

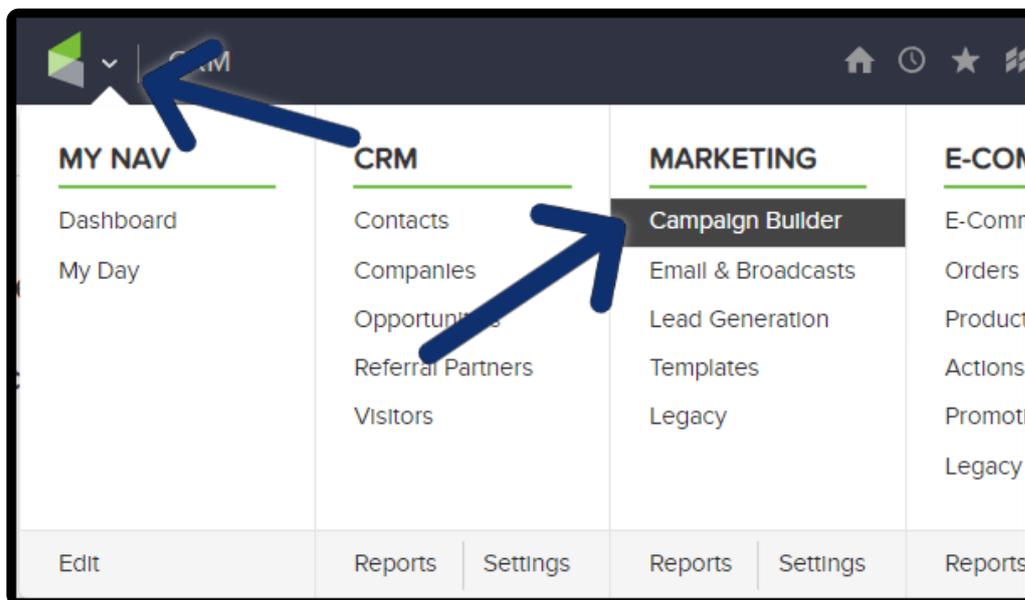
Referral Partner Sign Up Form

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](#)

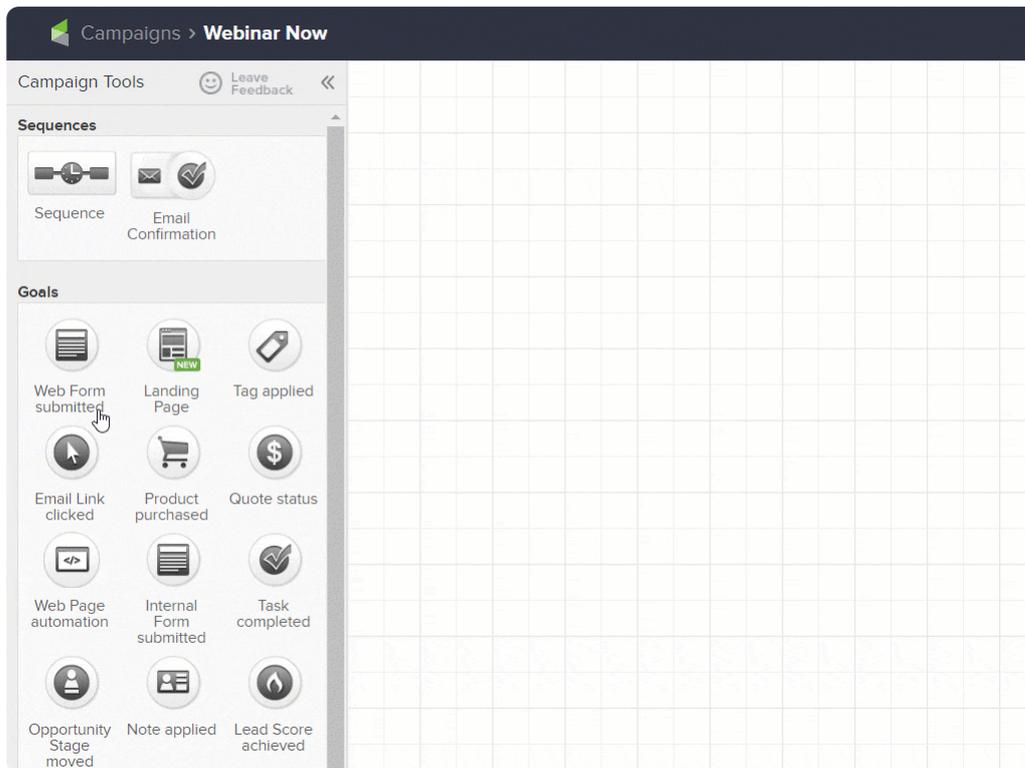
When someone fills out the referral partner sign up form, several things automatically occur:

