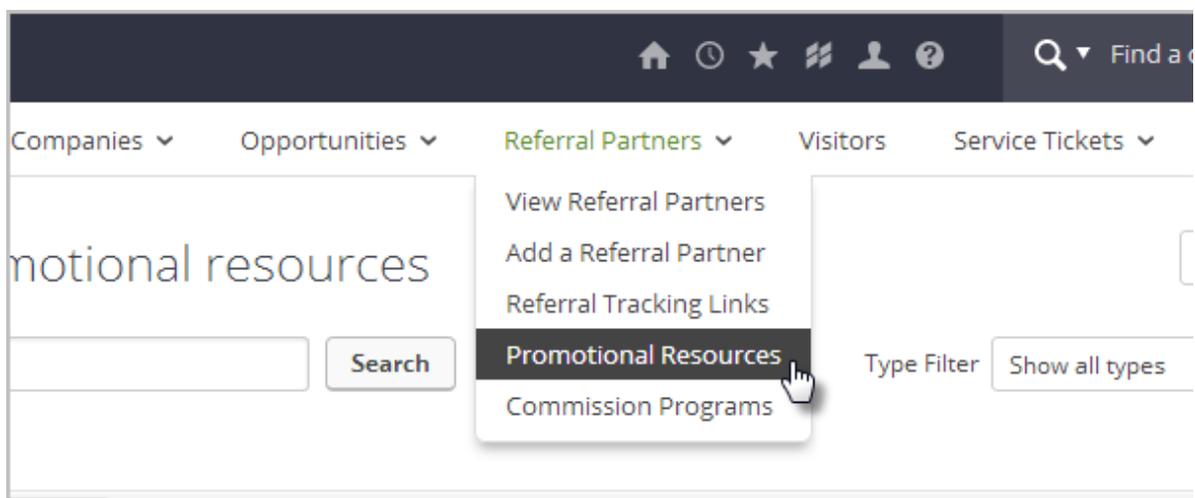


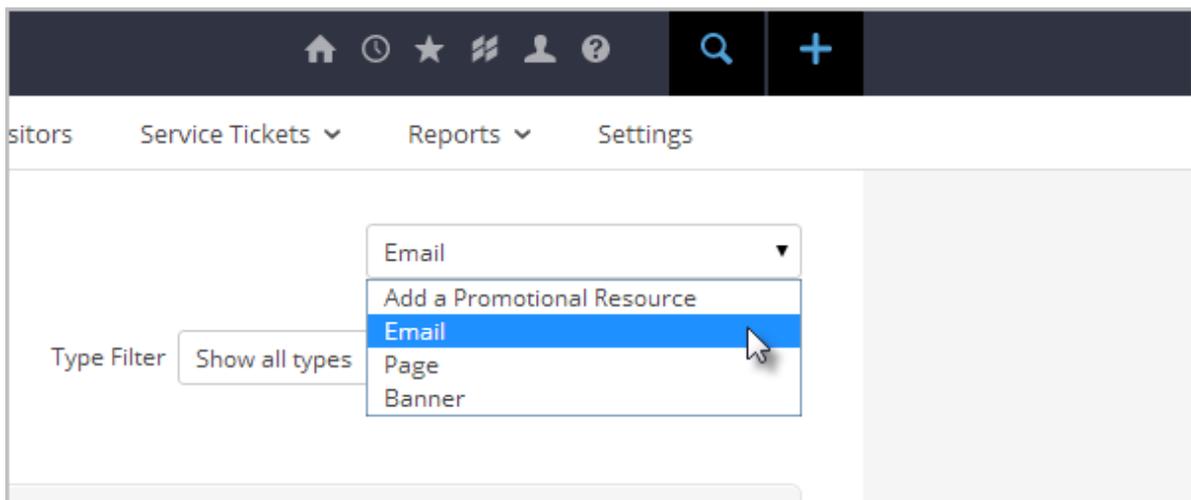
Create And Manage Promotional Emails For Referral Partners

Referral partners may actively promote your business by sending a dedicated email to their lists. Emails are used by partners who have a significant list (complementary businesses, industry influencers, professional affiliates.) Partners can just copy an email from the Referral Partner Center, paste it into their own email program, and send it to their list.

