User Permissions - Referral Partners

These permissions determine how a user can interact with referral partner records. To access these User Permissions, go to **Admin > Users** and click **Edit Permissions** next to the user you would like to modify.

Can view all records

This permission controls the ability to view referral partner records. If this permission is set to *No*, the user is denied access to referral partner records.

Can edit all records

This permission controls the ability to update a referral partner record. If this permission is set to *No*, the user will see an *access denied* message when they try to edit and save updates to a referral partner record.

Can add

This permission controls the ability to create new referral partner records. If this permission is set to *No*, the user will not see the option to *Add a Referral Partner* from the main menu.

Can search

This permission controls the ability to search for referral partners. If the *Can add* permission is set to *Yes*, the user is still able to create a new referral partner record, but will not be able to search for them later.

Can delete

This permission controls the ability to delete referral partners. If this permission is set to

No, the user will not see the *Delete* button in a referral partner record or the *Delete Referral Partners* option under the *Actions* menu at the top of a referral partner search result.

Can set commissions

This permission controls the ability to set up commissions for individual referral partners within a referral partner record. If this permission is set to *No*, the user will be denied access if they try to add or edit a referral partner's commissions.

Can view commissions

This permission controls the ability to view partner ledgers from within a referral partner record or from the referral partner ledger report. If this permission is set to *No*, the user will be denied access if they try to view a referral partner ledger.

Can create payouts

This permission controls the ability to record commission payments in individual referral partner ledgers or batch record payments through the referral partner ledger report. If this permission is set to *No*, the user will not see the *Create Payment* button in individual ledgers or the *Create Referral Partner Payments* option in the *Actions* menu at the top of the referral partner ledger report.

Can delete payouts

This permission controls the ability to delete payments in individual referral partner ledgers or batch delete payments through the referral partner payment search. If this permission is set to *No*, the user will not see a *Delete* button when editing a payment record in a referral partner ledger or the *Delete Aff Payouts* option in the *Actions* menu at the top of the referral partner payment search.

Can manage referral partner programs

This permission controls the ability to view, create, and edit referral partner commission programs. The commission programs generally apply to groups of partners who earn the same commission. If this permission is set to *No*, the user will not see the *Commission Programs* option in the main menu. If this permission is set to *Yes*, the user can do everything required to set up and manage the commission programs.

Can manage referral partner redirects

This permission controls the ability to view, create, and edit referral tracking links. Referral tracking links are the links referral partners use in emails and web pages to get credit for their referrals. If this permission is set to *No*, the user will not see the *Referral Tracking Links* option in the main menu. If this permission is set to *Yes*, the user can do everything required to set up and manage the tracking links.

Can manage referral partner resources

This permission controls the ability to view, create, and edit partner promotional resources (emails, banners, and pages.) If this permission is set to *No*, the user will not see the *Promotional Resources*option in the main menu. If this permission is set to *Yes*, the user can do everything required to set upand manage the email, banner, and web page resources for your referral partners.

Can create affiliate records in bulk

This permission controls the ability to batch create referral partner records for a list of contacts.

Can set referring Referral Partner in bulk

This permission controls a user's ability to batch assign a referral partner to a list of contacts or opportunities. If this permission is set to *No*, the user will not see the *Create*

Referral Partner Referral option in the *Actions* menu at the top of a contact or opportunity search.