives the idempotent commission service another chance to create the same order's row. Cancelling or expiring a subscription records its status change but does not automatically claw back historical renewal commissions. Individual orders continue to use their own refund and finality rules.

Multi-tier Network

Open **Multi-tier Network** with financial-management permission. It records a referred partner and the partner who referred them. Both the global switch and every relevant relationship must be enabled for new tier rewards.

Global control	Default and effect
Enable multi-tier commissions	Off. Enables new tier creation.
Maximum depth	2, selectable from 1 to 5 levels.
Level 1–5 default rate	0% each, allowed 0–100 with input step 0.01.

Choose **Save Global Settings**. If a save cannot be verified, the plugin attempts to restore the previous values and shows an error. Turning the global switch off does not delete earned records; it stops new creation and hides the partner dashboard network summary.

Under **Per-relationship Control**, enter the actual **Referred partner ID** and **Referring partner ID**, select **Enabled**, and optionally enter **Rate overrides**, such as 1:12.5, 2:4. Select **Save Relationship**. Suggestions show up to 100 partners, but you can type another valid partner ID. Zero IDs, the same partner on both sides, a cycle or a chain too deep to verify are refused. Use existing partner records: an incorrect typed parent can later prevent a complete tier ledger from being created.

One relationship is stored for each referred partner. Saving that child again updates the parent, enablement and overrides. To stop it, resave with Enabled unchecked. There is no delete control. Blank overrides inherit global rates; an explicit zero rate suppresses that level's payment while allowing the chain to continue. Only levels 1–5 are recognized; values are clamped to 0–100. The relationship list displays 50 rows per page.

Changes govern future tier creation. They do not change existing frozen tier rates or erase earnings. Source-linked refunds/status changes continue to synchronize applicable existing tier rows even if the global switch is later turned off.

What a tier earns and what the dashboard shows

Every tier uses the original referred partner's commission amount. It does not use the customer's total and does not compound from the preceding tier. If the primary commission is 40, level 1 at 12.5% earns 5 and level 2 at 4% earns 1.60. The original partner still earns 40.

Each receiving level must have a valid partner record. The engine does not add a separate affiliate-plan or active-status check to the receiving parent lookup, so enable only intended relationships and review the payout controls for those recipients. Zero or rounded-to-zero earnings do not create a tier row. The source and its required tiers are stored together; a failed required tier is not accepted as a complete partial result.

Each tier is a separate commission and payout obligation. Completion/holds follow the source; eligible open refunds reduce unfrozen tiers using their original percentage. Paid or payout-assigned tiers are protected. Paying the source does not pay the tiers; they close through their own batches. An attribution correction cannot rebuild tiers that are already final or assigned to a nonvoid payout.

Partners see **Partner Network** only when global multi-tier is enabled and there are active direct referrals or nonvoid earnings. **Multi-tier commission earned** is displayed separately by currency and includes provisional and already paid entries; it is not the amount available to withdraw. **Active referred partners** counts enabled direct relationships. Partners cannot edit the network from that section.

Reading the Commissions screen

The read-only **Commissions** screen has Status, Partner, Source, From and To filters. Choose **Filter** to apply them or **Clear** to return to the full list. Dates filter creation dates for the whole selected day. The table shows 75 rows per page, newest first. Source choices are Verified Member, Public Partner Coupon, Affiliate Link and Multi-tier Referral; a Manual Correction row may appear without its own source-filter choice.

The four cards summarize all ledger rows by status, not just the filtered page. They do not group or convert currencies. For a multi-currency ledger, reconcile the row currencies and currency-aware financial reports instead of treating those cards as converted amounts.

Each row shows the WooCommerce order link/number and partner commission ID, current order status, partner, attribution/coupon, order or renewal context, plan, commissionable sales, rate, commission, status and hold/payout information. **Waiting for order completion**, **Pending payout after...**, **hold complete**, **Paid...** and **Not payable** explain the stage. An advanced commission shows **Advanced Rule Snapshot** instead of a single percentage. A manual adjustment, bonus, clawback or correction has no order: its order and rate show —, a related order given with it shows as **Related order #...**, and once payable it shows **Ready for the next payout**.

This table does not send payment or edit a commission. Use the authorized payout or correction workflow for those operations. Keep the existing commission reference when investigating missing rows, refund repairs or payout issues.

Customer Refer a Friend

Customer Refer a Friend is an individual-customer reward program owned by Store Credit. It is separate from professional affiliates, commissions, multi-tier earnings and payout batches. A customer does not need a professional partner account or affiliate plan to participate under that program's rules.

When the compatible Store Credit service is present, staff with both Store Credit and WooCommerce management permission can use the plugin's **Customer Refer a Friend** link to its owner screen. Configure invitations, reward amounts, waiting periods, purchase minimums, expiry, limits and combination policies there. Selecting AffiliPartnerCS as the provider requires the supported integration and current execution permissions.

AffiliPartnerCS checks the actual buyer and inviter's consumer eligibility. A professional affiliate code, a coupon, or an administrator viewing the order cannot replace that check. Missing expected eligibility services hold the reward. Fulfillment uses the original claim ID and verifies the owner's receipt; it never creates or closes a professional commission.

Other offers and historical evidence

Store Credit's partner-offer combination selectors can identify offer types, partner plans and linked coupons. The selector catalog includes matching plans and published linked coupons; it does not transfer ownership of those offers to Store Credit. Rules can distinguish verified pricing, public coupons, affiliates and hybrid offer types.

All active offer facts must satisfy the accepted combination policy. An unknown partner/coupon relationship is not treated as “no other offer.” Too many coupons, missing partner/plan data or an unsupported relationship can therefore hold qualification. A verified-session order attribution currently may yield unknown historical offer evidence, while current cart verification is recognized directly. Review the original evidence rather than assuming that a currently working member coupon proves the historical combination.

Historical referral evidence

New checkout orders retain a signed record of their original partner/coupon offer facts, bound to that site, order, customer and coupon list. Later editing or deleting the live plan or coupon does not reinterpret those retained facts. Changing the order's customer/coupon identity, moving the record, changing the authentication salt, or losing the original evidence prevents it from being trusted.

Older orders without trustworthy evidence require review. Today's session or affiliate cookie cannot authorize a historical reward. A verified record showing no offers is different from an absent record whose offers are unknown. There is no automatic historical reconstruction from current settings. See Exact retained evidence for integration limits and formats.

Shared referral processing and continuity

A compatible Store Credit program can use Commerce Core to coordinate supported referral processing with AffiliPartnerCS. Store Credit still owns every credit balance, claim, original reward reference and financial receipt. The named controller is the product currently selected to handle supported work; it is not permission to bypass licenses, eligibility or unresolved attempts.

Migration is explicit in Store Credit. Installing either product does not automatically create a second campaign or move old claims. New shared AffiliPartnerCS capture requires the peer to advertise its supported referral qualification capability. Routine product version numbers alone do not prove this support. If the capability is absent, existing supported rewards can remain readable/processable while the new-capture choice stays held.

Original rewards and recovery

Both products must permit new referral execution, the original definition must match, and the store currency/precision must agree with the accepted program. A missing or incompatible Store Credit service pauses financial rewards; restore the original compatible service and reconcile the existing claim. Receipt inspection can remain available separately from permission to issue new value.

An authorized local integration can explicitly adopt a supported existing claim into the migrated program. It must supply that claim's original snapshot identity, not new recipients, amounts or guessed history. Existing signed qualification, referrer and order evidence must be valid. Adoption preserves accepted terms and does not itself issue a reward. This is a developer API, not a new APCS merchant button; see Shared operations.

If one side was issued and the other is uncertain, retain the same claim and side reference. Do not send replacement credit, cash or a coupon until the original outcome is established. A notification failure does not prove the financial issuance failed. When a compatible owner and Core can prove an expired original attempt made no financial effect, the owner can retry that same operation under fresh authority. It rechecks the original paid, unrefunded purchase, reward deadline, definition and receipt first. An uncertain result remains held for later reconciliation; it does not justify a renamed or replacement reward. The APCS continuity status's own retry flag is not the Store Credit owner's recovery capability.

Retained referral controls

Infrastructure's **Customer referral continuity** explains whether the program is available, paused, missing a service or awaiting reconciliation. For a supported retained program, it shows the preferred and last recorded controller. These recorded names do not guarantee current execution permission.

Authorized staff need APCS settings, Store Credit management, WooCommerce management and current APCS customer-referral permission to use these controls:

Control	Effect
Program title	Changes the retained title, up to 120 UTF-8 bytes.
Accept new invitations	Pauses/resumes new capture. Pausing preserves accepted obligations.
Process accepted rewards	Pauses/resumes supported shared effects while retaining the obligations.
Archive program	Holds shared processing without deleting or cancelling accepted rewards.
Save retained program controls	Applies the exact revision shown by the form.

If someone changed the program while your form was open, reload before saving. A stale form is not automatically applied to a newer revision. These controls can remain available for a supported existing definition even when Store Credit is temporarily absent; they do not make financial processing available without its owner. Other amounts, scopes and reward policies remain in Store Credit's full editor.

When paused or archived, accepted obligations remain retained. An original pending attempt may need reconciliation before other changes are allowed. If a missing optional capability blocks selecting or re-enabling APCS capture, install a peer that explicitly supports the required interface, then review the same program.

Shared program limits and accepted reward terms

The complete integration retains exact program identity, currency and price precision. These cannot be silently changed by a title/pause edit. Developer integrations must use the complete supported schema rather than sending a partial guess; Portable definition provides the exact field types and API limits.

The supported program defaults and bounds are:

Program term	Default and limit
Capture/provider	New capture off; Store Credit provider. A real enabled program requires its retained identity/revision.

Program term	Default and limit
Friend benefit	Credit by default; eligible programs can instead use a fixed eligible-merchandise discount.
Friend / referrer amount	1000 minor units each; each allowed from 1 to 1 billion minor units. At two decimal places, 1000 means 10.00.
Minimum purchase	2500 minor units; allowed 0 to 1 billion. At two decimal places, the default is 25.00.
Hold	14 days, allowed 0–365. This referral hold starts from payment, separately from professional commission holds.
Invitation window	30 days, allowed 1–365, measured from invitation acceptance.
Friend / referrer expiry	0 means no expiry duration; allowed 0–3650 days.
Referrer / program cap	25 / 1000 lifetime claims; allowed 1–10000 / 1–1 million. Cancelled and review claims still count.
Title / terms	Up to 120 / 4000 UTF-8 bytes.
Product/category scopes	Separate qualifying, friend-redemption and referrer-redemption include/exclude lists, each at most 100 unique IDs. Exclusions take precedence.
Combination policies	Qualifying purchase, friend redemption and referrer redemption each have coupon, sale, credit, freebie, partner and other categories. Each category supports all, none, only selected or except selected, with up to 100 selected identities. Defaults are none.

The friend must meet the program's first-purchase/one-per-program identity requirements. Self-referrals matching the inviter's user or normalized email are rejected. The inviter needs an account; a guest friend can participate with verified billing identity. Eligible minimum merchandise is measured after other discounts but before the friend discount, excluding tax, shipping and fees. Positive payment must remain. Credit products and subscriptions do not qualify under this contract.

The accepted program freezes the reward terms. Both current and retained audience evidence matter; removing an eligibility provider or retiring business policy is not an automatic consumer grant. Currency conversion is not performed. Shared execution requires the current store precision to match the frozen precision.

Referrer reward processing precedes the friend side. A friend checkout discount does not also issue friend credit. Credit is tied to the referrer's account and the friend's account or frozen email identity, has tax-exclusive value, and does not pay shipping. Native individual-use and frozen combination rules still apply even where credit allows coupons.

A cancelled/refunded order or positive purchase refund invokes the accepted cancellation policy. Only original credit that is unspent and unreserved can be revoked automatically. Used, reserved, missing or uncertain credit and changed order evidence require merchant review. Pausing invitations preserves obligations; pausing processing or archiving holds effects without cancelling them.

Rewards troubleshooting

Symptom	What to check
Affiliate visit is not attributed	Generated mpp_ref link, correct store destination, enabled affiliate plan/code, partner status, first/last-click policy, and higher-priority verified/public-coupon source.
Verified member has no discount	Actual linked WooCommerce coupon, its restrictions/status, verified session, current product permission, consumer eligibility and protected cart lines.
Coupon relationship error	Reload the same partner/coupon; distinguish restored state from Draft quarantine and unsafe recovery. Do not publish around a mismatch marker.
Attributed order has no commission	Valid stored rate structure, a deliberately nonpaying advanced rule, terminal order status, current permission and recorded creation error.
Commission is waiting	Complete the real order, inspect its hold/deadline and confirm maturity scheduling. Pending Payout still requires a separate payout.
Refund succeeded but ledger did not change	Determine whether the commission is final. Otherwise inspect the same refund's bounded repair and critical records; do not repeat the customer refund.
Tier missing or incorrect	Global/relationship switches, depth, exact child/parent IDs, zero rates, inherited overrides, original source amount and existing frozen snapshot.
Referral processing held	Current owner services, explicit supported capabilities, both permissions, retained definition/currency/precision and original pending operation.
Historical referral cannot be verified	Preserve its original claim/evidence. Today's coupon or session cannot reconstruct missing accepted terms.
Settings/rule form fails	Use a fresh authorized form and correct named fields. Reload settings after a partial multi-section save; remove an unwanted rule through Delete or an authorized explicit disabled API save.

For the exact logged code and its individual recovery condition, use the technical rewards error lookup. Preserve the original order, coupon, commission or referral reference when requesting help.

Choose payout methods and recipient details

Open **AffiliPartnerCS → Payouts → Payout Methods** to choose the methods your partners may use. The plugin prepares commission batches separately from paying them. Venmo, Cash App, Zelle, bank wire, prepaid cards and checks are fulfilled outside the plugin. PayPal, Stripe Connect and compatible Store Credit have their own reviewed settlement actions.

