

Simplified Affiliates

Last modified on: 06/25/2025 2:44 pm MST

Tags: Keap-Ultimate

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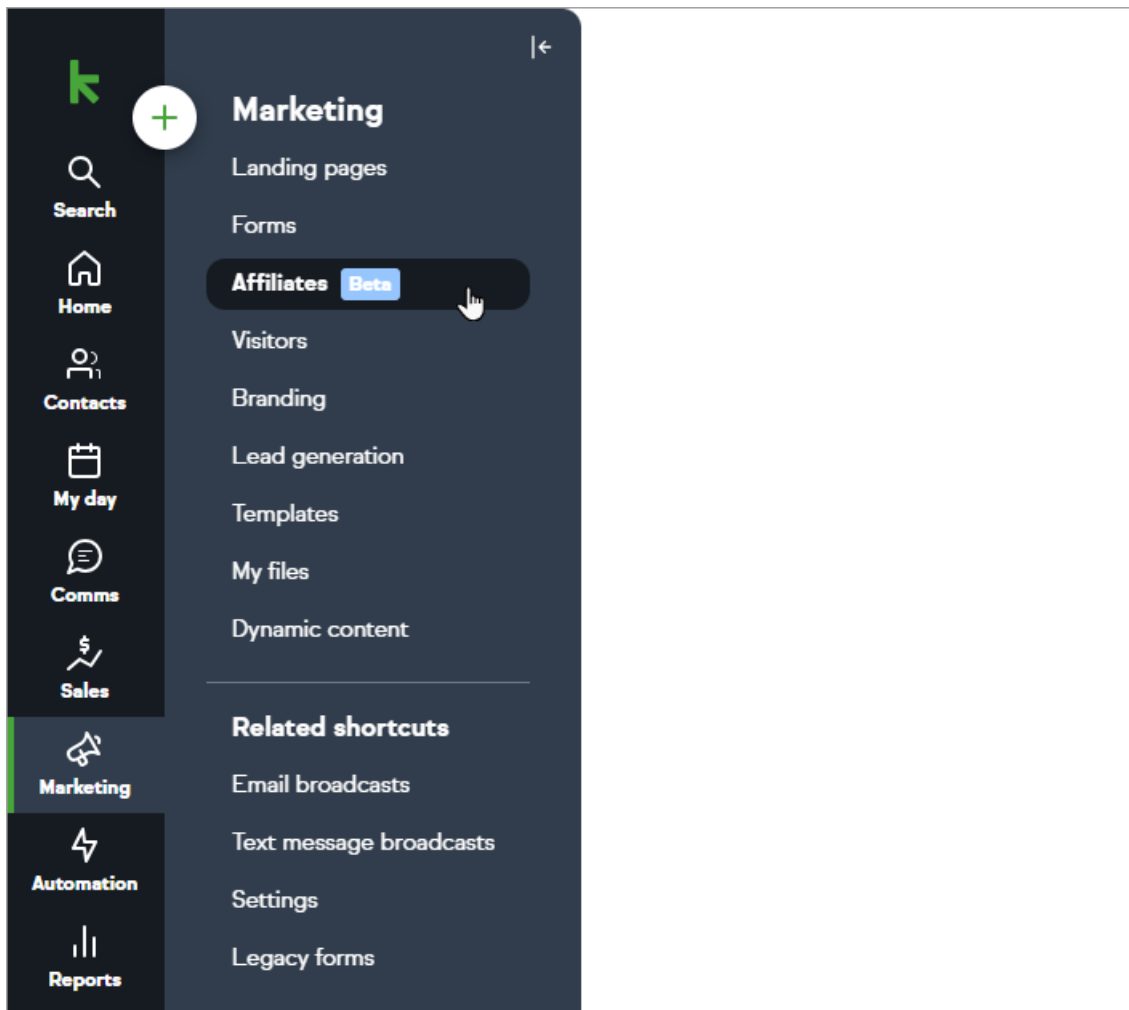
Overview

The Max Classic Referral Partner module has been simplified and relaunched as **Affiliates for Ultimate**. This includes renaming the feature back to "Affiliates" and relocating it to Marketing, as it is a lead generation activity. These changes will allow for additional updates and new features to be added later.

