

Create a Referral Partner record (manually)

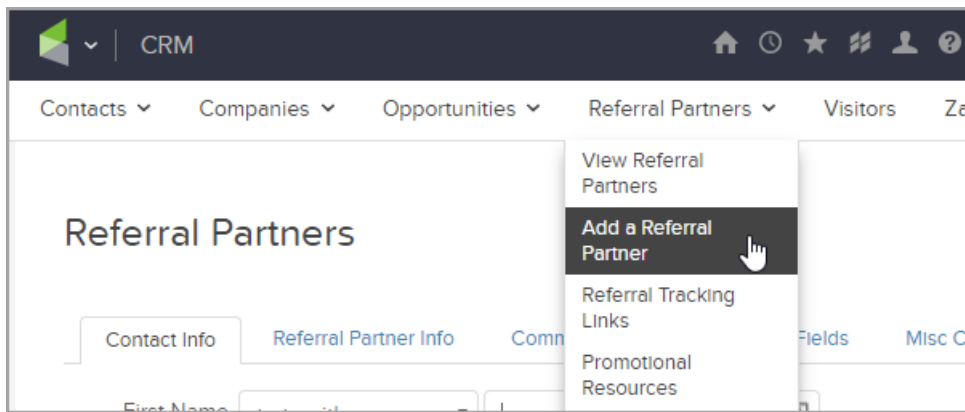
This article applies to:

Referral Partners are partners who sell your products on their sites for a commission that you pay to them, or they might sell a complementary product or solution to your own. It's one way to get revenue from your products without having to do all the marketing yourself.

There are automated methods that you can use to create referral partner records (see [Create a Referral Partner Sign-up Form](#)), but if you have only a few to create, then follow these steps.

Create a referral partner record manually

1. If you haven't done this yet, the first step is to [create a contact record](#) for your referral partner.
2. Once you have a contact record for your new referral partner, navigate to **CRM** and click **Referral Partners**.
3. Click the **Referral Partners** drop-down menu and click **Add a Referral Partner**.



4. Enter Referral Partner Information:

- **Contact** - begin typing the name of the new referral partner and click to select it.
- **Name** - this can be the contact's name or an entity or professional organization that the contact is associated with.
- **Code** - this will be the referral partner's tracking code and username for the Referral Partner Center. It must start with a letter. **Note that the referral tracking code is unique to the partner, so if you ever change this, it will reset the partner's affiliate links and reset their link tracking stats!**
- **Password** - enter a password; referral partners use this to log into the Referral Partner Center.
- **Parent** - this is optional - select the parent referral partner to this referral partner or leave it blank. You can set up parent referral partners to receive a commission when one of their referrals makes a lead or sale.
- **Status** - select Active.

Info: Referral partner records have two status options. When the status is active, the referral partner will be eligible for commission tracking. An inactive status will remove the referral partner from commission tracking.

- **Notify On Lead** - select this based on preference. Select Yes to send a notification to the referral partner's contact record email address when someone that they refer fills out a web form or landing page.
- **Notify On Sale** - select this based on preference. Select Yes to send a notification to the referral partner's contact record email address when someone that they refer purchases something from your business.
- **Track leads for** - enter the number of days that you want to track a lead. This limits the number of days the referral partner's tracking cookie is active after a link click. Leave this field blank if you do

not want to limit the credit window (the opportunity for commission).

- **Cart Skin** - this is optional - use this legacy shopping cart theme when customers access the shopping cart through this referral partner.

5. Click **Save**. You have manually created a referral partner record.

Referral Partner Information

Contact

Name

Code
Must start with a letter (no spaces)

Password

Parent

Status

Notify On Lead Yes No

Notify On Sale Yes No

Track leads for days. (Set as 0 for unlimited)

Cart Skin