

"Your Own Affiliate Program"

Version 4.0

User and Installation Guide

Developed by Paul Galloway

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“Your Own Affiliate Program”

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INTRODUCTION

"Your Own Affiliate Program" is a software package which allows you to start and maintain your own "Affiliate Program". An affiliate program allows other people to "sign up" as your "affiliates" -- these affiliates get a commission on any business they refer to you through a web site which is created for them when they sign up.

You can also award "points" when they recruit other affiliates, or to reward them for performance – they can then redeem these points later for whatever products or services you specify.

"Your Own Affiliate Program" consists of several Perl programs (also called "scripts"), all of which work together to give you a complete affiliate program solution. The software provides the following functions:

- Sign-up new affiliates
- Automatic web site replication for each new affiliate
- Dynamic or Static web pages for affiliate sites
- Updating of all affiliate static web pages
- Automatic (real-time) commission calculation and recording.
- Order checking for any time period
- Commission and traffic statistics checking by affiliates
- Manual "adjustment" transactions to affiliate accounts
- Month-end commission statements
- Affiliate record maintenance (modify and delete)
- "Referral Rewards" program allows you to give "points" to your affiliates which they can then redeem for various incentive items

This "User and Installation Guide" will explain how to install the software and how to use the various functions.

Even though you'll be installing the software before using it, the [installation section](#) comes after the user section, as you won't need to use the installation guide very often, and you shouldn't have to wade through it to get to the information you will likely be referring to more frequently.

ADMIN CONTROL PANEL AND

AFFILIATE FUNCTIONS

Once you have the software installed, the only administration script you'll need to remember is "conpanel.cgi". This is the "Control Panel" for your affiliate program administrative functions -- all other administrative scripts can be accessed from this screen, just by clicking on a "button"!

If YOAP was installed in the cgi-bin/yoap directory at "www.yoursite.com", you would access the control panel by entering this URL in your browser:

`http://www.yoursite.com/cgi-bin/yoap/conpanel.cgi`

Once you load that page, I recommend you bookmark it! :o)

Now let's go through the various screens available from the "Control Panel":

CHANGE YOUR PASSWORD

This is really the LAST option on the "Control Panel" page, but it's an important topic I want to discuss first.

The password is encrypted and stored in your "administration" directory. Anytime you decide you want to use a different password, just enter your old and new passwords and click on "Change Password".

If you ever forget your password, you can delete the "password.txt" file in your administration directory via FTP, then go to the control panel and set a new password.

VIEW AFFILIATE CONTACT AND COMMISSION INFORMATION

This is the "workhorse" of the whole package. From this screen you can access and change affiliate records, delete affiliates and their web sites, and generate commission reports.

Just select the function you want and click on the "Get Information" button at the bottom of the page. Let me explain each of the input fields and functions in the order they appear . . .

Affiliate You Want to Generate Reports For

This is where you enter the affiliate number you want to get information for. If you leave "ALL" in this box, then reports will be generated for ALL affiliates.

If a "keyword" is used (see below) with the "Mailing list", "Affiliate List", and "All logged info on affiliates" functions, then this "Affiliate Number" field is ignored. The program will return data for all affiliates whose records contain the keyword(s).

An affiliate number (not ALL) is REQUIRED for the "Modify or delete affiliate information and site" function and the "Disable" and "Enable" functions.

Modify or Delete Affiliate Information and Site

This allows you to edit affiliate information such as address, affiliate level, phone number, et cetera. The only field you can NOT change is the affiliate number.

You can also completely delete an affiliate's web site and affiliate account.

Disable/Enable Affiliate Account

Sometimes you want to disable an account without totally deleting it. These two options allow you to disable and re-enable an affiliate account. When someone visits the home page for a disabled affiliate account, the HTML code found in the "**disabled_account_message.txt**" file (in your admin directory) is displayed.

Mailing List (addresses only)

If you want a mailing address (snail mail) for an affiliate (or ALL affiliates) just click on this radio button and then the "Get Information" button.

Affiliate List

This gives you a "summary" of the affiliate information, including the affiliate's name, affiliate number, email address and web site URL. The email address is set up so you can click on it to send an email. The URL is set up so you can click on it to go to that site.

All logged info on affiliate(s)

This will give you ALL the information you have for the specified affiliate.

Enter keyword for above reports

Suppose someone emailed you and said, "My name is John Brown, from Tampa, Florida. I signed up for your affiliate program, but I can't find my password! Will you send it to me?"

That's when you'd use this field. You could just enter "Tampa" or "John Brown" in the "keyword" box, click on the "All logged info on affiliate's" radio button, and then click on "Get Information".

The "keyword" field is only used with the "Mailing list", "Affiliate List", and "All logged info on affiliates" functions. Keep in mind that the "Affiliate Number" at the top of the page will be ignored for these three functions if you have anything in the "keyword" field.

Monthly Commission Report

This is where this package saves you TONS of time! You can get the commission report for a single affiliate or for ALL affiliates. Choose the month and year of interest, select "Abbreviated" or "Detailed" report format (see below), and click on "Get Information". Be sure the proper affiliate number is entered in the affiliate number box . . .

One Year Commission Report

This will give you the commission report for all twelve months of the year you select. Use the "Year" list box in the previous line (Monthly Commission Reports) to select the year for this function -- the "Month" field will be ignored.

Other Fields Used with the Commission Reports (only)

Abbreviated: If you select this option, your commission reports will only contain the affiliate name(s), number of transactions for each month, and commission amount for each month.

Detailed: If you check this radio button, your commission reports will include everything in the "Abbreviated" report plus the date of each order and the products ordered, if known.

"Check this box if you do NOT want to view zero-transaction commission reports."

If you don't want "zero-commission" records included in your commission reports, check this box.