Venmo, Cash App, Zelle, PayPal, Bank Wire, Visa / Mastercard Prepaid Card, Check and Store Credit start enabled in the method configuration; Stripe Connect starts disabled. PayPal and Stripe Connect are offered to partners only while their connection under **Reviewed Provider Payouts** is enabled; a partner that chose one of them earlier gets no new batch until the connection is enabled or it chooses another method, and its workspace says so. The method list marks such a default as provider not set up. Store Credit is offered to partners only while a compatible service is available. Manual / Legacy is a staff compatibility method, not a partner choice, and is the initial merchant default.

For each method, configure its minimum payout, fixed fee, percentage fee, optional maximum fee, permitted currencies and instructions. Instructions are shown to partners with their payout method choice. Amounts and percentages start at zero. A blank currency list permits all currencies at this configuration level; list currencies separated by commas, spaces or semicolons. A positive maximum fee caps the combined fixed and percentage fee; zero leaves that fee uncapped. **Store Credit Bonus %** adds an incentive to that method only, and starts at zero. PayPal, Stripe and Store Credit always require explicit staff review.

Partner payout details are maintained through the authorized payout-profile controls. These are the required details by method:

Method	Details needed
Venmo	Username, phone or email.
Cash App	\$Cashtag.
Zelle	Email or phone.
PayPal	Valid PayPal email.
Stripe Connect	Complete hosted onboarding and payout verification before saving Stripe as the preference.
Bank Wire	Confirm that bank details are held outside the plugin. Do not enter bank-account numbers here.
Visa / Mastercard Prepaid Card	Complete both the payout identifier and the valid Delivery Email field.
Check	Mailing name, address line 1, city, state, postal code and country; line 2 is optional.
Store Credit	A valid linked store login with an email address and an available compatible credit service.

Changing a payout preference or fee does not rewrite an existing batch. Monetary terms and recipient evidence are retained when it is prepared; Stripe separately uses the current connected account shown at payment review. A profile that cannot be read must be restored before a payout can proceed; the system does not silently use the default recipient or another payment method. See the [partner payout workspace](#) for the visible partner controls and access conditions.

Convert payout currency and calculate fees

Payout-time FX converts the payment, while the original commission remains recorded in its original currency. Enable FX and save an explicit **From → To** rate with its source description. Each direction is separate; entering EUR → USD does not create USD → EUR. Without FX, ordinary methods keep the original currency. Store Credit must use the store currency, so a foreign-currency commission requires FX and the matching rate before batch creation.

The method minimum uses the eligible balance converted to payout currency. Fees are calculated on the converted gross amount. Store Credit bonus is also a percentage of that gross, before fees. For example, 300.00 commission with a 10% bonus, a 2.00 fixed fee and a 1% fee would have 5.00 fees; if the configured maximum fee is 4.00, the result is $300.00 + 30.00 - 4.00 = \mathbf{326.00 \text{ credit}}$. Amounts round to the store's monetary precision. Review gross, conversion, fees, bonus and net separately.

A saved batch keeps its original rate and fee/bonus terms when settings change. Missing rates, unsupported method currency or a balance below the method minimum leave the commissions for later action. No live exchange rate is fetched. Delete an obsolete rate only when future batches should no longer use it; already-frozen terms remain retained.

Download payout records

The batch CSV identifies the partner, method, source amount/currency, conversion, gross, fee, bonus, net, tax-reportable amount/status, recipient, schedule, batch status and payment reference. The pending CSV lists only Pending Review batches with net payout and manual-approval status. Submitted, Needs Review and recovery batches are not part of that pending-only list.

The complete pending file is prepared before download begins. If records change or storage cannot be read, retry the export; the plugin reports failure instead of presenting a partial list as complete. Downloading records never sends payment or marks a batch Paid.

Correct commissions while the adjustment hold is open

Open **Financial Controls** with financial-management permission. The screen lists recent risk alerts and audit events, and provides three separate financial actions. Review the order and reason before submitting: these controls apply their change when selected, without a second preview page.

Manual Order Attribution / Correction requires WooCommerce Order ID, Partner, an enabled Plan and Required Reason. Attribution Source can use the plan default, Verified Member, Public Coupon, Affiliate or Manual Correction. Choose **Apply Attribution Correction** to save the new attribution and recalculated commission together. The correction resets the old coupon/campaign/link attribution details. It does not refund or change what the customer paid. Existing final commission attribution cannot be changed, and a completed order cannot receive new attribution after its adjustment hold has ended.

Manual Commission Adjustment creates a separate ledger entry. Choose Partner, enter a positive amount to add commission or a negative amount to subtract it, set Currency and Required Reason, then choose **Create Adjustment**. The amount is rounded to the store's precision. A negative adjustment requires Related Order ID; the field says so. That order must belong to the same partner/currency and still have an open adjustment hold. For example, 25.00 adds a payable adjustment; -25.00 subtracts it only when the order-linked rules permit. An accepted adjustment starts in Pending Payout and follows the ordinary batching rules; it does not pay immediately.

Chargeback / Dispute / Fraud Commission Action requires WooCommerce Order ID, one of Chargeback, Dispute or Fraud / Manual Void, and Required Reason. Choose **Apply Financial Action** to void an eligible unpaid commission during its hold. Once it is payout-ready, frozen into a payout, paid, voided or beyond its hold deadline, its commission is final. A later customer dispute or refund does not authorize a clawback of that final partner commission.

The screen records the reason and actor in audit history, and attribution/financial actions add an order note. A repeated identical action submitted immediately is rejected as a duplicate. If another process is working on the order, wait and reopen the current record. A closed adjustment hold cannot be bypassed by retrying or relabeling a correction. There is no automatic undo button; any further allowed adjustment must itself satisfy the current rules.

Review self-referrals and unusual activity

Affiliate self-referrals are blocked by default when the purchaser's login or billing email matches the partner's linked store account. The related warning records how the identity matched. This is distinct from the optional activity monitor: velocity warnings report unusual counts and do not automatically suspend partners, hold payouts or void commissions.

In **Financial Controls → Fraud / Conversion Velocity Monitoring**, set these controls and choose **Save Monitoring Rules**:

Control	Default and use
Enable hourly velocity checks	Off. Turn on to evaluate active partners hourly.
Affiliate Clicks / Hour	0. Set the count that should produce a warning.
Affiliate Orders / Hour	0. Set the affiliate-order warning count.
Public Coupon Orders / Hour	0. Set the public-coupon-order warning count.
Affiliate Conversion Rate Warning	0%. The form accepts 0–1000%, in 0.1 steps.
Minimum Affiliate Visitors	20. At least 1 visitor event in the 24-hour calculation window.

Zero disables an individual threshold. A count at or above the configured threshold warns; the conversion rate is 24-hour affiliate orders divided by retained affiliate visitor events $\times 100$. Conversion warnings are evaluated only when the minimum visitors is met. A repeated count warning is grouped by partner/type/hour; a conversion warning by partner/day. This keeps the alert list useful without making the warning itself a financial decision.

Open Fraud / Risk Alerts shows the latest 100 open alerts with date, partner, type, severity, related order and message. Investigate the order and underlying events, then select **Resolve**. Resolution records who resolved it and when, and removes it from the open list. It preserves the evidence and does not restore a blocked self-referral or reverse a commission action. **Recent Audit Activity** shows the latest 100 events with date, event, partner, severity, actor and summary.

Run Bonus & Tier Evaluation Now also queues enabled velocity checks. Evaluation runs in background pages rather than completing inside that button request. Failed reads retry before pausing the affected cursor for administrator attention; use the system's paused-work recovery after restoring the underlying storage/queue problem. Turning monitoring off stops its evaluations without erasing existing alerts. [Performance bonuses and tiers](#) have separate qualification rules and do not make a risk warning an automatic financial penalty.

Prepare and settle payout batches

The **Payouts** screen separates eligible commission balances from payment history. Its top cards show the current schedule, next date, created batches awaiting payment and total paid. Money cards show the current store currency; they are not combined converted totals for every currency.

The **Unbatched Pending Payout Balances** table lists Partner, Currency, Eligible Commissions, Amount and Threshold, with 50 groups per page. Each partner/currency group is separate. **Ready** means the balance meets the global minimum; recipient details, method minimum, currency conversion and payment approval can still prevent a batch or payment. **Carry forward** means the balance has not met that global minimum. Signed adjustments contribute to the balance.

Configure when batches are prepared

Open the payout schedule controls in **General Program Settings**. Use **Payout Frequency**, **Payout weekday**, **Biweekly anchor**, the **Monthly Schedule / Nth / Weekday / Day** fields, **Day 1 / Day 2**, **Custom Monthly Days**, and **Minimum Payout** with its threshold rule. The initial schedule is the third Friday of each month, with a minimum of 200 and an at-or-above comparison. The minimum is applied separately to each original-currency balance, before conversion. Set the numeric threshold with the currencies you actually pay in mind.

Schedule choice	Controls
Weekly	Choose Monday through Sunday; Friday is the default.
Every 2 Weeks	Choose weekday and an anchor date. Use an anchor on that weekday. A blank anchor allows every selected weekday.
Monthly	Choose a numbered day, or the first/second/third/fourth/last chosen weekday. Numbered day defaults to 15; ordinal defaults to third Friday.
Twice Monthly	Choose two numbered days; defaults are 1 and 15. Identical days produce one matching day.
Custom Days Each Month	Enter comma-separated days, such as 1, 15; repeats are removed.

Numbered schedule days range from 1 to 28. Values outside that range are brought within it when saved. **At or above** includes a balance exactly equal to the minimum; **Above** requires a larger balance. Schedule and other payment settings affect future batch creation, not existing history. The plugin checks the schedule daily through WordPress scheduled work; a due date is not a promise of a bank transfer at a particular time. The biweekly calculation uses elapsed time from the anchor at local noon; the displayed next-date calculation also uses noon. If a scheduled check before noon does not prepare an expected anchored batch, the explicit eligible-batch action remains available. Detailed date behavior is in the technical schedule reference.

On **Payouts**, **Run Scheduled Payout Check** prepares eligible groups only when the current day matches the schedule. **Create Eligible Batches Now** permits an off-cycle run. It bypasses the date, while keeping the minimum, recipient, currency and integrity requirements. It does not send payment. A large run continues in background pages; completed batches remain recorded if a later page stops. A retry reuses or excludes already batched commissions.

Read the batch history

Payout Batch History shows 50 batches per page. Use **Batch Status → Filter** to narrow it, or **Reset** to show all statuses. Each row records Payout ID, Partner, Scheduled date, commission count, Method and payment identifier, Original amount, FX / Gross, Fees / Bonus, Net Payout, Status, Payment Reference, Validation and Action. If converted, the row also shows currency pair, rate, source and time. Once tax approval has been evaluated, Validation shows its year, gross reportable amount, status and evaluation time.

A batch freezes its amount, currencies, conversion, fees and bonus. Ordinary external payment details and PayPal email come from its retained snapshot. Stripe's review control separately shows the current connected account used for transfer. Store Credit binds the linked beneficiary to its saved credit request. Review the actual method-specific recipient control before approving payment.

Status	What to do
Pending Review	Review the batch, then use the method's payment action.
Submitted / Processing	Check the provider or original receipt. Avoid creating another payment for the same liability.
Needs Review	Read the reason. It can mean an offboarding hold, a definite provider failure or an unresolved credit attempt.
Provider Paid — Recover Ledger	Payment is already recorded; recover the remaining internal commission records.
Paid	Completed history; use CSV or the issued-credit link where available.
Reversed — Action Required	Review the reversal in the provider and retained financial records. The plugin does not send a replacement.
Voided	Historical batch state with no new payment action.

Validation: Review lists the exact issue: missing commissions, wrong partner/currency, a commission in an incompatible state, or differing amount/count. Payment is unavailable until the original records can be verified. Do not change an already-settled batch's economics to make a mismatch disappear. **Validation: OK** confirms ledger consistency; it does not itself mean payment has been approved or sent.

Record an external payment

For Venmo, Cash App, Zelle, bank wire, prepaid card, check or Manual / Legacy, make the payment using that outside method, then enter its transaction/payment reference and select **Mark Paid** on the pending batch. Checks label the field **Check number**. The reference is optional in this form; if omitted, the plugin retains an existing reference or uses the batch reference. Tax and ledger checks still apply. Mark Paid records settlement and closes included commissions; it does not initiate the outside transfer.

If internal closure stops, the batch retains its payment reference and enters recovery. Choose **Resume Internal Ledger**. The plugin resumes after the last committed group of commissions and accepts already-closed entries only under the same reference. It does not repeat the payment. PayPal, Stripe and Store Credit instead provide the specialized recovery actions below. Once a commission enters a nonvoided payout batch, its original liability is frozen.

Review an offboarded partner's retained liability

Suspending or terminating a partner retains accrued compensation. Pending batches move to **Needs Review**, and newly prepared accrued batches for that partner also require review. Reactivating the account does not automatically clear a retained batch hold.

On the batch, read **Accrued offboarding liability — manual finance review required**. Enter the required **Finance review reason**, confirm that you checked partner status, recipient, amount, currency, tax and payout method, then choose **Approve Reviewed Liability**. This records the reviewer/reason and returns the unchanged batch to Pending Review. Complete the normal method-specific payment review afterward. Approval alone never sends payment or marks the batch Paid.

If the row says its blocked liability has not reached the verified needs-review state, repeat the partner's offboarding action after resolving the reported storage problem. If liability state cannot be read, all new payout

actions remain unavailable. Already-issued Store Credit can still use receipt recovery to complete its original records without issuing new value.