- 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

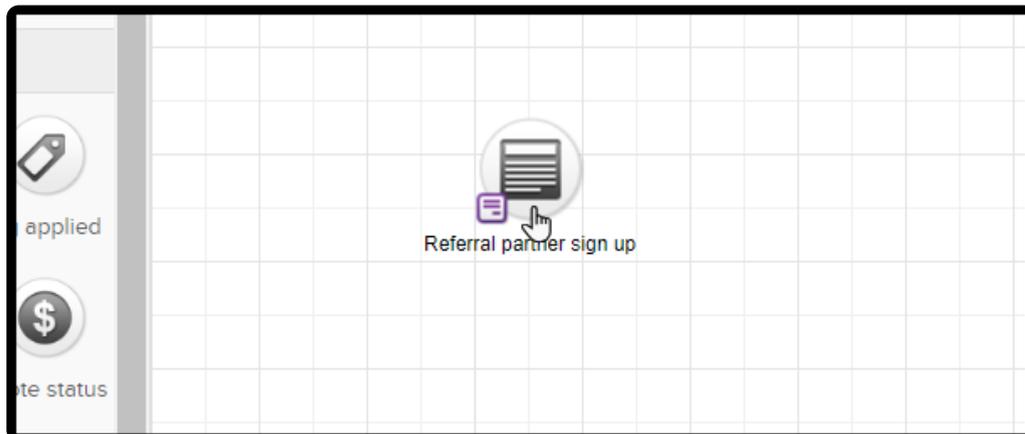


2. Drag the Web Form goal to the campaign canvas

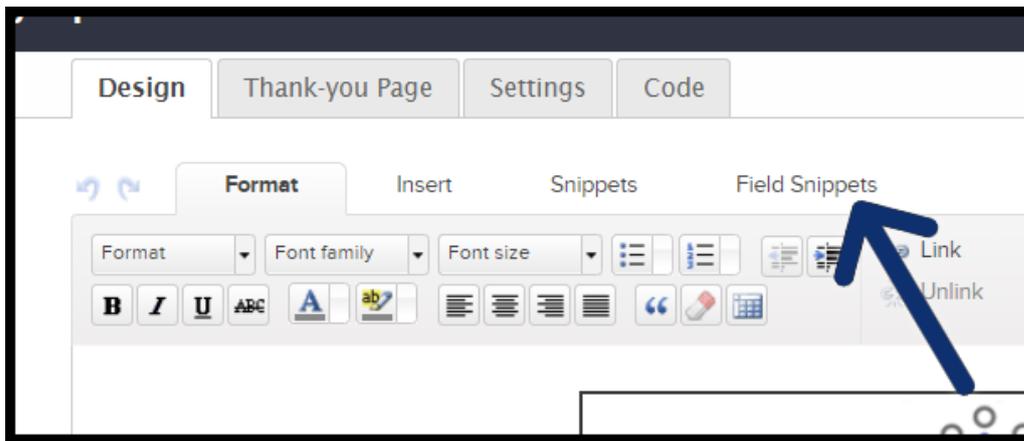


Configure the Sign-Up form

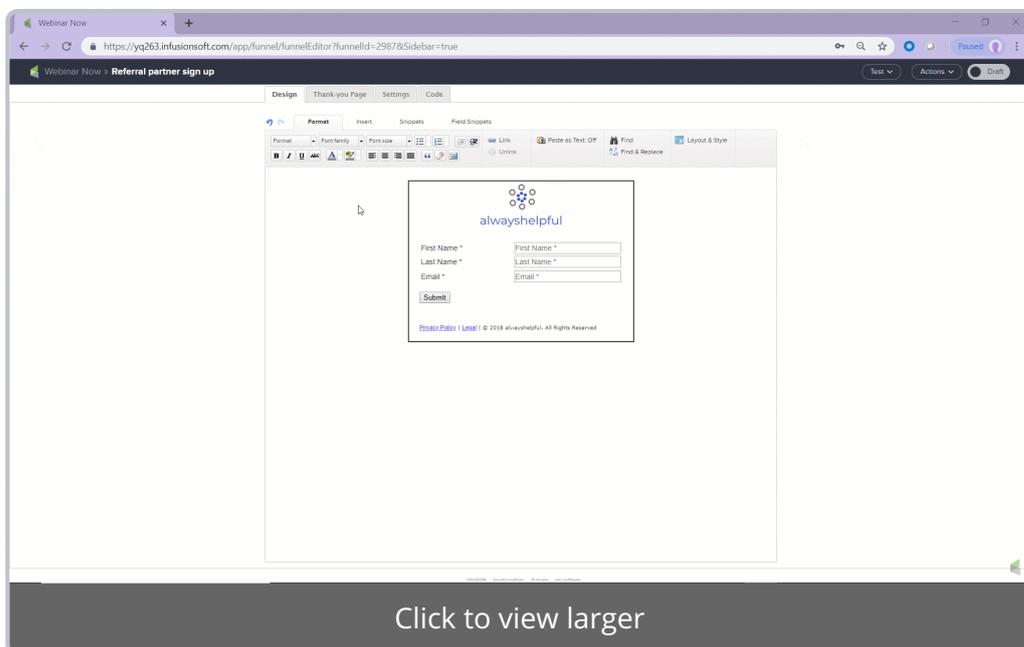
1. Double click on the web form goal



2. Go to the Field Snippets tab

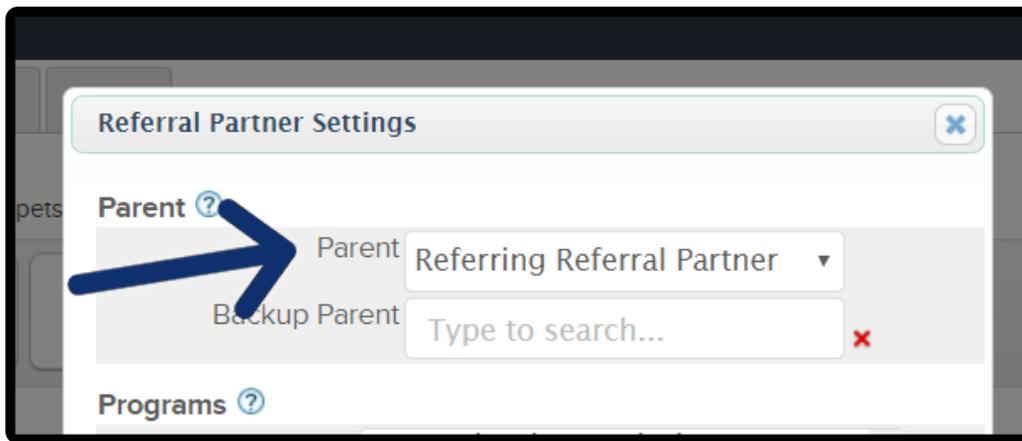


3. Drag the "Partner" snippet and drop it into the desired location on the form

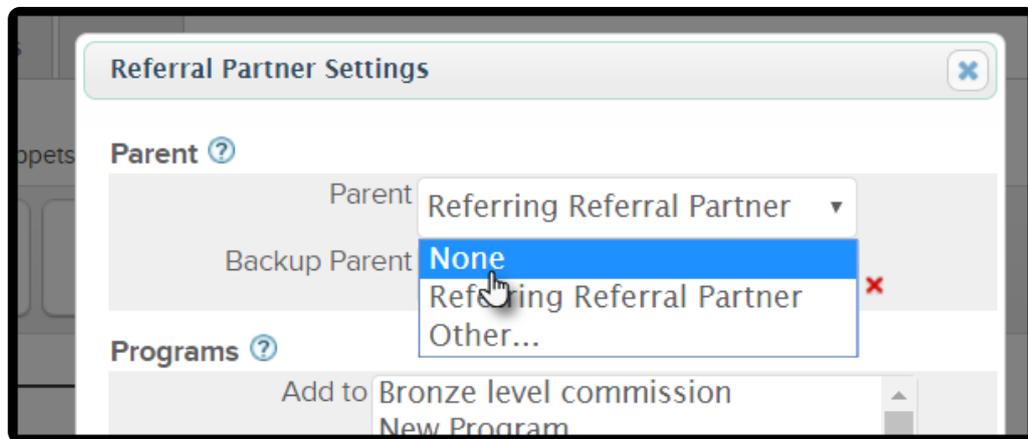


Configure the Referral Partner options

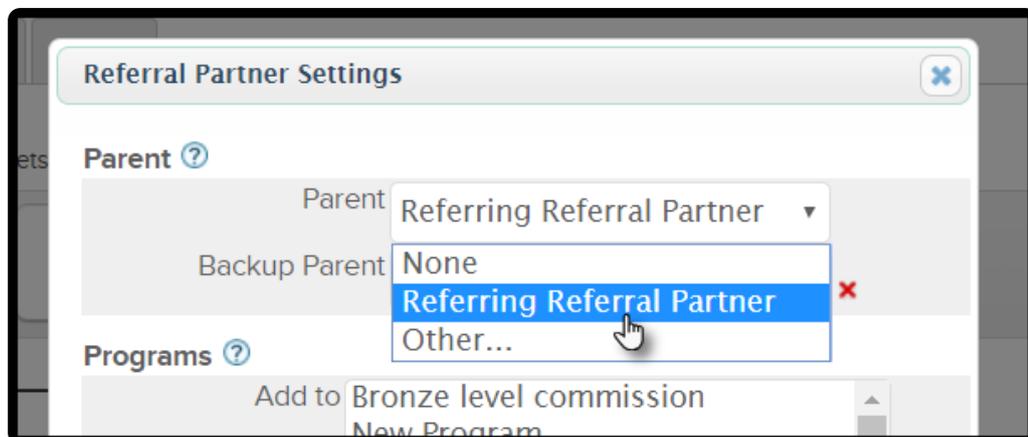
- **Parent:** (Optional) The parent is the partner who referred the person filling out the form. This only applies if you have two or more levels in your referral program. The parent partner earns commission when the people they recruited sell your products.