UPDATE ONE OR ALL STATIC AFFILIATE PAGES

(Only displayed if you have enabled static affiliate files)

Whenever someone signs up to be an affiliate, all of the ".htm" and ".html" files in the template directory are copied to the newly created affiliate site. Remember, these are "static" pages. Dynamic pages end with a ".txt" extension, and they don't get copied. (For details, read the section on "Template Files")

Let's say you want to change what the affiliate sites look like. Once you change the template files, the modified files will be copied into a new affiliate directory whenever someone signs up to be an affiliate. But what about all the previously created directories? That's what this "Update" page is for.

The "update" script will read the new files from the template directory and copy them to EVERY affiliate directory -- you can change 100's of web sites with the press of a button! If you want,

you can change just ONE affiliate directory at a time -- this makes it easy to "test" the functionality of your new design.

ENTER AFFILIATE COMMISSIONS ADJUSTMENTS

This is where you will enter adjustments made necessary by declined credit cards, product returns, phone orders, et cetera. As usual, begin by entering your admin password and the affiliate number whose account the transaction will be posted to.

The "Amount of Order" box refers to the total transaction amount including shipping and taxes.

The "Amount of Commission" box is where you can specify how much should be added to or subtracted from the affiliate's commission account.

If you leave "AUTO" in this box, the commission will be calculated for you based on the "Amount of Order". This is IMPORTANT to remember! If your "Amount of Order" includes taxes, shipping, or anything else that you do NOT pay commissions on, you need to specify some number in the "Amount of Commission" box. Otherwise, commissions will be calculated on the total transaction amount!

In other words, do NOT use "AUTO" unless the full amount of order is commissionable.

Automatic commission calculation is based on the commission values set when you installed the software -- or any changes you've made to that section of the "options.pm" configuration file.

ENTER AFFILIATE REFERRAL POINTS ADJUSTMENTS

(Only displayed if you have the point system enabled)

This allows you to adjust any affiliate's point balance. Just enter the affiliate number, reason for the adjustment, and amount of points. Then select "add points" or "subtract points", and click the button.

You can also check any affiliate's point balance history by entering the affiliate number at the top of the page and clicking the "Check Points Balance" button.

ADD/EDIT REFERRAL POINTS REDEMPTION ITEMS

(Only displayed if you have the point system enabled)

This is where you can specify items your affiliates can redeem their points for. You simply specify the item ID, description, and point cost for each item. If you have more than 10 items, the input list will expand accordingly. Note that the items are displayed in order of **ascending point values**.

Your affiliates can redeem their points through the “predeem.cgi” program. If you had YOAP installed in the cgi-bin/yoap directory of “yoursite.com”, **the URL to send your affiliates to for point redemption would be: <http://www.yoursite.com/cgi-bin/yoap/predeem.cgi>**

You are free to save the HTML from this predeem.cgi page and edit it to make the redemption center page look however you want – just don’t change the form field names or values.

[VIEW SALES RANKINGS AND AFFILIATE ACQUISITION HISTORY](#)

This program allows you to see the overall performance of your affiliates in terms of sales and affiliate sponsorship. All you need to do is specify a date range and select the desired report.

If you are selecting the affiliate acquisition report, you can specify the resolution of the output (daily, weekly, or monthly).

[VIEW ORDER DETAILS FOR SPECIFIC DATES](#)

Enter the affiliate number you want the order information for, or “ALL” for order details for all affiliates. Now select the starting and ending date, and select the report format:

Abbreviated: This format will only give you the date of the order, the customer's name, and the order total. This is a nice way to get a summary. If you see an order in this summary that you want more details for, just click on the order date "hyperlink" -- you'll get the full order details, the same as the "detailed format" described below.

Detailed: This format will return the order details including date, time, affiliate number, email address (if applicable) and customer name (if applicable). Whatever data you’re passing to the software via the add.cgi script will be available here -- see “Using the Affiliate Tracking System – Order Tracking” for details.

Note: This utility program does NOT give you full customer contact information and order details – you will need to get that from your shopping cart software or payment gateway account.

AFFILIATE ORDER AND STATS CHECKING UTILITY

If YOAP was installed in the cgi-bin/yoap directory of your site, "www.yoursite.com" your affiliates would access the control panel by entering this URL in their browser:

<http://www.yoursite.com/cgi-bin/yoap/checkord.cgi>

As the administrator, YOU can get to this page by clicking the link on your "Control Panel".

From this screen, your affiliates can:

- Check their commission status for any month where commissions have been earned.
- Check traffic stats for their affiliate site (if you've enabled this feature)
- Change their contact information and password (if you've enabled this feature)
- Have their password emailed to the email address they used when they signed up
- Check their points balance and history (if you've enabled the point system)

EXTENDED ADVERTISING TRACKING

If your affiliates want to track several ads to see which are producing their sales, they can add a "tracking" code to the end of their affiliate number. (This does NOT work with static affiliate pages . . .)

For instance, if my affiliate number was "abc1005" and I had two ads to track, here are two URL's I might use (this assumes the SSI or Javascript affiliate tracking method is being used):

<http://www.yoursite.com/?abc1005!ad1>

<http://www.yoursite.com/?abc1005!ad2>

Note that an exclamation point is used to separate the affiliate number from the tracking code. This is an exception to the "no special characters" rule (see the section titled "Things to Avoid" at the end of this manual).

MISCELLANEOUS SYSTEM INFORMATION

CRITICAL FILES IN THE ADMIN DIRECTORY

There are some files in your "admin" directory that it would be prudent for you to backup on a regular basis. And there are a couple of files you may want to change from time to time as your affiliate program and products change. Here are the file names and descriptions:

- *.ord All files ending with ".ord" are order log files. There will be a separate file for every month in which an order was placed. A typical order file name would be something like this: "adm-1998-06.ord". I recommend regular back-ups of these files. Once a month has ended, there is no reason to continue backing up the previous month's file, as all new orders will be logged in the file for the current month.

