Create a Referral Partner record (manually)

**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**.
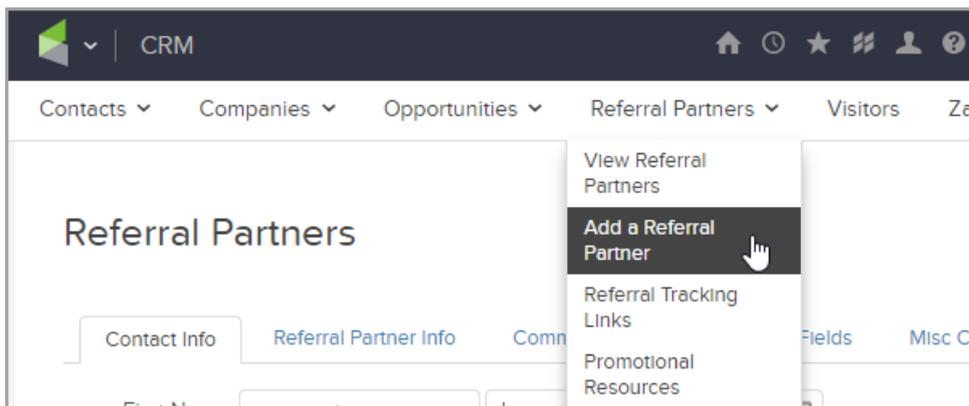
4. **Enter Referral Partner Information:**

   - **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.

- **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	Molly McButter ▾
Name	Molly McButter
Code	mmb1085
	Must start with a letter (no spaces)
Password	··············
Parent	Parent Name ▾
Status	Active ▾
Notify On Lead	Yes ○ No ◉
Notify On Sale	Yes ○ No ◉
Track leads for	0 days. (Set as 0 for unlimited)
Cart Skin	Please select one ▾

Save