Create a referral partner sign-up form

This article applies to:

Max
Max Classic

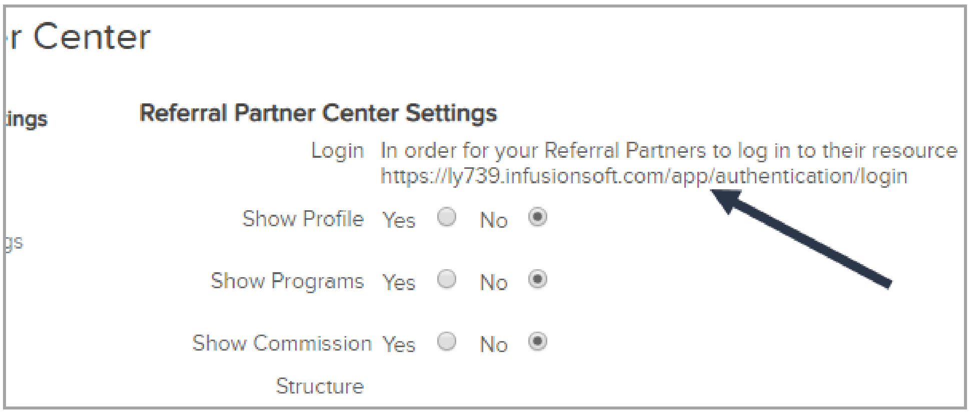
A referral partner sign-up form allows people to sign-up as referral partners in your referral partner program. Before creating the sign-up form, set up the commission program they will be assigned to.

When someone fills out the referral partner sign-up form, several things can automatically occur:

- A contact record is created if one doesn't already exist.
- A referral partner record is created.
- The referral partner is assigned to a commission program.
- If set up, the referral partner can view a thank you page and receive a welcome email with instructions to access the Referral Partner Center.

Grab your partner portal URL

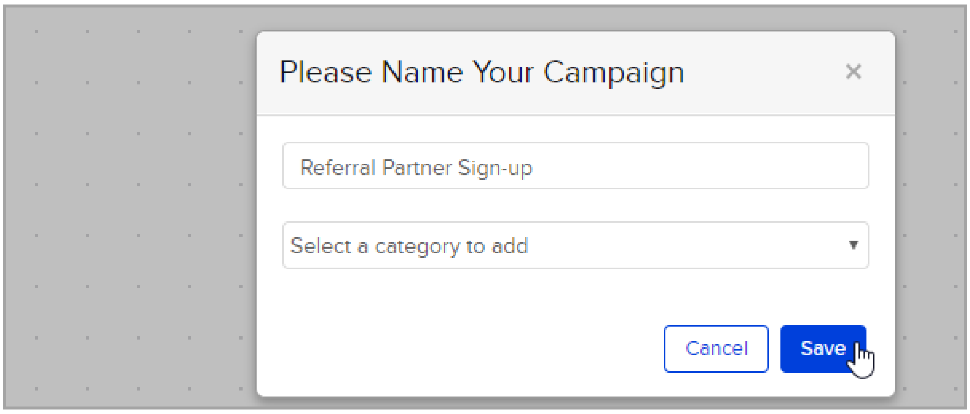
1. You will need this later. Navigate to **CRM** and click **Settings**.
2. Scroll down to the bottom left of the screen and click **Referral Partner Center**.
3. Copy the https address found under Referral Partner Center Settings. Save this for later in the process.