- adm-dealers.txt Contact information for all your affiliates is kept here. Anytime you modify or delete an affiliate, that action is recorded here. But you never actually delete every trace of an affiliate from this file, even though you can delete their web site and their affiliate privileges. You should DEFINITELY backup this file on a regular basis.

- password.txt This is where your encrypted password is kept. If you forget your password, delete this file and then enter your new password in the "Change Password" section of the "Control Panel" (leave the "old password" box blank).

- access_logs This is actually a directory in the admin directory. The access logs directory contains the traffic logs for all affiliates. You may need to delete some of the older files in this directory on occasion, as an active affiliate program can produce many megabytes of traffic data in a short period of time.

- aff_info This directory contains an "info" (.nfo) file for each affiliate and should be backed up regularly.

- aff_orders This directory contains order logs for each affiliate, and should be backed up regularly.

- aff_points This directory contains point data (if you've enabled the point system) for each affiliate who has any point history, and should be backed up regularly.

THINGS YOU SHOULD AVOID FOR BEST RESULTS

Special Characters in Affiliate Numbers

When determining your affiliate number scheme (prefix, suffix), be sure to avoid using any “special” characters. Only use the letters A-Z (upper- or lower-case) and numbers 0-9. Using a “-” (minus sign) or “!” (exclamation point) will cause you problems for sure, and other “special” characters are commonly stripped out of the input strings sent to the software for security purposes.

There are probably some you could get away with using, but I’m not telling you which ones -- my recommendation is to stay away from them altogether. The one exception to this is when you use the “!” for ad tracking (as explained earlier).

Using Too Many Static Pages

The more affiliates you plan on having, the more you should use dynamic pages. Consider this: If you have 40 static pages per affiliate site, and you have 2000 affiliates, when you attempt an “Update” operation, you’re asking the server to copy $40 \times 2000 = 80,000$ files. Many servers will time out before this is accomplished.

Manually Editing Affiliate and Order files

When you manually edit a file that was originally created by the software, you often render it unreadable by the software -- the permissions and ownership change. This can cause all kinds of problems -- anything from incorrect reporting to “Internal Server Errors” when an order is placed. Stick with the tools included with the software.

Placing Files in the Affiliate Root Directory

The software doesn’t expect any files in this directory other than what it creates there. So other files you place there are assumed to be affiliate directories, and will result in error messages when you run some affiliate-related reports. Not a problem really, but a bit annoying sometimes.

INSTALLATION GUIDE

While the installation of "Your Own Affiliate Program" is not difficult or complicated, there are a number of steps that must be taken for proper installation. If you have questions while reviewing the installation, please review the rest of this document -- your answer will most likely be found in the other sections.

If you can't find your answer here, do not hesitate to send me an email at **yoap@paulgalloway.com** -- I will be happy to help you!

You can expect this process to take about 30 minutes if you're somewhat familiar with terms such as "sendmail path", "absolute file path", "Perl path", "file permissions", etc.

If those terms sound very unfamiliar to you, you'll probably save valuable time by having someone else install the script for you. It's not hard, but you need to have some fundamental understanding of how CGI scripts work . . .

To save you the trouble of manually editing the configuration file, I have included a program called "install.cgi" -- it will help you create a correct configuration file -- all you have to do is answer the questions and fill in the boxes.

Just follow the steps below -- in the order given! -- and you should be fine!

Step 1: Collect Information

Before you start, you must have some basic knowledge of how your web site is set up. Be sure you can answer the following two questions.

The answers to these questions can usually be obtained from your ISP's "Frequently Asked Questions" or "Customer Support" page. If all else fails, your ISP should be able to supply the information when you ask. Here are the questions:

What is the full Perl path name? (should be something like /usr/bin/perl)

What is the absolute path to your web host's sendmail program? (something like /usr/sbin/sendmail)

Step 2: Check Perl Path and Edit if Necessary

All program files (which end in ".cgi") have "#!/usr/bin/perl" as the first line. 95% of the time, this is the correct Perl path. If your web hosting company has Perl located in a different location, you'll need to edit the first line of each of these files to reflect the correct location.

Be sure to use a plain text editor (like NOTEPAD in WINDOWS or EDIT in DOS) to make this change. Do NOT use "Word", "WordPad", or any other word processing application. You must use a "plain text" editor.

Step 3: Upload Files

The ZIP distribution file includes all the required files, organized by their upload destination.

All the **files and subdirectories** in the "cgi-bin" folder should be uploaded to an installation subdirectory of the cgi-bin folder on your web server. For example, you could create a "y" or "yoap" subdirectory in your cgi-bin folder, and then upload all the program files (the files in the distribution's cgi-bin folder) and folders there. I will refer to this folder as the "install directory" or "install folder".

IMPORTANT – be sure to upload these files in "ASCII" mode!

If your FTP program doesn't allow you to just upload whole directory structures, you will need to create the following subfolders in your install folder:

admin
templates
errors

Within the "admin" directory, you need to create the following directories (you must use the names specified here):

ip
cookie_IP
access_logs
temp
lock
aff_points
aff_info
aff_orders

Change the permissions on all sub-folders on your web server to **777 (rwxrwxrwx)**. Be sure you change the permissions on ALL sub-folders (including the subfolders within the admin folder).

Change the permissions on all the other files in your install directory to **755 (rwxr-xr-x)**.

Now you need to upload the "yimages" folder and its contents **IN BINARY MODE** to your main web folder. Do NOT upload it to your cgi-bin directory – it must be in your root (main) web folder, such as "www" or "htdocs" – wherever your home page is located.