1. Go to **CRM > Referral Partners** in the main navigation menu
2. Select **Promotional Resource** from the Referral Partners menu.



3. Select **Email** as the resource type.

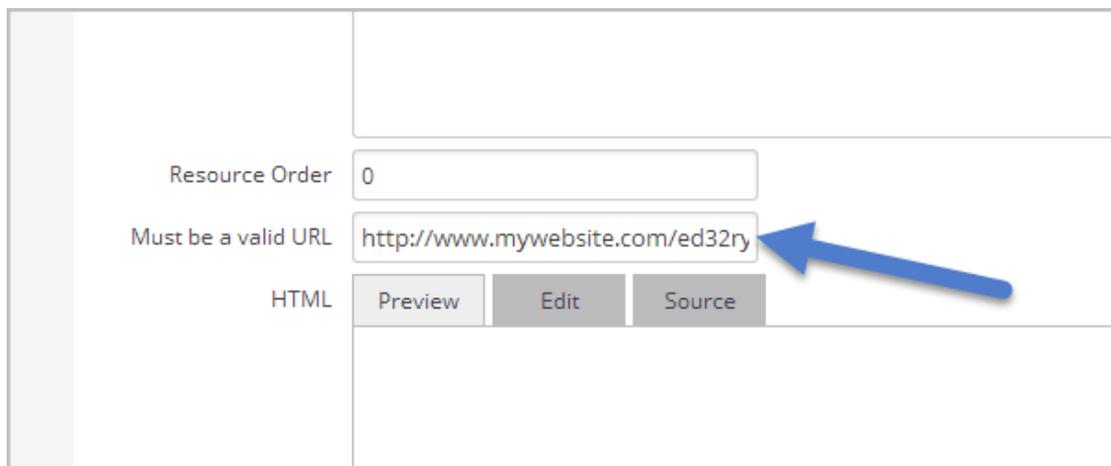


4. Go to the Information section

- **Title:** This is visible to both you and your partners. It should be short, descriptive, and be related to the content of the email.
- **Notes:** The notes are also visible to you and your partners. You can use this field to recommend an audience, a subject line, date range limits, etc.
- **Resource Order:** The order number determines where this email falls in the email resource list in the Referral Partner Center. Use it to put the most important email resources at the top of the list.

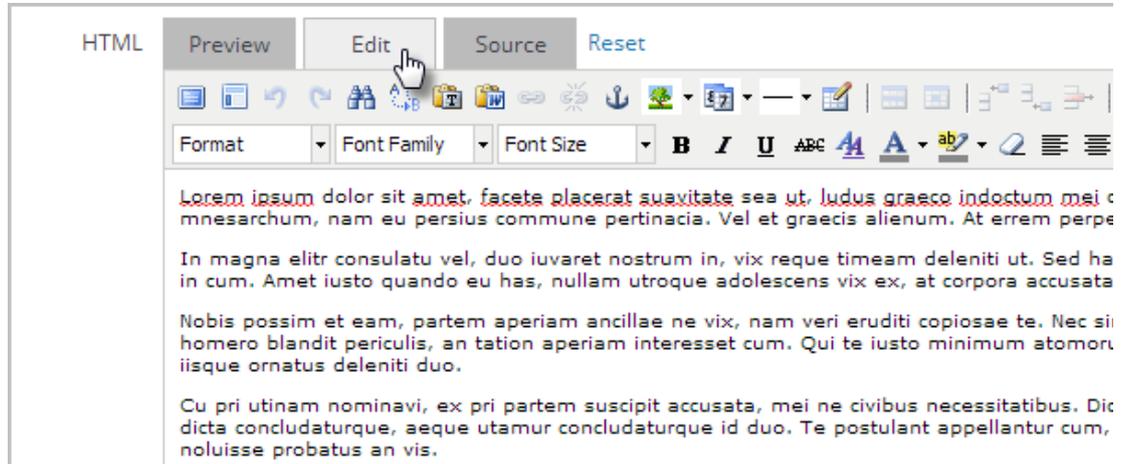
5. Create the email using one of these options