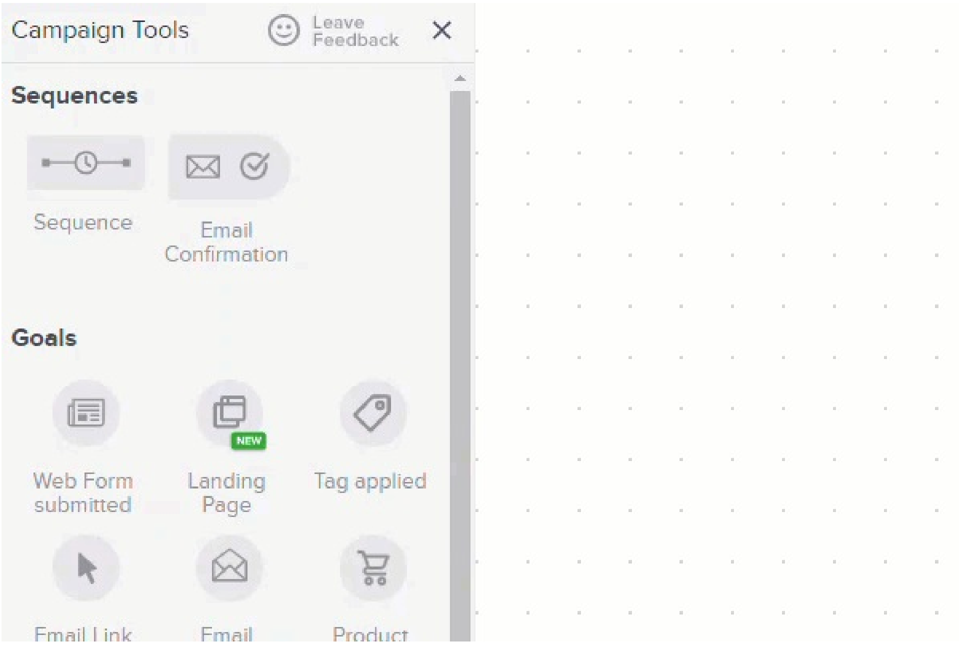
Create a campaign with a web form goal

1. Navigate to **Marketing** and click **Campaign Builder**.

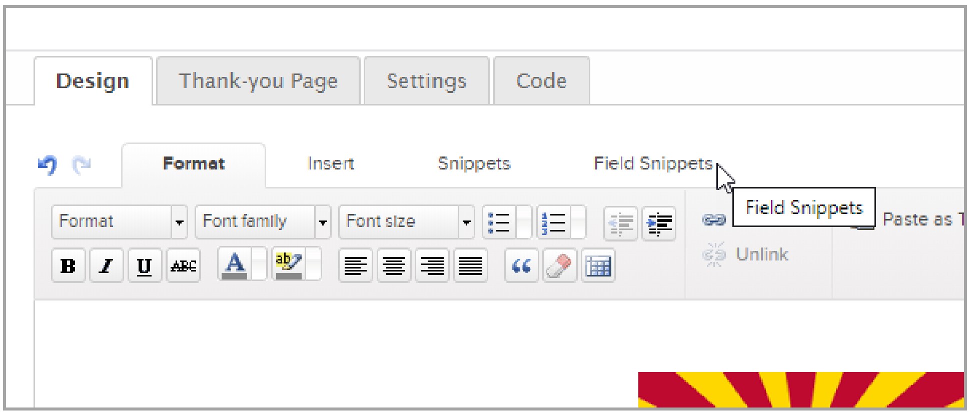
2. Enter a name for your new campaign and click **Save**.



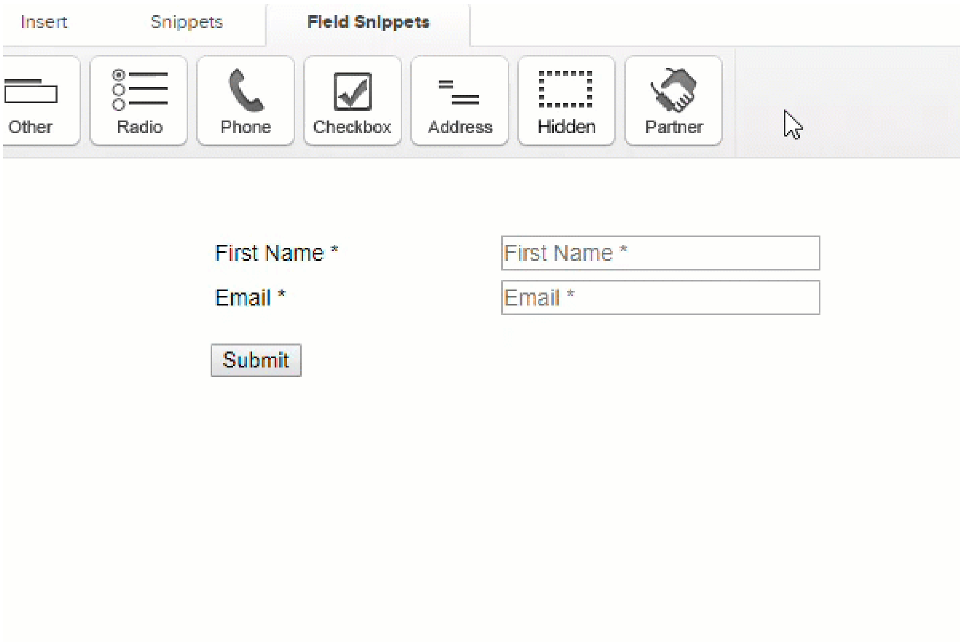
3. Drag the **Web Form submitted** goal to the campaign canvas and give it a logical name. Note: the Landing Page goal will not work for this campaign.



4. **Double-click** on the web form goal to configure the sign-up form and then click the **Field Snippets** tab.



5. Drag the **Partner** snippet and drop it into the desired location on the form.



6. **Referral Partner Settings**
    1. **Parent**: The parent is the partner who referred the person filling out the form. This only applies if you have two or more levels in your referral program. The parent partner earns commission when the people they recruited sell your products.
        - **Parent**
            - **None**: Choose *none* if you do not have two or more levels in your referral program. This is the most typical setting.
            - **Referring Referral Partner**: Choose this if you want Max Classic to automatically assign a parent partner based on referral link tracking. You can also assign a backup referral partner. The backup will be the parent partner if the new referral partner did not click on any type of referral tracking link before signing up.
            - **Other**: Choose other if you want one parent partner assigned to everyone filling out this web form. Use this option when you create a co-branded sign-up page to recruit referral partners through a specific strategic or joint venture partner. If you choose Other, Type to search for the name of the parent partner and select it.
        - **Backup Parent** - if you chose Referring Referral Partner in the previous step, you have the option to enter a Backup Parent. Leave this option blank if you do not have two or more levels in your referral program. Blank is the most typical setting.

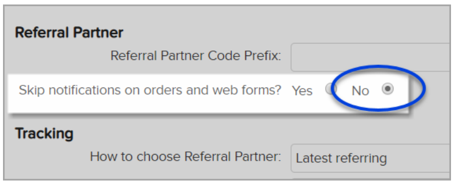
    2. **Programs** - select the commission program that you want to add new referral partners to.
        - **Add to** - select one or more programs here to automatically add contacts to this program when they submit the form.
        - **Remove from** - select one or more programs here to automatically remove contacts from this program when they submit the form.

    3. **Referral Partner Notifications**
        - On New Lead & On New Sale
            - Choose **Yes** if you want referral partners to receive an email notifying them of a new lead or

new sale.