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

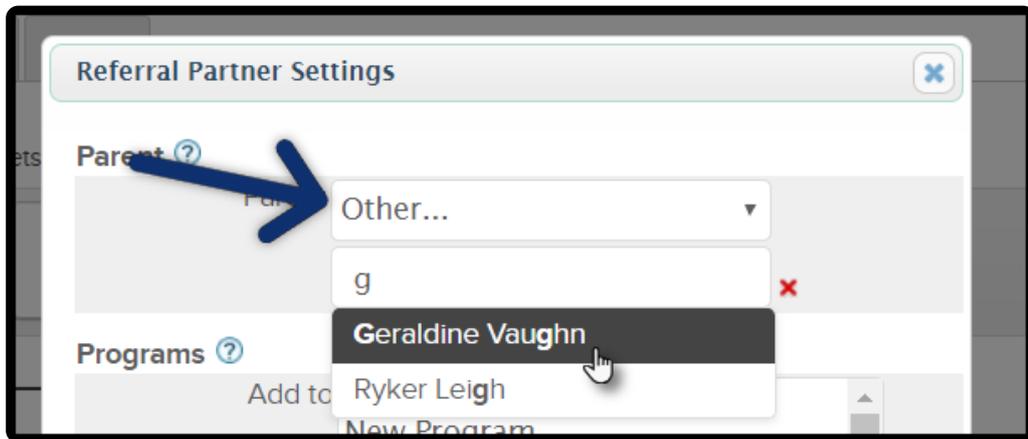


- **Referring Referral Partner:** Choose this if you want Infusionsoft to automatically assign a parent partner based on referral link tracking. You can also assign a backup referral partner. The backup will be the parent partner if the new referral partner did not click on any type of referral tracking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

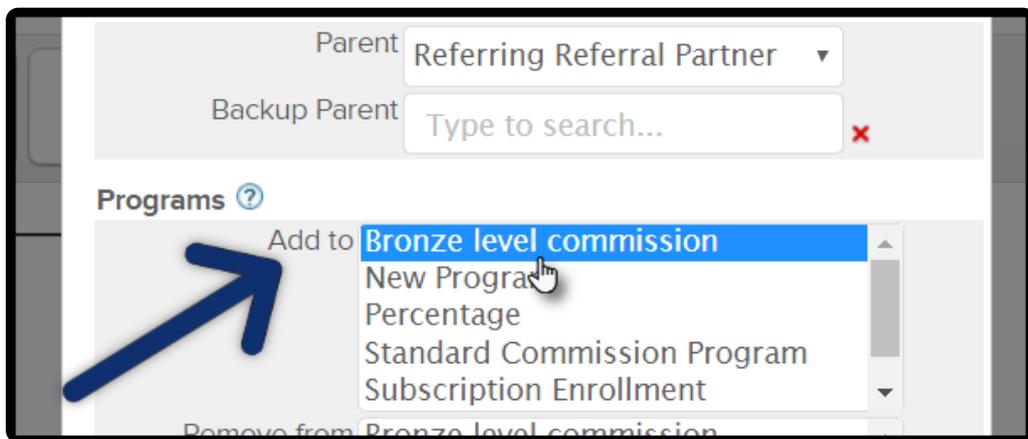


- **Other:** Choose other if you want one parent partner assigned to everyone

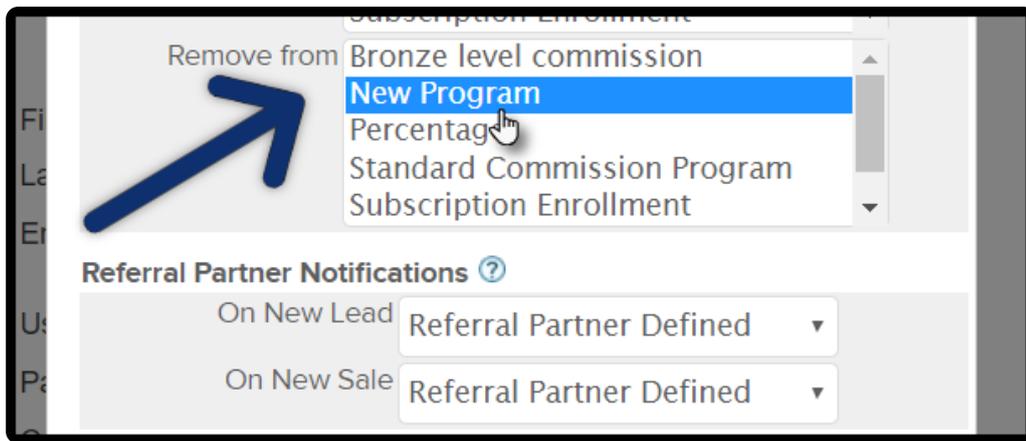
filling out this web form. Use this option when you create a co-branded sign-up page to recruit referral partners through a specific strategic or joint venture partner.



