Installation | Upgrade | Training | Support

SECTION 1: Installation Instructions
Please review all notes before proceeding with your installation.

General Notes Before Installation

❖ We highly recommend installing into a top level directory named /idevaffiliate/.

   Example: http://www.yoursite.com/idevaffiliate/

❖ Hosting on Yahoo Servers?
   iDevAffiliate 6 requires ionCube for licensing. To our knowledge Yahoo Hosting does not provide ionCube nor do they allow the use of provided run-time loaders. Having said this, you cannot install iDevAffiliate 6 into a Yahoo Webhosting Hosting account.

   This does not affect the ability to integration with Yahoo Stores. You can install into any hosting account and integrate iDevAffiliate with Yahoo Stores.

❖ If you need affordable hosting, we offer very competitive plans at http://www.idevwebhost.com.

Installation Instructions

1. Create a new MySQL database (naming it **idevaffiliate** is fine). This is typically done at the command line or via a **webhosting control panel** if your hosting solution provides one.

2. Create a directory in your Document Root called **idevaffiliate**.

   Example: public_html/idevaffiliate or http/idevaffiliate (each server looks different).

3. If you named your directory **idevaffiliate**, skip this step. Otherwise open /API/config.php and adjust the name of the installation directory.

   ```
   $install_directory_name = "idevaffiliate";
   ```

4. Open /API/database.php and adjust your database connectivity settings.

   ```
   $dbhost = "localhost";
   $dbuser = "yourdatabaseusername";
   $dbpass = "yourdatabasepassword";
   $dbname = "yourdatabasename";
   ```

   Leaving the host set to "localhost" will work in most cases. Save your settings and close the file.

5. Using your favorite FTP program, upload all of the files in their present directory structure to your hosting account (into your newly created directory called **idevaffiliate**).

   Important:
   Use AUTO-DETECT mode when uploading files. Images and PDF documents need uploaded in BINARY. All other files need uploaded in ASCII. Using AUTO-DETECT mode will automatically handle this for you.

6. From your web browser, run the install program. This program will automatically add the appropriate tables into your new database created in step 1. To execute the installation program simply type the following line into your web browser:

http://www.yoursitenamehere.com/idevaffiliate/install/index.php

Be sure to adjust the above path to match your actual location of iDevAffiliate.

Important Installation Notes

❖ Walk through each step carefully and follow the instructions for each step.

❖ Don't forget to set file permissions on the required directories. On the installation page, click the **Learn More** link for more information on what these permissions settings should be. The following 8 directories need given **write** permissions.

Required Folder Permissions

The following iDevAffiliate folders need write permissions. [Learn More]   Refresh This Page

Folder Name	Status		Folder Name	Status		Folder Name	Status	
/backups/	Writable	✔	/banners/	Writable	✔	/cache/	Writable	✔
/docs/	Writable	✔	/lightboxes/	Writable	✔	/logos/	Writable	✔
/peels/	Writable	✔	/uploads/	Not Writable	✘			

SECTION 2: Upgrade Version Notes
The built-in upgrade routine will update your current system for the following versions.

- 4.0.9.05
- 5.0
- 5.1
- 5.1 w/ latest patches

If you aren't already running one of the above versions, please upgrade your current installation to at least Version 4.0.9.05 before upgrading to Version 6.

iDevAffiliate 5.x Users

A) You will need to adjust the following two files before uploading the new Version 6 files.

/API/config.php
/API/database.php

We suggest doing a copy/paste of your database settings from your current database.php file to the new one you're about to upload. Just grab the following lines when copying/pasting.

```
$dbhost = "localhost";
$dbuser = "yourdatabaseusername";
$dbpass = "yourdatabasepassword";
$dbname = "yourdatabasename";
```

B) Because we have so heavily enhanced the affiliate control panel, you will unfortunately lose any template customizations you've made. New templates must go in to accommodate all the new front-end features. If you haven't altered any of the files in the /templates/ folder this won't affect you. If you've heavily modified your templates, we encourage you to make backups before performing your upgrade so you can reference your custom work when updating the new iDevAffiliate 6 templates.

Language packs, header images and color schemes won't be affected.

C) **Page Replication** links have been removed from iDevAffiliate 6. They were ineffective and didn't work correctly for some users. If you are currently set to use Page Replication links, your existing links will still work but your default linking style will be moved to **standard affiliate links**.

D) Most of the new features in iDevAffiliate are turned off by default. At first glance you may not see a big difference between Version 5 and Version 6. Please explore around the admin center to discover all the new features and decide whether or not to use them.

iDevAffiliate 4.0.9.05 Users

A) After your upgrade is complete, you will need to re-integrate your cart system. The integration function has changed from 4.x to 5.x but remains the same from 5.x to 6.x.