Configure and operate PayPal or Stripe

In **Payouts → Reviewed Provider Payouts**, enable the provider you use and choose its environment. These provider controls are separate from the partner-selectable **Payout Methods** settings. Partners choosing PayPal does not itself supply your PayPal credentials, and enabling Stripe's service does not complete a partner's Connect account.

Provider	Settings
PayPal Payouts	Enable reviewed PayPal Payouts; Sandbox or Live; Client ID; Client Secret; Webhook ID.
Stripe Connect	Enable reviewed Stripe Connect transfers; Test or Live; Secret Key; Webhook Signing Secret.

Both services initially start disabled. Enter the values for the selected environment, configure the displayed webhook URL in that provider, and select **Save Provider Settings**. PayPal starts in Sandbox; Stripe starts in Test. Stripe rejects keys whose test/live prefix differs from the selected environment. Client-secret/API-key/signing-secret fields never redisplay saved values; leave a password field blank to keep its current value. A field marked **Defined in wp-config.php** is controlled by your site configuration. If encrypted credentials become unreadable after a site URL or authentication-key change, restore the original configuration or re-enter the credentials.

Provider notices appear in the Payouts panel. A failed complete save reports the error and attempts to restore the previous pair of provider settings. Reload before relying on the displayed setup. Technical credential and transport configuration is in Reviewed provider payouts.

Prepare PayPal recipients

A PayPal batch uses the email retained when the batch was created. Confirm the email and net amount before approving it. Editing the current partner profile does not replace an existing batch's PayPal recipient. PayPal requires valid configured merchant credentials and a positive payment amount. The selected Sandbox/Live environment is displayed beside the send form.

A successful request may remain Submitted / Processing while PayPal processes it. **Check Provider Status** retrieves its current result. Success closes the original ledger. A definite denied, failed, blocked or canceled payment moves to Needs Review; inspect PayPal activity and recipient details before choosing **Review and Retry**. Returned, refunded or reversed funds move to Reversed — Action Required and remain part of the retained financial history.

Connect a Stripe recipient

A partner with payout-management access uses **Connect with Stripe** or **Continue Stripe Setup** in the partner payout controls. Stripe hosts identity and bank collection. The plugin stores the connected account ID and readiness flags. Complete the hosted flow, return to the partner dashboard, and save Stripe as the payout preference after readiness is confirmed. Stripe must report submitted details, enabled payouts and an active transfer capability. An account can show onboarding or restricted until those requirements are met.

The plugin reuses the partner's locally mapped account and protects account creation against immediate duplicate requests. If Stripe created an account but its local mapping could not be saved, preserve that account ID and resolve the reported database issue before retrying. Do not create substitute accounts to bypass that message.

When reviewing a Stripe payout, verify the **Stripe account** shown in the batch action. The transfer uses the partner's current connected account, even though the original batch retains an earlier profile snapshot. The plugin refreshes current readiness before submission. A successful Stripe transfer sends the net amount to that connected account and then closes the internal ledger. Stripe's onward bank-payout timing is outside this transfer action.

Send, reconcile or recover one provider batch

For either provider, check recipient, amount, currency, tax clearance, method and environment. Tick **I reviewed...**, type the displayed batch reference exactly and choose **Review and Send**. This creates one protected attempt under your staff identity. One authorized staff reviewer can perform it; there is no second-approver workflow. Provider settings, the typed reference and the check box are not substitutes for checking the actual batch.

If a request times out or its outcome is uncertain, use **Check Provider Status**. An uncertain attempt prevents a second send. Where no provider ID was retained, inspect the provider dashboard, enter its payout batch or transfer ID in **Provider batch / transfer ID**, tick **I verified this ID in the provider dashboard**, then choose **Attach Verified Provider ID**. Use the ID for this exact recipient, amount and batch. Attaching an unrelated successful payment could associate the wrong evidence with the liability; the control relies on your verification.

When the provider has confirmed success but local records remain open, select **Recover Internal Ledger**. It reuses the saved success and reference and sends no money. If a provider request is definitely failed, **Review and Retry** creates a new protected attempt after the full review. An unknown outcome cannot be treated as a definite failure simply to unlock that action.

Background checks and signed webhooks update submitted payments. They never approve or initiate a new payout. If background reconciliation has stopped or the provider is unavailable, the batch and attempt remain available for the same manual status/recovery actions. Keep the original batch and request identity throughout recovery. A reversal does not reopen original commissions, automatically create a clawback or pay again.

Pay reusable Store Credit

Store Credit pays the batch's net value into the partner's linked store account through compatible **AffStackDev Store Credit & Gift Cards**. The Payouts status panel tells you whether that local service is connected. The partner needs an existing linked store login and valid email; the recipient is that linked account, not the staff member approving payment.

New issuance requires your AffiliPartnerCS payout permission, Store Credit management permission and WooCommerce management permission, plus each product's available licensed operation. The integration does not add these permissions to your role. Both products must remain enabled and available for a new issue. Scheduled batch creation never issues credit, even if an older saved configuration allowed automatic settlement.

The payout currency must equal the current store currency. A foreign original-currency commission must be converted when its batch is created. The store's monetary precision must match the precision retained for this payout; the contract supports zero through four decimals. If store currency, precision or partner ownership

changed, resolve the original frozen terms before issuing. An old liability cannot be redirected to a new account through the payment form.

Review and issue credit

On the Store Credit batch, verify **Recipient: login (account #)** and the commission, bonus, fees, net and currency. If an older unpaid batch did not retain an account ID, the screen explains that approval fixes the displayed recipient. Tick the review box and choose **Pay Store Credit**. The server reconstructs the amount and beneficiary from the saved batch, and records the request before asking Store Credit to issue value. Reload and review again if the screen has become stale or either approval has expired.

The issued value is reusable account credit. This payout integration allows it to combine with coupons, supplies no expiry or product/category restriction, and issues tax-exclusive merchandise credit without shipping credit. Store Credit owns its balance, use at checkout and later credit administration. The payout uses one completed-payout notification from AffiliPartnerCS; it suppresses the producer's separate issue email. Email delivery does not determine whether credit was issued.

Store Credit Bonus % affects only newly created batches. With 300.00 commission and a 10% bonus, gross credit is 330.00 before configured fees. Fees reduce the net issuance; tax-reportable compensation includes gross plus bonus before fees. Review each value in the row instead of treating the commission balance as the final credit amount.

Recover credit without issuing twice

If issuance is unresolved or commission closure stopped, use **Recover Store Credit Payout** on the same batch. The first step checks Store Credit's permanent receipt. A matching receipt completes the original payout even when that credit has already been spent; recovery checks what was issued, not the remaining balance. It can also complete the ledger after the method was disabled, the partner was offboarded or tax settings changed, because no new value is being created.

If the receipt is confirmed absent, the same frozen request can be retried after current approval and issuance checks. If receipt lookup is unavailable, prior payment evidence conflicts, the original beneficiary/amount changed, or a receipt exists without the local protected request, the operation stops with a specific explanation. Retain the original batch and receipt evidence and correct the underlying problem. A separate manual credit or cash payment would not resolve that existing identity.

After Paid, **View issued credit** opens the producer's credit record for users with its management permissions. A repeated click on a completed payout does not issue again. Voided and reversed batches offer no new-credit action.

Complete historical coupon payouts

Older Store Credit payouts may already have an ordinary coupon rather than a reusable account-credit receipt. A verified matching historical coupon shows **Complete Legacy Payout Records**. This closes the original payout records only; it neither creates a second coupon nor converts that coupon into a reusable balance. Published, draft and trashed historical evidence is considered so it cannot be mistaken for missing value.

Multiple or conflicting historical coupons, a mismatched recipient or amount, or missing evidence for an existing legacy payment reference require review. The plugin preserves those records and does not substitute a new account-credit issue. Paid legacy rows are labelled as historical coupon payouts.

Track tax status and hosted onboarding

Open **Tax Compliance** with financial-management permission. This screen tracks gross paid compensation and the completion status from your hosted tax provider. Tax IDs and completed forms belong to the hosted provider; there is no document-upload or tax-ID field in this plugin.

Setting	Default and effect
Enable threshold tracking	Off. Shows partner tax status when enabled.
Annual paid threshold	2000, USD initially. Nonnegative amount and reporting currency.
Payout hold	On. At or above the threshold, the partner's yearly status must be Approved before a new payment.
Hosted provider	Provider label and secure session-creation endpoint URL.
Signing secret	Shared integration secret. Blank preserves the current secret.

Select **Save Settings** after configuring the service. The endpoint must be a permitted public HTTPS destination. A returned onboarding URL must use an explicitly approved provider hostname. Saved onboarding links and the signing secret are protected; the form does not redisplay the saved secret or hosted link. Your developer can configure an additional approved provider hostname through the hosted-provider contract.

Understand when a payout is held

Paid total is the sum of Paid batches in the reporting currency for the year. It includes payout gross and Store Credit bonus before fees. Other currencies are not automatically converted into this total. The pending batch's gross plus bonus is added when deciding whether its payment would reach the threshold.

For example, with 1900 already paid, threshold 2000, and a batch of 100 gross plus 10 bonus and 5 fees, the payment decision considers 2010 gross compensation; the net 105 does not reduce that reporting basis. With the hold enabled, this payout needs Approved status. A total below the threshold is allowed; exactly equal is held unless approved. A zero threshold, disabled tracking, disabled hold or different reporting currency does not apply this hold.

Batches can be prepared before tax clearance. The plugin evaluates tax when payment is approved and rechecks before provider or credit submission. The batch displays the saved decision, year and amount. A tax hold leaves the accrued commission liability intact. Once a provider or credit receipt confirms payment, later tax-setting changes do not block recovery of those already-paid internal records.

Maintain the yearly status table

The current-year table shows Partner, Paid / Threshold, Status, External Metadata and Update. It loads 50 partners per page and refreshes the profiles shown. If a refresh fails, the screen reports that displayed totals may be stale and grants no payout clearance from the failed reads.

Each row lets finance choose **Not Required**, **Required**, **Requested**, **Received**, **Approved** or **Needs Update**. Form classification choices are **Form not classified**, **W-9**, **W-8BEN** and **W-8BEN-E**. These are labels for the external record, not forms collected by this screen. Enter the opaque **Provider reference**, optionally paste a replacement **Hosted onboarding URL**, and choose **Save**. Leave the URL blank to keep its protected current value. Manual Approved records an approval time; another manual status clears that time.

A refreshed total can advance Not Required to Required. It does not automatically downgrade an already requested, received or approved workflow when the threshold or total changes. Manual status edits are available to authorized finance staff and are separate from signed provider callback updates. They do not reset the provider's callback sequence.

Export <year> Status CSV requires both financial and export permissions. The download includes the selected year's retained tax profiles, paid/threshold amounts, status, form classification, provider reference and lifecycle dates. The **Partner ID** column contains the partner slug. It excludes protected onboarding URLs and secret values. The export does not refresh every partner as part of downloading; use the status workflow to update retained profiles. A failed complete read produces an error instead of a partial file.

Partner completion and provider updates

With tracking enabled, the partner dashboard shows Tax Year, Status, Paid Total and Reporting Threshold. A partner with tax-management access sees **Continue Secure Tax Onboarding** for Required, Requested or Needs Update. Select it to open the hosted provider's secure process. Received/Approved statuses do not show that button. Offboarded/read-only access can retain status visibility without permitting a new onboarding action.

The plugin sends the partner slug, year, threshold, gross paid amount, currency and return/callback URLs to the configured service. It saves the returned protected link and requested status. The hosted provider then updates status through signed, sequential callbacks. Missing/out-of-order callbacks are rejected so the provider can retry the proper sequence; a storage outage retains the prior status. If onboarding cannot start, the partner sees the reported error in the dashboard. Correct the provider setup or storage problem, then continue the same yearly workflow.

These fields and controls are also covered in the [partner tax workspace](#). The technical contract gives the exact payload, signing and status-transition rules for an integration developer.

For exact integration failure identifiers and the appropriate recovery path, see the finance error reference.

Set up the public program pages

Open **AffiliPartnerCS → Signup Page → Public Page Setup** with permission to manage program settings. The plugin provides two page assignments: **Partner Program** and **Partner Member Pricing**. Use **Save Page Assignments** to select existing published, private or draft WordPress pages, or choose **Not assigned** to remove an assignment. Assigning a page does not insert content or publish it; add the appropriate block and publish it when it should be public.

Create Missing Plugin Pages creates and publishes only missing plugin pages. Their normal addresses are /partner-program/ and /member-pricing/. If a page already occupies one of those addresses, it is left alone: assign that page explicitly or resolve its slug in WordPress Pages. An existing assigned draft/private page is also left in its current state. Creation can succeed for one page while another needs attention. If setup reports an unconfirmed rollback, review Pages before trying again; if another setup request is running, wait for its short lock to expire.

The page selector distinguishes pages created/tracked by the plugin from pages you assigned yourself. It does not claim ownership of an existing merchant page. Ordinary visitor requests do not create or overwrite public pages.

Block to add	What it displays	Shortcode alternative
Partner Program	Complete program landing page and application.	[mos_partner_program]
Partner Application	Application form by itself.	[mos_partner_application]
Partner Member Pricing	Current verified-member pricing access and community landing experience.	[mos_partner_pricing]

The editor shows a placeholder; the configured experience renders on the live page. These blocks have no separate per-block settings. Edit the program copy, choices and field requirements in [Signup Page settings](#). The full program page contains a hero and Apply button, benefit cards, enabled program descriptions, verified-integration explanation when displayed, security/privacy copy, onboarding steps and application. The Apply button scrolls to the form. Displaying a program description does not itself enable that benefit for a partner.

The page adjusts cards and form fields for narrow screens. On its desktop layout it uses the available content width and hides adjacent article sidebars on common theme containers. Other pages keep their own theme layouts.