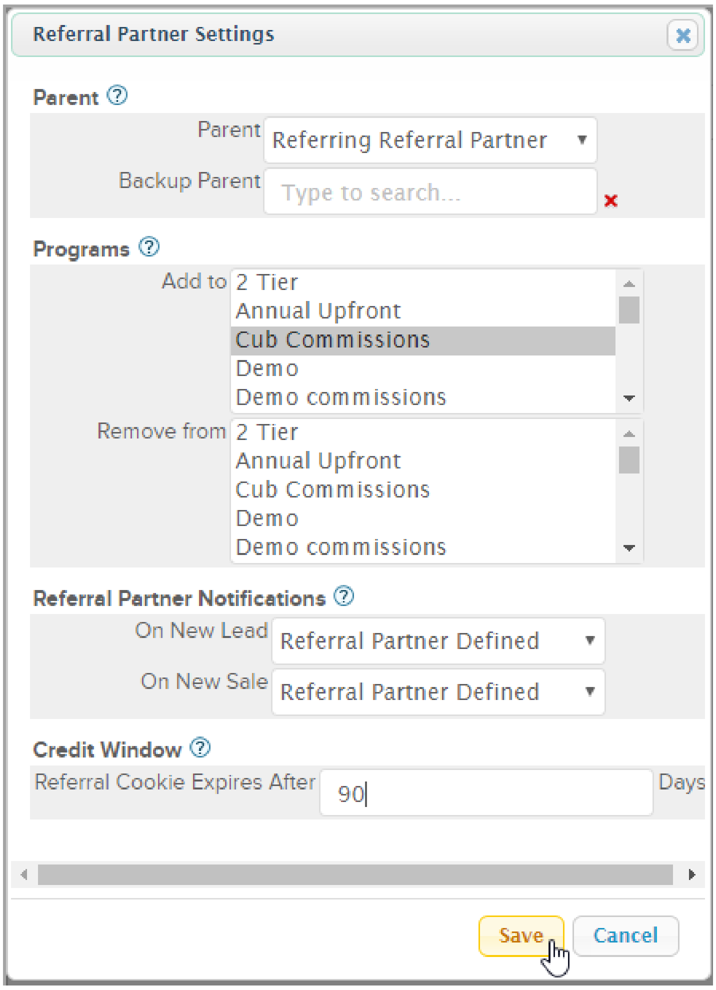
- Choose **No** if you do not want referral partners to receive an email notifying them of a new lead or sale.
- Choose **Referral Partner Defined** to let your new partners decide for themselves when they sign up.

  Note: If you want to send email notifications to referral partners, make sure the **Skip notifications on orders and web forms?** located at **CRM > Settings > Referral Partner Settings > Referral Partner Defaults** is set to **No.**

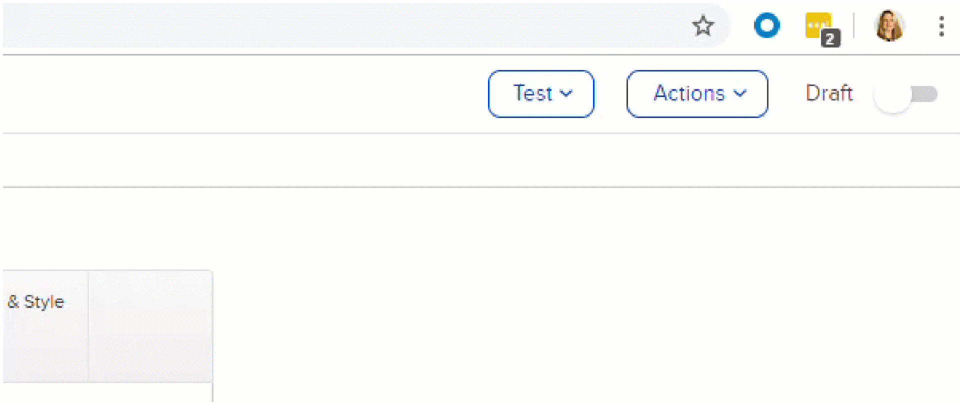
  

4. **Credit Window** - enter a number for the amount of days the referral partner's tracking cookie should remain active after a tracking link is clicked. Leave this blank if you do not want to limit the credit window.

