Referral Partner Sign Up Form %

A referral partner sign-up form allows people the ability to sign-up for your referral partner program. Before creating the sign up form, set up the commission program they will be assigned to. To setup your commission programs, click here

When someone fills out the referral partner sign up form, several things automatically occur:

- A contact record is created (if none already exist.)
- A referral partner record is created.
- The referral partner is assigned to a partner program.
- 1. Go to Marketing > Campaign Builder to add or edit a web form goal in a campaign

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MY NAV	CRM	MARKETING	E-CON	
Dashboard	Contacts	Campaign Builder	E-Comr	
My Day	Companies	Email & Broadcasts	Orders	
	Opportup"	Lead Generation	Product	
	Referral Partners	Templates	Actions	
	Visitors	Legacy	Promoti	
			Legacy	
Edit	Reports Settings	Reports Settings	Reports	

2. Drag the Web Form goal to the campaign canvas

🗧 Campaigns > Webi	inar Now
Campaign Tools	ave edback 🕊
Sequences	
Sequence Email Confirmation	
Goals	
Web Form Landing Ta submitted Page	ag applied
	(5)
Email Link Product Qu clicked purchased	Jote status
Web Page Internal automation Form co submitted	Task ompleted
Opportunity Note applied Le Stage a moved	ead Score achieved

Configure the Sign-Up form

1. Double click on the web form goal



2. Go to the Field Snippets tab

·	•						
	Design	Thank-y	ou Page	Settings	Code		
	م د	Format	Insert	Snippe	ets	Field Snippets	
	Format Font family Font size Font size						
							000

3. Drag the "Partner" snippet and drop it into the desired location on the form

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← → C	unnel/funnelEditor?funnelId=2987&Sidebar=true	어 Q ☆ O O Paused 🌒 :
Kebinar Now > Referral partner sign up		Test V Actions V Draft
	Design Thank-you Page Settings Code	
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	Click to view larger	

Configure the Referral Partner options

• **Parent**: (Optional) The parent is the partner who referred the person filling out the form. This only applies if you have two or more levels in your referral program. The parent partner earns commission when the people they recruited sell your products.

	Referral Partner Settings	×		
pets	Parent ⑦			
	Parent Referring Referral Partner			
	Backup Parent Type to search ×			
	Programs ⑦			

• **None**: Choose *none* if you do not have two or more levels in your referral program. This is the most typical setting.

	Referral Partner Settings			
opets	Parent 🕐			
	Parent	Referring Referral Partner	•	
	Backup Parent	None Referral Partner		×
	Programs ⑦	Other		
	Add to Bro	onze level commission w Program		A

• **Referring Referral Partner**: Choose this if you want Infusionsoft to automatically assign a parent partner based on referral link tracking. You can also assign a backup referral partner. The backup will be the parent partner if the new referral partner did not click on any type of referral tracking link before signing up.

	Referral Partner Settings				
ets	Parent 🕐				
_	Parent	Referring Referral Partner	•		
	Backup Parent	None		_	
		Referring Referral Partner	×		
	Programs ⑦	Other 🖑			
	Add to Bro	onze level commission		A	
	No	W Program	_		

• Other: Choose other if you want one parent partner assigned to everyone

filling out this web form. Use this option when you create a co-branded signup page to recruit referral partners through a specific strategic or joint venture partner.

	Referral Partner Settings						
ets	Parent (2)						
		Other •					
		g	×				
	D	Geraldine Vaughn					
	Programs 🕐						
	Add to	Ryker Leigh	A				
		New Program					

- **Programs:** Add people to a commission program or remove them from a commission program
 - Add to: Any contact that submits the form will have the selected commission programs added



• **Remove from:** Any contact that submits the form will have the selected commission programs removed from their Referral partner record



- **Referral Partner Notifications**: Do you want partners to receive a notification email when someone they refer signs up or buys something?
 - Choose **Yes** or **No** depending on if you want the referral partner to receive a notification email on a new lead or sale



• **Referral partner defined** lets the partner to decide for themselves when they sign up



