

Assign A Referral Partner To An Opportunity

Your company may have a partner program that pays referral partners commission for the leads they send to you. When a partner sends you a lead, you will need to make sure the referral is tracked in your opportunity record so that the affiliate will receive credit for the lead. The commission is calculated when the deal closes and a purchase is made.

1. While viewing an opportunity record, go to the *Set Lead Referral Partner* section and click on **Search**.

The screenshot shows a sidebar on the left and a main content area. The main content area has a header 'Set Lead Referral Partner:' followed by a text input field labeled 'Choose a referral partner id'. Below the input field are three links: 'Go', 'Search...' (which is highlighted with a mouse cursor), and 'Clear'. At the bottom of the section are four buttons: 'Save' (green), 'Save & Search', 'Delete', and 'Select an action'.

2. Search for and select a referral partner to attach to the opportunity.

The screenshot shows a 'Pop-up Search Referral Partner' dialog box. It has a 'Search Criteria' section with a dropdown menu set to 'contains' and an empty search input field with a 'Search' button. Below this is a table with three columns: 'Id', 'Link', and 'Name'. The table contains three rows of data. A mouse cursor is clicking on the '[Select]' link in the 'Link' column of the first row.

Id	Link	Name
1	[Select]	Samantha
3	[Select]	Professional Organization
5	[Select]	Professional Organization

3. Click on the **Save** button to apply the update.