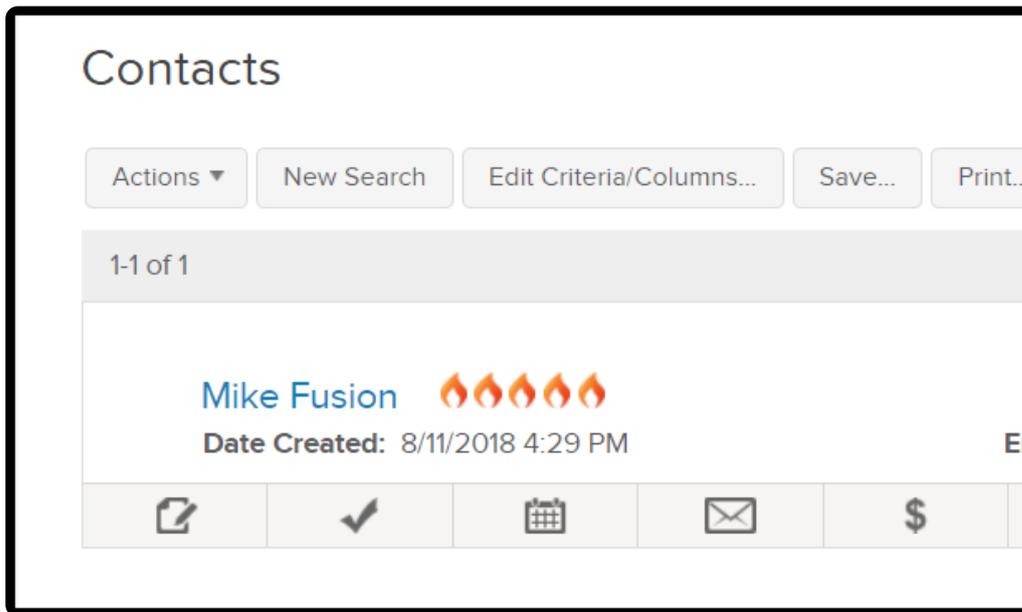


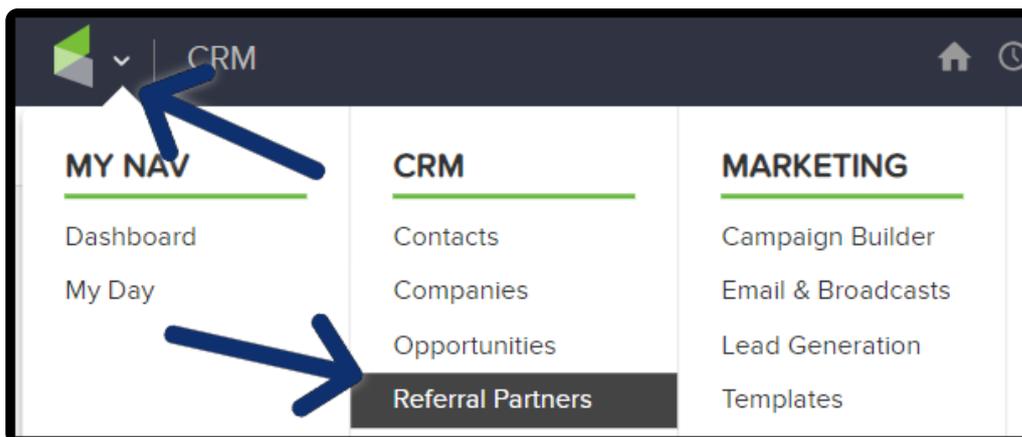
Create a new referral partner record

Follow the directions below to create a new referral partner manually.