Note: If you want to send email notifications to referral partners, make sure

the "Skip notifications on orders and web forms?" located under CRM > Settings > Referral Partner Settings > Referral Partner Defaults is set to "No"

Referral Partner
Referral Partner Code Prefix:
Skip notifications on orders and web forms? Yes No 🔍
Tracking
How to choose Referral Partner: Latest referring

- Credit Window
 - Add a number for the amount of days the referral partner's tracking cookie is active after a link click

Pa	Chinew Sale Refe	erral Partner Defined 🔹	
C	Credit Window 🕐		
N	Referral Cookie Expires After	20	Days
N			×
S		Save Cance	

• Leave blank if you do not want to limit the credit window

Pa	Referral Partner Defined
C	Credit Window ③
N	Referral Cookie Expires After Days
N	4
S	Save Cancel

• Click the Save button when you are finished configuring the sign up form



Thank you page

1. Click the "Thank-you Page" tab

Referral partner sign up						
	Design	Thank-you I	Page	ngs	Code	
	20	Format	Insert		ts	Field
	Format	✓ Font family	Font size	•		
	BZU	ABC A			"	

- 2. From the "Thank-you Page to Display" select
 - a. Thank you page Hosted thank you page that you design in the web form goal



b. Web address - add a URL to redirect once the form is submitted

Thank-you Page to Display	0
Web address	v
Redirect to thank-you p This option is only applicable when pa URL:	age ⑦ asting the JavaScript Snippet code onto your site. All other methods (H
https://referralpartner	resource.alwayshelpful.org
Pass contact's information	to the thank-you page ⑦

Web form code

- 1. Click the "Code" tab
- 2. Select one or more ways to access your form:
 - a. **Do It Yourself** Copy and paste the web form Javascript or HTML to your site by yourself



b. Have Your Webmaster Do It - Email the web form Javascript and HTML to your webmaster so they can put it on your site for you

Have Your Webmaster Do It Email the web form Javascript and HTML to you	rr webmaster so they can put it on your site for you.
Fill out the infe below and well conducin Webman	ter the Jaugestint Spinnet and LITML Code with instructions on how to install this form on your site
Your Email Address:	ter the Javaschpt Shipper and Frime Code with instructions of how to install this form on your site.
Amanda Madsen	Y
Your Webmaster's Email Address:	
Your Message (optional):	
	8
Send Email	

c. Use the Hosted Version - This web form is hosted on Keap's servers, so you can use this form without having to actually put it on your site



d. Share This With Your Network - Tell your followers about this web form

3	Share This With Your Network Tell your followers about this web form.						
Network	to Share With: 🔊						
🗆 📘 Tvi	itter	Edit					
Share!							

Note: The Campaign must be published before the code and/or hosted URL to become active. You must also publish the campaign whenever changes are made to the web form for it to update, if you are using the HTML Code it needs to be copied **AFTER** the campaign has been published, then use that code to update your pages.



1. Click "Ready" and then click back to the campaign

Referral Partner welcome email

Connected a campaign sequence to the web form goal so that new partners will receive a welcome email and a confirmation their registration.

1. Drag sequence to campaign canvas and drag from the web form goal to the sequence

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← → C (a) https://yq263.infusionsoft.com/app/funnel/funnelEditor?funnelId=2987	🖈 🗿 🍳 Paused 🌒 🗄
🗲 Campaigns > Webinar Now	t Reporting Actions ~ Publish
Campaign Tools 💮 Leave Keedback «	
Sequences	
Sequence Email Confirmation	
Coals	
Referral partner sign up	
Web Form Landing Tag applied submitted Page	
Email Link Product Quote status clicked purchased	
Web Page Internal Task automation Form completed submitted	
Opportunity Note applied Lead Score Stage achieved moved	
API WordPress Landing Ont-In Pane	