Complete the partner application

Visitors can apply while signed in or as guests. Signed-in applicants start with their WordPress display name and email filled in; they can review the contact details before sending. The form always requests Organization / Community Name, Website / Community URL, Platform, Contact Name and Contact Email. It also displays **If Other, describe your platform** as an optional field.

The merchant controls whether these additional questions are hidden, optional or required:

Question	How to answer
Approximate Community / Audience Size	Select a configured range or option.
Role / Position	Enter your role, such as owner, administrator, moderator or creator.
Phone Number	Enter the requested contact number.
Primary Audience / Community Focus	Describe your organization or audience.
How Would You Like to Work With Us?	Select the applicable partnership interests.
How Do You Plan to Promote or Use the Program?	Describe your promotion and member-use plans.
Current Partners / Sponsors / Affiliate Programs	Describe relevant existing relationships.
Estimated Monthly Traffic or Referrals	Enter an estimate if known.
Anything Else We Should Know?	Add information useful to review.

Text/email fields allow up to 255 characters in the form, the website field 500, and long text answers 5000. Required questions are marked. Confirm the authorization statement, review the privacy notice and any Privacy Policy link, then use the configured submit button. The statement, introductory text, privacy notice, button and success message are merchant configurable.

The form rejects an expired session, invalid website/email, missing required answer or absent authorization confirmation. Refresh an expired form before resubmitting. A submission made within two seconds of opening is rejected. After a successful application, the normal waiting period before another submission is five minutes; the merchant can set one minute to 24 hours. An identical recent application is blocked for 30 minutes, and an existing Pending/More Info application for the same email is not duplicated. Contact the store about the open application instead.

The store may add questions of its own after the built-in ones; they follow the same rules (a required one must be answered, a list answer must be one of its choices).

Validation and general save errors can restore your previous answers for ten minutes. Use the same account/browser context; successful submission clears them. The success/error notice is temporary and normally appears once after redirect. A success notice confirms receipt of the application, not partner approval. The store reviews it through [Applications](#). The public application does not replace the merchant's account-linking or approval process.

Sign in to the partner account

Use the merchant's **Affiliate Login** link or `/affiliate-login/`. It opens the normal WooCommerce My Account login in partner context. The ordinary customer registration column is hidden there; **Create an account** leads to the Partner Program application. `/affiliate-signup/` opens that application directly. After a successful partner-context login, you arrive at My Account → **AffiliPartnerCS**. These compatibility addresses can be disabled by a site's integration code when another system owns them.

If already signed in, Affiliate Login goes straight to the workspace. If the WordPress account has no linked partner, the workspace explains that and offers **Apply to the Partner Program**. Contact the merchant if an existing partner organization should be linked to this login. Community member verification for shopping is a separate process from logging into the partner organization's WordPress account.

Use the partner workspace

My Account → **AffiliPartnerCS** shows your organization and current Partner and Integration statuses. Available sections depend on the programs assigned to the organization, your team permissions and current license/partner status. Hard license lock makes the workspace unavailable. A read-only account can retain access to displayed history while forms for restricted changes are unavailable.

The enhanced view provides section tabs on wider layouts and a **Workspace section** selector when the actual content area is under 900 pixels wide. Select a section without losing unsaved entries in another section. Selection does not save a form, make a payout or contact an API. Desktop tabs support Left/Right, Home and End keys. Browser Back/Forward and existing section links restore the selected section; form errors and saved-profile feedback open the relevant panel.

My account / Account pages opens the normal account navigation above the workspace. Its links remain those supplied by WooCommerce and installed extensions. Escape closes the opened account menu. Wide tables have a local horizontal scrollbar and a “Scroll sideways to see all columns” hint when needed; the rest of the page stays within the screen. Detailed performance groups expand independently. A browser validation error also opens the containing section/disclosure.

If enhanced presentation is disabled or JavaScript is unavailable, the server-rendered sections and normal forms remain usable. The site header and footer remain accessible. Your permissions do not change with the view.

Performance, Commissions and Payouts appear only when at least one configured verified-member, public-coupon, click-back or affiliate display feature is available; Commissions also requires commission history. If those sections are missing, ask the merchant to review the assigned programs and your access.

Your programs and community profile

Your Programs summarizes the available Direct Member Coupon, Session Length, Public / Social Coupon, Affiliate Links code and Platform. A direct coupon may say Not assigned yet. These are account settings for reference; displaying a code does not guarantee eligibility for every basket. The merchant controls the actual plan and benefit rules.

Preview and request changes to the community profile

Your Community Profile previews the organization name, logo and description used on its merchant landing page. **Community Home**, **Login Page**, and the Partner Home URL, Login URL and Logo URL rows open configured addresses in new tabs. Missing values show Not configured.

When change requests are enabled and your account can manage the profile, expand **Request Changes**, complete the available fields and submit for merchant review. If temporarily ineligible, the panel shows the current reason instead. The detailed fields, limits and review outcomes are in [Profile change requests](#). A request does not bypass approval or immediately rewrite the public profile.

The **Integration** panel appears for the verified-member feature and shows Partner ID, Partner Domain, Connection Status and Partner Status. Authentication secrets are not displayed in the partner dashboard. **Need Help? → Contact Support** opens an email addressed to the program's **Support Email** (Settings).

Read performance and commission activity

Choose **7 days**, **30 days**, **90 days** or **12 months** in Performance. The default is 30 days; 12 months uses 365 days for totals and a monthly chart. The overview shows attributed orders, attributed sales and partner commissions. Each enabled program adds its own measures:

Program	Information shown
Verified Member Pricing	Visits, pricing activations, unverified landing views, authenticated rate, verified orders/sales, conversion, member discounts, commissions and sales per verified visit.
Click-Back	Unverified landing views, actual clicks back to the community/login destination and click-back rate.
Public / Social Coupon	Coupon orders, sales, customer discounts and commissions.
Affiliate Links	Clicks, unique visitors, orders, sales, conversion, commissions and sales per visitor; up to five most-clicked destinations.

A landing view and an actual click-back are different events. The chart compares Member Pricing Activated and Unverified Landing Views; hover a column for its date/counts. A last-event timestamp appears when traffic exists. Affiliate visitor/attribution periods follow the program's configured rules, and a paid order can consume attribution. See [Affiliate attribution](#) and the reporting settings for the authoritative counting rules.

Partner Performance Tier appears when a current or next tier is available. It shows the current tier, next tier, progress toward qualified sales/orders/earned commission, and evaluation window. A lock notice means the administrator has fixed the tier rather than allowing the normal progression to change it.

Commissions → Commission Status shows pending delivery, the configured return hold, pending payout, paid and voided totals across your commission history. These totals are separate from the selected performance date range. Aggregate money widgets use the store currency display; use the individual ledger and payout rows for their recorded currencies, particularly where your history includes more than one currency.

In **Commission Activity**, use Status, Source, From and To, then **Filter**. Sources are Verified Member, Public Partner Coupon, Affiliate Link and Multi-tier Referral. **Clear** removes filters. Results contain 25 rows per page with Previous/Next navigation. A Manual Correction may appear in history even though it is not a separate Source filter choice.

Each row shows its Commission ID, source/coupon, initial or renewal context, plan, commissionable sales, rate, commission, status and hold/payout explanation. Pending Order Delivery waits for completion; a return hold displays the payout-eligibility date; Pending Payout means the hold is complete; Paid displays its payment date; Voided is not payable. Advanced-rule commissions are labeled accordingly. This history does not expose customer order identities.

Create affiliate links and use creatives

An enabled affiliate account shows its Affiliate ID, attribution window, First Click/Last Click model and assigned commission. When the store has switched them on, it also shows **Your Coupon Through Your Links** (the partner's coupon is applied by itself for shoppers from the partner's links and landing pages) and the number of **Lifetime Customers**. **Your Landing Pages** lists the store pages that credit the partner without a link; their addresses can be shared as they are. Users with marketing permission can create links to eligible store pages.

1. Enter **Product or Store URL**.
2. Optionally add **Campaign** (up to 80 characters), **Sub-ID** (up to 80), **Landing Attribution Name** (up to 100), and select an active **Creative** or No creative.
3. Choose **Generate One-Time Link** for a generated tracked URL, or expand **Save as a reusable vanity / campaign link**, enter **Link Name** and optional **Vanity Slug**, then choose **Save Vanity / Campaign Link**. A blank slug is generated automatically.
4. Select the readonly result to copy it, or use **Open Generated Link** to open it in a new tab.

The service validates the destination; correct the displayed error if it is not accepted. Link generation is not a commission payment. The underlying tracking, naming and persistence rules are in [Marketing links](#).

Saved Vanity & Campaign Links lists up to 100 links with campaign, sub-ID, click count, URL and QR image when enabled. **Delete** asks for confirmation and removes the saved link while preserving conversion history. The Creative Library provides titles/descriptions, **Open Creative**, and any suggested destination. Campaign Performance and Creative Performance show orders and sales for the selected report range. Users without marketing permission can inspect available reporting/saved links, but cannot generate, save or delete them.

Choose a payout preference and inspect payments

With payout-management permission, open **Payouts → Payout Profile**. Choose an available **Payout Method**, review **Preferred Payout Currency**, and complete the information that method requires. The store's instructions

for each method appear below the choice. The form provides **Payment Username / Email / Handle** and **Prepaid Card Delivery Email**. For prepaid cards, supply both the identifier and a valid delivery email.

Expand **Check mailing information** for Mailing Name, Address 1, Address 2, City, State/Province, Postal Code and Country. For bank wire, confirm that you supplied bank details to the merchant outside the plugin; the form does not collect bank-account or payment-card numbers. Choose **Save Payout Profile** and check for the saved confirmation or a validation error. Method-specific requirements, fees, currencies and limits are detailed in [Payout methods](#).

If **Store Credit** is available, its explanation shows any extra-credit bonus and how eligible future payouts become reusable credit on the organization's linked store account. Choosing it does not pay pending commission immediately or change an existing payout batch. Store Credit must use the store currency at issuance; any required conversion is fixed in the batch. If your saved method is no longer offered (for example Store Credit without its service, or PayPal while the store's PayPal connection is off), the form says so and keeps it selected as not offered; commissions wait until you choose another method or the store offers it again. No other method is substituted automatically.

If Stripe is available, choose **Connect with Stripe** or **Continue Stripe Setup**. Complete Stripe's hosted identity/bank setup and obtain a payout-ready connection before saving Stripe as the preference. The panel distinguishes Not connected, connected but incomplete, and ready. Stripe collects the sensitive onboarding details; the plugin retains connection/readiness information. See [Stripe payouts](#) for send/reconciliation behavior.

Estimated Next Payout is available with payout-management permission and a readable payout profile. It displays each pending currency balance with method, gross, fee, bonus and estimated net, or its current reason for being unavailable. It is an estimate, not a transfer confirmation. The schedule/history overview can remain visible without permission to manage the profile. It shows schedule, next scheduled payout, minimum and unbatched pending amount. **Unbatched Pending Payout** combines amounts across currencies without conversion and displays the store currency; use the currency-specific estimate and historical batch rows to interpret mixed-currency balances. Unpaid eligible balance can carry into a future cycle until the merchant's threshold is met.

The history lists up to 100 batches with Payout ID, scheduled date, commission count, method, net payout/currency, status and paid date. Fees and bonuses appear when positive. Ask the merchant to investigate an interrupted payment using the batch status and provider recovery controls; changing the profile does not rewrite the displayed historical batch.

Merchant pricing, tax, team and support panels

A community member's **Partner Member Pricing** page displays the merchant's current verified/unverified experience, eligible pricing information, community branding and any enabled community/login links. Valid member and guest outcomes, coupon conditions and click-back behavior are explained in [Member pricing access](#). A verification link is not an organization-account login.

Additional account services

The workspace can also contain tax, Organization Team, messages and referral-network sections supplied by their services. Use [Tax compliance](#) for tax details and hosted onboarding, [Organization Team](#) for user access, and [Referral network](#) for network totals. Existing links to these sections still open the appropriate enhanced-workspace panel. Selecting a panel does not submit a form, approve a tax profile or authorize a payment.

Connect a community

Open **AffiliPartnerCS → Integrations** with integration-management permission. Search/select the partner and choose **Load Partner**. The selector shows 100 partners per page and retains the selected partner even when it is outside the current search results. If partner choices cannot be read, retry before editing.

Choose **Discourse — Self Hosted**, **Discourse — Managed / Hosted**, or **XenForo — Self Hosted / XenForo Cloud**. Enter the **Forum URL**, select **Enable this community integration**, and use **Save Integration**. All modes require a safe public HTTPS forum URL. Managed Discourse requires only the exact forum origin, such as `https://community.example.com`, with no added path/query/fragment. The displayed Store URL and Partner Site ID identify the merchant-side values to pair with the community.

For a newly created partner, first open its **Authentication** section, choose **Generate New Key** or enter a secure key, and **Save Partner**. [Authentication](#) explains this required initialization and restricted reveal controls. Self-hosted adapters keep the partner HMAC secret on the community server. Managed Discourse keeps that key in the merchant and uses a separate DiscourseConnect Provider secret. Browser code receives neither key. Staff need authentication-secret permission, as well as integration permission, to run the protected integration checks or reveal the managed provider key. Without that permission, the page explains why those controls are restricted.

Test Configuration checks the saved enabled connection. For self-hosted Discourse/XenForo it calls a signed challenge route to check the forum URL, Site ID and shared secret. For managed Discourse it checks the local configuration and encrypted key; it does not inspect the hosted provider settings. The last test shows result, message and time. A concurrent configuration change discards an outdated result; run it again after saving the final settings.

Test Signed Merchant Signal exercises the merchant's receiver using a generated assertion. It does not prove that an ordinary community visitor can reach the source adapter. Managed mode provides **Run Browser Verification** for the complete browser flow. These are configuration operations available to authorized staff, not a guarantee that every customer/cart qualifies for a discount.