Change the permissions on this folder and its contents to **755 (rwxr-xr-x)**.

IF you want to have “static” files for all of your affiliates (generally not recommended, so be sure you really want to do it), you will also need to create a “root affiliate” directory in your main web area – for instance, you could create a “home” or “main” folder in your www (or htdocs, whatever) web directory. Be sure to change the directory permissions to **777 (rwxrwxrwx)**.

All affiliate directories will be created in this “root affiliate” directory.

Step 4: VERIFY "install.cgi" Runs

The "install.cgi" program has one purpose -- to help you to quickly and easily build a configuration file (named "options.pm" for your affiliate program. Once we confirm that it is running properly, we'll also know that the Perl path is correct . . .

From your web browser, load the "install.cgi" script by entering the URL in your "Location" window.

For instance, if you uploaded the software to the “yoap” sub-directory of your cgi-bin folder, you would enter something like "http://www.yourdomain.com/cgi-bin/yoap/install.cgi" in your web browser "location" window and click "GO" or hit your "Enter" key.

If the script works, you'll get a configuration screen with the words "Software Installation -- Start" at the top of the page.

If you get an error at this point (most likely an "Internal Server Error"), it's probably for one of these reasons:

1. The first line of the install.cgi script does not contain the correct PERL path.
2. The read/execute permissions were not set correctly on the install.cgi file.
3. Your ISP has not correctly set up the "execute" permissions of the directory you placed the script in.
4. You uploaded the script in "binary" format rather than ASCII -- you must use ASCII format for FTP uploads of these scripts.

Assuming you and your ISP got everything right, let's continue!

Step 5: Build Your Configuration File

The "form" page you see may appear to be long to you, but you should be able to fill it in rather quickly -- not all fields will be applicable to your setup. Instructions, explanations, and considerations for each field are listed in the adjacent table cell.

Just answer all the relevant questions and hit the "Confirm" button at the bottom of the page.

The script will look at the information you gave it, and will check to make sure the required directories exist and can be written to. It will also make sure you supplied all required information.

If you get an error message, you need to hit the "BACK" button on your browser, correct the fields in question, and hit the "Confirm" button again.

If no errors are found, click on the "Create options.pm file!" button. When you do this, the "options.pm" file will be created and stored in your admin directory.

Step 6: Copy the options.pm File to the cgi-bin Directory

To prevent someone from inadvertently overwriting their working options.pm file, the install.cgi program writes this file to the admin directory. You need to copy the newly-generated file to the install directory (wherever you are keeping your YOAP program files).

Be sure you use ASCII mode when you download/upload this file via FTP.

IMPORTANT: After you have created the options.pm file, you MUST delete the install.cgi script from your install directory. Otherwise someone else could change your admin password by simply re-running the script!

Step 7: Edit and Upload the Response Page/Message Files

The following 3 files should be edited to your liking, then uploaded to the **admin** directory (again, in ASCII mode). Refer to "[Substitution Codes](#)" to see which substitution codes can be used for each file (they don't all use the same substitution codes).

```
signup_thankyou.html
signup_email.txt
disabled_account_message.txt
```

Step 8: Create and Upload Your Sign-Up Page

Using the "signup.html" file (in the distribution's "examples" folder) as a template, create your affiliate sign-up page and upload it to your web site. For more options related to the signup page, see "[Your Affiliate Signup Form](#)".

You can upload this as a static (.html) template or as a dynamic (.txt) template – if you upload it as a dynamic template, you can use the same substitution codes in this page as in the other template files -- see "[Substitution Codes](#)" for details.

NOTE: If you aren't running a two-tier affiliate program, you don't even need the signup page to be a dynamic page -- you can just hardcode the "ul" form variable with your "in-house" (first) affiliate number and upload the file to your server like any other HTML file.

Step 9: Create Template File (ONLY if you are using STATIC affiliate pages)

If you are going to be using “static” affiliate pages, you need to create an “index.html” template file and upload it to the “templates” folder. See “[Understanding Template Files](#)” for details.

Step 10: Add Tracking Javascript or SSI code to your site

In order that your affiliates are properly credited for the traffic they send to your site, you need to add some Javascript to your home page OR setup your home page as an SSI (server-side include) page with some image tags. See “[Using the Affiliate Tracking System](#)” for details.

Note: If you are using “static” affiliate pages, you may not need to add anything to your home page, but you’ll still need to add a tracking image to your affiliate “index” page template.

Step 11: Add Reporting Image to your Thank-You page

If you’re going to track affiliate commissions on orders, you need to add an image tag to the “thank you” page your customer’s see after they place their order. See “[Using the Affiliate Tracking System](#)” (Order Tracking section) for details.

Step 12: (OPTIONAL) Add Traffic Logging Image to Home Page

If you want to give your affiliates traffic stats, you’ll need to add a traffic logging image to your home page. See [Enabling Traffic Logging](#) for details.

You do NOT need to do this if you’re setting up your home page as an SSI page, but if you’re using the Javascript method OR using static affiliate pages, you’ll need to add this image (if you want traffic stats). If you’re using the Javascript method on your home page, you’ll need to add this image code via the PrintAffiliateCode function – see “[Enabling Traffic Logging](#)” (Javascript Method section) for details.

Step 13 Test Everything

The installation is now complete -- test everything out! I recommend that you try "signing up" as a new affiliate (the first time you do this, you'll be creating your "in-house" affiliate account.), placing an order via that new affiliate link, checking orders from the control panel, etcetera.

USING THE AFFILIATE TRACKING SYSTEM

The Affiliate Tracking System uses "cookies" and server-side "IP address files" to determine the affiliate responsible for referring a specific visitor to your site.

