VENDOR LAUNCH CHECKLIST

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Launch Checklist

1. Account Sign-up
2. Funnel Architecture
3. Product & Promotional Guidelines
4. Create Sales Pitch Pages (Video and/or Sales Copy + Design of the landing page)
5. Create Thank You pages
6. Create Products
7. Create Upsells & Order Bumps
8. Setup Affiliate Commissions
9. Customize Order Form
10. Test Funnel
11. Third Party Integrations (ex: Email, Membership, Fulfillment)
12. Submit Products for Approval
13. Affiliate Page
14. Vendor In-House Traffic
15. Affiliate Engagement

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Integrations/Tracking Checklist

- Email Service Provider/CRM
- Membership
- Fulfilling Physical Orders
- Create Ship Notifications in ClickBank after fulfilling Physical orders
- Setting up FB and Google Analytic Tracking Pixels
- Using VTID to track custom needs

For a list of software integrated with ClickBank, please refer to this link

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FUNNEL ARCHITECTURE

Considerations Before Building Your Funnel

- Though you can get started selling on ClickBank with only one product, giving consideration to additional products you might offer to your customer during the purchase process is an easy way to increase your revenue and make your offer more attractive to affiliates.
- What is your Initial Offer?
- What product can you offer as an Upsell after the customer purchases the Initial Offer? (You can present up to 3 upsell/downsell offers with PitchPlus which customers can then buy with a single click)
- Does it make sense for you to offer any Orders Bumps when the customer is on the Order Form and ready to pay for Initial Offer?
- Do you need to enable quantity for customers to buy multiples of the same item (Physical Offers: 2 bottles or 6 bottles)?

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FUNNEL ARCHITECTURE

Best Practices

- An Initial Offer is typically your most compelling product, the easiest to market with the highest converting sales page. Prices vary by product type and customer demographic. (EX: DIET BOOK)
- Order Bumps can be tricky. They appear on the order form and therefore can drop conversions if you don't manage them carefully. Order Bumps work best when they are a **low priced** complimentary offer. (EX: RECIPE BOOK)
- Upsell 1 is usually a complimentary offer that provides additional value and may or may not be more expensive than your Initial Offer. (EX: SUPPLEMENT PACK) It also works well to upsell to a "complete your set/package" offer (EX: WEIGHT LOSS LIBRARY)
- Downsell 1 is typically a less expensive offer, which can be just a discounted version of Upsell 1(EX: SUPPLEMENT PACK $10 Off)

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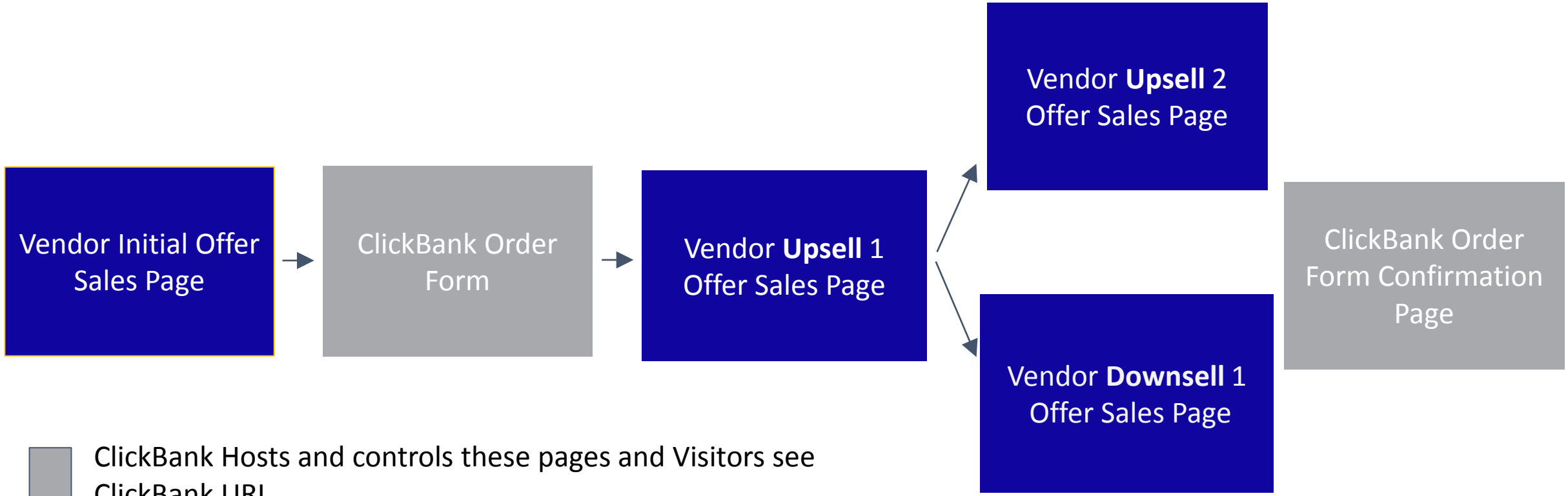
SAMPLE FUNNEL