B) After your upgrade is complete, you will need to re-adjust your email settings. We suggest using SMTP.

SECTION 3: Upgrade Instructions

1. If your current installation is in a folder named **idevaffiliate**, skip this step. Otherwise open /API/config.php and adjust the name of the installation directory.

   ```
   $install_directory_name = "idevaffiliate";
   ```

2. Open /API/database.php and adjust your database connectivity settings.

   ```
   $dbhost = "localhost";
   $dbuser = "yourdatabaseusername";
   $dbpass = "yourdatabasepassword";
   $dbname = "yourdatabasename";
   ```

   Save your settings and close the file.

3. Using your favorite FTP program, upload all of the files in their present directory structure to your hosting account into the current location of your existing iDevAffiliate files. Allow the new files to overwrite the old.

   Important:
   Use AUTO-DETECT mode when uploading files. Images and PDF documents need uploaded in BINARY. All other files need uploaded in ASCII. Using AUTO-DETECT mode will automatically handle this for you.

4. From your web browser, run the install program. To execute the installation program simply type the following line into your web browser:

   http://www.yoursitenamehere.com/idevaffiliate/install/index.php

   ❖ Be sure to adjust the above path to match your actual location of iDevAffiliate.
   ❖ You will automatically be re-routed to the upgrade routine.

Important Upgrade Notes

❖ Don't forget to set file permissions on the required directories. On the installation page, click the **Learn More** link for more information on what these permissions settings should be. The following 8 directories need given **write** permissions. Some will already be set for your existing installation.

Required Folder Permissions

The following iDevAffiliate folders need write permissions. [Learn More]   Refresh This Page

Folder Name	Status		Folder Name	Status		Folder Name	Status	
/backups/	Writable	✔	/banners/	Writable	✔	/cache/	Writable	✔
/docs/	Writable	✔	/lightboxes/	Writable	✔	/logos/	Writable	✔
/peels/	Writable	✔	/uploads/	Not Writable	✘			

SECTION 4: Configuring iDevAffiliate
Once you have completed your installation, login to your iDevAffiliate admin center and click on **Quick Setup Guide**.

Walk through the 10 steps to configuring iDevAffiliate. Once complete, you will have configured all your URL settings, email settings, cart integration setting, adjusted your commission settings and uploaded all your marketing materials.

This is a basic configuration. Once this is complete, be sure to review the training videos to really learn how to use iDevAffiliate and understand all the features it has available in it.

SECTION 5: Training Videos

We have two Video Training Libraries available.

- ❖ Admin Training Videos – Learn how to use iDevAffiliate.
- ❖ Affiliate Training Videos – Teach your affiliates how to be productive.

Admin Training Videos

We have a complete library of videos available for you to learn how to use iDevAffiliate. These videos are **free** to watch and can be found by clicking the **Admin Video Tutorials** link in your admin center.

Affiliate Training Videos

iDevAffiliate 6 now includes the ability to offer your affiliates their own Video Training Library. These videos range from the very basics of being an affiliate to the highly advanced functions such as creating complex linking structures for generating deep linking reports. Video content also consists of things such as how to build a website, how to generate more traffic and sales, how to cloak their affiliate URLs and much more. Affiliate training videos are built right into their account for them to watch anytime they want.

For more details on this Affiliate Training Video Library as well as a presentation video, screenshots, pricing and a library list of videos, login to your admin center and click on **Affiliate Training Videos**.

SECTION 6: Technical Support

Technical support for iDevAffiliate can be obtained in many different formats.

- ❖ In your admin center, click on **Admin Training Videos**.
- ❖ In your admin center, click on **User Documentation**.
- ❖ In your admin center, click on **Tools & Training**.

Open A Technical Support Ticket

If the information provided in the admin center still doesn't answer your question, please feel free to open a support ticket at http://www.idevsupport.com or directly via email at support@idevsupport.com.

Tickets are answered 9am to 5pm, Monday – Friday. We do answer tickets after hours and on weekends but cannot guarantee a response during these times. Tickets answered outside our normal operating hours are done so by technical support representatives donating their time to getting tickets resolved.

Telephone Technical Support

We also offer telephone technical support during normal business hours. However, before telephone support is provided, a support ticket must be opened first. If we cannot resolve your issue via the support ticket, your ticket will be escalated to telephone support.

For more information on our support procedures, please visit http://www.idevdirect.com/support.php.

SECTION 7: Custom Cart Integration
In the Cart Integration Wizard, you will find a dropdown list full of cart systems to integration with iDevAffiliate. If the cart system you want to integrate is not on the list, please use the following as a guide for integrating your cart.