A few points to remember:

1. Affiliate cookies are set to expire in 1 year. Given the present internet environment, however, I wouldn't expect a cookie to last more than a month or two. This is because cookies are frequently deleted or lost due to privacy concerns, browser updates, browser limitations, new computer purchases, etc.
2. The system is setup so that the most recent affiliate to refer someone to a site is the one who gets credit for the sale. The only exception is if the most recent affiliate number is the "in-house" (default) affiliate number -- in that case, the previous affiliate number is used, and that affiliate is given credit for the sale. This assures that an affiliate will get credit for anyone coming back to your "main" site page some time after being referred by the affiliate.
3. With the Affiliate Tracking System implemented, the hit-logging script (z.cgi) can be used to log hits to your main site pages. Simply add the IMG SRC code described in the section about "**Enabling Traffic Logging**".

For the Affiliate Tracking System to work at all, you **MUST** add cookie-setting code to the page your affiliates send people to. How you do this depends on the type of page you're adding it to, as shown on the next few pages.

SETTING UP YOUR SSI HOME PAGE

If your web server supports Server-Side Includes (SSI – most Unix/Linux web hosting accounts include this capability), I highly recommend you setup an SSI home page. This is the PREFERRED method of setting up your affiliate tracking because it allows your affiliates to link directly to your home page and works even if your visitors have Javascript turned off.

Here are the steps to setting this up:

1. Copy your main site "home page" (usually index.html or index.htm) to another file named "SSI_index.txt" -- this new file should be located in your templates directory, and it should be "prepared" in the same way as any other template file (absolute image references, etc.).

One caveat: the homepage.cgi program only works with ONE substitution code: AFF_NUM.

2. Be sure to add the cookie-setting image tags as discussed in the "[Adding Cookie-Setting Code to a Page](#)" section.
3. Make sure you have uploaded the "homepage.cgi" file to the same directory as your other YOAP scripts (for the sake of example, we'll assume that's the "cgi-bin/yoap" directory) - - also make sure its permissions have been set to 755 (rwxr-xr-x).
4. Make sure "test_ssi.shtml" has the proper path to the homepage.cgi file in it (i.e. "/cgi-bin/yoap/homepage.cgi") and upload to to your MAIN web directory (not any affiliate directory, your "root" www directory).
5. Now, try loading this page in your browser:

`http://www.yoursite.com/test.shtml?1000`

If the SSI_index.txt page displays, then you know SSI is enabled on this site.

If you get a "directive error" when you try the test.shtml URL, then SSI (server-side includes) is enabled, but there may be a problem with the homepage.cgi script (not uploaded? permissions?) OR it's possible that changing the SSI directive may solve the problem. The test_ssi.shtml file contains this directive:

```
<!--#exec cgi="/cgi-bin/yoap/homepage.cgi"-->
```

Try changing it to this:

```
<!--#include virtual="/cgi-bin/yoap/homepage.cgi"-->
```

If the source code of test.shtml is shown, then the server isn't parsing .shtml files in this directory. Try this -- create a .htaccess file (be sure it starts with a "." character) in that directory (if one doesn't already exist). In the .htaccess file, add this line:

AddType text/x-server-parsed-html .shtml

On some servers the SSI capability is there, but you need a .htaccess file such as the one described above to enable it on a directory-by-directory basis.

If the above test link still doesn't do what it should, contact your web hosting company's technical support and ask them to check if SSI has been enabled. They may even look at your test.shtml file and tell you if something needs to be changed -- this file should work on 90% of the systems out there, but not all servers are setup the same way.

Once the test.shtml link appears to be working correctly, rename it to "index.shtml".

To be sure "index.shtml" is the "default" file requested when someone comes to <http://www.yoursite.com>, rename the "index.htm" "index.html" file in your main directory to some other name (but don't delete it, in case you run into problems!)

Now when someone comes to your main site (with or without the /?affnum designator), they will see the **SSI_index.txt** page which is in the templates directory. Since the affiliate tracking system uses cookies, this may be the only template file you need to make.

NOTE: Be sure your affiliate's know to include the "/" before the "?" -- like so:

<http://www.yoursite.com/?affnum>

If they leave out the last "/", some browsers will have a problem with the link.

JAVASCRIPT-BASED AFFILIATE TRACKING

If your server does NOT supports SSI, you can add affiliate tracking Javascript to your home page instead of using the SSI method.

The disadvantage to this that there will always be some visitors who will have Javascript turned off in their browser, and affiliates will lose out on commissions from any sales those visitors make.

For any page your affiliates may be sending visitors to, here is what to do:

(This example uses domain.com as the example domain, with the installation in the cgi-bin/y directory)

1. Find the “**trk.js**” file from the software distribution “examples” folder, and edit line 16 to use your in-house affiliate number (first affiliate number) like so:
var inhouseNumber = 10000;
2. Upload the **trk.js** file to your **main web directory**.
3. In the **<HEAD>** section of your page add this code:

```
<SCRIPT SRC="http://www.domain.com/trk.js"></SCRIPT>
```

4. In the **<BODY>** of your page, you need to have this code:

```
<SCRIPT Language="Javascript" type=text/javascript>  
<!--  
PrintAffiliateCode('');  
PrintAffiliateCode('');  
//-->  
</SCRIPT>
```

Be sure that each “PrintAffiliateCode” line is on a line by itself (and just one line, not two or more!). Note the above example is enabling traffic logging as well as cookie-setting code.

If you're adding the code to an index file (the default file) in a given directory, you can then use this as an affiliate URL (assuming affiliate number 12345):

http://www.domain.com/directoryname/?12345

Or in the case where it's your home directory: **http://www.domain.com/?12345**

(Note there is a SLASH AND QUESTION MARK before the affiliate number. This is required.)

