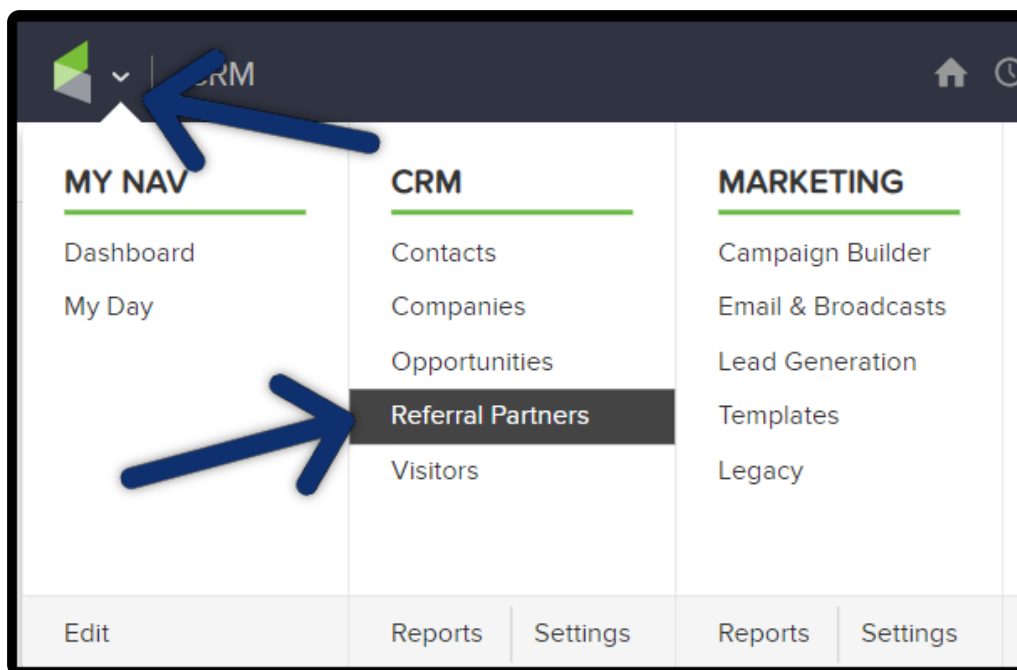


# Create a commission program🔑

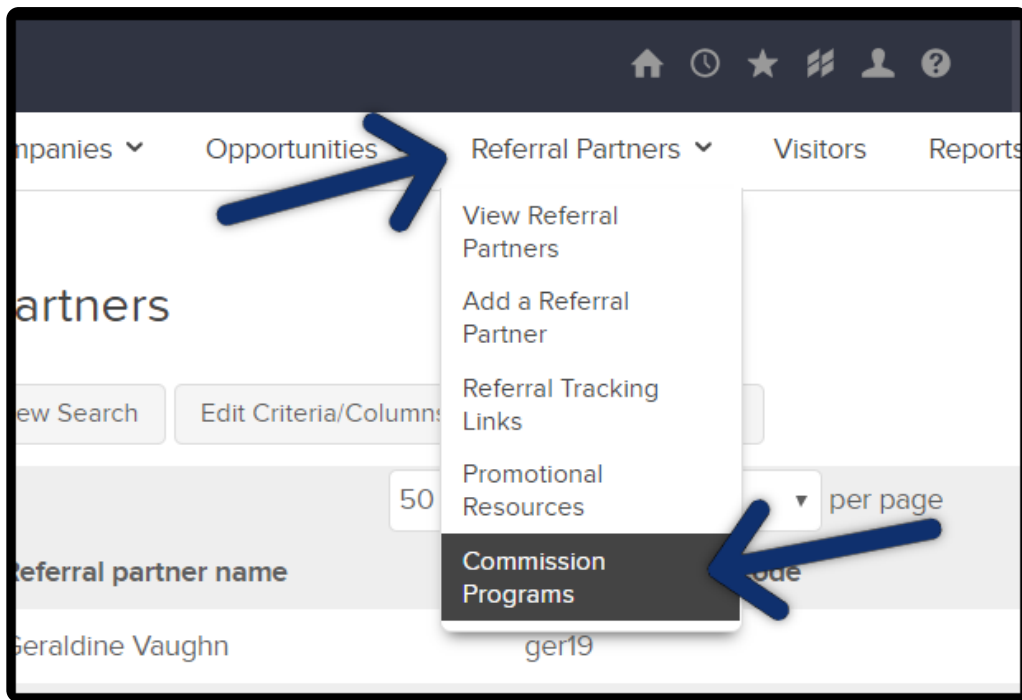
A commission program defines the payment structure for a specific group of referral partners. You can create multiple programs, each with its own set of commissions and products. The commissions apply to every partner enrolled in the commission program; however, you can override program commissions for individual cases.