5. Click **Save**.

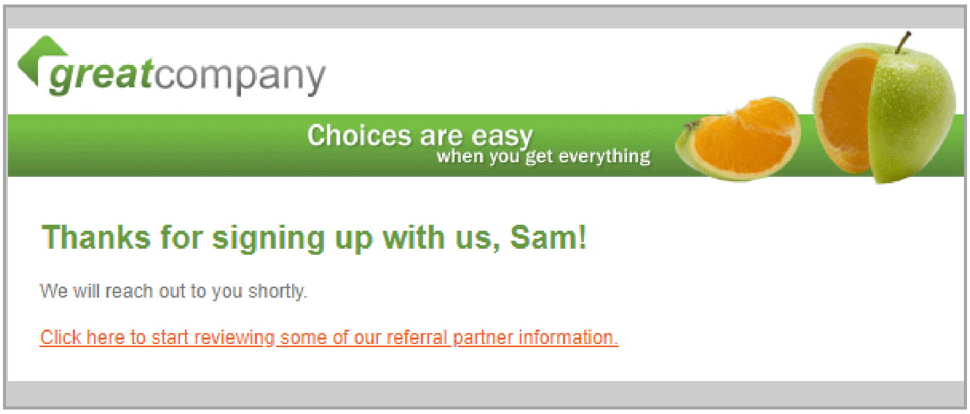


6. Locate the toggle in the upper right corner and click it from Draft to **Ready**.

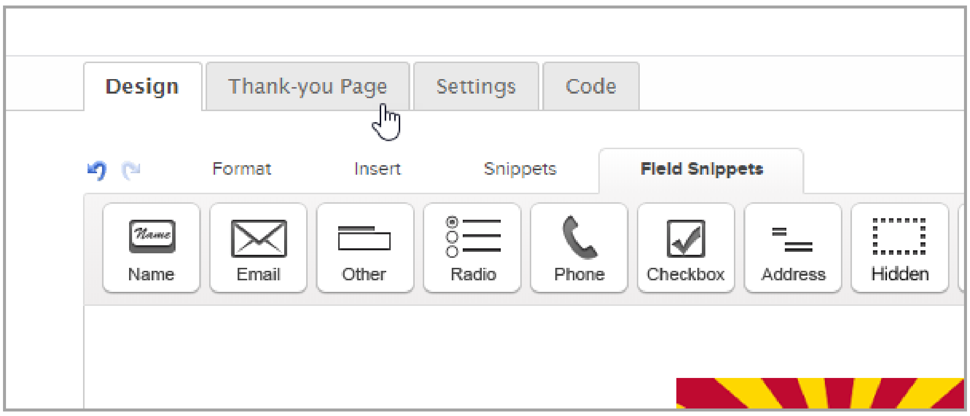


Set up a thank you page (optional)

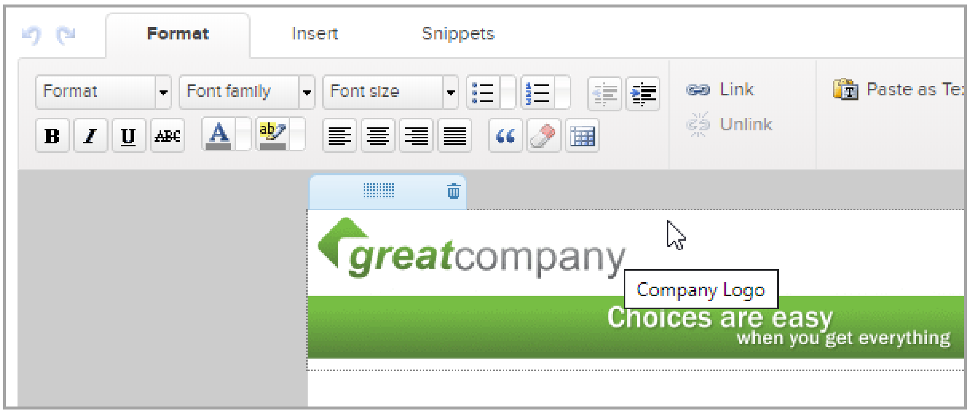
This is optional. You can create your own page in Max Classic or link to an external web page. A thank you page displays after someone fills out your referral partner sign-up form. Here's an example:



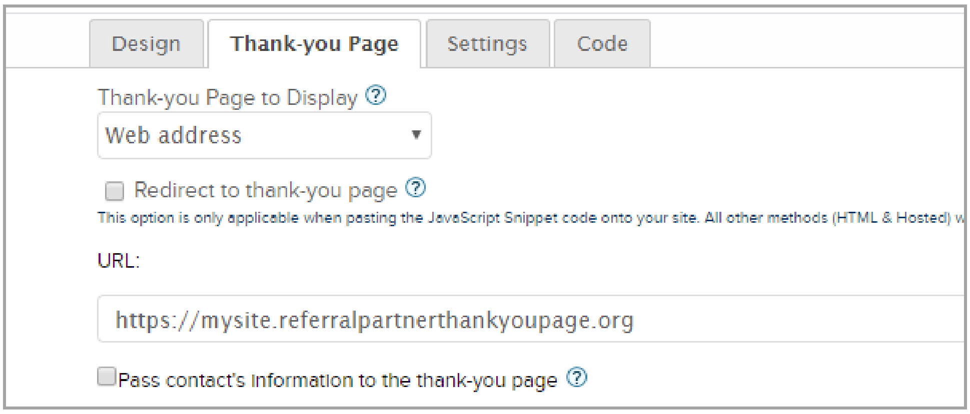
1. Click the **Thank-you Page** tab.



2. **Thank-you Page to Display** - you can either build your page in Max Classic or link to a URL on your external site.
    - To build your page in Max Classic, click the **Thank-you Page to Display** drop-down and select Thank-you page. Here, you can create and edit your thank you page. There may be a default example visible that you can edit or remove.



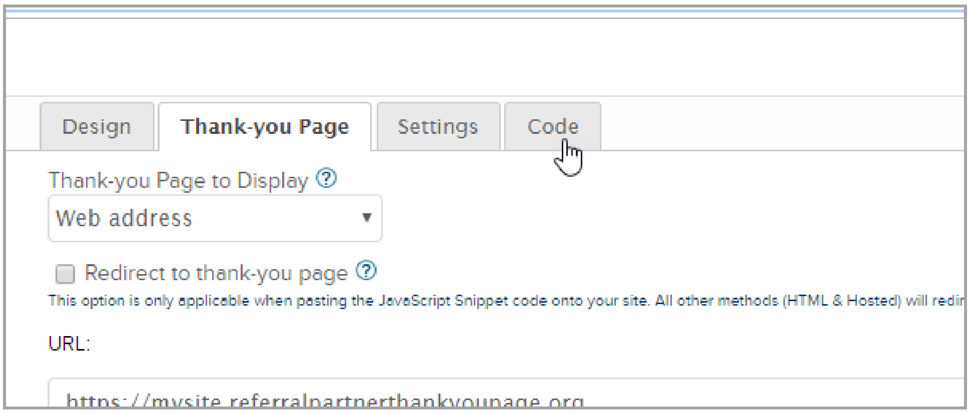
- To link to a thank you page on your external site, click the **Thank-you Page to Display** drop-down and select Web address. Enter your URL following the example format.