ClickBank Hosts and controls these pages and Visitors see ClickBank URL

Vendor's Hosts Sales and Upsell pages and Visitors see Vendor website URL

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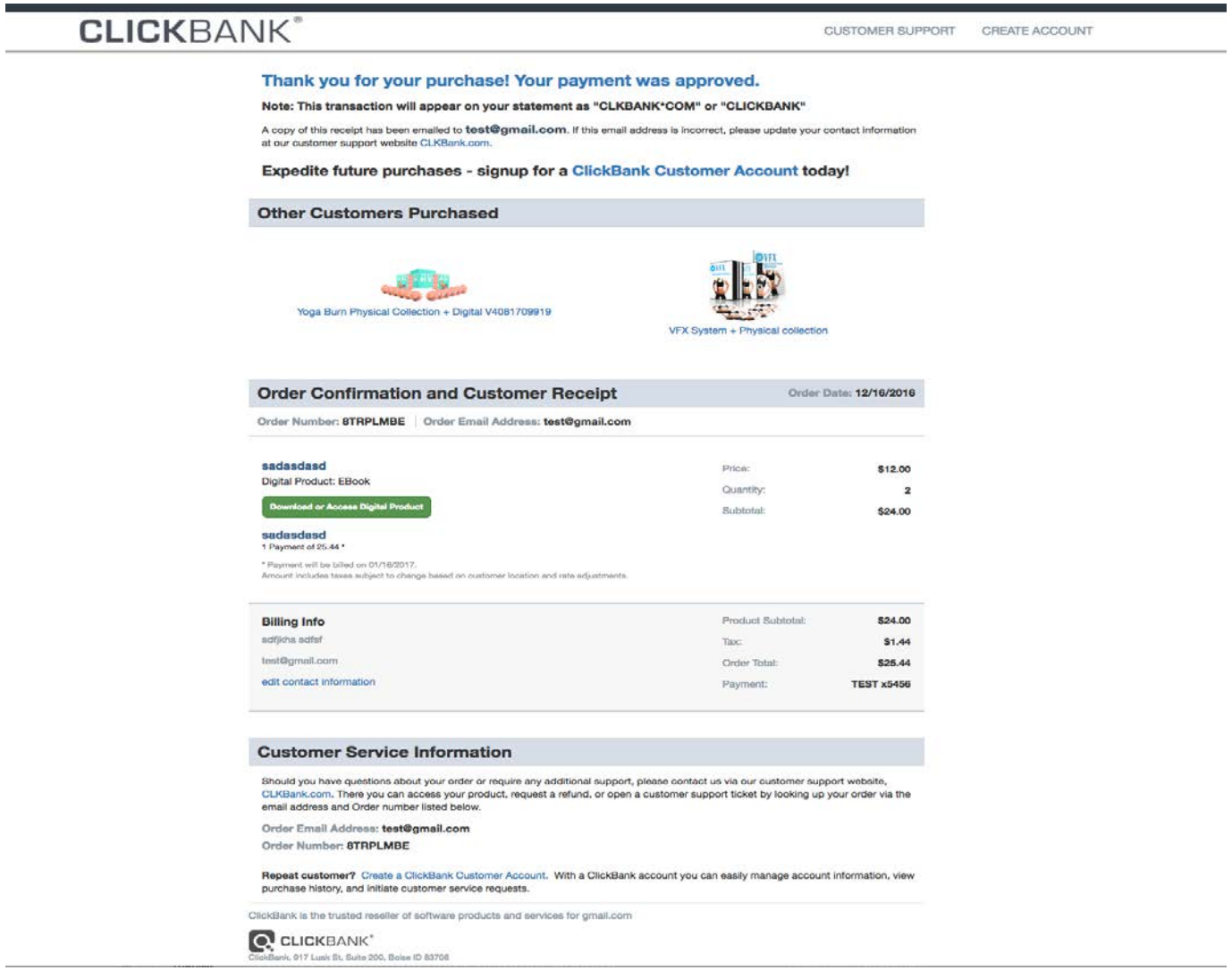
SAMPLE ORDER FORM CONFIRMATION PAGE



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CUSTOMER SUPPORT CREATE ACCOUNT

Thank you for your purchase! Your payment was approved.

Note: This transaction will appear on your statement as "CLKBANK*COM" or "CLICKBANK"

A copy of this receipt has been emailed to **test@gmail.com**. If this email address is incorrect, please update your contact information at our customer support website CLKBank.com.

Expedite future purchases - signup for a ClickBank Customer Account today!

Other Customers Purchased

Yoga Burn Physical Collection + Digital V4081709919

VFX System + Physical collection

Order Confirmation and Customer Receipt Order Date: 12/16/2016

Order Number: 8TRPLMBE | Order Email Address: test@gmail.com

sadasdasd
Digital Product: EBook
Download or Access Digital Product

sadasdasd
1 Payment of 25.44 *

* Payment will be billed on 01/16/2017.
Amount includes taxes subject to change based on customer location and rate adjustments.