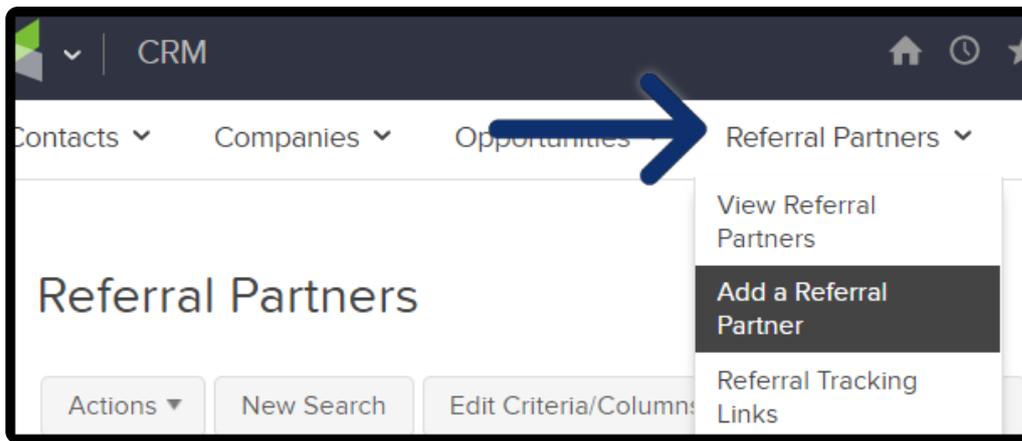
1. Make sure a contact record for the partner already exists before continuing



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



3. Select Add a Referral Partner from the Referral Partners menu



4. Type the name of the contact you are created the Referral Partner record for

A screenshot of the 'Manage Referral Partner' form. The title 'Manage Referral Partner' is at the top. Below it is a tab labeled 'General'. Underneath, there is a section titled 'Referral Partner Information'. This section contains three input fields: 'Contact' with a dropdown menu, 'Name', and 'Code'. A blue arrow points to the 'Contact' dropdown menu. Below the 'Code' field, there is a red error message: 'Must start with a letter (no spaces)'. There is also a small red 'x' icon next to the 'Contact' dropdown.

5. Add a name for your referral partner. It can be the same as the contact's name, or it can be an entity that the contact is associated with (e.g. a professional organization.)

Manage Referral Partner

General

Referral Partner Information

Contact ✓

Name

Code

Must start with a letter (no spaces)



6. Create a code that will be used as the referral partner's tracking code:
 - a. It is included in all of the referral tracking links and resources
 - b. It's the referral partner's username when logging into their referral partner center
 - c. The code must start with a letter with no spaces

Manage Referral Partner

General

Referral Partner Information

Contact ✓

Name

Code

Must start with a letter (no spaces)



7. The password will log the referral partner into their referral partner center. You can merge this password into follow-up email since you are creating the password for them.

Name

Code

Must start with a letter (no space)

Password ←

Parent

Status

8. The parent referral partner to this referral partner. However, you cannot select self as the parent. This is optional.

Code

Must start with a letter (no spaces)

Password

Parent

Status

Yes No

9. Select "Active" from the drop down otherwise the referral partner will be created as inactive

Parent

Status ←

Notify On Lead Yes No

Notify On Sale Yes No

Track leads for days. (Set as 0 for unli

Cart Skin

10. Select whether or not to send a notification when a lead or sale is made

Parent

Status

Notify On Lead Yes No

Notify On Sale Yes No

Track leads for days. (Set as 0 for unlimited)

Cart Skin

11. The number of days to track the lead. Limit the number of days the referral partner's tracking cookie is active after a link click. Leave this field blank if you do not want to limit the credit window.

Notify On Lead Yes No

Notify On Sale Yes No

Track leads for days. (Set as 0 for unlimited)

Cart Skin

12. The cart skin is a legacy shopping cart theme to use when customers access the shopping cart through this referral partner. This is optional.

Notify On Lead Yes No

Notify On Sale Yes No

Track leads for days. (Set as 0 for unlimited)

Cart Skin

13. Click on the "Save" to create the referral partner record

Notify On Lead Yes No

Notify On Sale Yes No

Track leads for days. (Set as 0 for unlimited)

Cart Skin

Save