Edit your web form code

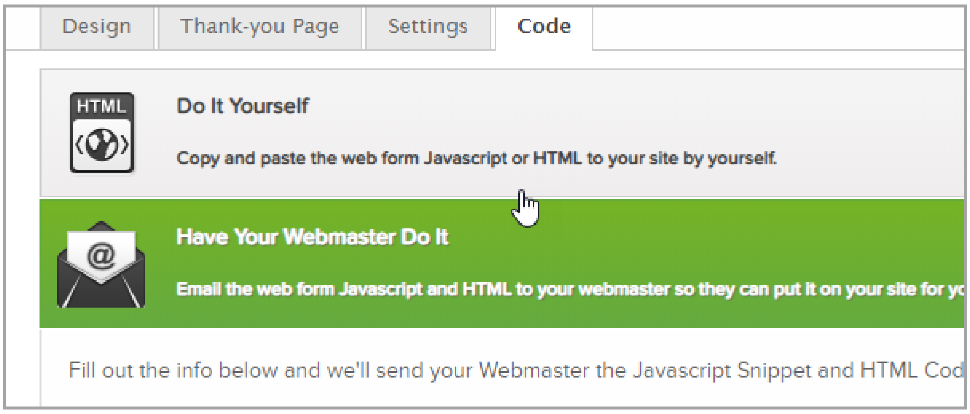
Choose where and how your sign-up page will be hosted.

1. Click the **Code** tab.

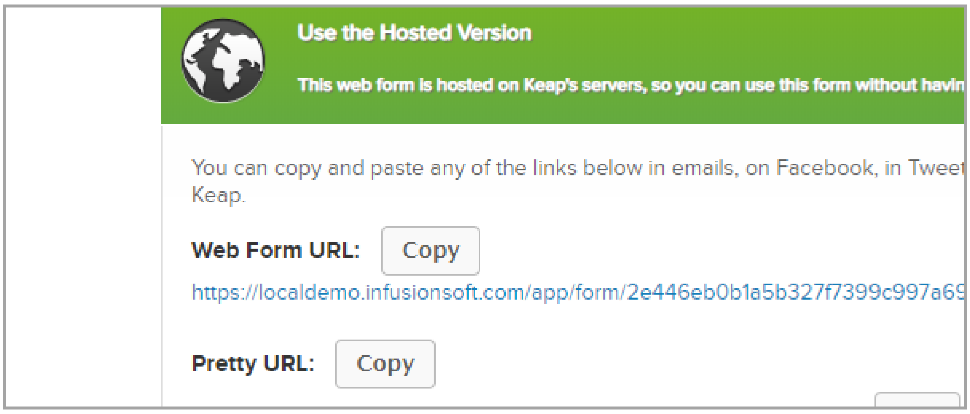


2. If you are hosting the sign-up form on an external business site, then you have the option to do it yourself or

your webmaster can do it.



3. If you want your sign-up form hosted on Keap's servers, use the hosted version.



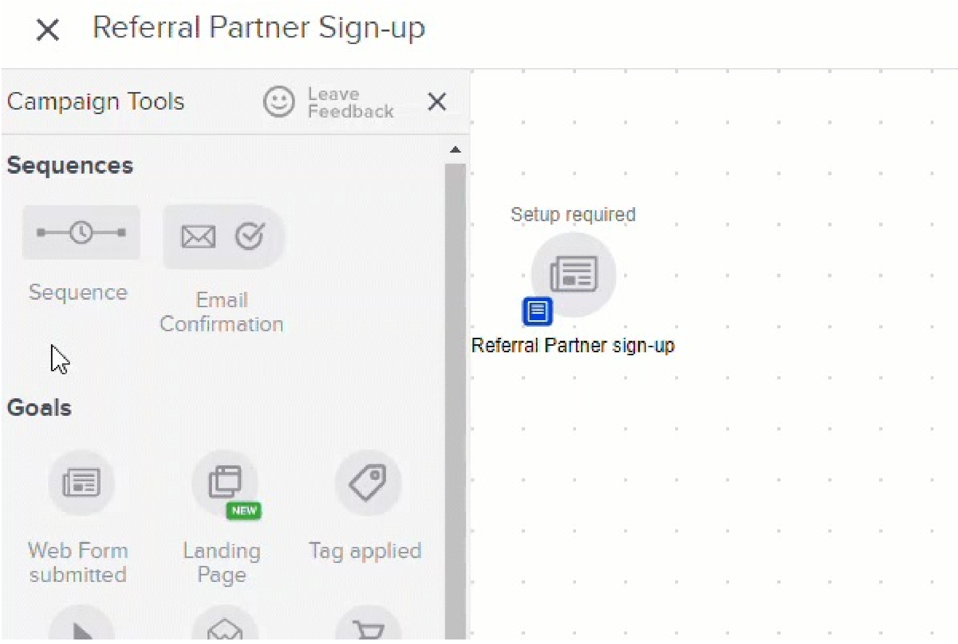
4. Locate the toggle in the upper right corner and click it from Draft to **Ready**.