Price:	$12.00
Quantity:	2
Subtotal:	$24.00

Billing Info
sdfjkha sdfaf
test@gmail.com
edit contact information

Product Subtotal:	$24.00
Tax:	$1.44
Order Total:	$25.44
Payment:	TEST x5456

Customer Service Information

Should you have questions about your order or require any additional support, please contact us via our customer support website, CLKBank.com. There you can access your product, request a refund, or open a customer support ticket by looking up your order via the email address and Order number listed below.

Order Email Address: **test@gmail.com**
Order Number: **8TRPLMBE**

Repeat customer? Create a ClickBank Customer Account. With a ClickBank account you can easily manage account information, view purchase history, and initiate customer service requests.

ClickBank is the trusted reseller of software products and services for gmail.com

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PRODUCT & PROMOTIONAL GUIDELINES

It is a best practice to ensure that your copy on the sales pitch page and VSL (Video Sales Letter) adhere to FTC guidelines for your product to get approved. Please take a moment to review the guidelines below for a smoother and faster compliance approval process.

- Promotional Guidelines
- Product Guidelines

Please note that if you are have a video on your sale page, you will be required to provide a script as part of the approval process. Making sure that you have this on hand can help to make sure that the approval experience is easy and seamless.

Haven't recorded your video yet? Feel free to send over the script beforehand to avoid any necessary edits later on!

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CREATING SALES PITCH PAGE

- Your sales page is your own! However, there are a few required elements you'll need to know about no matter what format you use:
- Please make sure that you have a ClickBank Trust badge on your page. You can read how to get the code for Trust badge here.
- Please make sure that your pages have a ClickBank Disclaimer in the footer - Refer to Product Guidelines for different type of disclaimers based on your product type.
- Make sure that the item no in the Paylink matches the item no in the ClickBank Product editor.
- If this is an upsell page, make sure your paylink has extra parameters needed for the accept and decline links.
- You can use our Paylink Generator to create links for your Buy buttons (Initial Offer) and Accept, Decline links (Upsell/Downsell Offers). You can read more about creating paylinks here.
- Example Sales Pages:
  - http://purathrive.com/turmeric/
  - http://paleorecipeteam.com/paleo-eats/

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CREATING A THANK YOU PAGE

Please make sure that your Thank You pages adhere to the following guidelines (only seen by customers after they successfully completed the purchase of your product)

- Customers must be able to reach you if they have a question about your product need technical assistance after the purchase. **Please include an email address**, a link to your email address, or a contact us link on your Thank You Page.

- A reminder to the customer that their credit card or bank statement will show a charge by ClickBank or CLKBANK*COM, rather than a reference to your specific product. This reminder should be prominent, as customers sometimes request refunds because they forget that ClickBank is handling the purchase.

- Clear instructions on how to download or access the product, or information on how and when it will be delivered to them.

- To ensure your use of a ClickBank trademark does not mislead consumers as to any sponsorship, affiliation or endorsement by ClickBank of your company, products or services, the following disclaimer needs to be at the bottom of any page with a ClickBank reference:

- ClickBank is the retailer of products on this site. CLICKBANK® is a registered trademark of Click Sales, Inc., a Delaware corporation located at 1444 South Entertainment Ave, Suite 410, Boise Idaho, 83709, USA and used by permission. ClickBank's role as retailer does not constitute an endorsement, approval or review of these products or any claim, statement or opinion used in promotion of these products.

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CREATING A PRODUCT

ClickBank supports the sale of the following product types as Initial Offers, Upsells and Order Bumps:

- One time Digital Product
- Recurring Digital Product (Subscription/Membership)
- One Time Physical Product
- Recurring Physical Product (Auto-Ship/Subscription)
- One time Digital and Recurring Physical product (ex: Diet/Cookbook with auto-ship supplements)
- One Time Physical and Recurring Digital product (ex: Physical Book with access to Facebook group for support for a monthly fee)

NOTE:

- For Physical Product(s) make sure you have created a shipping profile. (You won't be able to submit the product for approval until it's added).
- For Recurring Products, once the product is approved you cannot change the price, so please make sure that you set the specifications for the initial and recurring billings correctly.

