Participants

The *Participants* page is a database where you can view all the intricate details of your participants. This data will help you understand their individual performance and allows you to modify their commission and points and even block them from further participation.

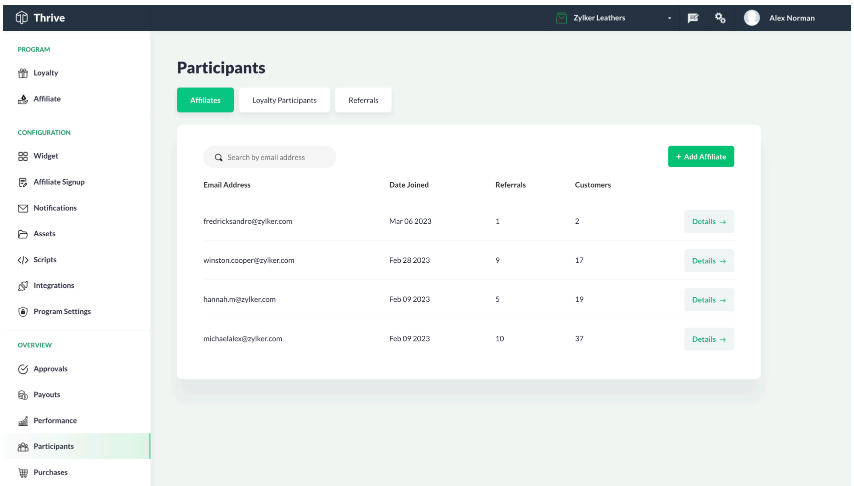
The section is divided into three subsections:

Affiliates

This section holds the records of your all your registered affiliates. Upon opening the section, you can view their **Email Address**, their date of joining (**Date Joined**), and the real-time count on the **Signups** and **Customers** they generate.

To get a more detailed view on each individual affiliate:

1. Choose an affiliate.
2. Click **Details**.



Inside every details section, you can view the following:

- Overall **Revenue Generated** by that affiliate
- Overall **Commissions** the affiliate is eligible for with separate pending and paid commission counts
- Count of **Referrals** (both signups and customers) generated
- Details of every individual customer and signup generated

> A **Signup** record will move to the **Customer** listing after they make a purchase.

- List of all the **links** created by and for them along with the visit, signup, and purchase count of each link. (Read on for more on this.)
- List of **coupons** created by and for that affiliate, along with their details. (Read on for more on this.)

In addition to the viewing permissions, you also get some manual controls over your affiliates with Thrive.

- To attribute signups to an affiliate manually:

    1. Navigate to *Participants* -> *Affiliates.*
    2. Select the affiliate for whom you wish to attribute the signup.
    3. Click **Details.**
    4. In the top-right corner, click **Actions.**
    5. Select **Add Signup**.
    6. Provide the customers' **First Name**, **Last Name**, **Email Address,** and **Customer ID**.

    > You can find the **Customer ID** by following the steps in this article.

    7. Decide whether to **Skip Verification.** (Only for Custom-built site brands)

    > By leaving the toggle disabled, the signup added will be verified based on the status and method chosen by you in the [Referral Verification] settings, before attributed to the affiliate. If the verification is disabled, the signup will be attributed immediately irrespective of the status of the **Skip Verification** toggle.

    8. Click Add.

- To attribute purchases to an affiliate-referral manually:

    1. Navigate to *Participants* -> *Affiliates.*
    2. Select the affiliate who generated the referral.
    2. Click **Details**.
    3. Go to **Signups**.
    4. Select the referral for whom you wish to attribute the purchase.
    5. Click **Details**.
    6. In the top-right corner of the new page, click **Actions.**
    7. Select **Add Purchase** in the drop-down.
    8. Provide the **Purchase Amount** and **Order Number.**

