

Monitor Referral Partner Activity🔗

As an affiliate program manager, you'll want to be able to see which affiliates are most active so you can reward top performers and / or fulfill on incentives you've promised. There are several Referral Partner Reports (**CRM > Reports > Referral Partners**) that will help you manage your programs and evaluate individual referral partner performance.

Referral Partner Activity Summary

The referral partner activity summary report shows referral partner performance within a specific date range. It summarizes the number of clicks (on a referral tracking link), web form opt-ins (all opt-ins are counted, not just unique opt-ins), and sales. You can filter this report by date range, number of clicks / opt-ins / orders, dollar value of orders, and affiliate. It will also show you the number and value of recurring orders (subscriptions.)

Referral Partner Redirect Activity Summary

The Referral Partner Redirect Activity Summary shows performance for the referral partners' Sales Websites - or the performance for the tracking links available to them. Within the report, you can monitor the number of clicks to the Sales Website, number of opt-ins gained, number of orders, as well as the sum of all orders gained from that sales website. You can edit the report criteria to show Redirect Activity for specific referral partners to help monitor their performance.

Referral Partner Referral Report

The referral partner referral report is more robust. It allows you to search by and display information from the contact record and referral partner record making this report more customizable. You might use this report to view a list of customers who were referred by a specific referral partner within a specific date range. If you apply a product-specific tag when customers buy from you, then you can also narrow down results by products purchased. You can filter this report by referring partner, referred person, Tag(s), referral partner record custom fields, and more.

Field Name	Description
ID	Referral Partner ID number
Name	Referral Partner Name
Num Clicks	Number of clicks from all of their links within the date range selected

Field Name	Description
Num Opt Ins	Number of web form and shopping cart submissions connected to their Referral Partner within the date range
Num Orders	The number of orders connected to the Referral Partner within the date range
Sum Orders	Sum of the order total of all the orders connected to the Referral Partner within the date range
Num Recurring	Number of subscription records connected to the Referral Partner within the date range
Sum Recurring	Sum of the subscription total for all subscriptions connected to the Referral Partner within the date range.