## Add commission program to referral partner record %

To create a commission program review this article, "Create a commission program "

## Add a commissions program to your referral partner

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



2. Click "New search"



3. Enter the Search Criteria for your referral partner

| Contact Info       | Referral Partner Info | Commission Info | Custom Fields |
|--------------------|-----------------------|-----------------|---------------|
| Commission Program | n contains any        |                 |               |
|                    | New Program           |                 |               |
|                    | Standard Commis       | sion Program    |               |
|                    | Percentage            |                 |               |
|                    | Bronze level com      | nission         |               |
|                    | Subscription Enrol    | llment          |               |
|                    | System Commissi       | on              |               |
|                    |                       | -               |               |

4. Click "Edit" next to the referral partner you are adding the commission to

| Referr   | al Partr | ners                   |           |                    |
|----------|----------|------------------------|-----------|--------------------|
| Actions  | New Se   | arch Edit Criteria/Col | umns Save | e Print            |
| 1-2 of 2 |          |                        | 50        |                    |
|          | Edit     | Referral partner name  | e         | Referral partner o |
|          | [Edit]   | Geraldine Vaughn       |           | ger19              |
|          | [Edit]   | Ryker Leigh            |           | rleigh             |

5. Below the Referral partner information is the commission programs. Select the commission program from the drop down.



6. Click "Add"

| Commission Programs            |          |                       |          |  |  |  |
|--------------------------------|----------|-----------------------|----------|--|--|--|
| Add: Bronze level commission   | •        |                       | Add      |  |  |  |
| Name                           | Priority | Date Added            | Remove   |  |  |  |
| Standard Commission<br>Program | 1000     | 2019-02-22 13:52:03.0 | [Remove] |  |  |  |
| Save Delete Login              |          |                       |          |  |  |  |

7. The commission program you selected will be listed below

| Commission Programs            |          |                       |          | Aus |
|--------------------------------|----------|-----------------------|----------|-----|
| Add: Commission Program        | •        |                       | Add      | Ed  |
| Name                           | Priority | Date Added            | Remove   | No  |
| Bronze level commission        | 3        | 2019-03-10 16:54:12.0 | [Remove] |     |
| Standard Commission<br>Program | 1000     | 2019-02-22 13:52:03.0 | [Remove] |     |
| Save Delete Login              |          |                       |          |     |

Below the Commission programs is that commissions tab, which will allow you to add overrides to the commission programs and/or specific products and subscriptions. For more information regarding overrides, click here

## Global Override

Global override will give that Referral Partner commission for that product whether or not they are a lead or sale affiliate. So, If you have a partnership with someone and you want to give them a percentage of all the sales you get, then add the global override and then they don't have to be set as the Referral Partner on the order.

1. Click "Override"



2. Enter an amount or percentage in the "Global Override" field

| Level    | Level 1 | I  | Level 2 |    | Global Ove | rride |
|----------|---------|----|---------|----|------------|-------|
| Sale Amt | 0.00    | \$ | 0.00    | \$ | 0.00       | \$    |
| Sale Pct | 0.0     | %  | 0.0     | %  | 10.0       | %     |
|          |         |    |         |    |            |       |

3. Click "Save"

| Level    | Level 1 |    | Level 2 | (  | Global Ove | rride |        |
|----------|---------|----|---------|----|------------|-------|--------|
| Sale Amt | 0.00    | \$ | 0.00    | \$ | 0.00       | \$    |        |
| Sale Pct | 0.0     | %  | 0.0     | %  | 10.0       | %     |        |
|          | 4       |    |         |    |            |       | pFront |
| Save     |         |    |         |    |            |       | pFront |

**Note:** When the "Global Override" is set that referral partner will receive the commission regardless of being the referral partner for that contact. The "Global

Override" is meant to give that referral partner a commission for every unit sold, period.

