Merge referral partner info into emails

Merge fields are used to personalize email, letter, and task templates in partner messages and internal notifications. These merge fields work just like any other template merge fields. You can merge standard and custom referral partner record fields.

Referral Partner Fields

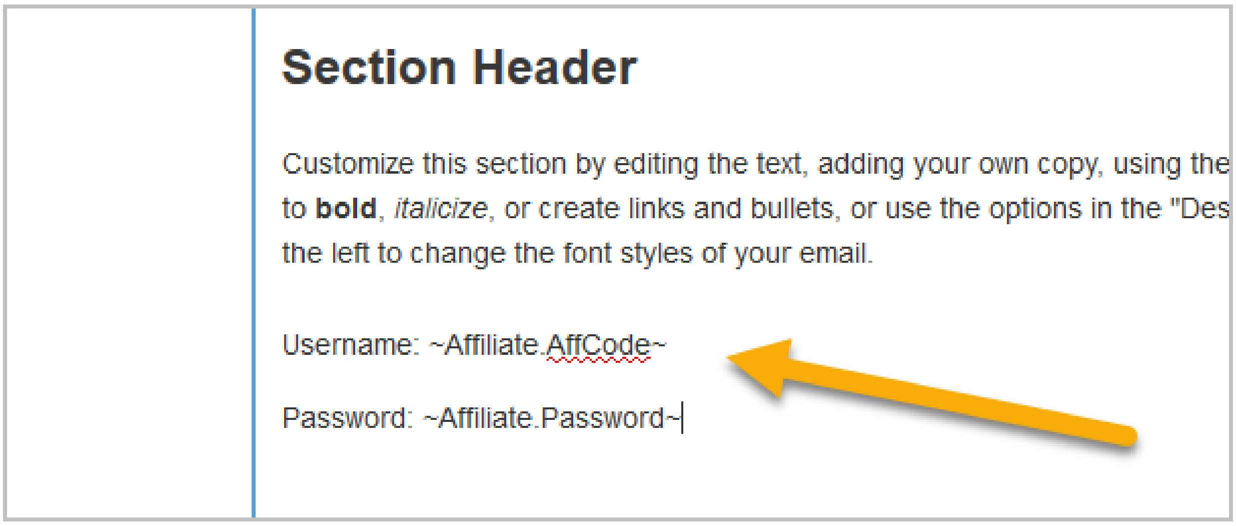
These fields pull information from the referral partner record. The Referral Partner Fields include:

- **Aff Name**: the referral partner name. It may be a first name, an organization name, or something else if the partner record was created manually.
- **Aff Code**: the referral partner's code. This code serves as a username when the affiliate logs into the Referral Partner Center. It is also part of every referral tracking link. The referral partner code is the only thing that differentiates one referral tracking link from another.
- **Password**: the referral partner's password used to log into the Referral Partner Center.
- **Notify Lead or Notify Sale**: the referral partner's email notification preference. You can change these preferences by editing a referral partner record.
- **Lead Cookie For:** the Credit Window. The Credit Window defines the number of days a partner is eligible for lead or sale commissions after one of their referrals clicks on a referral tracking link.

To use these fields in an email,

1. Click inside the email where you would like to enter the merge field.
2. Click the Merge button in the blue bar.
3. Select Referral Partner Fields.
4. Select the Merge Field.

For example, the code below would merge the username and password of the referral partner.



Referral Partner's (Contact) Fields

These fields pull information from an affiliate's contact record instead of their partner record. The information is pulled when a follow-up sequence or broadcast is sent to a list of prospects or customers. These merge fields can be used to send a personalized Thank You to a partner when one of their referrals opts-in or buys, for internal notifications, and to Cc: partners on the communications you send to their referrals. There is a generous list of merge fields to choose from.