Note: The Campaign must be published before the code and/or hosted URL to become active. You must also publish the campaign whenever changes are made to the web form. If you use the HTML Code you must copy it **after** the campaign is published.

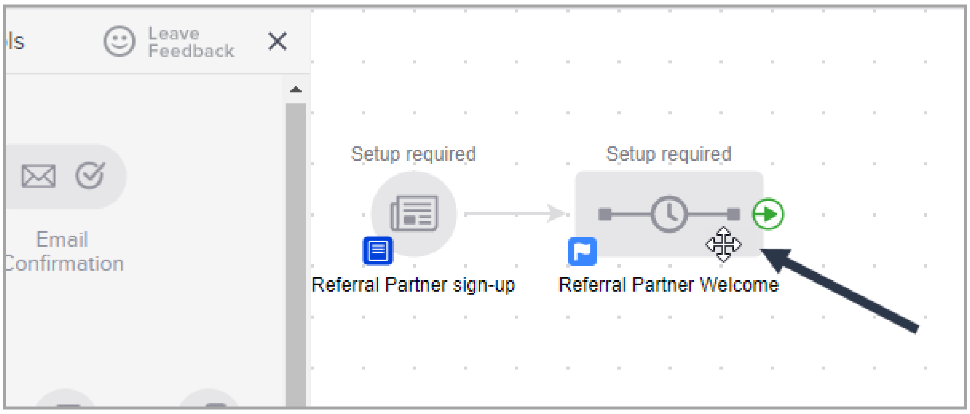
Add a referral partner welcome email to your campaign

Connect a campaign sequence to the web form goal so that new partners automatically receive a welcome email with a registration confirmation.

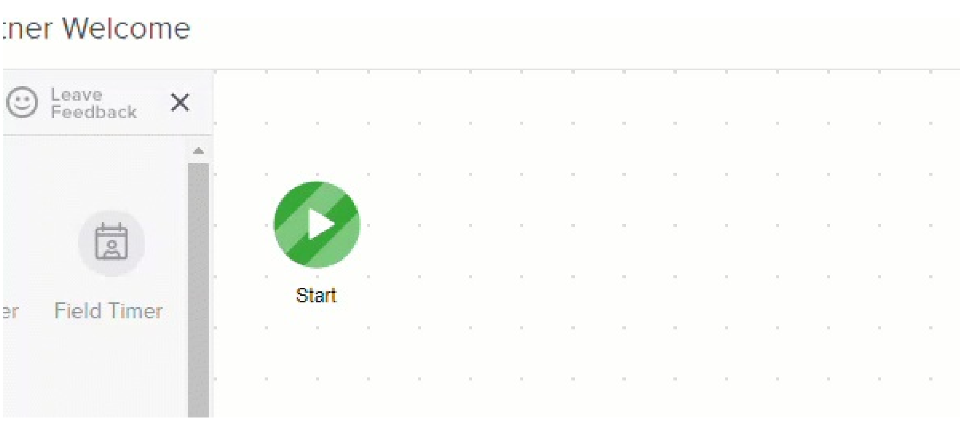
1. Drag a sequence to the campaign canvas and give it a logical name. Then, link the web form goal to the sequence.



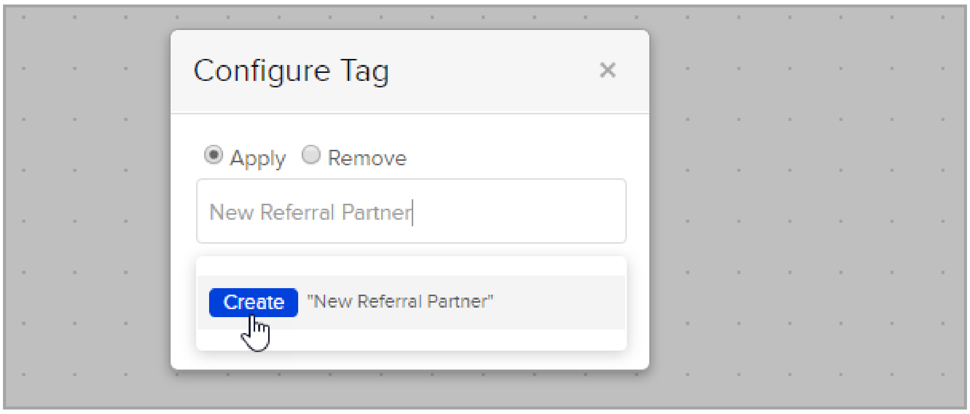
2. Double-click on the sequence.



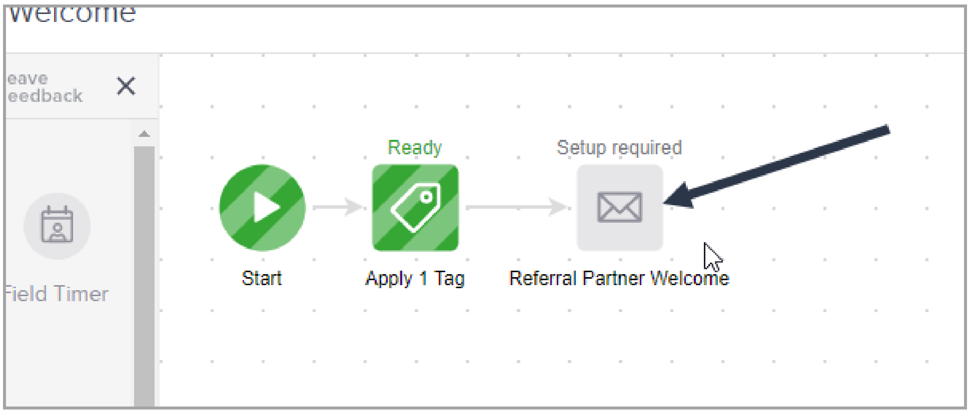
3. Drag and drop the **Apply/Remove Tag** and the **Email** sequence tools to the canvas. Name the email.



