Create And Manage Promotional Banners For Referral Partners 🔗

Banners are branded graphics that have a referral tracking link included in the embed code. Referral partners who have strong website traffic can embed banner ads onto website, driving traffic for the business. When the referral partner's website visitor clicks on the banner, they will go to the specified web page. Some referral partners may also use banners in email newsletters or other email marketing. Referral partners can copy the banner code from the Referral Partner Center and paste it into an email or website.

1. Before adding a banner, the banner image must first be upload to Infusionsoft or hosted on an external web hosting service. Get the image location url for use later.

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

3. Select **Promotional Resources** from the Referral Partners menu.
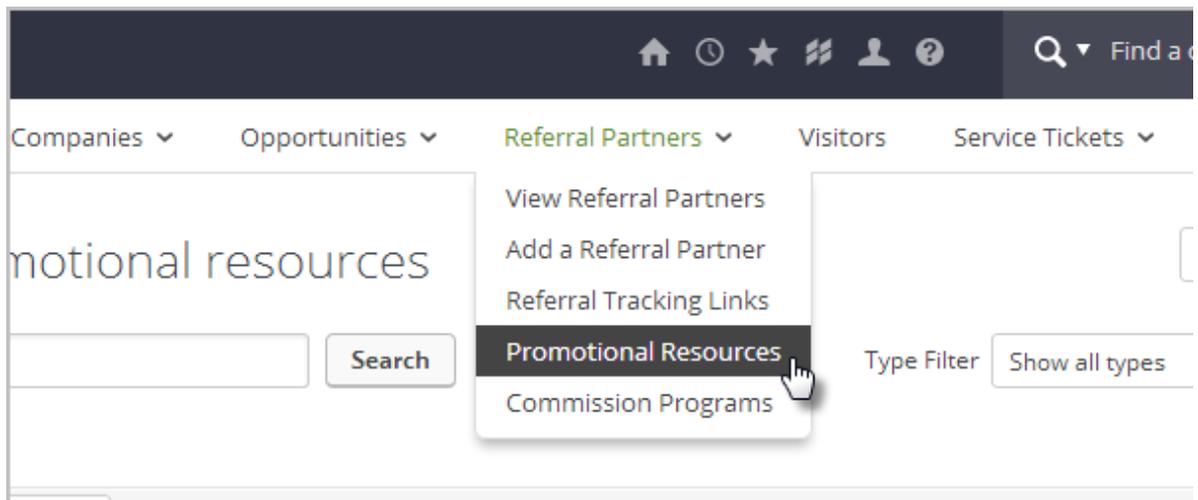
4. Select **Banner** as the resource type or click on the name of an existing banner to edit it.
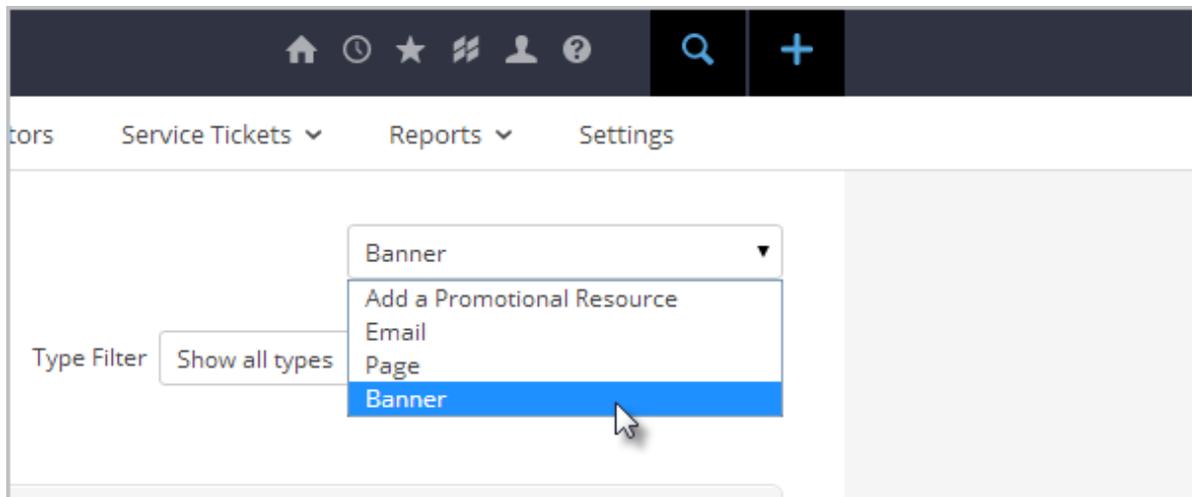
5. Go to the *Information* section
    o **Title**: This is visible to users and referral partners. It should be short, descriptive, and be related to the message in the banner
    o **Notes**: The notes are also visible to users and referral partners. This field can be used to note the banner size, recommend uses, and note any date range limits.
    o **Resource Order**: The order number determines where this banner falls in the banner resource list in the Referral Partner Center. Use it to put the most important banners at the top of the list. The lower the number the higher on the list it will appear

6. Enter the URL for the image that should be displayed as the banner (include the http:// part of the URL).

7. (Optional) Limit access. By default, all of referral partners are able to access this banner. Click on the name of a referral partner program to limit access so that only the referral partners in the selected program can view and use the banner. Hold

down the Ctrl key on the keyboard to select more than one program.
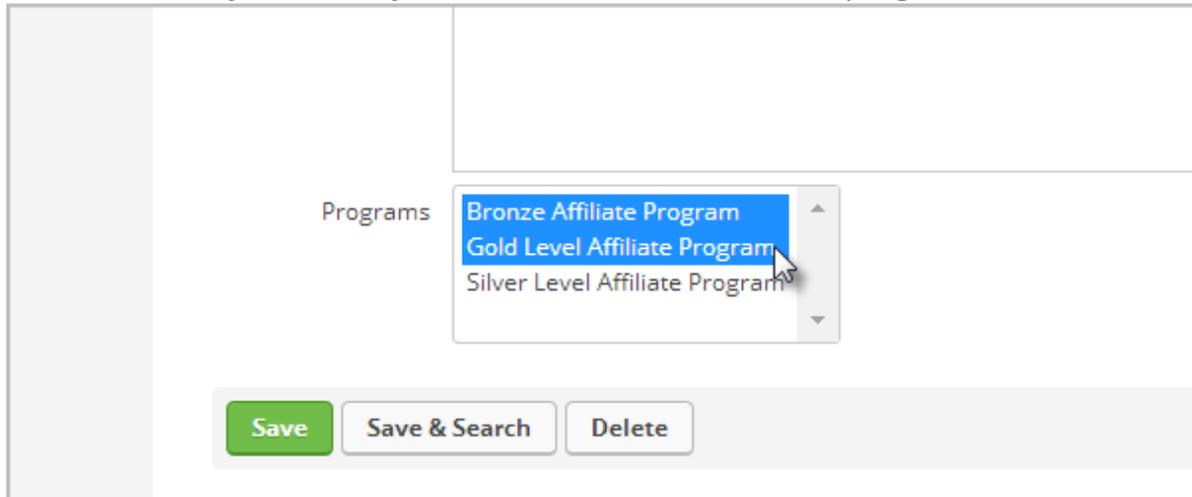
8. Click the **Save** button. This will automatically update the Referral Partner Center so that referral partners can start using this resource.