Download the installation resources

Integration Downloads supplies the following resources after a partner is available:

Platform	Download controls
Discourse self-hosted	Download Plugin ZIP; Setup Guide.
Discourse managed/hosted	Download Theme Component ZIP; Setup Guide.
XenForo self-hosted/Cloud	Download Add-on ZIP; Self-Hosted Guide; Cloud Guide.
All integrations	Download Documentation ZIP.

The merchant prepares these packages from bundled files when you download them. A filesystem or resource-preparation error means the file could not be produced; ask the site administrator to restore the plugin resources/filesystem access and retry. Embedded adapter version labels are separate from the WordPress plugin release label.

Install self-hosted Discourse

A self-hosted Discourse administrator must be able to install backend plugins. Both community and merchant use HTTPS.

1. Download **Discourse — Self Hosted → Download Plugin ZIP**. Install discourse-mos-partner-pricing using the site's normal server-plugin deployment process and rebuild/restart Discourse as that process requires.
2. In Discourse Admin → Settings, search mos_pp. Turn on **Enable AffiliPartnerCS integration**, replace the example **WooCommerce store base URL** with the exact merchant HTTPS origin, and enter the exact **Partner Site ID** and **Shared HMAC secret**.
3. Set **Intercept store links** on if ordinary store links should request a signed verification signal; it defaults on. The adapter itself also defaults enabled, but its blank Site ID/key still require setup.
4. In the merchant Integrations page, save the matching mode and forum URL, then use **Test Configuration**.
5. Follow an ordinary merchant link while logged into Discourse and again as a guest, using the merchant's configured click-back behavior to assess the expected destination.

The community server signs whether the browser is logged in. It does not send username, email or member ID, and does not apply a special forum-group or paid-membership condition. The browser receives only the short-lived signed merchant URL. Guests are not forced through Discourse login.

This adapter intercepts ordinary primary clicks in the current tab. Modified clicks, middle-button clicks and links opening another tab keep their ordinary behavior. Turning interception off leaves merchant links alone. If the signal/configuration request fails, the link remains usable and opens its original destination without creating a new verification assertion. That browser fallback does not itself remove an already valid merchant session.

Install managed or hosted Discourse

Managed mode needs a plan that permits both custom theme components and **DiscourseConnect Provider**. Its theme component declares Discourse 3.2.0 or newer. If either facility is unavailable, this integration cannot be replaced by putting a secret into JavaScript.

1. On the merchant Integrations page, select the partner, Managed / Hosted mode and the exact HTTPS forum origin. A staff member with authentication-secret permission enters a provider secret or selects **Generate a new 256-bit secret**, then saves. Use one choice, not both. Entered secrets must have 32–256 non-whitespace characters.
2. Open **Managed Discourse Pairing Card** and note Merchant origin, Connection ID, Verification endpoint and DiscourseConnect callback. For the Discourse provider domain, use the hostname of Merchant origin; the card's Provider domain row may be blank.
3. Choose **Reveal Provider Secret**. Copy that value into Discourse's server-side **Discourse connect provider secrets** entry for the merchant hostname. Enable **Discourse connect provider**. Keep the forum's existing login methods in place; this setup does not make the merchant control forum login. Disable unnecessary optional provider claims where that setting is available.
4. Download **Theme Component ZIP**. In Discourse Admin → Appearance → Themes & components → Components → Install, use **From your device**. Attach the component to every active/user-selectable theme that should verify merchant links.
5. Copy only the public merchant_origin, connection_id and verification_endpoint values into component settings, then enable **Verify exact merchant-domain links**. It defaults off.

6. Complete the cache/log settings below. Save the merchant configuration, use **Test Configuration**, then **Run Browser Verification** in a logged-in and logged-out Discourse browser.

The provider secret is different from the partner HMAC secret. Keep both in their respective server-side settings, never in theme settings, posts or browser code. The reveal page is private/noncached and has a return link; it is available only to authorized secret managers.

The component recognizes exact-origin HTTPS merchant links. It handles ordinary, new-tab, modified and middle-button clicks. Downloads, named-frame targets, explicitly skipped links and nonmerchant links retain their normal behavior. Invalid public settings also leave normal links alone. It sends the browser to the merchant, which performs a silent DiscourseConnect Provider check and then passes a verified/unverified result to normal merchant validation.

Protect the managed callback and recover failures

Configure the hosting/CDN/proxy/security/analytics layers to bypass page and edge caching for /member-access-managed/ and /member-access/. Suppress or redact query strings for the managed callback from access logs, WAF capture, security plugins, analytics and session replay. Keep HTTPS end to end. The standard DiscourseConnect response contains mandatory identity fields; the merchant receives them briefly, validates the response and discards them. The plugin does not persist or forward those identity fields, but it cannot erase a query already captured before WordPress runs. Self-hosted adapters avoid sending those fields to WordPress at all.

The managed exchange lasts up to 180 seconds and is tied to the starting browser with a Secure, HttpOnly, SameSite=Lax cookie. A copied callback in another browser, missing cookie, expired state, incorrect signature or disabled configuration cannot grant a benefit. Start a new flow after correcting the issue rather than reusing an old callback. Protocol failure clears current verification and returns to the merchant Member Pricing page. If Discourse is unreachable before returning the browser, a network error may interrupt the flow.

A signed member result continues to the requested merchant page after validation. A signed guest gets no verified benefit: when click-back is off the original merchant destination is used; when on the branded Member Pricing page is shown. Community/login links appear only under the merchant's click-back settings; the bridge does not force a guest to log in.

To rotate the provider secret, prepare a new 32–256-character value, update the Discourse server provider entry, then immediately save the same value in the merchant. Blank keeps the current key; entering or generating a different key rotates it. The old merchant copy can validate callbacks for ten minutes, while new starts use the current key. Changing away from managed mode removes its saved provider-secret fields; disabling the integration prevents new managed verification. If a saved secret becomes unreadable after WordPress salt changes, re-enter it or restore the original salts. The separate partner HMAC key has its own restricted rotation control.

Install XenForo or XenForo Cloud

The bundled server add-on requires XenForo 2.2 or newer and PHP 7.4 or newer. XenForo Cloud can use it only when the service/plan permits third-party server add-ons. HTTPS is required on both sides.

1. Download **XenForo** → **Download Add-on ZIP**. Use Admin CP → Add-ons to install/upgrade the archive. For an allowed manual self-hosted installation, merge its upload/ folder into the XenForo root, then install Mos/PartnerPricing through XenForo's normal administration/CLI process.

2. Open Admin CP → Setup → Options → **AffiliPartnerCS**. Enable the bridge; enter the exact **WooCommerce store URL**, **Partner Site ID** and **Shared HMAC secret**. Set **Intercept store links** as required. Enable/interception default on; store/Site ID/key start empty.
3. Save the merchant's matching XenForo mode and HTTPS forum URL under Integrations, then run **Test Configuration**.
4. Follow an ordinary merchant link as a logged-in XenForo visitor and a guest. The server signs only the Boolean login state; no username, email or member ID is sent to the merchant.

The secret stays in XenForo server options and is excluded from that option's normal backup flag. The browser receives only public configuration and signed URLs. Ordinary primary current-tab clicks are intercepted; modified, middle-button and new-tab links keep ordinary behavior. If signing fails, the original destination still opens without a new verification assertion. The retired `/partner-pricing/auth` route returns 410 and must not be used as a login flow. If Cloud does not permit the add-on, leave this integration disabled and use ordinary merchant links.

REST reporting and outbound notifications

An authorized developer can read system status, partners, applications, commissions and payouts through `/wp-json/affilipartnercs/v1`. Collections support pages and a limit of 1–500 rows (default 100), and include total/page headers. These are administrative interfaces protected by the relevant maintenance, partner, financial or payout permissions; possession of a public partner ID is not access. The only status-write route supports Suspend, Reactivate or Terminate for one partner and requires a reason, using the same offboarding rules as administration. A database failure reports temporary unavailability instead of an empty collection. The technical REST reference lists exact routes, fields and permissions.

Webhook delivery and recovery

Administrators can configure event subscriptions through [Webhook administration](#). Events cover application submission, partner lifecycle, attributed orders, commission creation/voiding, payout creation/payment, fraud alerts and tier changes. The destination must be a safe public HTTPS URL and at least one event must be selected.

Deliveries run asynchronously. The receiver gets signed JSON with event type, event ID, timestamp and data; it must verify the signature and deduplicate event IDs. The same event may arrive again after a retry or interrupted response. Successful 2xx responses finish delivery. Failed attempts retry after 5 minutes, 30 minutes, 2 hours and 12 hours, up to five attempts total. Delivery history records attempts, response code and a short response excerpt. Disabled/missing endpoints or unavailable signing keys fail locally instead of sending unsigned data.

Rotating an endpoint secret takes effect immediately, including queued deliveries; update the receiving system accordingly. Deleting an endpoint marks its outstanding deliveries failed while retaining history. A scheduler problem can leave rows pending for later scheduler recovery. The administration screen displays recent deliveries but provides no manual retry button. Correct the destination or configuration for subsequent events and use scheduler recovery for still-pending rows. Receivers must deduplicate events before repeating any external side effect.

Secrets and exported CSV files

Integration credentials are encrypted using keys derived from WordPress secret material. Preserve the original salts when moving a working installation, or re-enter affected credentials if they cannot be decrypted. Normal endpoint listings report whether a key is configured instead of exposing it. Use the restricted reveal/rotate controls only for the relevant server connection.

CSV exports quote cells consistently and guard values beginning with spreadsheet-formula characters. Keep the original exported values when importing into another system; a leading apostrophe may be present to prevent a spreadsheet from evaluating a text value as a formula.

Reading integration errors

Use the displayed message to distinguish configuration, permission, expired-browser-state and storage failures. Correct a URL or paired secret in its own settings; ask an authorized secret manager when a protected control is unavailable. Wait for an existing save/setup operation to finish before retrying a busy request. If page creation reports an unconfirmed rollback, inspect Pages and assignments before creating again. Reopen an expired managed verification from a fresh community link in the same browser instead of copying an old callback. A database error requires restoring storage before repeating the operation; it is not confirmation that an empty history or new page is correct. Developers can match exact codes and failure reasons in the interface error reference.

Configure the program and its public page

Open **Commission, Refund & Payout Settings** and use **Save Partner Program Settings** after reviewing the whole form. Set **Merchant / Company Name**, **Support Email**, **Admin Notification Email**, **Program / Brand Label**, and **Default Brand Logo URL**. A blank company name displays the site's name; a blank brand label displays AffiliPartnerCS. Support email falls back to the site's administrator email, and administrative notices fall back to the support address. Enter a valid email to replace a saved address; leaving its field blank does not erase it.

Set **Public Merchant / Store URL** when partners should use a public hostname different from the hosting system's WordPress address. Enter only `http://` or `https://`, hostname and optional port, without credentials, a page path, query or fragment. Leave it blank to inherit the WordPress Site Address. Check **Effective public merchant URL** before distributing links. The setting controls public program links and integration destinations; it does not change WordPress's own hosting address.

Default Verified Session starts at 30 days and accepts 1–365, used when a partner has no individual duration. **Analytics Retention** starts at 730 days and accepts 30–3,650; the daily cleanup keeps analytics for the saved number of days. **Enhanced Admin Workspace** and **Enhanced Partner Dashboard** start on. Turning them off uses the native server-rendered/theme presentation while retaining permissions and actions. A Suite-wide JavaScript override can force the native merchant interface even while the local preference remains on.

Plugin Uninstall defaults to **Retain all AffiliPartnerCS data**. **Delete AffiliPartnerCS data on uninstall** applies only when the plugin is later uninstalled, at which point deletion is permanent. Deactivation retains data. If a save reports it was incomplete, reopen the form and verify every value; some earlier settings may already have been written.

Financial and change request settings

The same form contains **Commission Adjustment Hold**, **Payout Frequency**, **Weekly / Every 2 Weeks** and its anchor date, **Monthly**, **Twice Monthly**, **Custom Monthly Days**, **Minimum Payout**, **Partner Change Requests**, and **Change Request Frequency**. Review [commission holds](#), [payout schedules](#) and [change requests](#) before changing these rules. Monthly day controls use days 1–28. The payout minimum distinguishes paying at or above the amount from paying only above it; balances below the selected threshold carry forward. A change-request cooldown starts after an approved change, while rejected requests do not restart it; zero removes that cooldown.

The settings form does not offer a self-referral choice, and saving it leaves the affiliate self-referral option as it is. Do not use undocumented form fields to assume that a customer-facing or partner-specific reward rule has changed.

Edit the signup page and application choices

Open **Partner Signup Page**. Use the public-page panel to select the program page, and **View Public Partner Program Page** to view its saved presentation. **Save Signup Page & Application Settings** saves the full form, so finish all edits before submitting.

Section	Controls to review
Hero	Page Kicker, Hero Heading, Hero Copy and Primary CTA
Why Partner With Us?	Section Heading plus Title and Copy for Verified Member Pricing, Partner Commissions, Affiliate Links, Public Coupons, Partner Dashboard and Flexible Programs
Program Options	Section Heading, Section Intro, and Show this program on the signup page, Title and Copy for verified pricing, public/social coupons, affiliate links and hybrid programs
Verified Integration, Security & Privacy	Integration Heading, Integration Intro, Integration Steps, No-PII Explanation, Security Heading/Copy and Privacy Heading/Copy
How It Works	Section Heading and Steps; enter one Title Description pair per line
Application Form	Application Heading/Intro; Platform Options, Audience Size Options and Partnership Interest Options, one choice per line
Your Own Questions	Up to 10 questions of your own: Question, Help Text, Answer Type, Choices, Show and Order (see Your own questions)
Terms, Privacy & Success Message	Required Acknowledgement, Privacy Notice, Privacy Policy URL, Submit Button, Success Heading/Message and Success CTA Text/URL
Application Emails	Subject and Body for administrator notification, applicant confirmation, approval, rejection, more-information request and partner invitation

All four program cards start visible. Hiding a card changes this page's presentation; it does not disable an approved partner's program. Descriptions should reflect the actual arrangements you offer. The default copy describes individual review and does not promise a commission rate, discount, payout threshold or approval.