4. Double-click the **Apply/Remove Tag** sequence tool.
5. Click the **Apply** radio button. Enter a name and a category for your tag or select an existing tag. Click **Save**.

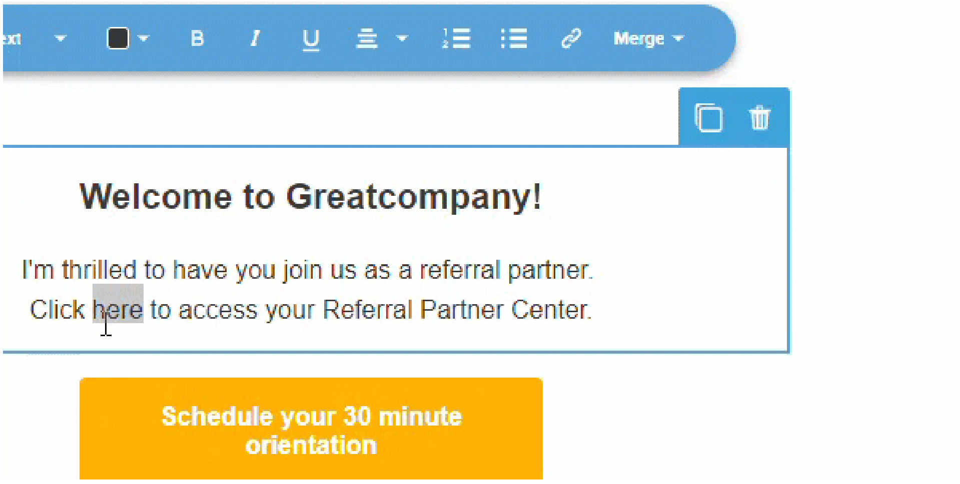


6. Double-click the **Email** sequence tool.

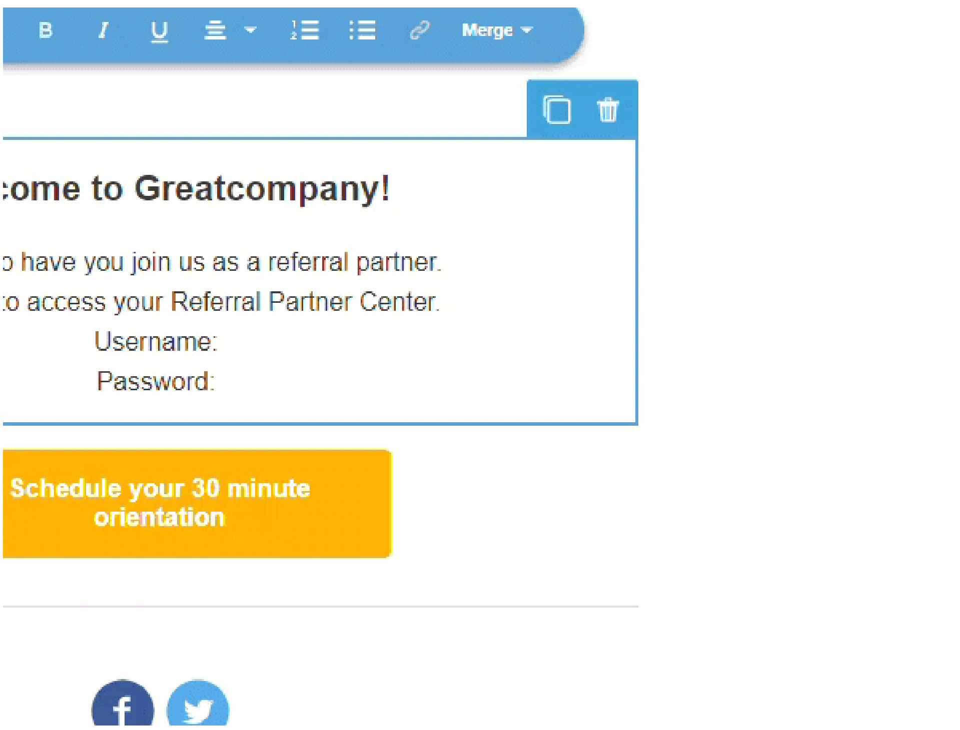


7. You can create your email from the Gallery options, My Templates, or select from the Actions menu. For more instructions on building emails, refer to the article How to use the Email Builder.

8. It's time to add your partner portal URL from the first step in this article. Copy and paste the URL into your email.



9. Next, your new referral partners will need their personal username and password so that they can log into your Referral Partner Center. If you use Merge fields, this information will auto-populate the individual referral partner's info into every welcome email.