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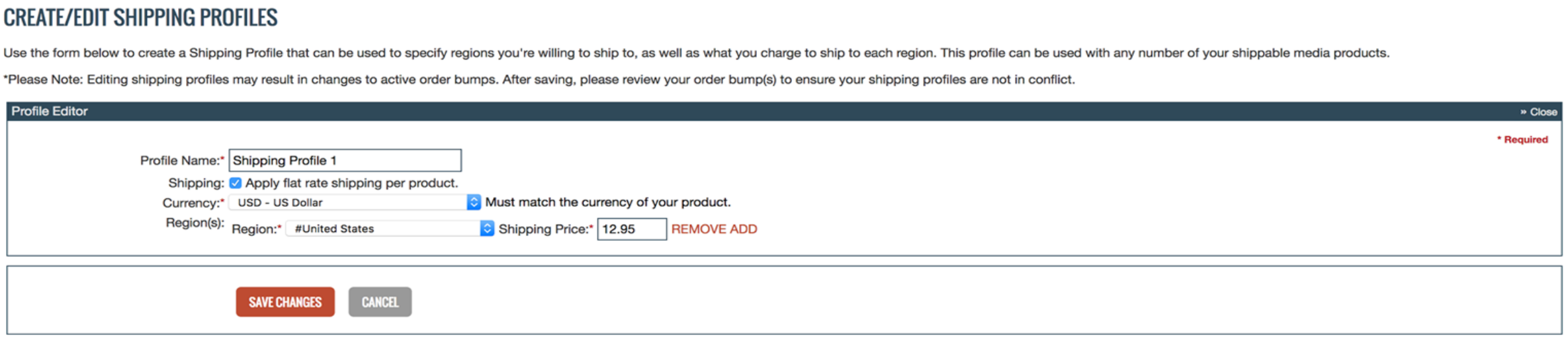
SHIPPING PROFILE (ONLY FOR PHYSICAL PRODUCTS)

Before selling a Physical Product you **must** create a Shipping Profile. Without a Shipping Profile you will not be able to submit a Physical Product for approval.

To create a Shipping Profile:

1. Login to your ClickBank Vendor Account
2. Select **Settings**
3. Select **My Products**
4. Select **Shipping Profile** in the **ADD NEW** taskbar
5. Enter the following information
    a. Profile Name
    b. Select whether or not to apply flat rate shipping per product
    c. Currency
    d. Region(s)/Shipping Price **NOTE**: *You may add multiple regions and shipping prices per region*
6. Select Save Changes to save your Shipping Profile



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FULFILLING PHYSCIAL ORDERS

Using API
Your fulfillment center or your Dev can connect ClickBank to your fulfillment via our Shipping API and download all the transactions that needs to be Shipped for a certain period automatically.

Please provide the following page as a reference to your fulfillment center and the Developer to refer to Shipping API and Ship Notification API Specifically

https://support.clickbank.com/hc/en-us/articles/220376527-ClickBank-APIs

Using PackageBee
PackageBee is a software as a service app that has integrated ClickBank with multiple fulfillment warehouses, and can add new warehouses that use 3PL central or Veracore. So you can use one of the Fulfillment warehouse already integrated or see if your fulfillment center is interested in integrating with ClickBank using PackageBee.

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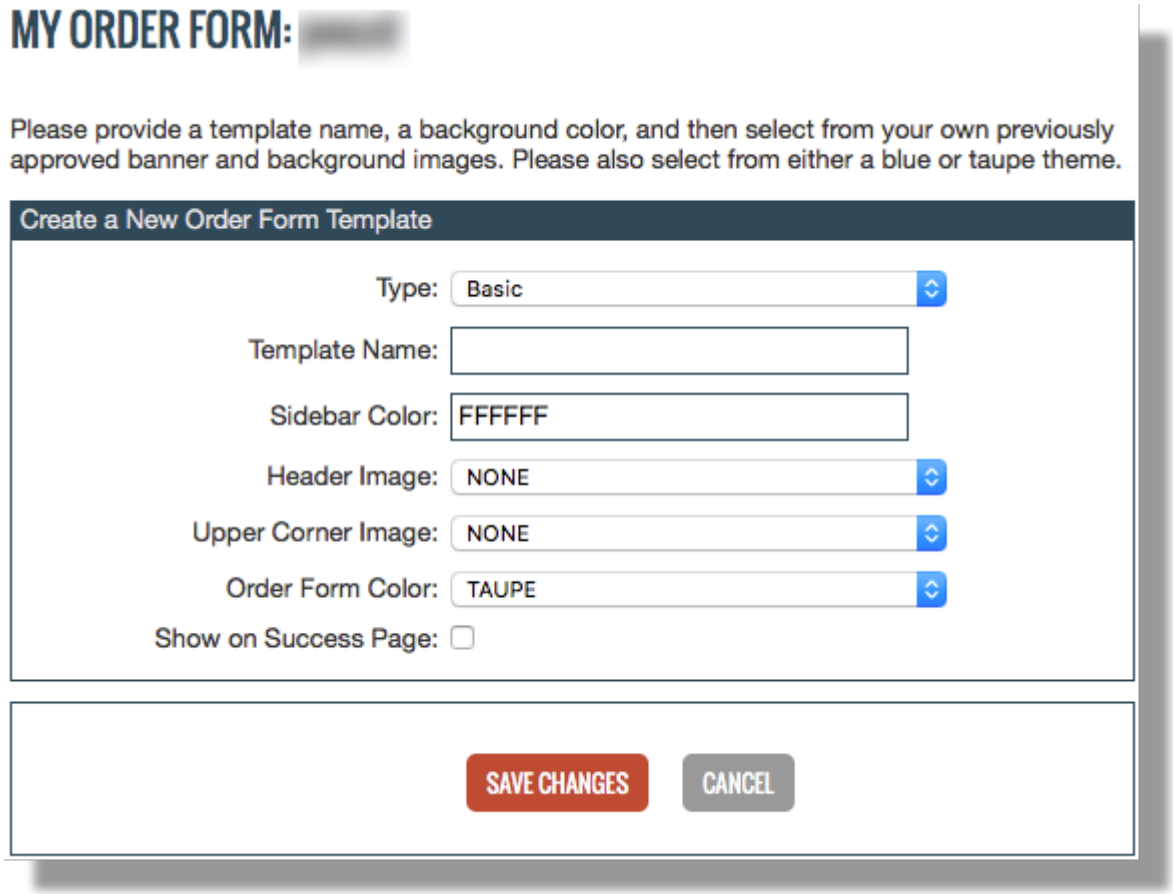
CREATING A CUSTOM ORDER FORM