In the case where you want to direct someone to a specific page, such as "product.html", you'd do it this way: **http://www.domain.com/product.html?12345** (no slash in this case)

The "product.html" page would of course need to include the affiliate-tagging and traffic logging Javascript code added, as shown above.

ORDER TRACKING

YOAP is designed to work with just about any shopping cart and/or payment system – as long as you can place an image tag on your "Thank you for your order" page, and include the sale amount in the image URL, it should work.

Here's how to use it. On the "thank you" page your customer's see after placing their order, place an image tag like this:

```
<IMG SRC="http://www.domain.com/cgi-bin/yoap/add.cgi?  
a=AFFNUM&s=XXXXX&e=EMAIL_ADDRESS&n=CUSTOMERNAME&i=ITEMNAME"  
HEIGHT=1 WIDTH=1 BORDER=0>
```

NOTE: While the above example is split on 3 lines, you need to insert the image tag code ALL ON ONE LINE. If it spans multiple lines, it may not work.

Here's an explanation of each of the arguments being passed to the add.cgi script:

The "s=XXXXX" parameter is REQUIRED. XXXXX is the sale amount -- no characters except numbers and decimal point -- i.e. 124.95

The "a=AFF_NUM" is desired, but if not present the script will try to determine the correct affiliate number from cookies. You will **NOT** use "AFFNUM" in a literal sense here -- you will use whatever substitution code or "smart tag" is specified by your shopping cart such that it can embed the correct affiliate number at this point.

If you can't/don't pass the affiliate number to the cart system, there's no point in including this parameter in the image tag – you'll just have to count on the affiliate tracking system to get that information from a cookie or an IP file.

The "e=email_address", "n=customername" and "i=itemname" parameters are optional.

If your cart system allows you to insert customer information on your thank-you page, then you can use these arguments to pass the email address, customer name, and item name (what they ordered) to the add.cgi script – which will then log that information.

IMPORTANT: Because some of these field values may contain spaces (for instance, the customer name) you MUST include the quotes around the URL . . . otherwise some of the information will NOT be passed to the script.

ENABLING TRAFFIC LOGGING

As long as you have hit logging enabled (you set this when generating your configuration file), you don't need to do anything extra for hits to dynamic pages (including the home page if you're using the SSI method).

If you want to enable hit logging (traffic stats) for other pages (regardless of whether they are templated or not), you need to include the following HTML code in the template files of interest.

```
<IMG SRC="http://www.yoursite.com/cgi-bin/yoap/z.cgi?AFF_NUM">
```

Obviously, you'll need to use the correct URL for your software installation . . .

This will result in a 1-pixel (invisible) image on the page. You should always insert the "traffic logging HTML code" as close to the top of the page as possible to assure the page visit is logged. There are a couple of caveats to this method of logging "hits" and "referrer" information . . .

First, if someone has their graphics turned "off" on their browser, this hit counter will never be activated -- because the browser will never act on the image code you added to the HTML file.

Second, if someone has viewed the page recently, and they come back to view it again, most likely that "hit" won't register, because the image file will still be in that person's browser "cache".

Third, if one of your affiliates has a link (to their affiliate page) on some other web site and someone clicks on it, this method of hit logging won't be able to tell where the clickthrough came from. That's because the page containing the image is considered to be the "referring" page.

Note: If you're using the Affiliate Tracking System, you can use z.cgi to track hits to your main site pages. Just include the above IMG SRC code on the page. The z.cgi script will check for an affiliate cookie and will use that value instead of "AFF_NUM" when logging the hit to that page.

ADDING COOKIE-SETTING CODE TO A PAGE

To add cookie-setting code to a file, just add the following HTML code (assuming the YOAP scripts are in the "cgi-bin/y" directory of your web server):

```
<IMG SRC="http://www.domain.com/cgi-bin/yccode.cgi?AFF_NUM" WIDTH=1 HEIGHT=1>
```

Assuming you're adding this code to a template file, "AFF_NUM" will be replaced with an affiliate number which has been specified previously.

This is true for static and dynamic templates, including the SSI_index.txt file you'll use if you're setting up your home page as SSI (see "[Setting Up Your SSI Home Page](#)")

If you want to add the cookie-setting code to a page which is using Javascript-based affiliate tracking, you would need to add this image by way of the "PrintAffiliateCode" Javascript function. See "Javascript-Based Affiliate Tracking" for details.

Here's a tip -- unless you have your own secure certificate, you probably ought to have TWO of these cookie-setting tags in your code -- one for your "non-secure" domain (yoursite.com) and one for your SSL (secure) domain.

If you're sharing your web hosting company's secure certificate, the cookie setting code for the secure server would be something like this:

```
<IMG SRC=https://www.webhosting.com/cgi-domain/ccode.cgi?AFFNUM" WIDTH=1 HEIGHT=1>
```

Don't forget to use "https://" instead of "http://"!

So together (normal and secure domain cookie-setting image tags), here's what you'd have:

```
<IMG SRC="http://www.domain.com/cgi-bin/y/ccode.cgi?AFF_NUM" WIDTH=1 HEIGHT=1>  
<IMG SRC=https://www.webhosting.com/cgi-domain/y/ccode.cgi?AFF_NUM" WIDTH=1 HEIGHT=1>
```

To make sure the cookies get set before the visitor clicks to a new page, these image tags should be as close to the opening BODY tag as possible – be sure they are placed BELOW the opening BODY tag, not above it!

YOUR AFFILIATE "SIGN UP" FORM

This should be the easiest part of the installation! Just take the example signup page, "signup.html", and modify the HTML code to your needs. Be sure to change the FORM action to point to the "start.cgi" script in the YOAP program files directory on your server.

VARIABLES RECORDED/USED BY THE SIGN-UP SCRIPT

The signup script (named "start.cgi") is designed to work with specifically defined FORM variables. You must use these specific variable names for the script to work correctly.