Choose **Hidden**, **Optional** or **Required** independently for **Audience Size**, **Role / Position**, **Phone Number**, **Audience / Community Focus**, **Partnership Interests**, **Promotion / Use Plan**, **Current Partners / Programs**,

Estimated Traffic / Referrals, and Anything Else. Audience/community focus starts required; the others start optional. **Submission Rate Limit** defaults to five minutes per visitor/browser fingerprint and accepts 1–1,440 minutes. Duplicate or blank list lines are removed; existing escaped line breaks are normalized for editing and display.

The default platform choices cover Discourse, XenForo, WordPress, WooCommerce, BuddyBoss, Invision Community, phpBB, vBulletin, Facebook Group, Reddit Community, Discord, Social Media / Creator, Custom Website and Other / Not Sure. Audience choices range from Under 1,000 through 100,000+, with Prefer not to say. Interest choices cover verified pricing, public/social discount codes, affiliate links, hybrid programs and asking the store to recommend a setup. Adjust the available choices to your program. The default privacy link follows WordPress's privacy-policy page; the success button returns to the public store.

Your own questions

Below the settings of the built-in questions, **Your Own Questions** takes up to 10 questions of your own. For each one:

- **Question:** the wording the applicant sees (up to 200 characters). Leave it empty to remove the question.
- **Help Text:** an optional line under the answer field.
- **Answer Type:** **Short text**, **Long text**, **One choice from a list** or **Yes or no**.
- **Choices (one per line):** the list for **One choice from a list** (up to 20); a list question without choices is not asked.
- **Show:** **Optional**, **Required** or **Hidden** (kept but not asked).
- **Order:** the order among your questions (0-99).

They are saved with **Save Signup Page & Application Settings** and asked after **Anything Else We Should Know?**. A required question left empty, or a choice that is not on the list, is refused with the question named, and the answers already given stay in the form. An application keeps each question exactly as it was asked when it was sent, so changing or removing a question later does not change applications already received. The answers appear on the application's review page (also through **View Original Application** on the partner's record), in the Applications CSV export (column **Your Own Questions**), in the admin email through {custom_answers}, in [Review with AI](#) and in the applicant's personal-data export and erase.

Email wording and placeholders

Use the Subject and Body fields for the six application/invitation messages. Application-submission messages can use {store_name}, {program_name}, {application_id}, {organization_name}, {website_url}, {platform}, {contact_name}, {contact_email}, {partnership_interests}, {custom_answers} (the answers to your own questions, one "Question: answer" line each) and {review_url}. Decision messages use store/program, contact/organization and {message} for review notes. Invitations use store/program, contact/organization, {partner_id}, {dashboard_url} and {account_note}. Keep each token's braces and spelling. Unsupported tokens remain visible as written; the exact template mapping distinguishes the events.

Marketing toolkit

Open **Affiliate & Marketing Toolkit** to configure attribution, provide promotional assets and review saved partner links. Access depends on the merchant messaging/marketing permission. Partners use only features enabled for their accounts.

Attribution and optional QR previews

Under **Affiliate Attribution**, select **Last affiliate click** (the default) or **First affiliate click**, set **Affiliate Window** from 1–365 days (default 30), then choose **Save Marketing Settings**. Verified-member sessions and public partner coupons keep their higher overall attribution priority; the click model does not replace those rules.

Partner Discount Through Links and **Lifetime Customers** (with **Lifetime Length**) are in the same form and are off until you switch them on; see [The partner's coupon through their links](#) and [Lifetime customers](#). Only this form changes them: another save of these settings, for example through the AffStackDev AI action, keeps them as they are.

Enable QR previews for saved partner links is off by default. When enabled, previews load from `api.qrserver.com` and disclose the generated partner URL to that service. Leave the setting off if external QR generation is unsuitable for your program. The saved partner link works without a QR preview.

Partner landing pages

A landing page credits a partner without a link or code: a visit to the page counts as a visit through that partner's affiliate link. Use it for a page you build for one partner's audience, such as a page a podcast host reads out on air.

1. Open **Affiliate & Marketing Toolkit** and go to **Partner Landing Pages**.
2. Choose the **Page** and the **Partner**, then **Make Landing Page**. Only partners with affiliate links on and an enabled affiliate plan are listed.

What happens on a visit:

- The visitor gets the same referral cookie as from the partner's link, for the same [window, with the same first-click or last-click rule](#). One click is recorded when the visit makes this partner the one credited; opening the page again records nothing more.
- A visit through any partner's affiliate link in the two minutes before is kept, so a link that leads to another partner's landing page credits the link's partner.
- The sale is credited through the partner's Affiliate plan. The order's **Landing Attribution** reads landing-page- and the page's address name (for example landing-page-summer-podcast).
- When your host serves the page from its cache, the page counts the visit through a small request of its own (in the visitor's browser, with JavaScript), so caching does not lose it.

A page belongs to one partner: to give it to another partner, **Remove** it first. Your shop, cart, checkout, account and terms pages, your front page and posts page, and the partner program and member pricing pages cannot be landing pages, because every visitor of them would be credited to one partner. The list shows each page, its partner and whether it **Credits Visits** now: a page that is not published, or a partner that cannot be credited (affiliate links off, no enabled affiliate plan, suspended), credits nothing until that changes. The partner's record (Affiliate Links section) and the partner's own workspace list the partner's landing pages.

The partner's coupon through their links

With **Partner Discount Through Links** switched on (off until you switch it on), a shopper who arrives through a partner's affiliate link or landing page gets the partner's public coupon in the cart by itself, without typing it, once the cart has an item.

- It applies when the partner has a public coupon (Codes & Coupons) with an enabled Coupon plan. A partner without one gives no discount; the link credits the sale as before.
- The coupon is an ordinary WooCommerce coupon applied through the cart, so its own limits (minimum spend, products, usage limits, individual use) and the [partner coupon rules](#) decide whether it applies. When it does not apply, the shopper sees no message about it.
- The sale counts as a coupon sale, exactly as if the shopper had typed the code: the Coupon plan's discount and commission. The order keeps the link's Affiliate Reference, Campaign, Sub-ID, creative and landing name, and the sale counts as the link's conversion in campaign and saved-link reports.
- A member session comes first, and so does a partner coupon already in the cart. A shopper who removes the coupon does not get it back in that visit.

Saved partner links

An affiliate-enabled partner can save a store destination with a **Link Name**, optional **Vanity Slug**, **Campaign**, **Sub-ID**, optional enabled creative and landing label. Use an HTTP/HTTPS store URL or a path beginning `/`.

Destinations must use the configured store hostname, treating its `www.` variant as the same host. Campaign and sub-ID allow letters, digits, dots, underscores, hyphens and spaces; spaces become hyphens, other characters are removed, and values are limited to 80 bytes. Landing labels use the same format with a 100-byte limit.

Leave the vanity slug blank to generate one, or choose a unique slug. The saved `/partner-go/...` link checks that the partner and link are still enabled before redirecting to the store with tracking information. Existing unrelated destination parameters are retained. An unavailable link displays an error instead of granting affiliate access. Deleting a saved link ends that shortcut while leaving historical conversion records intact.

Recent Saved Partner Links lists partner, link name, vanity URL, campaign, sub-ID, creative ID and clicks, 50 rows per page. Use its URL to open the saved destination. This merchant list does not contain a link-edit form. The partner workspace's link controls follow the partner's permissions and enabled affiliate access.

Publish and remove creative assets

In **Creative Library**, enter **Title**, **Type**, **Asset URL**, optional **Suggested Store Destination**, **Description**, and **Show to partners**, then choose **Add Creative**. Types are Image, Banner, Text, Document and Other. The asset can be an externally hosted URL; the suggested destination must lead to the configured store host. Both title and asset URL are required. Show to partners starts checked, and only enabled creatives are available for new partner links.

The list displays the asset's status and provides **Open Asset**, an optional destination **Open** link, and **Delete**. Confirm deletion when prompted. Deleting removes the creative association from saved links but preserves historical order attribution; the original externally hosted file is not deleted by this record action. If deletion fails, reload and check the saved state before retrying. The native list offers adding and deleting, without an edit control.

Interpret marketing counts

Campaign and creative performance group orders and merchandise sales separately by currency, with up to 50 leading groups in the selected period (30 days by default). Saved-link statistics include its click count and lifetime conversion totals by currency. These are marketing observations of affiliate-attributed orders. Product line totals reflect discounts; these figures are not a payout balance, proof of payment or a refund-adjusted accounting ledger. Use the commission and payout screens for amounts actually owed or paid.

Email notifications

General Program provides eight independent, initially enabled email switches: application submitted, application status, integration connected, change request submitted, change request reviewed, payout ready, payout paid and key rotated. Submitted applications notify the administrative address and applicant; application decisions notify the applicant. Integration connections and key rotations notify administrators and the partner. Change requests notify administrators on submission and the partner after review. Payout-ready notices go to both; paid notices go to the partner.

The partner contact normally comes from the linked application, then the linked WordPress user. For a committed Store Credit payout, the receipt's frozen recipient account supplies the email instead. Set a valid support and administrative notification address in [general settings](#). Application email wording and placeholders are configured in [signup settings](#). Unknown placeholders remain literal; use the supported names shown there.

Application review notes are included in applicant status email through {message}, including the default approval, rejection and more-information templates; the review screen says so under the field. Change-request review notes also go to the partner under **Admin notes**. Put private staff discussion in an internal conversation note instead.

A ninth switch, **New commission (email to the partner)**, is off until you switch it on. The partner then gets one email for each commission a sale earns them, also for a subscription renewal: the order number, the amount, how the sale came to them (affiliate link or landing page, coupon, member pricing, lifetime customer, credited by the store) and when it can be paid, never the customer's name or address. It goes to the partner contact described below. It is sent from WooCommerce's background queue shortly after the commission is recorded (the queue runs with your site's scheduled tasks), never during checkout, and once per commission; a commission voided before then is not announced. Bonuses, adjustments and network commissions are not emailed. Only the settings form changes this switch; another save of these settings, for example through the AffStackDev AI action, keeps it.

Invitations and urgent payout-provider review notices are separate from these nine switches. A new partner's invitation explains that WordPress sends account setup separately; an existing user is directed to log in. Key-rotation email never contains the new secret. Store Credit paid email explains original amount, bonus, fee, credited amount, receipt reference and where the customer can use the balance. Emails other than the new-commission email are sent immediately through WordPress mail, without a plugin delivery retry queue; a saved business record can exist even when its email fails. Check the record's status before repeating a financial action.

Use [Email Tools](#) to resend invitations or payout notices or send a test message. A resend does not change a payout; choose the notice that matches its actual state. [Documentation](#) provides the Complete Customer Reference and Master Technical Reference as bundled downloads. Older guide links resolve to the customer reference when their download authorization remains valid.

Partner conversations and staff notes

In the partner dashboard, open **Messages & Disputes**. Choose **Open Conversation**, then General Question, Commission Dispute, Payout Dispute or Integration Support. Enter Subject and Message. A dispute also needs the commission or payout reference belonging to that partner. Select **Send**. Messaging and dispute permission must be enabled for that member; offboarded read-only accounts can see history without sending messages.

Each conversation has a PT - reference. The screen shows 20 conversations per page and the full shared history within each, with sender and time. Partner replies set the conversation to awaiting merchant. Shared merchant

replies set it to awaiting partner. Partners cannot see internal merchant notes. There are no conversation attachments or delete controls.

For an active conversation, enter a reply and choose **Reply**, or use **Close** to change its status. Close does not send the textarea content and does not need any. Resolved and closed conversations hide partner reply controls. Ask the merchant to reopen or respond when another discussion is needed.

On the merchant **Messages** screen, staff with messaging permission see 20 conversations per page, including internal notes. Use **Add Reply** for a partner-visible response, or check **Internal merchant note** for private staff text. The status selector and **Update Status** allow open, awaiting merchant, awaiting partner, resolved or closed. A shared merchant reply to a closed or resolved thread changes it back to awaiting partner. An internal note keeps its status. Closing or resolving a financial dispute does not change commission money or a payout receipt; make any correction separately in Financial Controls.

New-conversation notices use the WordPress administration email. A shared merchant reply alerts active partner members who can message. Internal notes send no partner notice. These conversation notices are independent of the eight general notification switches and omit the message body. If saving fails, the transaction rolls back rather than leaving a thread without its first message; check the displayed result and retry only after resolving the reported failure.

Bonuses and automatic partner tiers

Financial Controls can reward active partners using Qualified Merchandise Sales, Qualified Order Count or Earned Order Commission. These figures come from non-voided order commission records in the selected currency; adjustments and bonuses do not count toward further bonuses. No currency conversion is performed. The order measure counts qualifying ledger entries. Daily background work processes partners in batches of 200, so a large program may not update all partners immediately.

Performance Bonus Rules

With financial-management permission, open **Performance Bonus Rules**. Fill **Rule Name**, leave **Enable rule** checked if it should run, select Metric and monthly/quarterly/yearly Period, enter a positive Threshold and Bonus Amount, and set Currency. Currency starts as the store currency and permits up to ten typed characters. Select **Add Bonus Rule**. The rule list shows its enabled status, metric, period, threshold and bonus.