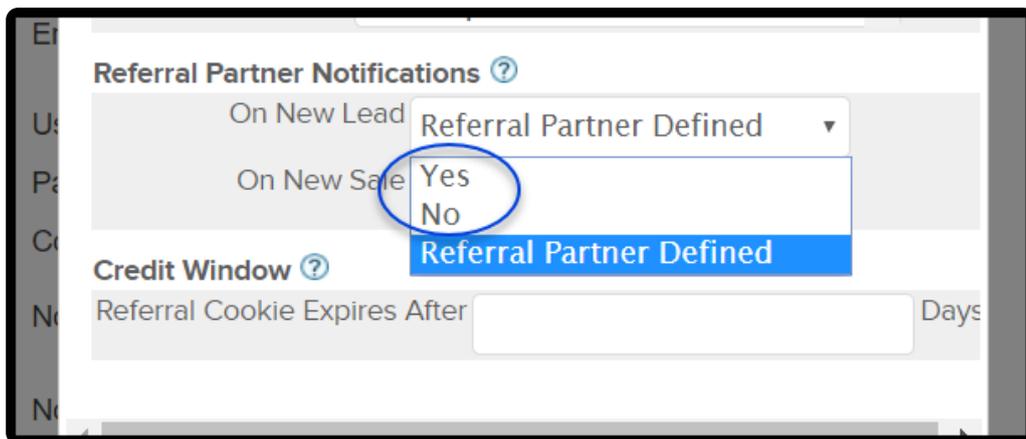
- **Programs:** Add people to a commission program or remove them from a commission program
 - **Add to:** Any contact that submits the form will have the selected commission programs added



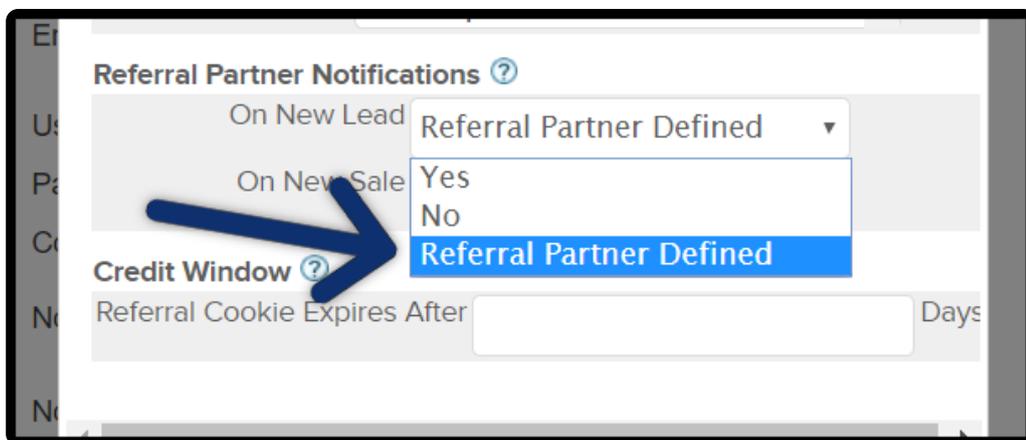
- **Remove from:** Any contact that submits the form will have the selected commission programs removed from their Referral partner record



- **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

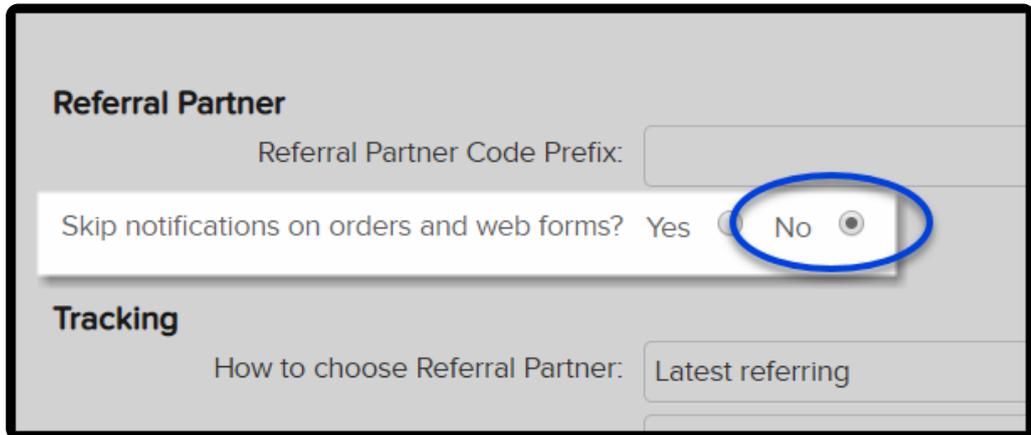


- **Referral partner defined** lets the the partner to decide for themselves when they sign up



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

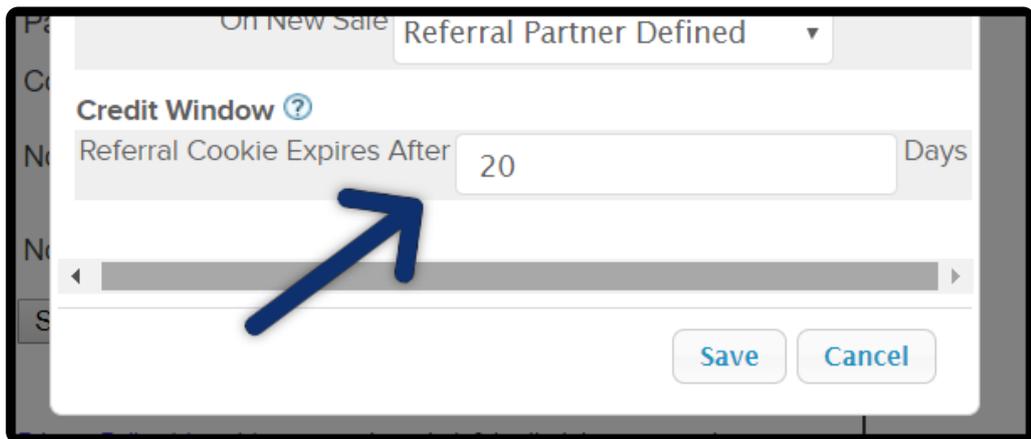
the "Skip notifications on orders and web forms?" located under CRM > Settings > Referral Partner Settings > Referral Partner Defaults is set to "No"