- **URL:** Enter a URL to an email designed outside of Infusionsoft that is hosted online. This allows you to use an outside resource to create and update the email HTML without logging on to your Infusionsoft system. If you use this option, it will override an email created in Infusionsoft using the HTML editor.

A screenshot of a form interface. It features a 'Resource Order' field with the value '0'. Below it is a 'URL' field with the text 'http://www.mywebsite.com/ed32ry'. A blue arrow points to the URL field. Underneath the URL field are three buttons: 'Preview', 'Edit', and 'Source'. The 'HTML' label is positioned to the left of these buttons.

- **HTML:** Create an email using the Infusionsoft WYSIWYG editor. You can create the email in Infusionsoft or paste in the HTML source code that has been

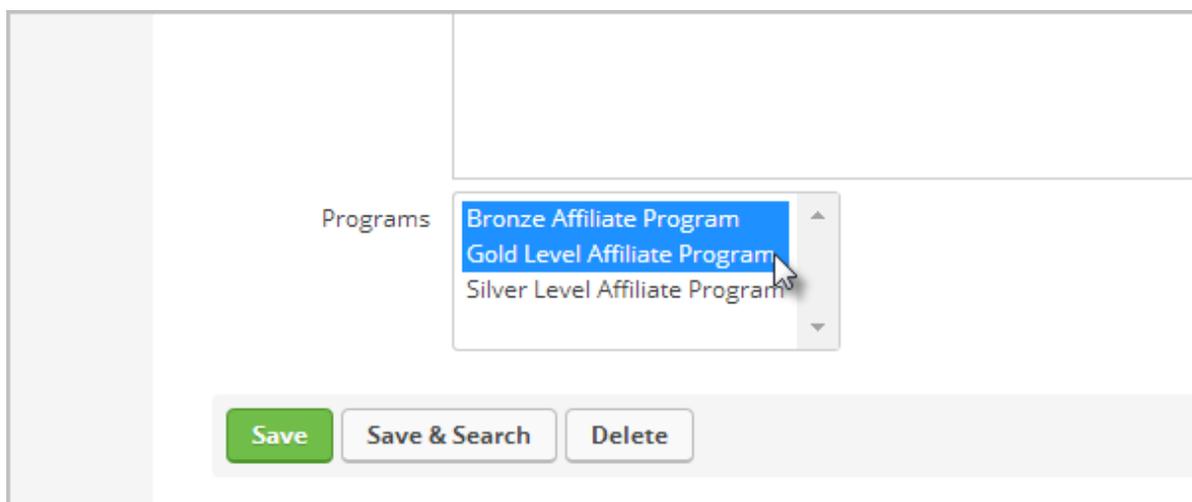
created outside of Infusionsoft. Note: If you don't know how to create beautiful HTML emails using the WYSIWYG editor, go to the template library to create a pretty email using the drag & drop Builder. After you save it, convert it to the code builder. You can copy the HTML source code from this builder and paste it into the source tab here.



Pro Tip!

You can insert a merge field so that when your referral partners copy the email, each referral partner's unique tracking code is inserted into the email. The merge field is ~TRACKING~

- (Optional) Limit access. By default, all of your referral partners are able to access this email. Click on the name of a referral program if you want to limit access so that only the partners in the selected program can view and use this email. Hold down the *Ctrl* key on your keyboard to select more than one program.



- Click on the **Save** button to create or update the email resource. This will

automatically update the Referral Partner Center so that partners can start using this resource. They will copy and paste the email into their own email program to send it to their contacts.