For instance, for the "Name" field, the variable must be "name" -- it can't be "fullname", because the script is looking for a variable called "name".

Here are the variable names used (and recorded to disk, sent by email) by the new affiliate signup script:

(IMPORTANT! All variables names MUST BE LOWERCASE!)

Variable Name	How Used
level	This is the "affiliate level" you will be assigning to those who submit this signup form. Usually a "hidden" field (See explanation below . . .)
name	Affiliate's name
address	First address line
suite	Second address line
city	City
state	State/province
zip	Zip Code
phone	Phone number
email	Email address
country	Country
checkboxx1	checkboxx1 and checkbox2 are fields you can use if you want someone to "okay" a statement you make on your signup form. See the "signup.html" file for an example of this.
checkboxx2	
custom1	These 5 custom fields can be used for whatever additional information you require from your affiliates. Web site address, ID#, Tax ID#, favorite color, referral info, whatever you feel is important . . .
custom2	
custom3	
custom4	
custom5	
forcednum	Affiliate-seleted affiliate number
forcedpass1	Affiliate-selected password
forcedpass2	Affiliate-selected password (same as forcedpass1)
required	"Required field" definition

SIGNUP FORM "LEVEL" FIELD

The "level" variable is normally a hidden field on your form, as in this example for a "level 1" affiliate sign-up form:

```
<input type=hidden name="level" value="1">
```

When someone signs up as an affiliate, the value of this field will be written in their file and will determine what "level" of commissions they are eligible for.

If you want to offer your affiliates multiple "signup" options (i.e. if you want them to be able to sign up as a "level 1" or "level 2" or "level 22" affiliate) you can either have a separate form for each level, or you can allow them to select different levels using normal HTML input elements such as checkboxes, radio buttons, or a "select" box.

However you set up the level selection, be sure you use "level" for the name of your input element. If the "level" field is omitted from your form, it will default to "1".

You can always change levels manually by using the "Modify/Delete" option from the "Affiliate Contact and Commission Information" administration page.

UPLINE SPONSOR FIELD

If you are using the "Two-Tier commission mode", this field is required. When the "signup form" template is copied to a new associate's site, this field will contain their associate number. So when others sign up "under" that new associate, the signup script will know who the sponsor is.

In the **template file** for the "signup" form used on your associate sites, you need to have this line:

```
<input type="hidden" name="ul" value="AFF_NUM">
```

Note that "AFF_NUM" will be replaced with a real (newly generated) affiliate number when a new affiliate site is replicated. Remember, this is for your TEMPLATE file.

If you're going to have a signup form on your "main site", then instead of using "AFF_NUM" for the "ul" value, you'll want to use an affiliate number YOU control.

Note: The software will use the Affiliate Tracking System to identify the new affiliate's sponsor if the "ul" value is left blank, set to "NONE" or set to the "in-house" affiliate number. Therefore, if you want to force a specific affiliate number as the "sponsor", you must set the "ul" value to an affiliate number OTHER THAN your in-house affiliate

AFFILIATE-SELECTED NUMBER AND PASSWORD

If you include a "forcednum" input field, the signup script will use that value for the affiliate number. All characters other than letters and numbers are stripped out of this affiliate number.

If this field is left blank (or left off the form altogether), an affiliate number will be automatically generated using the affiliate number "prefix" and "suffix" values set in the configuration file.

If the "forcedpass1" and "forcedpass2" fields are filled in (and are the same), that value will be used for the new affiliate's password. If they are left blank (or left off the form), a set of random characters will be used to generate one automatically.

DEFINING "REQUIRED" AFFILIATE SIGNUP FORM FIELDS

There will be certain information which you will want to REQUIRE the affiliate to supply -- such as name, address, credit card information, etc. Through the use of a "hidden" field, you can specify which information is required.

If the affiliate fails to supply information in the specified fields, they will get an error message and will be asked to hit their browser "BACK" button and fill in the missing information. An example is given below:

```
<INPUT TYPE="hidden" NAME="required" VALUE="firstname-First Name,lastname-Last Name,email-Email Address,address1-Your Address,city-City,state-State,zipcode-Zip Code">
```

Note the format being used -- first you type the field name used on your form, then you add a hyphen ("-"), then you add the text to be displayed if someone leaves that field blank. For instance, in the above example, if someone left the address line blank, they'd get a message telling them that "Your Address" (not "address1") was a required field.

Be sure to include commas but NO SPACES between fieldname-text values, as shown. Spaces in the defined "text to display" are fine (as shown in the above example).

If you leave the "required" line out altogether, the following default value will apply: "firstname,lastname,email,address1,city,state,zipcode".

SUBSTITUTION CODES

Substitution codes allow you to insert "dynamic" values in your affiliate site pages, response pages and emails. Here are some examples of what you might want to do:

1. You could insert the affiliate's name and email address somewhere on the "home" page of their affiliate site (either a static page or a dynamic page).
2. After someone signs up as an affiliate, you could include all of their affiliate information in the confirmation email, thus allowing them to check it for accuracy.

Here are the substitution codes you can use in your **template** files (including the "disabled_account_message.txt" file, which is really just a special-use template file):

AFF_NUM	AFF_SUITE	AFF_CUSTOM1
AFF_NAME	AFF_CITY	AFF_CUSTOM2
AFF_EMAIL	AFF_STATE	AFF_CUSTOM3
AFF_PHONE	AFF_ZIP	AFF_CUSTOM4
AFF_ADDRESS	AFF_COUNTRY	AFF_CUSTOM5

The above substitution codes may also be used in any template file in the templates directory.

These can also be used in the **signup_thankyou.html** file and the **signup_email.txt** file. These files define what someone sees on their browser and in their email, respectively, when they sign up as an affiliate. There is one additional substitution code which can only be used in these two files: **AFF_PASSWORD**, which is replaced with the affiliate's password.