2. Double click the sequence



3. Add any elements you want to run along with the welcome email



4. Provide the login URL

Here are your log	Here are your login details for the member's area						
Referral Partner F	Referral Partner Portal: click here						
Username: ~Affili Password: ~Affilia	Username: ~ <u>Affiliate.AffCode</u> ~ Password: ~Affiliate.Password~						
Let us know if you	Let us know if you have any questions,						
R	Amanda Madsen						
Media							
	amanda.madsen@alwayshelpful.org						
	(414) 399-9899 - Mobile						
	WWW.INTUSIONSOTL.COM/						

• The partner portal URL is found by going to CRM > Settings > Referral Partner Center Default

<	CRM			f © *	#10 0	Find a contact	+	
Contac	ts 🗸	Companies Y Opportunit	ties 🖌 Re	ferral Partners 👻	Visitors Reports ~	Settings		
Car	npaig	ns			Go to the	e Strategy Guide	eate my own Campaign	
Searc	h		Search	Category SI	now all categories	Manage Cate	gories	
Acti	ons 🔻							
1-18	of 18		50		per page			
	ld	Name		Categories		Active Contacts	Published Date	
	3031	[MP-19] Launch a Referral F Program	Partner			0		
	3013	Sales				0		
	3011	Purchase Session		Sales		2	2/22/2019 12:45 PM	
	2987	Webinar Now				0	3/19/2019 6:20 PM	
	2979	Opportunity Goals		Follow Up		0	3/8/2019 11:13 PM	
	2937	Quiz		Follow Up		0	10/31/2018 5:05 PM	
	2925	KB Follow Up All		Follow Up		0	9/11/2018 6:54 PM	
•	2921	KB Follow Up Both HC		Follow Up		0	9/18/2018 2:01 PM	
	2917	KB Follow Up KB Classic H	łC	Follow Up		0	9/11/2018 6:45 PM	
	2913	KB Follow Up Knowledge		Follow Up		0	9/19/2018 9:35 AM	
	2909	KB Follow Up New Infusion Guides	nsoft Help	Follow Up		0	9/11/2018 6:09 PM	

5. Add the Referral partner merge fields for their username and password



6. Click Merge and scroll down to Referral Partners

➡ DETAILS			
Normal Text \bullet $\square \bullet$ B $I \ \cup \equiv \bullet \ ; \equiv ?$	Merge 🔻		
	Contact Billing Address	>	•
	Contact Shipping Address	>	
Hello ~ <u>Contact.FirstName</u> ~,	Contact Optional Address	>	
Welcome to our referral partner program!	Owner Fields (most common)	>	
Here are your login details for the member's area	Owner Fields (additional)	>	
	Logged-in User Fields (most	>	
Referral Partner Portal: <u>click here</u>	Logged-in User Fields (additi	>	
Licername: - Affiliate AffCode-	Your Company Fields (most	>	
Password: ~Affiliate.Password~	Your Company Fields (additi	>	
Latus know if you have any questions	Client	>	
Let us know il you have any questions,	Employee	>	
	Spouse	>	
	Referral Partner Fields	>	
Amanda Madsen	Referral Partner's Fields	>	
Media amanda madsen@alwayshelnful.org	Date	>	
(414) 399-9899 - Mobile	Campaign Fields	>	•
www.infusionsoft.com/			

a. Username will use the "Code"



b. Password will use "Password"

Normal Te	xt ▼	}≡ :≡ ∂	Merge 👻			
			K Referral Partner Fields			
			. Id			
Hello ~Contact Fi	r <mark>stName</mark> ∼,		Name			
Welcome to our re	erral partner program!		Code Password			
Here are your log	in details for the member's area	7	Notify Lead			
			Notify Sale			
Referral Partner F	'ortal: <u>click here</u>		Lead Cookie For			
Username: ~ <u>Affiliate.AffCode</u> ~ Password: ~Affiliate.Password~						
Let us know if you	rhave any questions,					
	Amanda Madsen					
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THE NUMBER OF A	annanaaaaaa aa aa aa aa aa aa aa aa aa a					
	(414) 399-9899 - Mobile					

When done switch the email from "Draft" to "Ready"



Also switch the sequence from "**Draft** to "**Ready**"



To activate your web form and sequence click "Publish"

•				
	Edit	Reporting	Actions	Publish
1				7