

Set Up and Manage Your Referral Partner Program in Infusionsoft®

Watch the Referral Partner Program Overview Video

Decide How Partners Will be Tracked

If two partners are marketing to the same person and the person clicks on both of the partner's links...which partner gets credit for the sale? Check out the [How Partners are Tracked](#) article to see how to configure your referral partner settings to properly manage these scenarios.

Configure the Default Commission Program Tracking and Payout Options

Just [a couple of things to configure here](#) before creating your first commission program. Will you be paying your affiliate a percentage of the sale or a flat rate...or both?

Create a Commission Program

Now that you have the basics down and have made some decisions on how you will be setting up your referral partner system, it's time to [cocreate your first commission program](#) in Infusionsoft.

Set Up Tracking Links

Now it's time to [create some tracking links](#) so that your referral partners can promote your products and services.

Set Up the Referral Partner Center

Next, it's time to [set up the referral partner center](#) so that your partners can sign in and generate links, build ads, and review their affiliate ledger. Note that the Referral Partner Center is a separate sign-in and doesn't use up any user licenses on your account. You'll also want to know how to quickly preview the referral partner center.

Understand How Your Referral Partners Can Leverage the Referral Partner Center

[Click here](#) to see articles created to help your referral partners take advantage of the referral partner center.

Build a Referral Partner Signup Campaign

Now that you have everything set up, it's time to automate! You can start by downloading a pre-built campaign, or you can build it from scratch.

1. The first thing you'll need to learn is how to [create a referral partner registration form](#) in the campaign builder.
2. Then, you'll want to learn how to [merge referral partner fields into an email](#) (like their user name and password).

Learn Referral Partner Reporting

Time to check out how well your referral partners are doing. It's important to know who your top partners are so that you can establish closer relationships with them.