The screenshot shows the 'Referral Partner Defaults' configuration page. Under the 'Referral Partner' section, the 'Referral Partner Code Prefix' is an empty text field. Below it, the 'Skip notifications on orders and web forms?' setting is shown with radio buttons for 'Yes' and 'No'. The 'No' radio button is selected and circled in blue. Under the 'Tracking' section, the 'How to choose Referral Partner:' dropdown is set to 'Latest referring'.

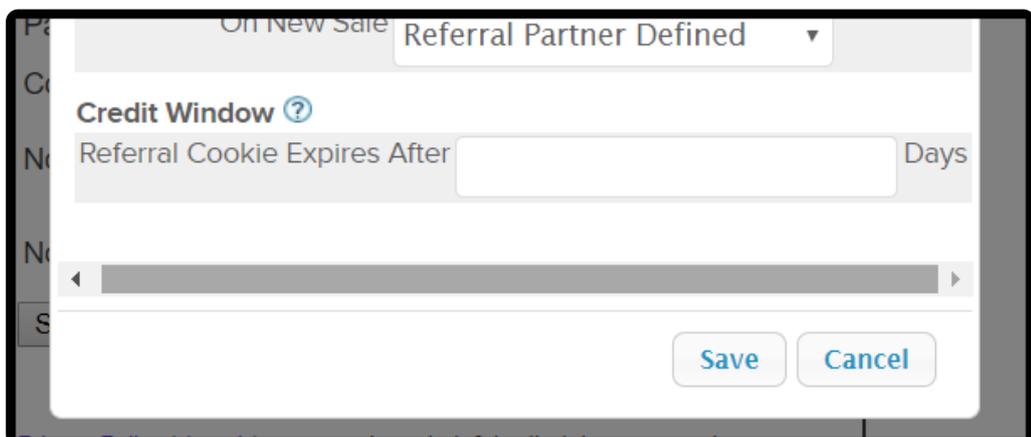
- Credit Window

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



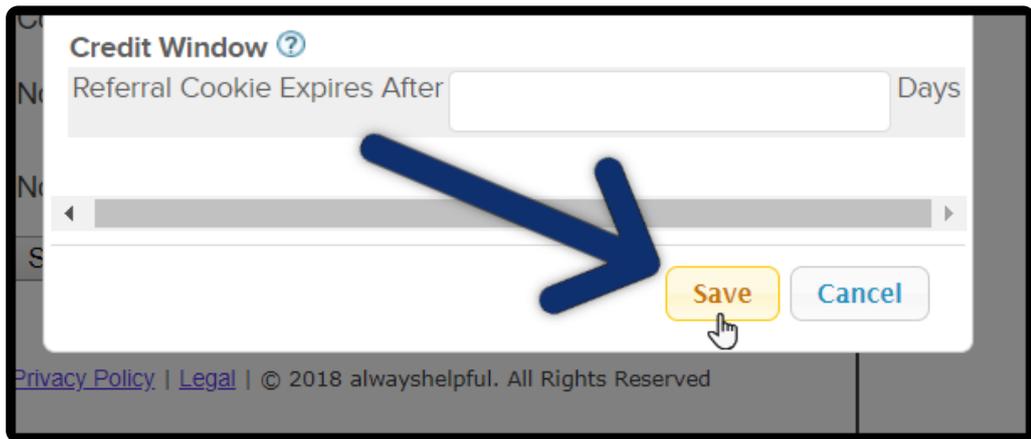
The screenshot shows a 'Credit Window' dialog box. At the top, it says 'On New Sale' and 'Referral Partner Defined'. The main section is titled 'Credit Window' with a help icon. Below the title, the text 'Referral Cookie Expires After' is followed by a text input field containing the number '20' and the word 'Days'. A blue arrow points to the input field. At the bottom right, there are 'Save' and 'Cancel' buttons.

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



The screenshot shows the same 'Credit Window' dialog box as above, but the 'Referral Cookie Expires After' text input field is now empty. The 'Save' and 'Cancel' buttons are still visible at the bottom right.