    > You can find the Customer ID by following the steps in this article

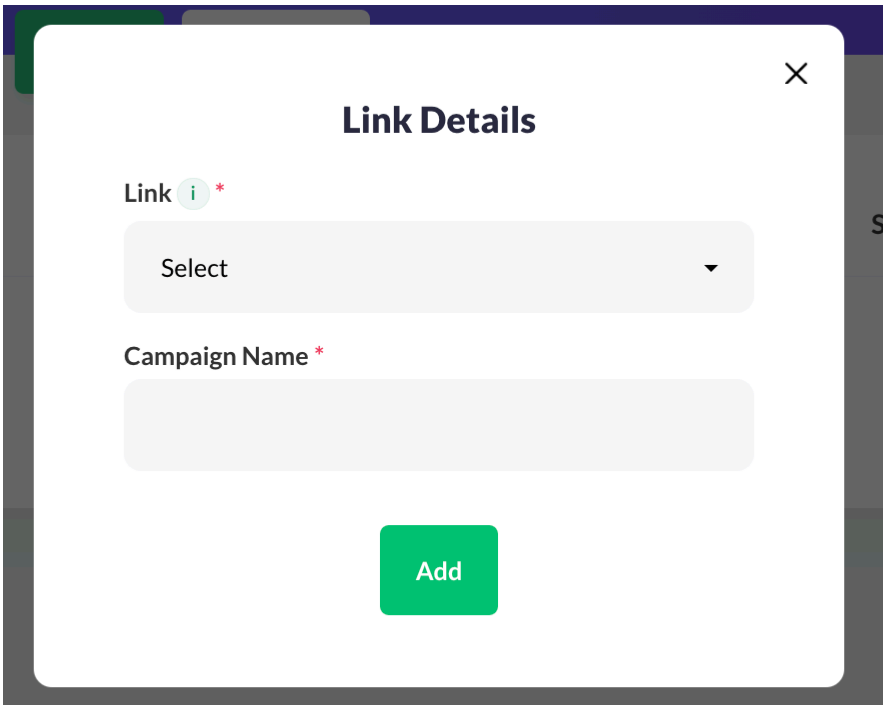
9. Decide whether to **Skip Verification**.

> ⓘ By leaving the toggle disabled:
>
> For a custom-site brand, the purchase added will be verified based on the status and method chosen by you in the [Purchase Verification](#) settings**,** before attributed to the affiliate-referral. If the verification is disabled, the purchase will be attributed immediately irrespective of the status of the **Skip Verification** toggle.
>
> For other platforms, the purchase details added will be verified with your integrated store/site and the purchase will be attributed only if the details match between both of them. You skip this by enabling the toggle.

10. Click **Add**.

- To add custom links for your affiliate to use:

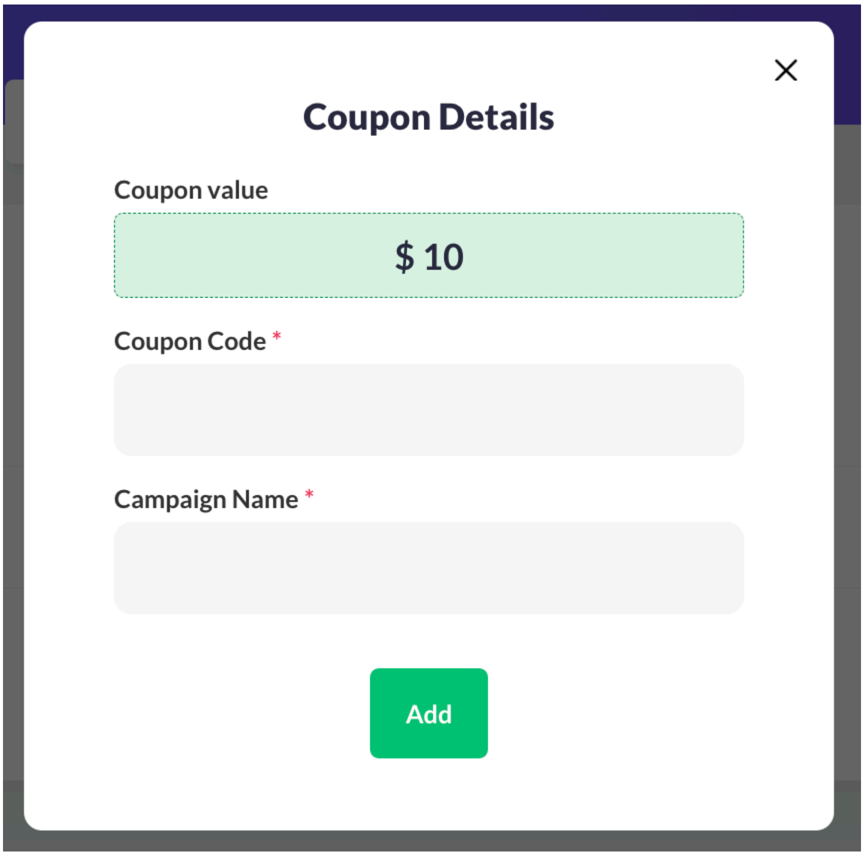
1. Select the affiliate for whom you wish to add a link.
2. Click **Details.**
3. In the top-right corner, click **Actions.**
4. Select **Add Link.**
5. Select a **Link Label** from the list to create a custom link (link that is specific to that affiliate).
6. Provide the **Campaign Name** where you want the affiliates to promote the link.
7. Click **Add.**



