

Referral Partner Center Overview

This article applies to:

[Max](#)

[Max Classic](#)

The Referral Partner Center is a password-protected portal that your referral partners use to access their referral reports, generate redirect links, and acquire marketing and help materials that you provide for them (banner ads, email copy, etc...) The Referral Partner Center will give your referral partners easy access to the tools and information they need to be successful.

Sign in to the Referral Partner Center

1. Have your referral partner go to your account sign in page (<https://APPID.infusionsoft.com/app/authentication/login?isClientOrAffiliate=true>). The APPID will be replaced with your specific application. This Link is also found in your application in the main navigation CRM>Settings> Referral Partner Center (Left hand side menu)
2. The partner will then enter their sign-in credentials. Each referral partner is assigned a unique code. The code is their username. They also need a password, which is usually created by them when they first signed up as a referral partner on your website.

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Navigating the Referral Partner Center

Navigation is performed by clicking on the relevant menu option on the left-hand side of the page. There are three menu categories: **Home**, **Resources**, and **Reports**.

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- **Home:** The Home section gives partners access to update their contact information and the ability to view information regarding their commission program(s). You can choose to show or hide these individual menu options in **CRM > Settings > Referral Partner Center**.
 - Welcome: Shows the welcome message that you can edit in **CRM > Settings > Referral Partner Center**.
 - My Profile: Gives the partner access to view and update their profile information.
 - My Programs: Gives the partner access to a list of the program(s) they are enrolled in and the description you entered when you created the program.
 - My Commission Structure: Gives the partner access to the specific commission fees/percentages for their program(s).

 - **Resources:** The Resources section gives partners access to the tools they need to promote your products/services
 - They can generate their redirect links
 - They can access your promotional material: Advertising banners, Email Copy, and Resource Pages.

 - **Reports:** The Reports section gives partners access to commission, lead tracking, and sales reports. The **My Ledger** report will be a valuable tool they can use to access their financial earnings.
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