- o Click the **Save** button when you are finished configuring the sign up form

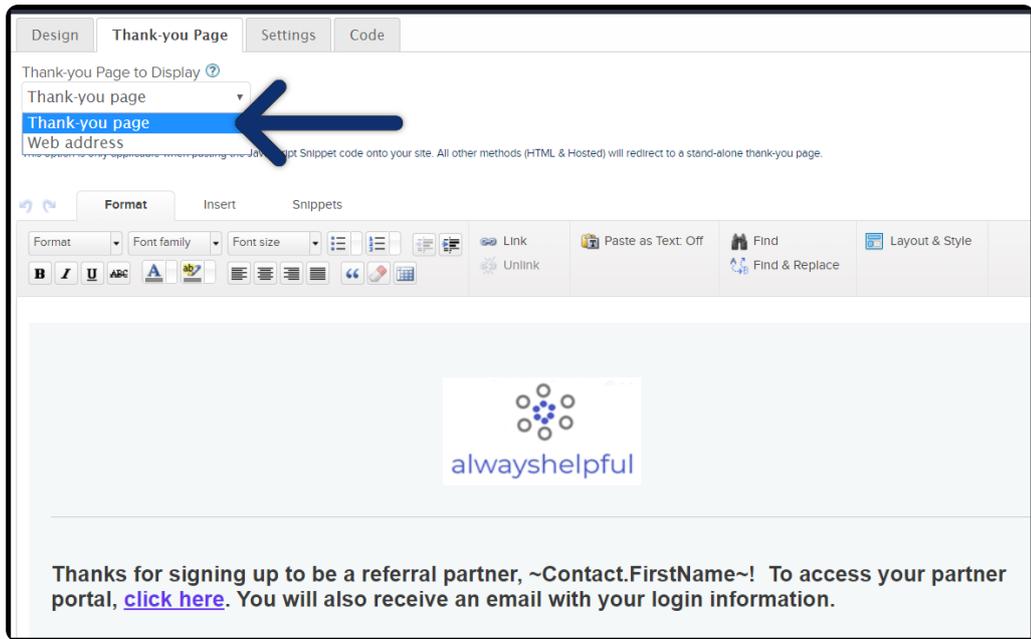


Thank you page

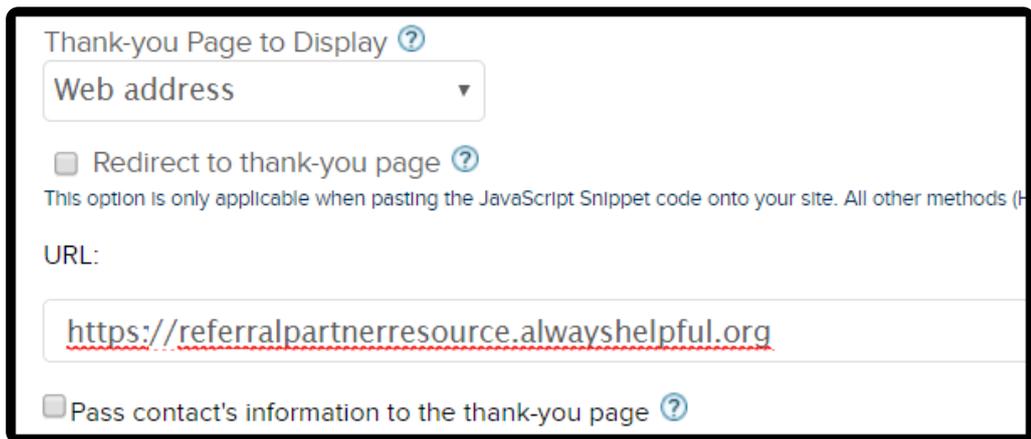
1. Click the "Thank-you Page" tab



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



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

HTML Do It Yourself
Copy and paste the web form Javascript or HTML to your site by yourself.

Javascript Snippet
 HTML Code
 HTML Code (unstyled)

With the Javascript Snippet you can change the design of this form inside Infusionsoft by Keap and have those changes automatically show up on sites that have this form.

Paste the following code anywhere between the HTML body tags of the page you want this form on:

```
<script type='text/javascript' src='https://yq263.infusionsoft.com/app
```

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 your webmaster so they can put it on your site for you.

Fill out the info below and we'll send your Webmaster the Javascript Snippet and HTML Code with instructions on how to install this form on your site.

Your Email Address:
Amanda Madsen

Your Webmaster's Email Address:
[Empty field]

Your Message (optional):
[Empty text area]

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

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.

You can copy and paste any of the links below in emails, on Facebook, in Tweets, etc... When clicked, this web form will appear on a page hosted by Keap.

Web Form URL:
https://yq23.infusionsoft.com/app/form/cc0a4604fe9ba2435037f0f0714bbdf9

Pretty URL:
h https://yq23.infusionsoft.com/app/form/referral-partner-sign-up2

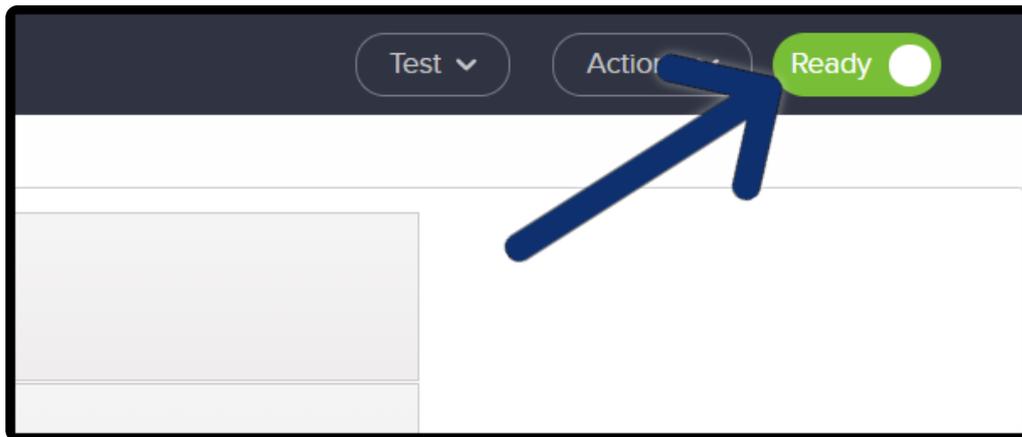
d. **Share This With Your Network** - Tell your followers about this web form

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

Network to Share With: Edit

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.

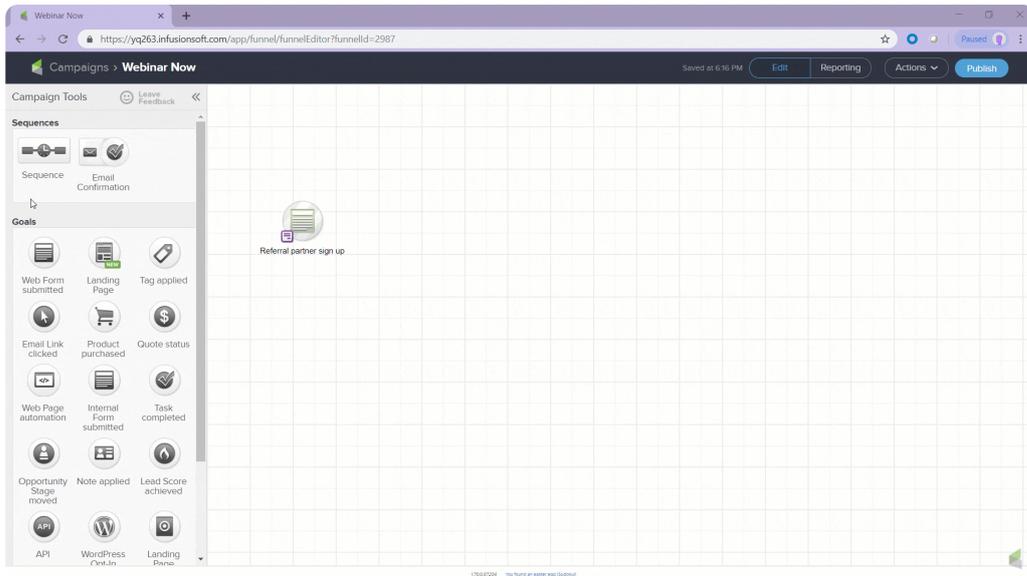
1. Click "Ready" and then click back to the campaign