- To create custom coupon codes (feature specific to Zoho Commerce, Shopify, and Wix platform integration) for your affiliate to use:

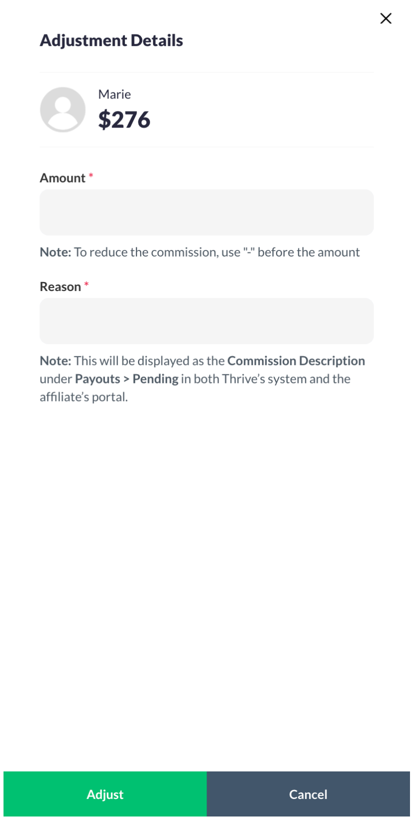
1. Select the affiliate for whom you wish to add a link.

2. Click **Details.**
3. In the top-right corner, click **Actions.**
4. Select **Add Coupon.**
5. Enter a **Coupon Code** and **Coupon Name**.
6. Click **Add.**



- To adjust commissions for your affiliate:

1. Choose the affiliate for whom you wish to adjust the commission.
2. Click **Details.**
3. In the top-right corner, click **Actions.**
4. Select **Adjust Commission.**
5. Enter the commission to be adjusted in the **Amount** field and provide a **Reason.**
6. Click **Adjust.**



- To block an affiliate:

1.
    1. Choose the affiliate whom you wish to block.
    2. Click **Details.**
    3. In the top-right corner, click **Actions.**
    4. Select **Block Affiliate.**
    5. Agree to **Block.**

> Blocking the affiliate will:
>
> 1. Disable all their referral links. Any signup or purchase that took place before the process and is yet to be approved will be commissioned.
> 2. Disable coupon attribution. The shared coupon codes will stay enabled and any purchase that takes place via these codes will not be attributed to the affiliates.
>
> While they are gone, as the admin or user (with edit permissions) of the program, you can still create coupon codes on behalf of the affiliates.

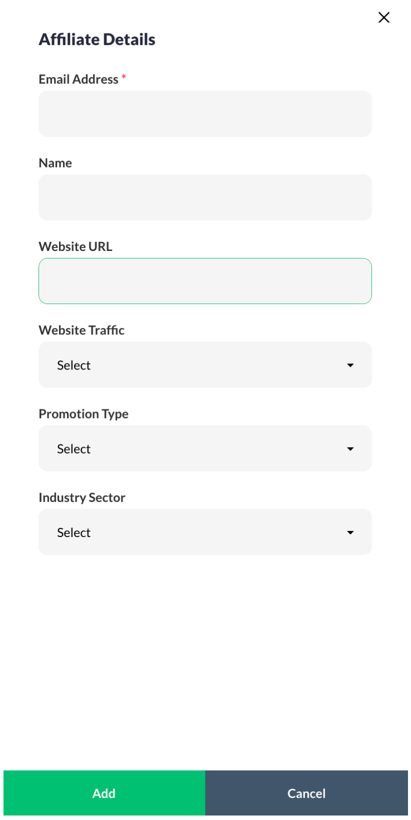
> You can unblock the affiliate by clicking **Unblock affiliate** button in the exact location mentioned in the steps above.

- **To add affiliates one-by-one to your program manually:**

1. Navigate to *Participants -> Affiliates.*
2. In the top-right corner, click + **Add Affiliate.**
3. Fill in the affiliate's details.

> ⓘ This detail form is a direct link to your affiliate registration form. If you want to modify it, you must do it from [there.]()

4. Click **Add.**



- **To import affiliates into your program:**

1. Navigate to *Participants -> Affiliates.*
2. In the top-right corner, click **Import Affiliates** in the drop-down
3. Download the CSV file template available in the description.

> ⓘ The CSV file will contain field IDs of all the fields available in the affiliate signup form at that moment. If you want to update it, you must do so from [there]().

4. Enter the details of all your affiliates properly under the respective field IDs.

> ⓘ If any of the fields do not contain data, you can leave it empty by filling in a "-".

5. **Save** the file.
6. Return back to the dialog box and **click** in the upload box.

