Merge Referral Partner Info Into Emails

There are 2 types of referral partner merge fields: Referral Partner Fields and Referral Partner's (Contact) Fields. These merge fields can be used to personalize Email, Letter, and Task Templates. These merge fields work just like any other template merge fields. You are able to merge in the following standard partner fields and any custom referral partner record fields you create: Referral *Partner* Fields and Referral *Partner's* Fields.

Referral *Partner* Fields

These fields pull information from the referral partner record associated with the person you're communicating with. You'll use these merge fields in partner follow up messages and/or internal notifications. The Referral Partner Fields include:

- **Aff Name**: Merges in the referral partner name, which may be different from the person's name if the partner record created manually. The referral partner name, might be an organization name instead of an individual's name.

- **Aff Code**: Merges in the referral partner's code. This code serves as a "username" when the affiliate logs into the Referral Partner Center. It is also part of every referral tracking link. If you are not using the partner center, you can use this merge field to send a redirect link by email.

  For Example: The referral partner code is the only thing that differentiates one referral tracking link from another. The default format for a tracking link is: https://ices.infusiontest.com/go/FBVS/**dcamp**. In this link, **dcamp** is the partner's code. You can send this link in an email by replacing the actual code with a merge field (~Affiliate.AffCode~) https://ices.infusiontest.com/go/FBVS/**~Affiliate.AffCode~**. When you send the email to a group of referral partners, each partner's unique code will be merged from their referral partner record.

- **Password**: Merges in the partner's sign in password. They need this password to log into the Referral Partner Center.

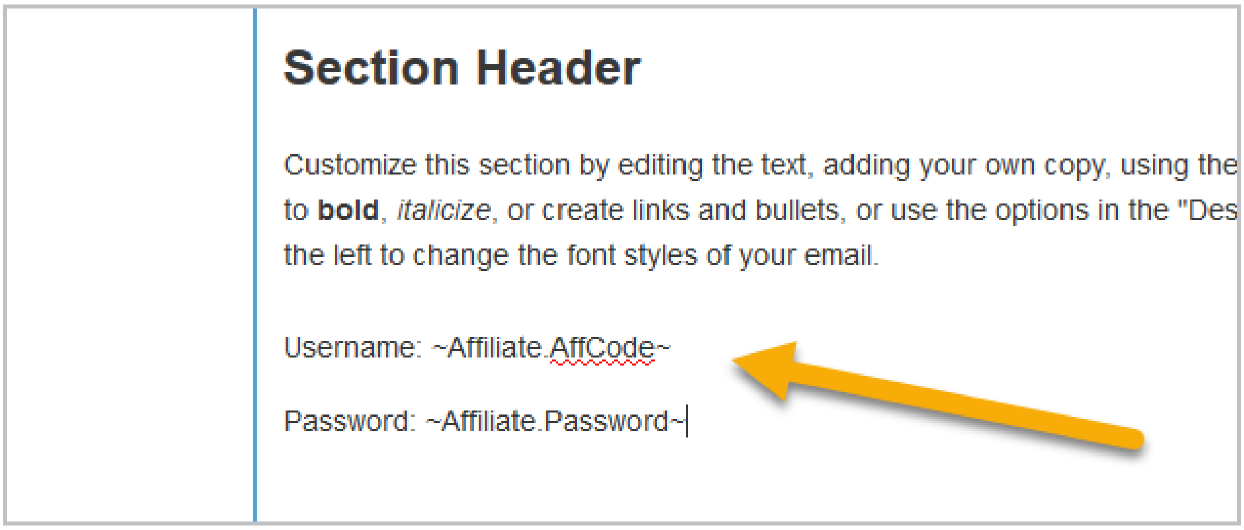
- **Notify Lead or Notify Sale**: Merges in the affiliate's email notification preference. They cannot change these preferences themselves, but you can change them upon request by editing a referral partner record.

- **Lead Cookie For:** Merges in the Credit Window. The Credit Window limits the number of days a partner is eligible for lead or sale commissions after one of their referrals clicks on an affiliate redirect link.

To use these fields in an email,

1. Click inside the email where you would like to enter the merge field
2. Click the Merge button in the blue bar
3. Select Referral Partner Fields
4. Select the Merge Field

For example, this would merge in the username and password of the referral partner.



Referral *Partner's* (Contact) Fields

These fields pull information from an affiliate's contact record instead of their partner record. The information is pulled when a follow-up sequence or broadcast is sent to a list of prospects or customers. These merge fields can be used to send a personalized Thank You to a partner when one of their referrals opts-in or buys, for internal notifications, to cc partners on the communications you send to their referrals, etc. There is a generous list of merge fields to choose from.