3. How to Create an Affiliate Hub

Affiliate Hub module lets you group new clients by their acquisition source—affiliate campaigns, PR outreach, or any custom channel—and funnel them into the right teams with built-in tracking and analytics. Before you can route clients into these groups, you'll need to create an affiliate hub. Follow the steps below to get started.

To add a new affiliate hub, follow these steps:

1. In the left sidebar, click the **Affiliate Hub** icon.
2. Click the **+Add** button in the top-right corner.
3. Complete the fields in the **General Information** section:

Project: The project to which the affiliate hub will be assigned. You will be able to designate clients only to the desks within this project.

Name: The business-facing name of the affiliate hub (displayed in the UI).

Affiliate ID: A unique identifier used to track clients brought into this affiliate hub and monitor their activities. You can enter an Affiliate ID manually or generate it automatically based on the Name.

Responsible Manager: The employee assigned to oversee and manage affiliates. To select a responsible manager from a drop-down list, you must first add them to the **Employee** table with an **Employee role**. In the **Roles** module, you can configure their rights and what information they can access, depending on your needs.

4. Fill out the Sources section

Sources identify the origin of each lead, enabling you to track and analyze which acquisition channels drive traffic. You can create as many sources as needed to match your business requirements and accurately track different lead origins.

To add a source, click **+ New** source and type its name.

5. Complete the Permissions section

In this section, you need to assign affiliate managers who will be responsible for managing the affiliate hub. To do this, add an employee in the **Employees** module and assign them the **Affiliate** role. Next, configure the affiliate manager's access to the information available to them. Go to the

Roles module, check the boxes for the permissions and actions you want to grant.

Affiliate Hub settings:

- **View All** provides access to all affiliate hubs you have.
- **View Own** grants access only to the assigned hub.
- **Manage All** allows the affiliate manager to edit and configure all affiliate hubs.
- **Manage Own** allows the affiliate manager to modify settings and manage data only within their assigned hub.

Leads settings:

- **View** allows viewing leads from all sources in your affiliate hub.
- **View by Source** grants access only to the leads from the specific source assigned to the employee.
- **Create/Edit** permits to make changes, add new sources, and edit automation settings.

To ensure the affiliate manager can see all hub-related information, select **View** for the **Leads**, **Sources**, **Configurations**, **Automation**, and **Analytics** fields. If you want to allow changes to settings, tick the **Create/Edit** option.

Please note: When configuring permissions for the affiliate hub, thoroughly review the rights for each role. The system works like this: To ensure the affiliate hub operates properly, you need two roles. The first is a **Root Affiliate**. This role must have **View** permissions for **Leads**, **Sources**, **Configurations**, **Automation**, and **Analytics** to access full hub information. Otherwise, the Root Affiliate will act like a webmaster and will not be able to manage the affiliate hub. The second role is employees with the **View by Source** permission. This allows them to track information limited to the designated source. They can be assigned as webmasters to manage specific sources.

To save the settings, click **Save** if you plan to continue working with this module, or **Save and Close** if you have finished configuring it.

Webmasters are users who can track only the leads by their assigned sources. They are assigned after creating an affiliate hub in the Sources table. To designate a webmaster for the **Source**, you should add them in the **Roles** module as an Affiliate Webmaster and grant them the **View by Sources** permission. However, you can adjust the role's permissions as needed. One webmaster can be assigned to several sources.

When all fields are completed, click **Create affiliate partner** at the bottom of the window. You'll see a confirmation toast ("Affiliate Hub Successfully Created"), and your new affiliate hub will appear on the main Affiliate Hub page.

> **Pro Tip:** If dropdown lists are empty, ensure you've first created the corresponding Projects and Users under **Settings**.

Next Steps & Conclusion

With your affiliate hub now in place, you can:
Assign clients to it manually via the Clients → Edit screen, or automate assignment through your workflow rules.
Route clients to specific desks within the chosen project for streamlined onboarding.
Analyze performance by filtering on the affiliate hub’s Affiliate ID in your Analytics dashboard to measure ROI and conversion rates.

By defining clear affiliate hubs that map to your marketing channels, you gain full visibility into where your clients come from and how they progress—enabling data-driven optimization of your acquisition strategy.

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