ClickBank's Custom Order Form feature gives you an easy way to increase conversion rates. By adding your own branding, graphics and color scheme to the ClickBank Order Form, you can make the transition between your Pitch Page and the ClickBank Order Form more seamless for consumers. On average, a Custom Order Form converts 125% higher than one without customization!

1. Log in to your ClickBank account.
2. Click the **Settings** tab.
3. Click **My Order Form**.
4. Click **Add New Template**.
5. The My Order Form page is displayed. For example:
6. Enter your order form details:
    - **Type –** Select **Advanced**.
    - **Template Name –** A name for the order form template.
    - **Sidebar Color –** Choose the color (by typing in a specific hex code or choosing from the color picker we provide) that will appear on the order form page to the left and right of the box where customers enter their payment details.
    - **Header Image –** Choose an approved image to display at the top of the order form.
    - **(Optional) Upper Corner Image –** Choose an approved image to display in the upper corner of the order form.
    - **Order Form Color –** The color scheme of the payment details box. Select Taupe or Blue.
    - **Show On Success Page –** Check this box to display the custom images and colors on the success page where customers access their purchases.
7. Click **Save Changes**.
8. Your Custom Order Form template is now complete.



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CREATING UPSELLS

PitchPlus Upsells are designed to enable you to drive additional sales by presenting a buyer (after they have already made a purchase) with additional offers for related or value added products. The consumer only needs to click a single button to immediately buy the additional product without having to again visit the order form.

1. Log in to your ClickBank account/ Click the **Settings** tab.
2. Click **My Products**/In the Add New section, click **Upsell Flow**.
3. Enter a name for the upsell flow, then click **Create Flow**.
4. A graphical representation of the upsell flow is displayed. For example:
    1. Configure each Offer by clicking the Select option for it. Offer 1 is made automatically after the initial product is purchased. Offers 2 and 3 are contingent on the customer's choices on prior offers. At each step, you can either end the flow or offer a different product. For each offer, there are two options:
        1. **End Flow –** The PitchPlus Upsell Flow ends, and the user is taken to the order confirmation page. This is the default option for each stage.
        2. **Product –** A product that you specify is offered to the user as an upsell.
5. To configure an offer, click Select and enter the following information:
    1. **Product –** The number of the product to offer. To offer another vendor's product, select other and enter the vendor's name and product number.
    2. **Pitch URL –** The standard Pitch Page URL. You must provide at least one pitch URL.
    3. **Mobile Pitch URL –** The mobile Pitch Page URL. You must provide at least one pitch URL.
    4. **% Commission –** The commission percentage that the affiliate receives for this product. You can configure different commissions for each stage. If you don't specify a commission percentage, the default commission percentage for your account is used.
6. When you are done entering product information, click **Save**.
7. When you have completed the PitchPlus Upsell Flow, click **Close**.
8. Click **Request Approval** in the status column.