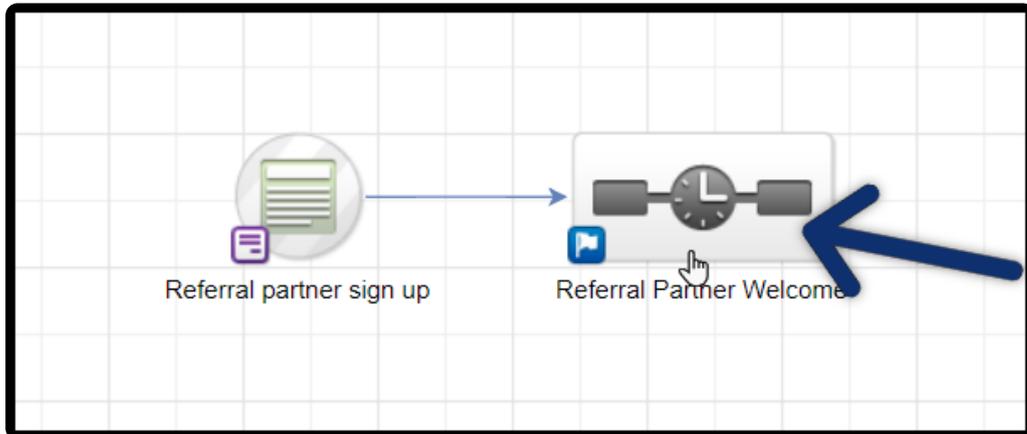
Referral Partner welcome email

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

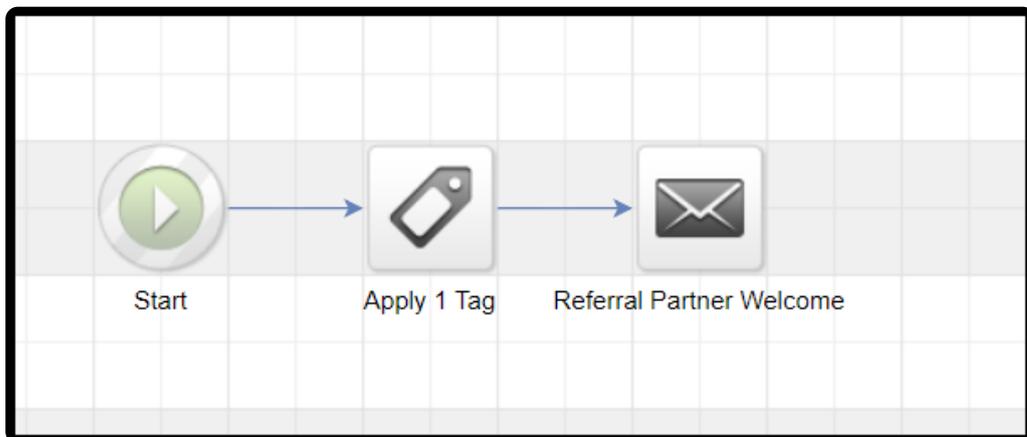
1. Drag sequence to campaign canvas and drag from the web form goal to the sequence



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 login details for the member's area

Referral Partner Portal: [click here](#)

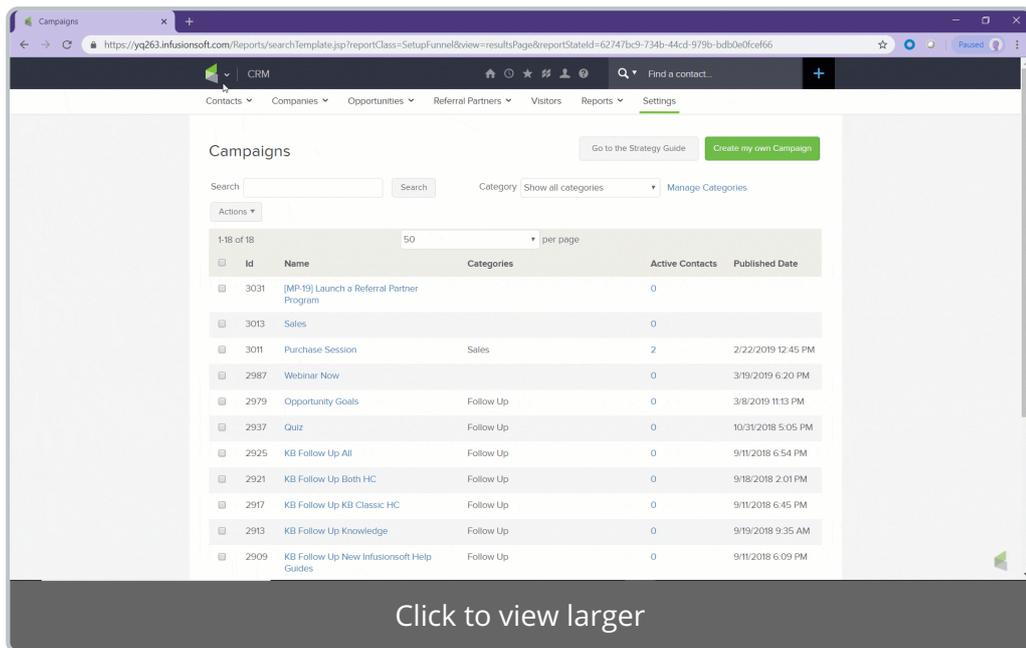
Username: ~Affiliate.AffCode~
 Password: ~Affiliate.Password~

Let us know if you have any questions,



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 amanda.madsen@alwayshelpful.org
 (414) 399-9899 - Mobile
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- o The partner portal URL is found by going to CRM > Settings > Referral Partner Center Default