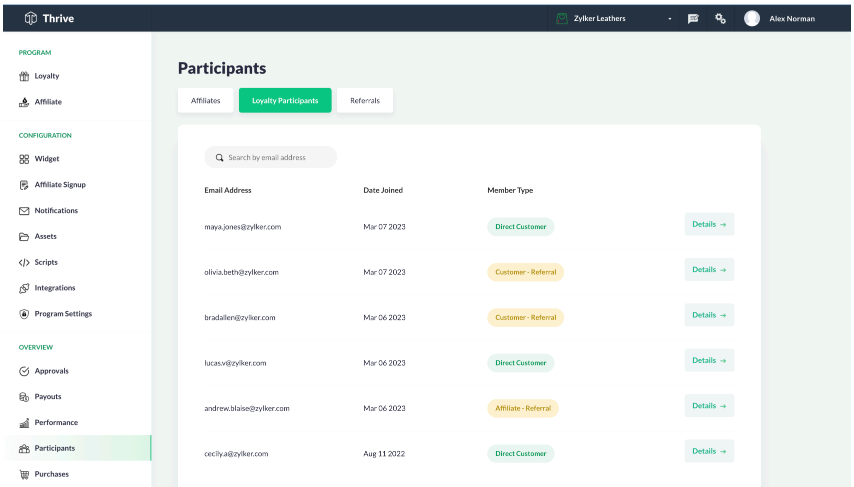
7. Pick the file and click **Open**. This will upload the file to the system.
8. Click **Upload.**

> Once the upload is complete you can view the number of records (non-duplicate) imported to the system and also the duplicate records if any.

Loyalty Participants

Under this section, you will find details like your member's **Email Address**, their **Date Joined**, and, most importantly, their **Member Type**. There are three member types:

- **Direct Customer -** Members who opt-in for your program
- **Affiliate Referral -** Members brought in by your affiliates
- **Customer Referral -** Members brought in by your customers



After the addition of participants, when you click on each record separately, you get to view each of their:

- Available **Points**
- **Points** details
- **Purchases** history
- **Referrals** brought in by that customer with their details
- **Testimonials** provided by that customer
- **Reviews** made by that customer
- **Rewards** redeemed by that customer with its details

Similar to the affiliates' control option, this section also provides complete control over your loyalty participants.

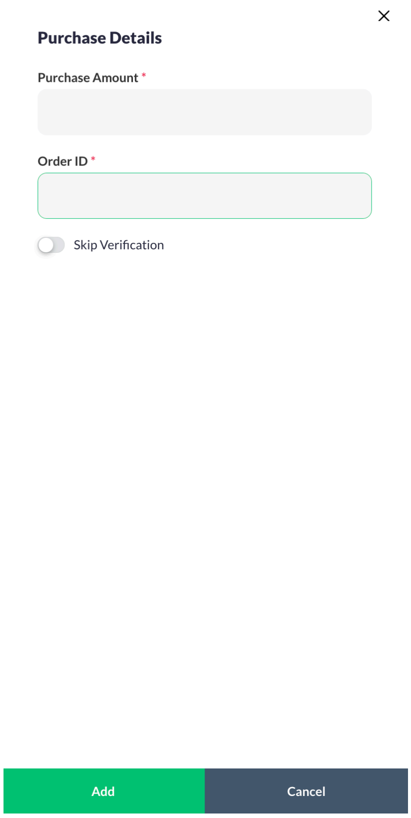
- To add a purchase record for your customer:

1. Select the record for which you wish to add the purchase
2. In the top-right corner, click **Actions.**

3. Select **Add Purchase.**
4. Provide the **Purchase Amount** and the **Order ID.**
5. Choose whether to skip the purchase verification.

> ⓘ This will skip all the verification setup and add the data immediately.

6. Click **Add.**



- To add referrals respective to the customer:

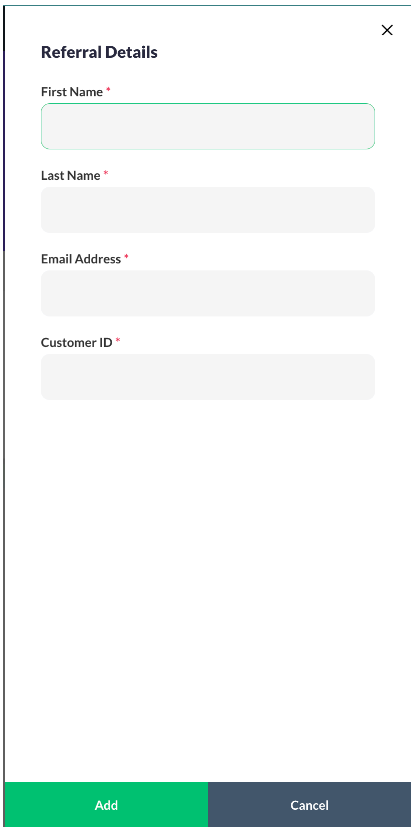
1. Navigate to *Participants -> Loyalty Participants.*
2. In the top-right corner, click **Actions.**
3. Select **Add Referral.**
4. Fill in the referral's **First Name, Last Name, Email Address,** and **Customer ID.**

> ⓘ You can find the Customer ID by following the steps in this article.

