

An Introduction to Referral Partner Management🔗

Chat Support

The Infusionsoft by Keap Referral Partner component helps you extend your marketing reach through partner relationships. It includes tools to help you enroll, equip, track, and reward the referral partners (affiliates) who help sell your products. It works hand-in-hand with the CRM and E-Commerce components to automatically track referrals and commissions.

Referral Partner Center

Upload banner ads, emails, and other collateral for your affiliates to use in their marketing efforts. Partners sign in to the Referral Partner Center to access these marketing materials and to view their tracking statistics (i.e. link clicks, opt-ins, sales.)

Reporting

Reporting tools that allow you to see the number of new leads your partners are driving to your site and automatically tracks the partner as the referral source so you know whom to pay when the sale is made.

Tracking

Automatic tracking that calculates commission payouts and produces ledger reports that tell you how much to pay partners so you can issue payments through your bookkeeping system, PayPal, etc.

MLM

Ability to create a tiered structure that encourages partners to recruit other partners for your program. The "parent" partner can receive commission for sales made by the people they recruit (the "child" partner.)

Enroll Referral Partners

Use Infusionsoft web forms to set up a new referral partner account in Infusionsoft, assign them to a commission program, and automate follow up.

Track Productivity

The Referral Partner component automatically tracks online partner referrals through tracking links. Referral partners log into an Affiliate Center to access their tracking links and other marketing resources, like emails and website banners. They can also monitor their own activity by accessing reports that give them real-time information about the number of leads they send to you and those that convert to sales.

Pay Commissions

Infusionsoft tracks affiliate-generated sales and automatically calculates commissions based on the programs you

set up. The commission programs pay out a flat fee or a percentage based on the price of the product(s) sold. You can run a ledger report each payment period to view commissions due. After you send referral partner checks or pay them electronically, you can zero-out ledger balances by marking the ledgers as "Paid."

Keap HQ

1260 S. Spectrum Boulevard
Chandler, AZ 85286

Contact: +1 866 800 0004
Contact (Local): +1 480 499 6500
Support: +1 480 499 6500
Fax: +1 480 391 8177

Europe/Middle East/Africa

Contact: +44 (0) 808 258 0093
Support: +1 480 499 6500
Fax: +44 (0) 8456 122 061

Asia/Pacific

Contact: +61 1800 730 419
Support: +1 480 499 6500
Fax: +61 (0) 2 9994 8008