Create a Referral Partner record (manually)

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This article applies to: Max Classic

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.

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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. This function works with Web Form Submitted goals and legacy Landing Page Submitted goals as found in the Advanced Automation builder. Submissions using Public Forms or the new Landing Page builder will not trigger these notifications.
- 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 Partne	er Information		
Contact	Molly McButter	T	
Name	Molly McButter	<u>Å</u>	
Code	mmb1085		
	Must start with a letter (no	spaces)	
Password	•••••	()	
Parent	Parent Name	Ŧ	
Status	Active	•	
Notify On Lead	Yes 🔵 No 💿		
Notify On Sale	Yes 🕞 No 💿		
Track leads for	0	da	ys. (Set as 0 for unlimited)
Cart Skin	Please select one	•	
Save			