5. Choose whether to skip the purchase verification or not.

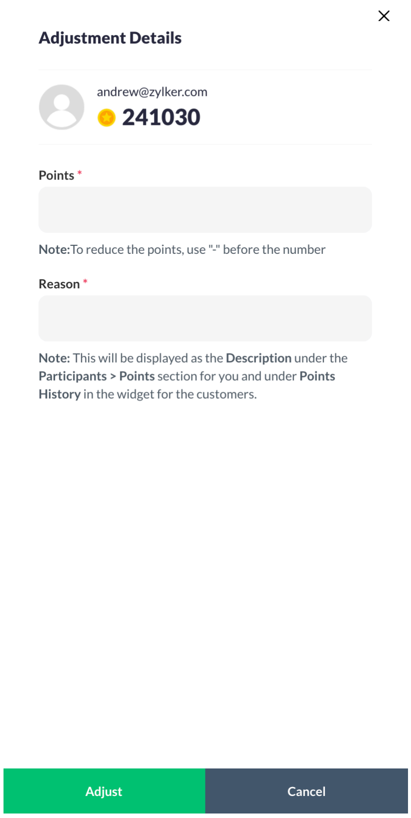
> ⓘ This will skip all the verification set up and add the data immediately.

6. Click **Add.**



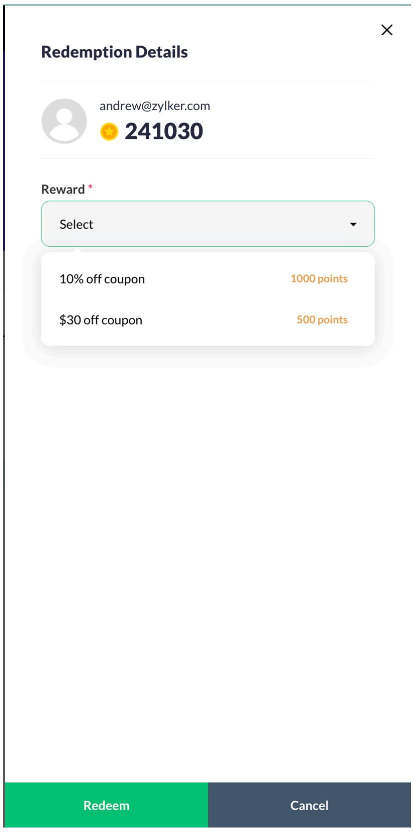
- **To adjust points for your loyalty participant:**

1. Choose the loyalty participant for whom you wish to adjust the points.
2. Click **Details.**
3. In the top-right corner, click **Actions.**
4. Select **Adjust Points.**
5. Enter the **Points** to be adjusted and provide a **Reason.**
6. Click **Adjust.**



- To redeem points for your loyalty participant:

1. Choose the loyalty participant for whom you wish to redeem the points.
2. In the top-right corner, click **Actions.**
3. Select **Redeem Points.**
4. Select the **Reward** to be redeemed.
5. Click **Redeem.**



- To opt out the loyalty participant from the program manually:

1. Choose the loyalty participant whom you wish to opt-out.
2. Click **Details.**
3. In the top-right corner, click **Actions.**
4. Select **Opt Out.**
5. In the pop-up, agree to **mark** as opted-out.

  - Block individual loyalty participants from your program:

    1. Choose the loyalty participant whom you wish to block.
    2. Click **Details.**
    3. In the top-right corner, click **Actions.**
    4. Select **Block Member.**
    5. Agree to **Block.**

> Blocking a loyalty participant will:
>
> 1. Hide the widget from their store/site view
> 2. Disable all their referral links. Any referral signup or purchase that takes place after the process will be considered a separate entry and won't be attributed to them.

You can unblock the affiliate by clicking the **Unblock affiliate** button in the location mentioned in the steps above.

Referrals

The referrals section will include the details of all the referrals brought in by both affiliates and loyalty participants. All controls and views are similar to those in the loyalty participants section, except for the referral addition.