A qualifying partner receives one bonus for that rule during the current calendar month, quarter or year. For example, a USD 10,000 monthly sales threshold with a USD 250 bonus grants USD 250 once when the threshold is reached; running evaluation again that month does not duplicate that award. A later calendar month can earn another award. The bonus becomes a normal positive commission-ledger entry, subject to the financial workflows for that ledger.

Use **Delete** and confirm to stop future evaluation of a rule. Existing awarded bonuses and their history remain. Deleting does not reverse an award; recreating the rule gives it a new identity. The native list provides Add and Delete controls, without a row-edit form. If an award cannot be safely recorded, its transaction rolls back and background recovery handles the failure rather than intentionally awarding a partial record.

Automatic Partner Performance Tiers

Enter **Tier Name**, enabled status, **Sort Order** (initially 10), Metric, nonnegative Threshold, **Evaluation Window** (initially 30 days, 1–3,650), Currency, and optional Verified, Public Coupon and Affiliate Plan Overrides. Choose **Add Performance Tier**. A zero threshold is allowed. Put higher intended tiers at higher sort-order values: the last

qualifying enabled tier in sort/threshold/ID order wins, with each tier measured using its own window and currency.

A blank/no-override plan selection uses the partner's preserved base assignment. Before applying the first tier, the plugin saves those base assignments; if the partner later ceases to qualify while still assigned a tier, it restores them. A **tier lock** on Manage Partner stops automatic changes for that partner. The dashboard can show the current tier, next tier with a higher sort order, progress and lock state. Same-sort tiers are not next targets; a failed metric read leaves progress unavailable. Near timezone boundaries the progress preview and evaluation can differ because they use different time boundaries.

Delete removes a tier and clears its partners' tier assignment and lock. It does not restore plan assignments immediately, and a later no-qualification evaluation should not be relied on to restore them after deletion. Review affected partners in Manage Partner and explicitly set the plans you want.

Choose **Run Bonus & Tier Evaluation Now** to request another evaluation and run enabled velocity monitoring. It starts the same queued process used daily; it does not bypass an already active cycle or an administratively paused failure. Review [background recovery](#) if evaluation remains paused. A failed save or database read is reported; preserve the intended rule and partner details while correcting the underlying error before retrying.

Reading analytics

Analytics separates verified visits, unverified visits, click-backs, affiliate clicks and affiliate visitors. Verified plus unverified visits form the visit total; the verified percentage divides verified visits by that total. Click-back percentage divides click-backs by unverified visits and is capped at 100%. A zero denominator shows zero.

Unverified landings and click-backs are each deduplicated for 30 minutes per partner/browser fingerprint. Affiliate clicks are recorded on each call, while the affiliate visitor count is deduplicated over the affiliate cookie window, normally 30 days. The fingerprint uses a salted combination of IP address and browser information; it does not establish a person's identity. Shared networks, changed browsers, missing browser information and cleared/expired transient records can affect the counts. Verified visit logging has no equivalent deduplication in this service.

Date-based summaries include today and start at midnight in the site's timezone. The service supports 1–730 days, defaulting to 30; daily charts fill dates without events with zeros. Monthly series cover up to 36 months, starting at the first day of the oldest month. Recent-event records show event, result, details and time. Top affiliate destinations rank paths by clicks and omit URL query strings and fragments; the homepage alone is not a nonempty path in this ranking. Older destinations may populate progressively through background backfill. If that process pauses, use [background recovery](#).

Sales and conversion measures

Order reporting counts orders attributed to verified sessions, public coupons or affiliate links, excluding cancelled, failed, refunded and trashed orders. Other order states may appear; this is not restricted to paid orders. Merchandise sales use product totals after discounts and line-item refunds, without shipping, tax or fees. Customer savings use product subtotal minus discounted product total and do not separately reduce the savings figure for refunds. Commissions come from non-voided commission records.

The report provides orders, merchandise sales and commissions for verified, public-coupon and affiliate sources, customer savings for verified/coupon orders, and overall totals. It loads the full matching history in batches and

can retain a cached result for two minutes. Currency amounts are not grouped or converted by this helper. Use currency-specific commission/payout records for accounting, especially on a multi-currency store.

Verified conversion is verified orders divided by verified visits. Affiliate conversion is affiliate orders divided by counted affiliate visitors. Sales per visit/visitor divides the corresponding sales by that traffic count. A single visitor can place multiple orders, so conversion can exceed 100%: three orders from two counted visitors produces 150%. These figures can differ from marketing observations and performance-rule totals because those reports use different records and bases.

Dashboard access

Full program managers receive the operational dashboard described in [Dashboard](#). Staff with narrower roles see **Your AffiliPartnerCS Areas** and links only to their permitted work. Navigation badges count pending applications, all partners/plans/commissions and pending payout batches; the partner badge is not an active-only total. Manager navigation counts may be up to 45 seconds old. Restricted users do not receive hidden financial counts through the scoped dashboard.

The standard pages retain usable links and forms without enhanced navigation. On smaller screens controls wrap and wide chart/table areas scroll. The shared key-field Reveal/Hide and Copy helpers change only the displayed field; Generate creates a new random candidate and asks before replacing an existing candidate. **Save Partner** is still required to persist it. If browser secure generation is unavailable, no replacement key is generated. Partner and plan permissions still apply.

AI and MCP

You can connect your own AI to AffiliPartnerCS: Claude, ChatGPT or another app that supports MCP (Model Context Protocol). It reads your program's results and records, and it can prepare changes that wait for your approval. It works through WordPress's own Abilities API and WordPress's MCP Adapter plugin, without any AffStackDev service. AffiliPartnerCS charges nothing for it; your AI company bills its own use. Everything is off until you switch it on in the **AI & MCP** section of **Settings**, below **Save Partner Program Settings**.

Switch AI on

The **AI & MCP** section starts with a readiness table:

- **WordPress Abilities API:** needs WordPress 6.9 or later; shows how many AffiliPartnerCS abilities are registered.
- **MCP Adapter:** whether WordPress's MCP Adapter is running (see step 1 below).
- **AffiliPartnerCS MCP server:** the state of AffiliPartnerCS's own MCP servers the last time an AI connected.
- **Application passwords:** whether WordPress offers them on this site (WordPress needs HTTPS for them, unless the site is a local one).
- **claude.ai and ChatGPT:** whether a connector plugin with sign-in is active (see [Connect Claude, ChatGPT or another AI app](#)).
- **WordPress AI (Settings > Connectors):** whether WordPress 7's AI client has a key, for [Review with AI](#).
- **AffStackDev AI:** not needed for anything in this section.

The switches below it:

- **AI Abilities:** lets AI tools use AffiliPartnerCS's abilities. Off until you switch it on. With only this switch on, an AI can read and cannot change anything.
- **Proposed Changes:** lets an AI prepare changes that wait for your approval (see [Changes your AI proposes](#)).
- **Ability Groups:** one switch for each group: results; applications and partner records; orders; payouts overview; show me how; and five groups of changes (partners, applications, seats and messages; plans, rules, commissions, corrections, bonuses and tiers; payouts; marketing, coupons and creatives; settings, pages, integrations, webhooks and maintenance). A group switched off is not offered to any AI. The read groups also apply to the AffiliPartnerCS reads of AffStackDev AI.
- **Partners' Own AI:** lets partners connect their own AI to their own workspace (see [Partners' own AI](#)).
- **Review with AI: Your Criteria:** what a good partner looks like for your store, for example the audiences you want, a minimum size or the kinds of sites you decline (up to 4,000 characters).

Select **Save AI Settings**. The change is recorded in the audit log and in [AI activity](#). Changing these settings needs permission to manage the product's settings.

A developer can keep AI off with the constant `MOS_PP_AI_DISABLED`, or allow reading only with `MOS_PP_AI_READ_ONLY`, in `wp-config.php`; the matching switch then cannot be turned on. The filters `mos_pp_ai_enabled` and `mos_pp_ai_changes_allowed` do the same in code.

Connect Claude, ChatGPT or another AI app

1. Install and activate WordPress's **MCP Adapter** plugin (`mcp-adapter`). WooCommerce 11.2 includes the adapter: there, switching on **WooCommerce MCP (WooCommerce > Settings > Advanced > Features, under experimental features)** starts it instead, and AffiliPartnerCS's servers start with it. The readiness table shows **Running** once the adapter has started on a request.
2. Make an application password for the WordPress account the AI will act as: **Users > Profile > Application Passwords**. The AI sees and does only what that account may do in AffiliPartnerCS. For an AI that only reads, use an account with the **AffiliPartnerCS Analyst** role.
3. Under **Connect Your AI**, copy the setup for your app and put the application password in place of your - application-password: **Claude Desktop** (the `claude_desktop_config.json` file), **Claude Code** (a `claude mcp add` command) or **Codex** (a `codex mcp add` command). These setups run WordPress's `@automattic/mcp-wordpress-remote` bridge, which needs Node.js on your computer.

The setup points at AffiliPartnerCS's own MCP server, `https://your-store/wp-json/affilipartnercs/mcp`, which offers only the abilities you switched on and lets in only accounts with AffiliPartnerCS permission. The MCP Adapter's own default server can reach the same abilities.

claude.ai and ChatGPT add your store as a custom connector that signs in with OAuth, which the MCP Adapter alone does not offer. Free WordPress.org plugins that, by their own descriptions, add that sign-in and pass on the abilities other plugins register: Royal MCP; Easy MCP AI; Enable Abilities for MCP (together with the MCP Adapter); StoreAgent; and WPVibe (through its own service). The readiness table shows when one of them is active.

With **Easy MCP AI** (tested with its version 2.2.2):

1. Under **Easy MCP AI > Tools**, check that AffiliPartnerCS's abilities (the **Affilipartnercs** group under **Abilities**) are on, and save. Easy MCP AI switches on the abilities it finds when it is first activated, so check the list if you switched AffiliPartnerCS's AI on after installing it.

2. Connect your app from **Easy MCP AI > Connections**, or add `https://your-store/wp-json/easy-mcp-ai/v1/mcp` as a custom connector in the app, and sign in with an account that has AffiliPartnerCS permission. On Easy MCP AI's sign-in page, keep **Full access**, or under **Custom** keep the row **Abilities — AffiliPartnerCS** ticked.
3. If that row is greyed out, the app did not ask for those abilities and cannot use them through the sign-in. Use Easy MCP AI's **Token in URL** connection instead, with a token for AffiliPartnerCS's tools.

Easy MCP AI lets any account that can publish posts sign in; AffiliPartnerCS still answers only accounts with its own permission. WPVibe's **Dangerously bypass approvals** setting skips WPVibe's own approval prompts, not AffiliPartnerCS's: with any app, a change the AI proposes waits for your approval on this screen.

What your AI can read

Ability	What it answers	Permission
Get partner program summary	Credited orders, commissionable sales and commissions by currency; commissions by status and by how the sale came (member pricing, coupon, affiliate link, lifetime customer); network, bonus and adjustment entries; affiliate clicks and visitors; partners by status and new ones; applications received and waiting; payouts paid, open batches and payable commissions not yet in a batch; the top partners	View the program
List top partners	Partners ranked by commission, sales, orders or affiliate clicks	View the program
Compare two periods	Orders, sales, commissions and clicks of one period against another (by default the same number of days just before), for the program or one partner, with the difference and percent change	View the program
Get one partner's results	The partner's plans, coupons and affiliate code; orders, sales, commissions, clicks and payouts for the period; open commissions; lifetime customers	View the program
Get a partner coupon's results	The coupon's partner, its WooCommerce settings and uses, and the orders, sales and commissions it credited	View the program
Get affiliate link results by campaign	Orders and sales through affiliate links, by campaign, sub-ID, saved link, landing name or creative	View the program
List recent program activity	The latest audit log entries, optionally for one partner or one kind of event	View audit records
List partners	Partners with status, platform, links, coupons and plans; filter by status or search; 50 a page	Manage partners
List applications waiting for a decision	Organization, website, platform, audience size, contact name and the review link; no email address or phone number	Manage partners
Get an application for review	The application's answers and your review criteria (see Review with AI)	Manage partners

Ability	What it answers	Permission
Get an order's partner	Which partner an order is credited to, how, with which plan, campaign and coupon, and its commission; no customer details	View financials
Get payouts overview	Payouts paid by currency, open batches by status, payable commissions not yet in a batch	Manage payouts
Show me how	The sections of this guide that best match a question	View the program

Dates are days in your site's time zone (YYYY-MM-DD). Without dates, a read covers the last 30 days; one period can be up to 3,660 days. A partner can be named by ID, slug, affiliate code or exact name. No ability returns keys, secrets, IP addresses or customers' contact details, and each one checks the connected account's AffiliPartnerCS permission every time; a refused call is not run and not listed in [AI activity](#).

Changes your AI proposes

With **Proposed Changes** on, an AI can list the changes it may propose, read the fields one takes, propose one and check its state later. These are AffiliPartnerCS's 90 reviewed changes, the same set AffStackDev AI uses: partners, applications, seats, plans, commission rules, coupons, corrections, bonuses, tiers, payouts, marketing, messages, settings, pages, integrations, webhooks and maintenance. Each group can be switched off.

A proposal changes nothing. AffiliPartnerCS prepares it without saving anything: the exact record, its current values and the values it will save. It then waits under **Waiting for Your Approval** with who proposed it, when, how it came and the AI's reason. **Target** shows the record as it is now; **Expected saved result** shows it after approval; the box also says whether the change can be undone later.

- **Approve** prepares the change again as your account and applies it only if nothing it depends on changed since it was proposed. If something changed, it is listed under **Not Applied** and your AI can propose it again. It is applied through the same reviewed path AffStackDev AI uses: one change at a time, with a journal and a check of the saved result. A change whose result cannot be confirmed is never repeated; check the record first. AffStackDev AI is not needed for any of this.
- **Reject** drops the proposal.