## Setup a commission program

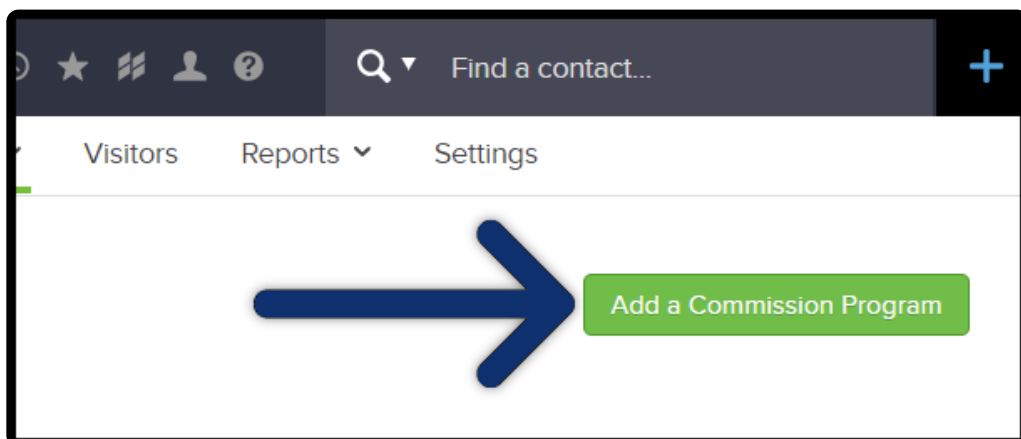
1. Go to **CRM > Referral Partners** in the main navigation menu



2. Select **Commission Programs** from the Referral Partners menu



3. Click on the **Add a Commission Program** button to create a new commission program



Provide the following information in defining a commission program:

- **Name:** A name/title of the program
- **Notes:** A description about the program
- **Priority Number:** The priority number determines which commission program takes precedence if a partner is enrolled in more than one program.

Contacts ▾ Companies ▾ Opportunities ▾ Referral Partners ▾

## Manage Referral Partner Program

**Information**

Name

Notes

Priority

After the commission program is saved there will be three commission program sections.

- Default commission
- Product commission
- Subscription plan commission

When changing/editing the program it does not recalculate existing orders.

## Default Commission

Default commissions apply to ALL of the products AND subscription programs you sell in Infusionsoft by Keap. The default commissions will also apply to each new product or subscription program you add in the future.

Click "**Edit**" to the payout type and commission levels

SaveDelete

Default Commissions

Default commissions will be paid for products and subscriptions plans that do not have an override specified below.

Product	Price	Level 1	Pay Ty	Cyc
Default	N/A	Not Set	Not Set	N/A

[Edit]

## Default payout type

- Up-Front Credit in Full:** The amount of the commission will be given based on the total amount **currently paid** on the order

Commission Information

Referral Partner Program

Bronze level commission

Description

Default

Payout Type

Up-Front Credit In Full

*Example: An order of \$100.00 with a payment plan is placed. So far, \$50 of the order (50%) has been paid. The commission program will pay 10% of the order. \$10.00 commission is calculated, and currently \$5.00 commission is given to the affiliate.*

- Credit on Customer Payment:** If you choose this option, the partner will not get credit for the sale or receive any commissions until after the customer pays the total amount due. For one time orders, this is the full purchase amount. For subscriptions, this is the amount due on the first billing cycle.