UNDERSTANDING TEMPLATE FILES

If you want the ability to embed affiliate information (affiliate number, name, email, etc.) on a web page, you'll need to upload a "template" of that page to your "templates" folder.

Templates can be created for two kinds of pages:

1. "Static" pages, which are copied to an affiliate directory (with their unique information embedded where specified) anytime a new affiliate signs up.
2. "Dynamic" pages, which exist only in the templates folder, but can be displayed "on demand" with all the required "dynamic" information (unique affiliate information).

The only real differences between these files and your typical HTML files are how you name the files and how you "link" to other pages:

1. Templates which you intend to use for "static" pages need to have a ".html" or ".htm" extension (e.g. index.htm, contact.html, etc.)
2. Templates for "dynamic" pages must be uploaded with a ".txt" extension (e.g. index.txt, contact.txt, etc.)

BACKGROUND INFORMATION: STATIC/DYNAMIC PAGES

Static Pages

If you choose to use only "static" pages for your affiliate sites, then every affiliate will have every template file to copied to their own affiliate directory.

You are no doubt familiar with the link structure for a static page. It would be something like this:

<http://www.yourdomain.com/products/d2343ac/index.html>

In this example, "products" is your "root affiliate directory" and "d2343ac" is the directory created for your affiliate number d2343ac.

If you are only going to have a few affiliates, this may not ever be a problem. But if you plan on having several thousand affiliates, and if you have a fairly sophisticated web site, the required disk space could be significant.

Say you had 1000 affiliates, and your web site was 10 pages of 20000 bytes each. This would mean you'd require $1000 \times 10 \times 20000 = 200,000,000$ bytes of data for your affiliates sites.

Dynamic Pages

Dynamic pages only exist in one place -- your template directory. The link for a dynamic page really point to a CGI script that "copies" the template file to the viewer's browser. As it reads the template file, it looks for the substitution codes specified earlier. When it finds one of these words, it doesn't send that word to the browser, it instead sends the value corresponding to that substitution code.

The link structure for a dynamic page would be something like this:

`http://www.yourdomain.com/cgi-bin/d.cgi?index-d2343ac`

In this example, "d.cgi" is the CGI script that reads the index file from your template directory, makes specific substitutions of the affiliate number, and delivers the modified page to the viewer's browser.

The space you save is the only advantage you'll gain by using this method, but the savings can be significant. Using the same example as I used for "static" pages, your 1000 affiliates would require only 200,000 bytes of storage! That is literally 1000 times LESS storage space than if you used static pages!

The possible disadvantages are:

1. Your affiliates may not have as much "play" with the search engines and directories if they are submitting dynamic pages. This WAS a factor at one time, but I believe it's less so now.
2. Heavy traffic to your affiliate sites may put a greater load on your web server when compared to static pages – this is because a script interpreter must be run every time a dynamic page is requested.

Generally I recommend dynamic pages as a cleaner solution – I have yet to see any case where the use of dynamic pages have slowed down a server to any noticeable degree.

REMEMBER – if you use the Javascript method of affiliate tracking, you aren't required to have ANY templated pages – though you can still have them if you want pages with embedded affiliate information.

If you use SSI for your home page, you only need to create a single (dynamic) template – the SSI_index.txt file. (See [“Using the Affiliate Tracking System”](#) for details.) This is the preferred method of implementing the affiliate tracking.

TEMPLATE FILE SPECIFICS

NOTE: If you're going to have your affiliates promote your site via "static" templated pages, the "home" (first) page of every affiliate site must be named "index.html" or "index.htm".

General Requirements

You must give all your "static" pages an extension of ".html" or ".htm" that's how the sign-up script knows to copy them to the new affiliate's directory.

The "dynamic" pages must have an extension of ".txt" -- the "d.cgi" script requires that extension.

When someone signs up to be an affiliate, a directory will be created for them (under the root affiliate directory), and all the static pages will be copied from the "templates" directory to that new affiliate directory.

Links to Static Pages

When you link to a static templated page from another static templated page, you can do it one of two ways:

A "relative" address:

```
<A HREF="details.html">Get the details</A>
```

An "absolute" address:

```
<A HREF="http://www.yoursite.com/new/AFF_NUM/details.html">Get the details</A>
```

REMEMBER, you're creating a TEMPLATE file here. "AFF_NUM" will not end up in the copied file. When someone signs up to be a new affiliate, the script will take the template file, and when copying that file, it will first substitute the new affiliate number (i.e. "d2343ac") in for every instance of "AFF_NUM" in the template file.

Links to Images

Because graphics files aren't copied to affiliate directories, any graphic files you have for your affiliate web pages must be referenced as an absolute URL, such as this one:

```
<IMG SRC="http://www.yoursite.com/images/picture.gif">
```

Links to Dynamic Pages

One of the scripts in this software package is named "d.cgi". This script expects to be given two pieces of information: the name of the template file being requested and the affiliate number. This information is all included in the request, as shown here:

```
<A HREF="http://www.yoursite.com/cgi-bin/d.cgi?contact-AFF_NUM">Contact  
Information</A>
```

[Again, remember that this link is in a TEMPLATE file. After all the substitutions are made to this template file, (and assuming the new affiliate's number was d2343ac), the above link will look like this: **<http://www.yourdomain.com/cgi-bin/d.cgi?contact-d2343ac>**]

In the above example, the page being requested is "contact" -- the d.cgi script knows to add a ".txt" to the end of that name and then to look for "contact.txt" in the templates directory.

The affiliate number is "d2343ac". The script will look up this affiliate's information use that information in place of any substitution codes you have in the contact.txt file. See "[Substitution Codes](#)" for details.

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