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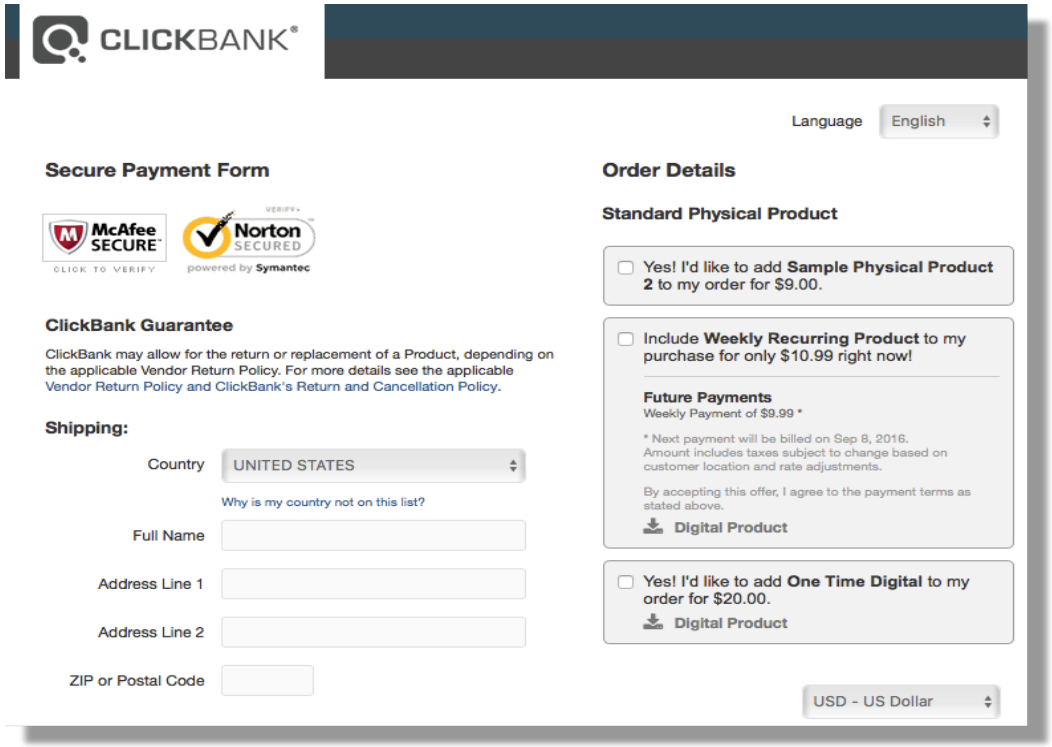
ORDER BUMPS

An Order Bump is a feature that lets you configure supplementary products to display on your order form. After a customer selects an initial product, they can choose to add these “bump products” to their order. Bump products are typically low priced products that are well suited to complement the original product being purchased.

Think of it as “you’re already buying the pasta…add the sauce for just $5 more.”

1. Log in to your account.
2. Click **Settings**.
3. Click **My Products**.
4. Click **Order Bumps**.
5. The Order Bumps tab is displayed. For example:
    a. Click the **ADD NEW: ORDER BUMP** button.
6. Click the **Add Initial Product** button. Select the initial product you’d like to create the Order Bump for, then click the **ADD INITIAL PRODUCT** button.
7. Click the **Add Bump Product** button to add up to five bump products, then click **ADD BUMP PRODUCT(S)** to confirm.
8. The Order Bump Configuration page is displayed. For example:
    a. Select the text to go with each bump. Choose from either ClickBank text or approved Custom Text that you’ve created.
9. Drag and drop bump products into the appropriate order if necessary. The bump products are displayed in the order you select on the customer's order form.
10. Click the **SAVE ORDER BUMP** button to activate your new Order Bump.
11. When the customer goes to purchase the product you’ve just created an Order Bump for, the bump products you’ve chosen displays on the order form.



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TEST YOUR FUNNEL

Test Credit Cards

To generate test credit card information to test product Payment Links, click the My Site link under the Settings tab in your ClickBank account. If you've created a product in the My Products tab, you should see a box near the bottom of the My Site page called Testing Your Products. Next to Test Credit Card Number, click Generate New Card Number. This will create a credit card number, expiration date, and validation code you can use to place test orders. This card information will be valid for 24 hours, after which time it will expire and will no longer be usable for test orders.

Testing HOPLINKs

A HOPLINK™ referral tracking URL, or HopLink, is a URL that does two things: It links a potential customer to a vendor's site, and it informs ClickBank which affiliate brought the customer there. As a ClickBank affiliate, you need to know how to use a HopLink to promote ClickBank products. To test your HopLinks:

1. Follow your HopLink, either by clicking it or by entering it into your browser.
2. Click the **Buy Now** button or the equivalent.
3. The ClickBank order form is displayed.
4. Scroll to the bottom of the order form.

   If you see [affiliate=yournickname], the HopLink is working.

   If you see [affiliate=none], the HopLink is not reporting you as the affiliate. See Common Issues for more information.

   If no [affiliate=] line is displayed, the vendor may have disabled the display of that line on their order form.