Approving or rejecting needs permission to manage the product's settings, and approving also needs the change's own permission. A proposal not decided within 7 days expires.

Undo. Under **Applied AI Changes**, a change whose earlier values can be written back has **Undo**: a partner's settings, profile, program, performance, affiliate and pricing sections and its team seats; suspend and reactivate; plans, commission rules, bonuses, tiers and creatives that existed before; marketing, fraud-monitoring, general, commission-hold, payout-schedule, network and program-page settings; and attaching or detaching a partner coupon. Undo prepares the earlier values as a new proposal, which waits for your approval like any other. Changes that create or delete a record, send an email, pay, change money owed or replace a key cannot be undone from here.

Review with AI

On a partner application's page, **Review with AI** asks your own AI for a recommendation: **Approve**, **Decline** or **Ask for more information**, with its confidence, a short summary, up to six reasons and up to five questions to ask the applicant. It uses WordPress 7's AI client with the key you saved under WordPress's **Settings** > **Connectors** (for example Anthropic, Google or OpenAI), and that AI company bills its own use.

It sends the application's answers (organization, website, platform, audience size, contact role, description, interests, promotion plan, other programs, traffic, anything else and duplicate warnings), the answers to [your own questions](#) and your criteria from **Review with AI: Your Criteria**. It never sends the email address, phone number or contact name fields.

The recommendation is shown in the box and kept with the application's answers, so it is part of the applicant's WordPress personal-data export and is removed by an erasure request. It is never put in **Admin Notes**, which are emailed to the applicant. **Review Again with AI** replaces it. The AI only recommends: you decide with the buttons under **Review Application**. The box appears while **AI Abilities** is on, and also shows a saved recommendation while it is off; reviewing needs permission to manage partners.

An AI you connected can do the same through **Get an application for review**, and it can propose the decision (the change "Review partner application"), which then waits for your approval.

Partners' own AI

With **Partners' Own AI** on, the partner workspace shows **Connect Your AI** to each partner member once the partners' MCP server has started (it starts with the MCP Adapter and stops being offered when the adapter no longer runs):

- **Server address:** the partners' MCP server, `https://your-store/wp-json/affilipartnercs/partner-mcp`.
- **Create an AI Password:** makes an application password for the partner's own store account and shows it once; partners usually cannot open WordPress's profile screen to make one. **Remove My AI Passwords** ends all of them.
- **Setup for Claude Desktop (claude_desktop_config.json) and other MCP apps**, with the partner's username and, right after creating it, the password filled in.

A partner's AI can read the partner's account (organizations, role, affiliate code, coupons, plans and landing pages), results for any period, commissions (date, source, plan, rate, amount, status and when payable; no customer or order details) and payouts, and it can make a tracked affiliate link, which saves nothing. Team members see what their role allows, and making a link needs a role that manages marketing. Nothing of other partners or your customers is offered. An AI password lets whoever holds it use the store's API as that account, so partners should keep it private. When WordPress does not offer application passwords on the site, the card says so.

AI activity

Recent AI Activity lists the latest 30 entries: each ability call its account was allowed to make and what it was about, each proposal, approval, rejection and undo, each Review with AI, partners' AI passwords made or removed, and AI settings changes, with who, how it came (MCP, REST API, WP-CLI, this screen or AffStackDev AI) and the result. It never keeps what was asked or answered. Entries are kept 90 days; **Clear Activity** empties the list and is recorded in the audit log. Proposals, approvals, rejections and reviews are also recorded in the audit log.

When AffStackDev AI is active, the same reads are also its AffiliPartnerCS read actions, and its own approval screen works as before.

Downloading business data

[Infrastructure → Exports](#) offers CSV files for Partners, Applications, Commissions, Fraud Alerts and Audit Activity. You need export permission. Each includes the entire selected resource, without screen-level date or partner filters. Partners includes program assignments and statuses; Applications includes contact and review details and a **Your Own Questions** column with the answers to your own questions; Commissions includes partner reference, plan, attribution, currency, amounts, renewal/hold/status/payment details; Fraud Alerts includes alert/state/review data; Audit Activity includes event, actor, object, severity, summary and time. Exact columns are in the technical export reference.

The plugin prepares the complete file before download and checks that the expected row count was read. If records change during preparation or a database/staging operation fails, it reports export unavailable instead of deliberately sending a partial file. Resolve the error and retry. A successful CSV is a report, not a full restorable backup: partner secrets and audit-detail JSON are omitted. Keep the download within the access appropriate for its business/contact data.

WordPress privacy requests

WordPress personal-data export and erasure tools include **AffiliPartnerCS partner data**. They match an email and its linked WordPress account, then process records in groups of 50. Export can include applications, invitations, team/account relationships, authored messages and requests, payout profile, commissions, payouts and provider-attempt status, tax status, private partner notes, fraud/security records, bonus awards, marketing data, network relationships and relevant audit events. Team membership alone does not grant export of all of an organization's financial records; those require the financial association used by the exporter.

A financially associated partner's private notes can appear in this personal-data export. Keep that in mind when writing staff notes. If an export shows **AffiliPartnerCS export status** with an incomplete-record message, resolve the database issue and repeat the request; do not treat that file as complete.

Erasure removes eligible contact/application details, invitations and team seats; detaches matched account links; removes authored message text while leaving a removal marker; and clears request text and proposed values. It retains the business structure, some application organization/status information, thread subjects and reviewed request history. It does not delete the WordPress user or automatically terminate the commercial relationship.

A separate entry, **AffiliPartnerCS lifetime customer link**, covers [lifetime customers](#): export lists the partner a customer is linked to, the first order and the dates; erasure removes the link, so later orders are no longer credited to that partner.

Financial, payout-profile, tax, fraud, conversion, security and audit records remain for merchant review under the store's approved retention process. Nothing is silently paid, voided or financially rewritten. Read/write failures keep erasure incomplete and identify the need to retry. The plugin supplies draft privacy-policy content in WordPress describing these categories; review it for the way the store actually operates.

Personal data fields

The technical field reference lists exactly which fields appear for each matched record. Some business records use different export projections: a referred commission exposes fewer fields than the partner's own commission, and a provider attempt exports status/error timing without its raw payment request.

Diagnostics and repair

Open [System Status](#) to check environment versions, schema, schedules, queue health and integrations, then [Diagnostics](#) for the read-only integrity scan. Review critical results first, then warnings. The scan checks missing schema objects, duplicate order commissions, missing commission references, partner/plan/owner relationships, cross-partner user access, payout items and paid states, marketing/change-request/profile/bonus/webhook relationships, terminated-partner activity flags, schedules and paused work.

A failed database inspection is reported as incomplete rather than healthy. Rerun after resolving that cause. A bonus relationship warning can follow deletion of a rule whose legitimate awards were retained; inspect the specific relationship rather than deleting the award. Other orphan or duplicate financial findings need deliberate record review. Paid-provider/open-ledger problems require the dedicated payout recovery action and must not prompt another payment.

The [Safe Repair Bundle](#) repairs/verifies schema, restores recurring schedules, refreshes partner routes and generates missing PC- commission references. A call processes at most 5,000 missing references; repeat if more remain. It does not remove orphan financial records, repair every business inconsistency or settle payouts. Diagnostics runs again after the bundle. When repair reports failure, inspect the resulting status and correct the cause before retrying.

Diagnostic logging and audit history

[Infrastructure → Logs](#) controls optional operational logging, initially disabled. Enable it for a specific investigation, use **Write Test Log Entry** when available, and open WooCommerce Logs with source `affilipartnercs`. Related entries share a request ID. Record the time, component, operation and error code when investigating, then disable logging when finished.

Logging omits common credentials, identifying fields and raw request bodies, trims large values and records only bounded sanitized information. Review logs before sharing them. WooCommerce controls their retention/deletion. Disabling logging suppresses even operational warning/critical entries, but does not turn off durable financial receipts, payout attempts, fraud records or audit history. Audit Activity is a separate record of business operations, with actor, event, severity and time.

Recovering paused background work

Performance, velocity checks, historical destination backfill and payout eligibility discovery can retry temporary failures automatically. The ordinary five retries are delayed by 5, 10, 20, 40 and 80 minutes. After exhaustion, work pauses with its progress cursor and error so an administrator can investigate. It does not silently restart on each daily trigger.

Resolve the reported cause, then use [Restart Paused Background Work](#). The service queues from saved progress and clears only the same pause record it reviewed. A failed restart remains reported; another concurrent restart is blocked. Check queue/status results rather than repeatedly launching work while a continuation is pending. Restarting these workers never authorizes a new provider payment.

Short-lived locks and request claims protect concurrent operations. A message that an equivalent request is already being processed calls for checking the existing operation and waiting for its completion or expiry, not clearing its records. Database uncertainty is treated as failure to acquire permission to proceed.

Maintenance and sample data

Daily operational cleanup removes expired request claims, authentication nonces and old traffic/security analytics. [Clean Expired Operational Data](#) runs the same cleanup explicitly. It preserves partner, commission and payout business records. Analytics retention defaults to 730 days; the settings field accepts 30 to 3,650 days, and the cleanup keeps analytics that long. Deleted analytics are not restored by increasing the setting later.

Database optimization touches only plugin tables and can briefly lock them depending on the host; use the [optimization control](#) during low traffic. Schema, schedule, route and reference repairs are separate maintenance choices. Reported partial failures need review because earlier cleanup steps may already have completed.

Factory Reset is a distinct, irreversible operation for an administrator with both site-management and plugin-activation authority. It deletes plugin partners, applications, plans, commissions, payouts, messages, audit records, secrets, settings and jobs, then restores an empty schema. It leaves WordPress users/pages and WooCommerce orders/products/customers/coupons in place. The [reset screen](#) requires its exact confirmation phrase and checkbox. This is not an undo or a remedy for an uncertain payout. If reset fails partway, inspect the reported state rather than assuming the former program remains intact.

Choosing and removing sample records

The setup notice and General Program settings let you **Load Sample Data**, **Leave As-Is**, or **Remove Sample Data**. Loading creates disabled examples for verified membership, public coupons and affiliate use. Their coupon codes cannot be used until deliberately enabled. Leave As-Is preserves the existing records and dismisses the pending choice after it is saved.

The sample partners are sample-verified-clickback and sample-hybrid-all-three; sample coupons are samplemember10, samplehybrid10 and samplepublic7. The bundled plans demonstrate verified membership with/without click-back, public social coupons and affiliate behavior. Loading is optional; remove untouched examples before using real program data if they are no longer useful.

Removal checks a saved registry, original identifying values and dependent history. Changed records, activated/integrated samples or records with business/financial dependencies can block cleanup. The plugin does not delete financial history to make a sample removable. Use normal partner/plan management for changed records, preserving historical obligations. A removal may complete earlier stages before a later storage failure; retain the error and inspect what remains instead of assuming every sample was removed. Settings permission is required for these choices.

Understanding operational errors

Validation errors usually need a corrected address, store URL, reference, unique slug, enabled creative or required rule value. Permission errors require the relevant assigned role or partner-member permission. Storage and scheduling errors require resolving the reported database or queue cause; do not treat an unreadable record as an empty record.

For incomplete settings saves, reopen and compare saved values. For CSV or privacy exports, repeat after the cause is resolved and check the file is complete. For sample cleanup, inspect what remains because deletion has several stages. For paused evaluation, use the dedicated restart after review. A failed notification does not mean a payout failed, and a duplicate-request warning calls for checking the existing operation. The technical error reference maps exact codes to their conditions and recovery paths.

Find the complete references

Open **AffiliPartnerCS → Infrastructure → Documentation** to download the **Complete Customer Reference** or **Master Technical Reference**. You need permission to view the product. The customer reference explains settings and tasks; the technical reference provides exact fields, interfaces, validation and recovery contracts. Both describe the installed release. Word and PDF editions of the customer reference are on affstackdev.com.

Use the references with the local AI reader

When the compatible AffStackDev AI reader is available, it can discover these two references from the installed plugin. The references are tied to the installed plugin version. Large manuals and capability lists are read in successive pages; the first returned page is only part of the reference.

If the reader reports a missing or mismatched reference, restore the matching plugin release and its documentation files. The complete pair is stored inside `affilipartnercs/docs/`. Selecting an old standalone guide does not repair an incomplete current pair. Discovery details describe the exact version and file requirements.

Documentation discovery does not activate financial or administrative actions. Your existing product permissions and any separate AI approval workflow still govern operational requests.

Glossary

Term	Meaning
Partner	An organization or professional affiliate with its own partner record, program assignments and operating settings.
Partner user	A WordPress user linked to a partner workspace through the plugin's partner access controls.
Plan	A reusable set of partner program terms that can be assigned to a partner.
Verified member	A visitor whose current partner membership has been accepted through the supported signed verification flow.
Affiliate referral	An attributed visit or sale associated with a professional partner; it can produce a commission under the applicable rules.
Customer referral	A Store Credit customer Refer a Friend program; it is separate from professional partner commissions.
Commission	A recorded partner earning with its own calculation, hold, eligibility and payout state.
Payout batch	A retained group of commissions and payout terms reviewed and processed together.
Reconciliation	Establishing the result of an earlier operation from its original provider response or retained receipt.
Store Credit	The separate product that owns spendable balances and authoritative credit issuance.
Attribution	The rules that associate a visit or order with a partner and record how that association was chosen.
Snapshot	Facts saved at a defined point so later decisions retain the original context.

Term	Meaning
Revision	The version of a saved record used to detect competing or stale changes.
HMAC	A keyed message authentication code used to verify that a message matches the trusted sender and has not changed.
Nonce	A value used in a defined request or form to prevent unintended or replayed operations; its rules depend on the interface.
Commerce Core	The shared AffStackDev runtime for supported audience, protection, ownership and operation contracts.
Protected update	A release whose product identity, signature and exact file inventory are checked before installation.