Click to view larger

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

Here are your login details for the member's area

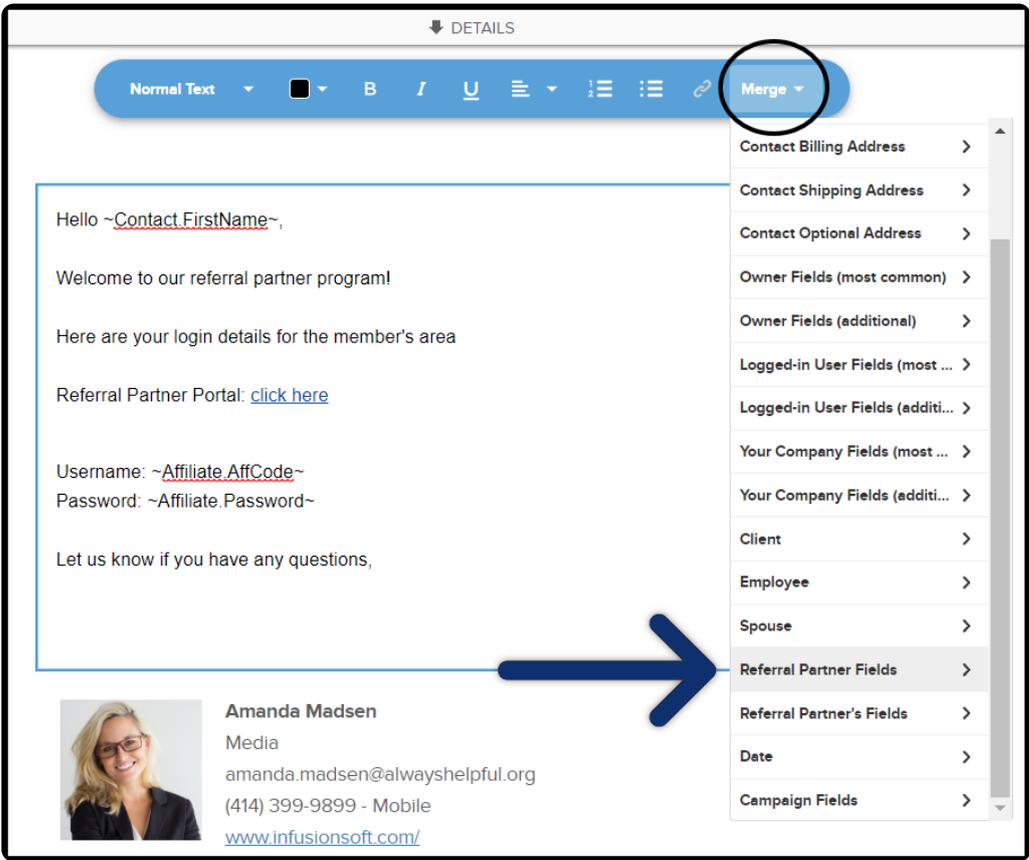
Referral Partner Portal: [click here](#)

Username: ~Affiliate.AffCode~
Password: ~Affiliate.Password~

Let us know if you have any questions,



6. Click Merge and scroll down to Referral Partners



The screenshot shows a CRM interface with a 'DETAILS' header. A toolbar at the top includes a 'Merge' dropdown menu, which is circled in red. Below the toolbar is a text editor containing a message template with merge tags: ~Contact.FirstName~, ~Affiliate.AffCode~, and ~Affiliate.Password~. A large blue arrow points from the 'Merge' dropdown to a list of fields on the right. The list includes 'Referral Partner Fields', which is highlighted with a blue background. Other fields include 'Contact Billing Address', 'Contact Shipping Address', 'Owner Fields', 'Logged-in User Fields', 'Your Company Fields', 'Client', 'Employee', 'Spouse', 'Referral Partner's Fields', 'Date', and 'Campaign Fields'.

a. Username will use the "Code"

Normal Text | B | I | U | Merge

Referral Partner Fields

Id
Name
Code
Password
Notify Lead
Notify Sale
Lead Cookie For
refund request

Hello ~Contact.FirstName~,

Welcome to our referral partner program!

Here are your login details for the member's area

Referral Partner Portal: [click here](#)

Username: ~Affiliate.AffCode~

Password: ~Affiliate.Password~

Let us know if you have any questions,

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b. Password will use "Password"

Normal Text | B | I | U | Merge

Referral Partner Fields

Id
Name
Code
Password
Notify Lead
Notify Sale
Lead Cookie For
refund request

Hello ~Contact.FirstName~,

Welcome to our referral partner program!

Here are your login details for the member's area

Referral Partner Portal: [click here](#)

Username: ~Affiliate.AffCode~

Password: ~Affiliate.Password~

Let us know if you have any questions,

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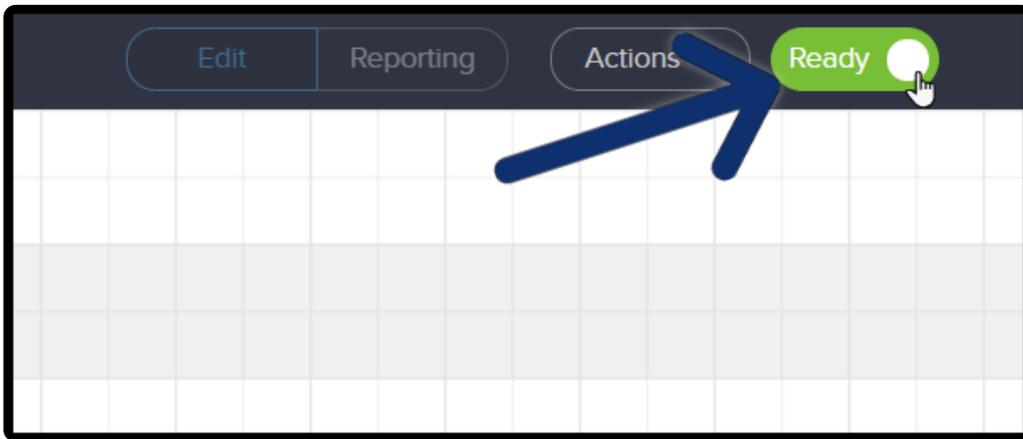
When done switch the email from "Draft" to "Ready"





Also switch the sequence from "Draft to "Ready"

-



To activate your web form and sequence click "Publish"

-