Hop Scripts

If you have more than one product in an account, then a hop script is needed to be set as hop link target URL for affiliates to promote multiple products. Script and more details can be found here

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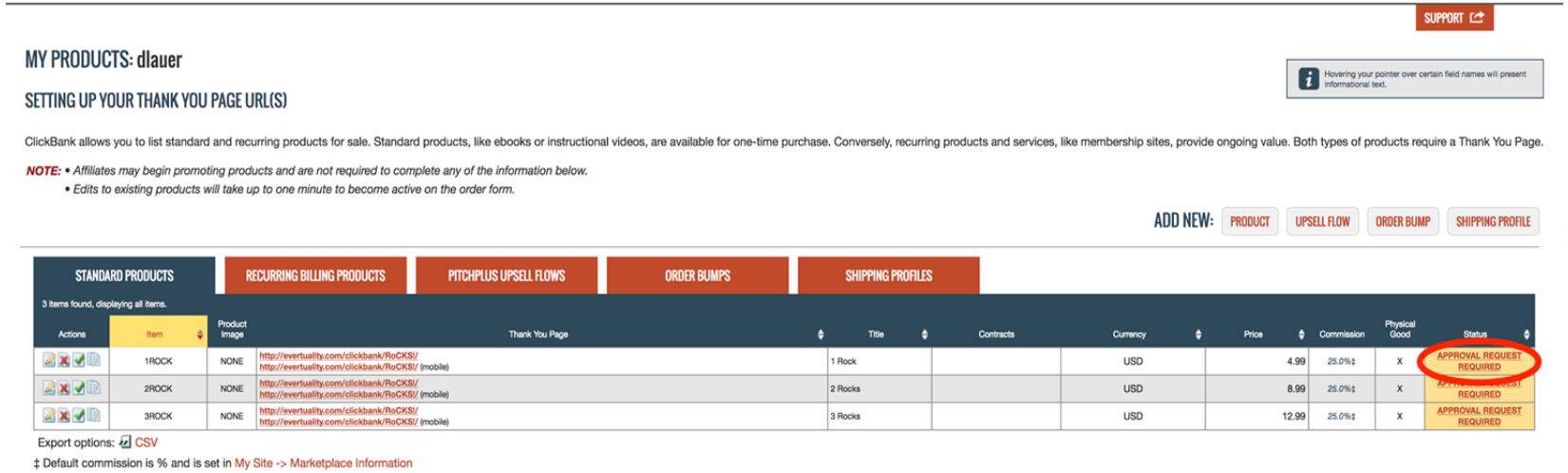
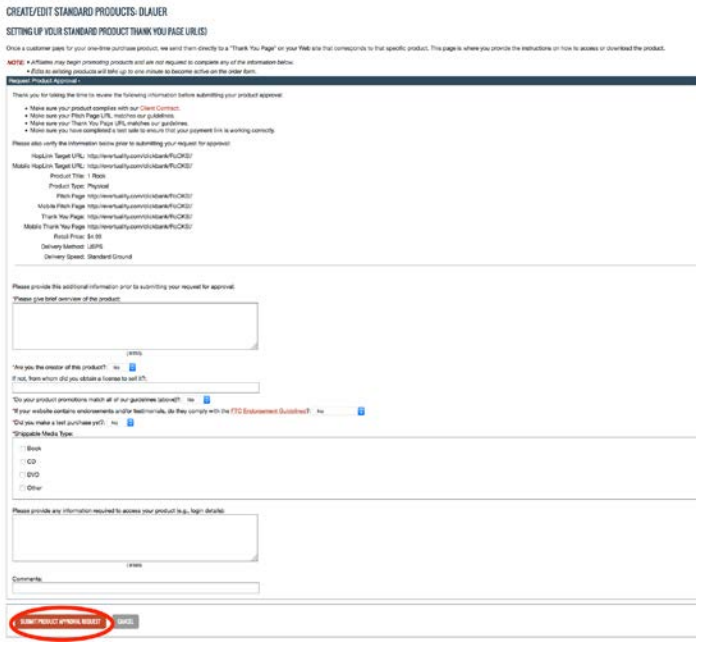
SUBMIT PRODUCTS FOR APPROVAL

Once you have completed adding your product they will need to be submitted for approval and reviewed by ClickBank staff. To request a review find the product you want to submit in **My Products** and select **Approval Request Required** under the Product's Status on the far right.



This will open a subsequent page where you must provide additional information and submit your product to the review process. Once your request is received your product will with either be Approved, Denied, or ClickBank staff may contact you for additional information before you product can be approved for sale.



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AFFILIATE RESOURCE PAGE

Several vendors create Affiliate Resource Pages to provide interested affiliates with details about their offer along with performance data and promotional creatives.

The types of resources that an Affiliate Resource Page might provide include:

- Banners
- Logos
- Text Ads
- Email Swipes
- The benefits of being an Affiliate
- Affiliate instructions and rules
- Alternative landing pages that the affiliate might promote. (For more information on how to set this up, visit the Redirect Scripts Section of the ClickBank Tools Page: https://www.clickbank.com/tools/redirectScript/)