Commission Information

Referral Partner Program

Bronze level commission

Description

Default

Payout Type

Credit On Customer Payment

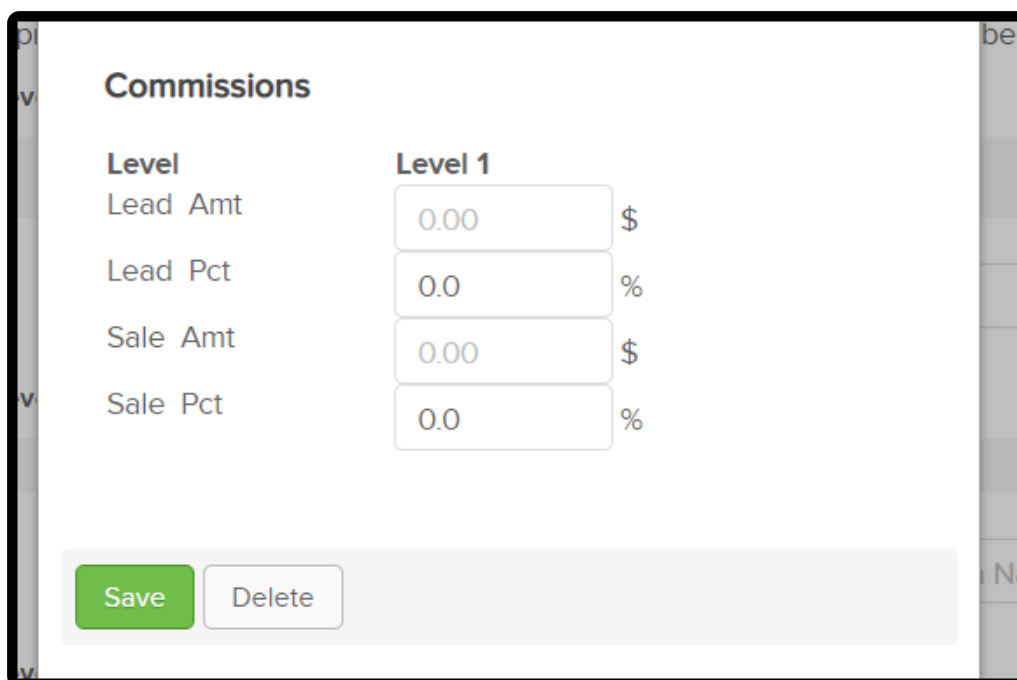
*Example: An order of \$100.00 with a payment plan is placed. The commission*

*program will pay 10% of the order. On first successful payment, \$10.00 commission is calculated, and the affiliate earns \$10.00.*

**Note:** Chargebacks (refunds and voids) which take back the commissions (clawback) earned does not apply for this method.

## Default level

- Add the amount of the commission to be paid on purchase by level



The screenshot shows a web form titled "Commissions". It has a table with two columns: "Level" and "Level 1". The "Level" column lists four categories: "Lead Amt", "Lead Pct", "Sale Amt", and "Sale Pct". The "Level 1" column contains input fields for each category, with the values "0.00", "0.0", "0.00", and "0.0" respectively. To the right of each input field is a unit indicator: "\$" for "Lead Amt" and "Sale Amt", and "%" for "Lead Pct" and "Sale Pct". At the bottom of the form, there are two buttons: a green "Save" button and a grey "Delete" button.

Level	Level 1	
Lead Amt	0.00	\$
Lead Pct	0.0	%
Sale Amt	0.00	\$
Sale Pct	0.0	%

**Note:** To setup the commission levels and select if it's a flat rate or percentage, go to CRM > Settings > Referral partner defaults

## Create an override

Any product and/or subscription commission can have an override created. The override has the highest priority of all linked commission programs.

## Product commissions

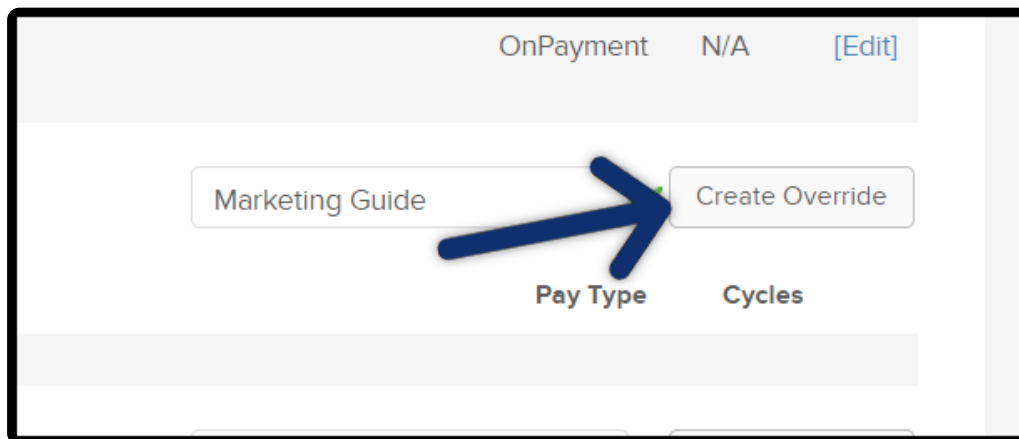
To override a specific product in the commission program:

1. Type the product name



The screenshot shows the 'Product Commissions' form. At the top, there are tabs for 'Default', 'N/A', and 'Not Set', with an '[Edit]' link. Below the tabs, the form title 'Product Commissions' is displayed. To the right of the title is a 'Product Name' input field with a red 'x' icon and a 'Create Override' button. A blue arrow points to the 'Product Name' input field. Below the input field, there are labels for 'Product', 'Price', 'Level 1', 'Pay Type', and 'Cycles'.