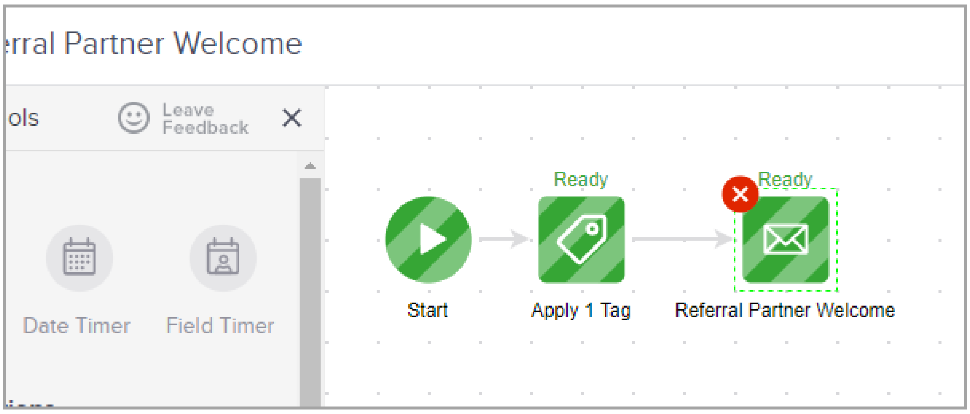
   1. Type 'Username:' in your email template with a space after.
   2. Click the **Merge** drop-down menu and select **Referral Partner Fields**.
   3. Select **Code** to insert the username merge field.
   4. Repeat the process for the password, this time click **Password** instead of Code to insert the password merge field.

10. When you have completed your email design, click the toggle in the upper right corner from Draft to **Ready**.

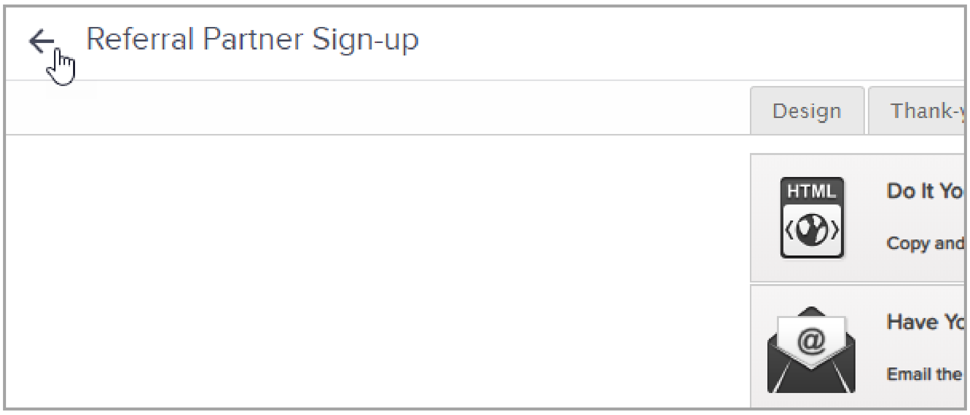
11. Click the <- arrow to return to your sequence. Now that it is complete, click the toggle in the upper right corner from Draft to **Ready**.

Publish your new campaign

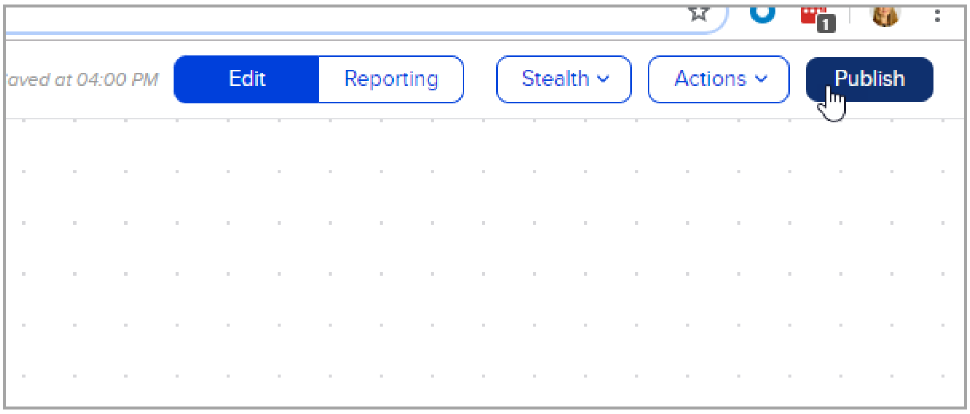
1. Now that all of your campaign elements indicate Ready, you are ready to publish your campaign.



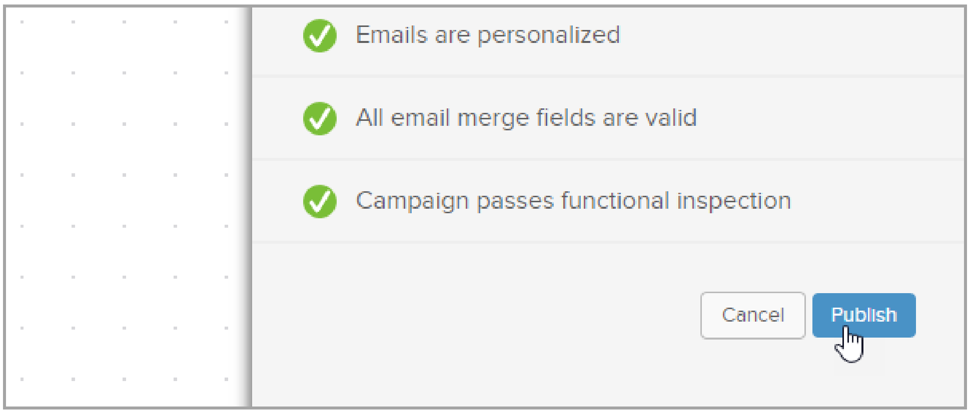
2. Click the <- arrow to return to your campaign.



3. Click **Publish**.



4. click **Publish** again.


Emails are personalized
All email merge fields are valid
Campaign passes functional inspection
Cancel
Publish