Table of Contents
1. Generic Tracking Pixel
2. Creating an API Call
3. Recurring Commissions
4. Profile Explanations & General Notes

Section 1: Generic Tracking Pixel
The most common method for integration is to use a tracking pixel in the sale confirmation / online invoice page of the cart system. Doing this would require the iDevAffiliate user to login to their admin center and enable the "Generic Tracking Pixel" method. This module will provide them with a tracking pixel that looks similar to this.

```
<img border="0" src="http://www.site.com/idevaffiliate/sale.php?profile=72198&idev_saleamt=XXX&idev_ordernum=YYY" width="1" height="1">
```

When placing this pixel into the sale confirmation / online invoice page, simply alter the following items.

❖ XXX needs replaced with the actual variable that contains the sub/total amount.
❖ YYY needs replaced with the actual variable that contains the order number.

Two examples in one: idev_saleamt=<?PHP echo $_POST['sub_total']; ?>&idev_ordernum={$order_number}

Note: The actual variable names and structure will more than likely be different in your system.

Final output in a browser should look something like this: idev_saleamt=99.99&idev_ordernum=test

Section 2: Creating an API Call
If you would prefer to call our commission processing file from an API file or backend processing file of some sort, you can do so using a CURL snippet. The only difference is you will also need to pass in the customer's IP address.

```
<?PHP
$ch = curl_init();
curl_setopt($ch, CURLOPT_URL,
"http://www.site.com/idevaffiliate/sale.php?profile=72198&idev_saleamt=XXX&idev_ordernum=YYY&ip_address=IPA");
curl_setopt($ch, CURLOPT_RETURNTRANSFER, true);
curl_exec($ch);
curl_close($ch);
?>
```

As you can see, the URL being called is constructed the same as a generic tracking pixel only we're adding the ip_address variable as well. Replace the following in this string.

❖ XXX needs replaced with the actual variable that contains the sub/total amount.
❖ YYY needs replaced with the actual variable that contains the order number.
❖ IPA needs replaced with the customer's IP address.

This code along with more detailed instructions can be found in your admin center.

❖ Setup & Tools > Advanced Developer Tools > Custom Functions > cURL Tracking Pixel

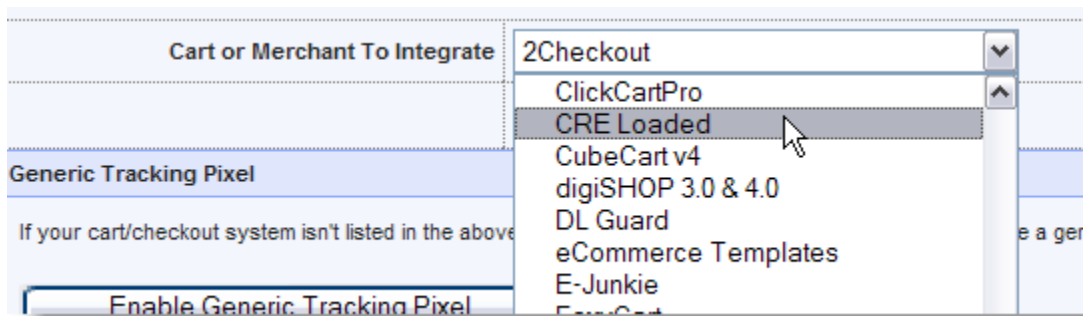**Section 3: Recurring Commissions**
To automatically generate a commission each time the customer is billed, simply call the above CURL code when the customer is charged and continue passing in the same IP address each time. It's important to use the same IP address because that is the IP address iDevAffiliate has stored for tracking.

Section 4: Profile Explanations & General Notes
As you can see in the above examples, we have profile=72198 set in each URL call. This is because we're using the "Generic Tracking Pixel". This number will never change, please do not adjust it. 72198 happens to be the profile number associated with this integration.

Once you have this integration working with your cart system, please feel free to forward us the integration instructions and we'll be sure to add you to the automated drop-down list found inside our admin center. Once added, our mutual users will pick your cart from the list to integrate with and we'll provide them with the detailed step-by-step instructions needed to implement iDevAffiliate with your cart system. Once added, the profile number will change as your cart system will be provided with its own unique ID number. For instance, your cart system might be assigned number 87 in which case the code would change from profile=72198 to profile=87.

Why do the cart systems have profiles? iDevAffiliate allows for 3 different optional variables to be passed into the commission record and each cart system can have its own defined variables. We pass in the profile number so we know which cart system delivered the commission thereby allowing us to display the correct optional variable tags. Optional variables help customers further identify and cross-reference the commission record to the actual purchase made in your cart system by having the ability to add things to the commission record such as a customer name, email, etc.

To submit your cart integration instructions, please send them to jim@idevdirect.com.