Example Affiliate Page: http://purathrive.com/affiliate-portal/

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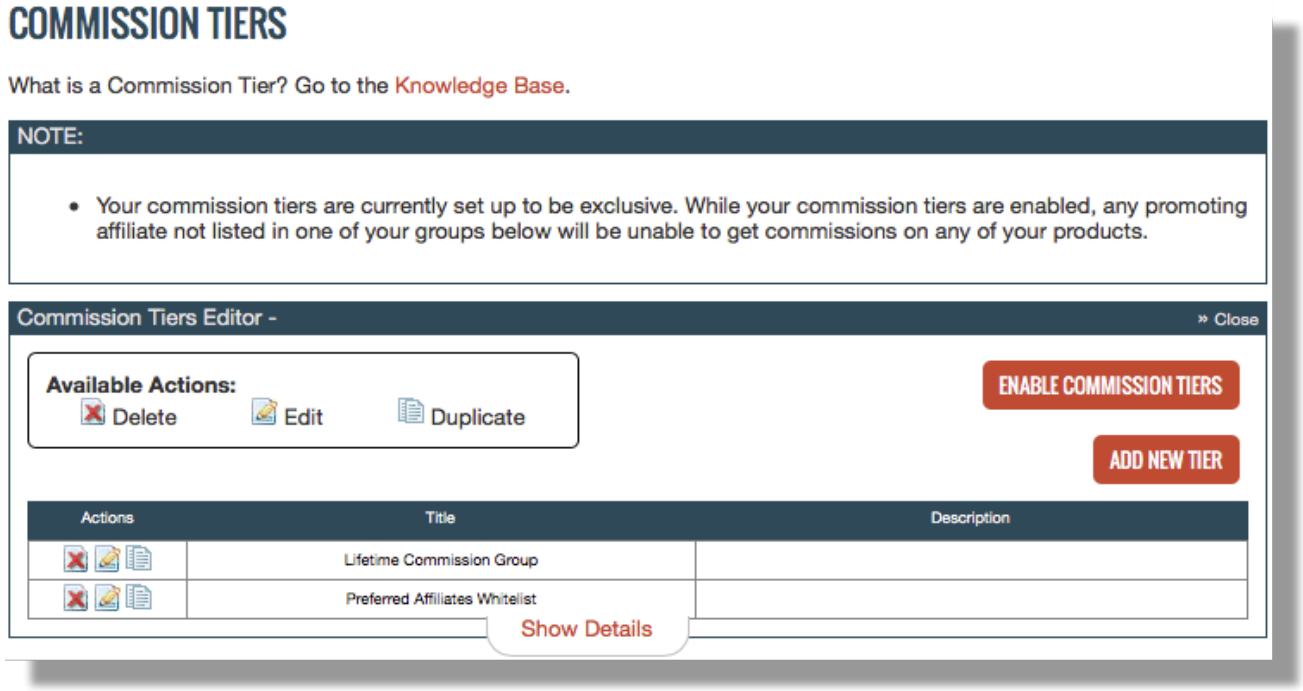
SETTING UP AFFILIATE COMMISSIONS

By creating Commission Tiers, vendors can set unique commission rates for that tier of affiliates. This can be useful for vendors who wish to reward productive affiliates or JV partners with higher commission rates.

You can create unique rates for any of the following criteria:

- All products
- Specific products
- By product type
  - Digital products
    - Standard
    - Recurring
      - Initial payment
      - Rebill payments
  - Physical Products
    - Standard
    - Recurring
      - Initial payment
- Upsell flow



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VENDOR IN-HOUSE TRAFFIC

- Before “going live” we recommend promoting your offer with your own traffic (e.g. email, website, or Facebook, etc) through your own affiliate account.

- Affiliates are able to view performance statistics through the Marketplace, and affiliate driven sales carry more weight to push your Marketplace rank higher. The statistics include:
  a. Earning Per Hop
  b. Order Form Conversion Rate
  c. AOV (Average Order Value)
  d. Upsell Conversion Rate

- By promoting the offer through your own affiliate account, you focus on optimizing the performance of the offer to drive more revenue and better entice successful and proven affiliates.

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AFFILIATE ENGAGEMENT

1. After your internal promotions, now it's time to engage with affiliates! The vendor can keep the offer open for anyone to promote. In this case they can provide different commission tiers to affiliates (ex: some big time affiliates will want higher payouts than the vendor is willing to giving to any other affiliate). This can be achieved via our Whitelist feature. Here we can also talk about those points on how Commission set at the product level can be overwritten by the commission set at the upsell vs the commission set at the whitelist level.
2. If the vendor wants to talk to certain affiliates only after talking to them, then the vendor can use our Exclusive Whitelist feature.
3. For any affiliate to promote the offer, they will need to know the following
    a. What version of sales pitch pages are available (ex: Long Form, Video Sales Letter) and what parameters needs to be appended to hop link
    b. Any email swipes that the vendor can provide
    c. Image assets like Banners/Product images/Ad images and banners
4. Vendors can provide such info using the Affiliate Page that they host. vendors can provide this link in the marketplace description for affiliates to check it out.
5. Vendors can work with ClickBank Affiliate Manager to get help with Affiliate engagements and also to include their offers in any contests that are ongoing (if applicable).

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