2. Click "Create Override"



The screenshot shows the 'Product Commissions' form. At the top, there are tabs for 'OnPayment' and 'N/A', with an '[Edit]' link. Below the tabs, the form title 'Marketing Guide' is displayed. To the right of the title is a 'Create Override' button. A blue arrow points to the 'Create Override' button. Below the button, there are labels for 'Pay Type' and 'Cycles'.

## Subscription plan commissions

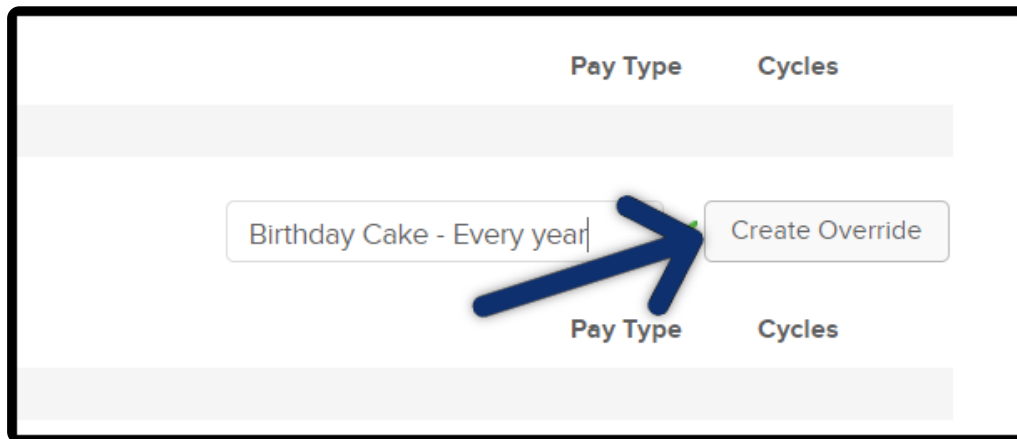
To override a specific subscription product in the commission program:

1. Type the name of the subscription



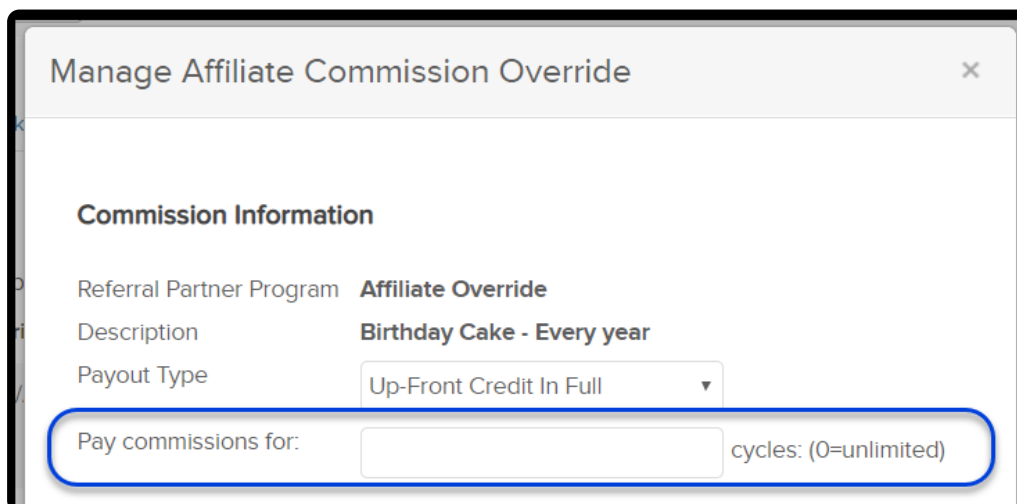
The screenshot shows the 'Subscription Plan Commissions' form. At the top, there are tabs for 'Default', 'N/A', and 'Not Set', with an '[Edit]' link. Below the tabs, the form title 'Subscription Plan Commissions' is displayed. To the right of the title is a 'Subscription Plan Name' input field with a red 'x' icon and a 'Create Override' button. A blue arrow points to the 'Subscription Plan Name' input field. Below the input field, there are labels for 'Product', 'Price', 'Level 1', 'Pay Type', and 'Cycles'.

2. Click "Create Override"



Pay Type	Cycles
Birthday Cake - Every year	<button>Create Override</button>

**Subscription cycles:** Enter a Cycle limit for subscriptions. This setting gives you the ability to limit the commission on subscription programs to a specific number of billing cycles. The default is 0, meaning the partners are eligible for commissions every time the customer pays a recurring charge related to a subscription program.



### Manage Affiliate Commission Override

**Commission Information**

Referral Partner Program **Affiliate Override**

Description **Birthday Cake - Every year**

Payout Type **Up-Front Credit In Full**

Pay commissions for:  cycles: (0=unlimited)