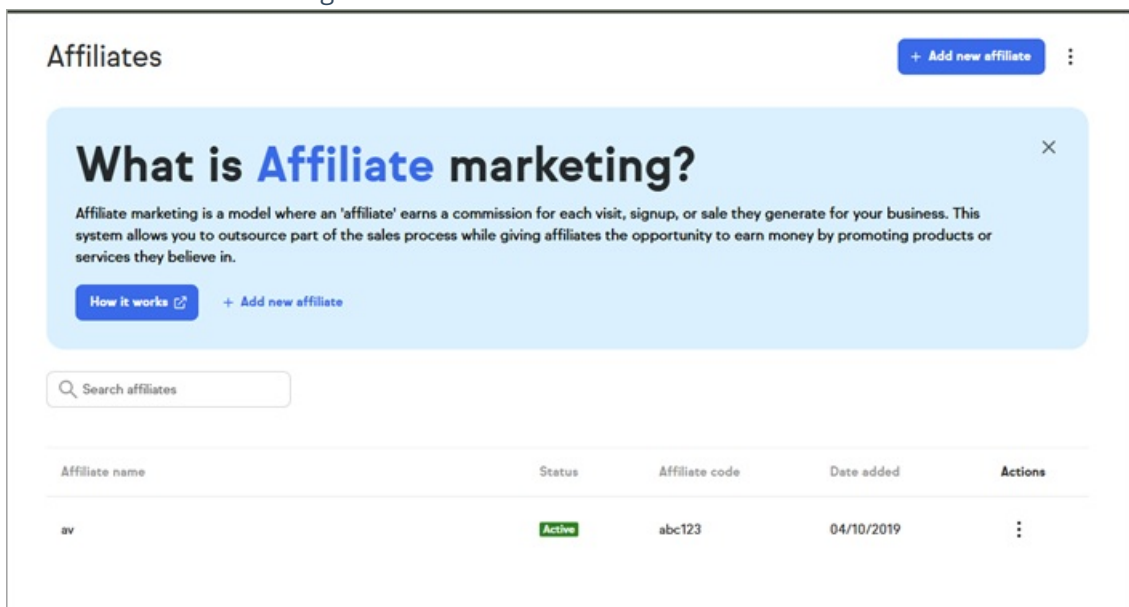
Managing Affiliates

Affiliates are the record used to represent a person or business that is driving referral traffic on your behalf.

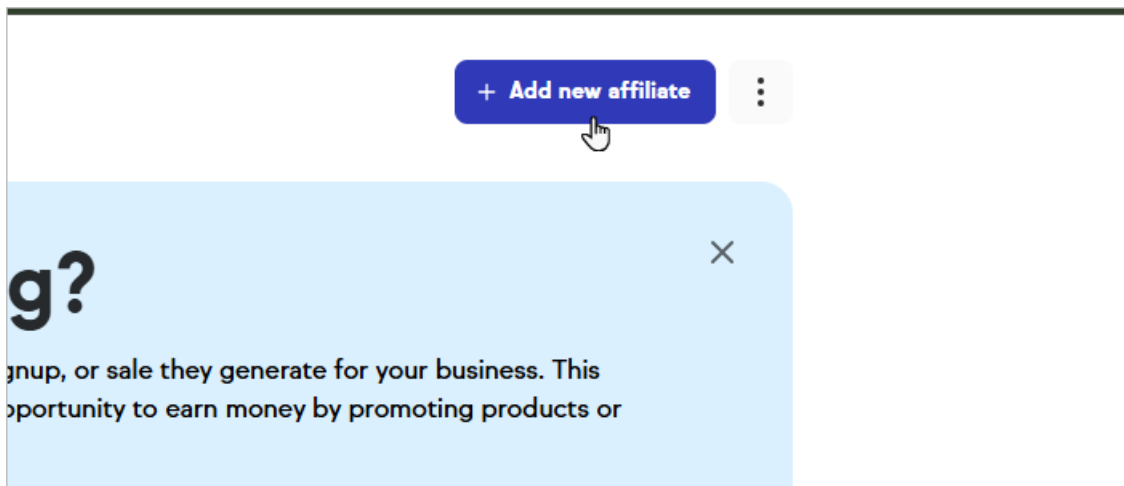
1. Navigate to Affiliates by going to **Marketing** from the left-hand nav and choosing **Affiliates**.



2. Once there, you'll be presented with a list of any existing affiliates, as well as the ability to add new affiliates or view an existing one.



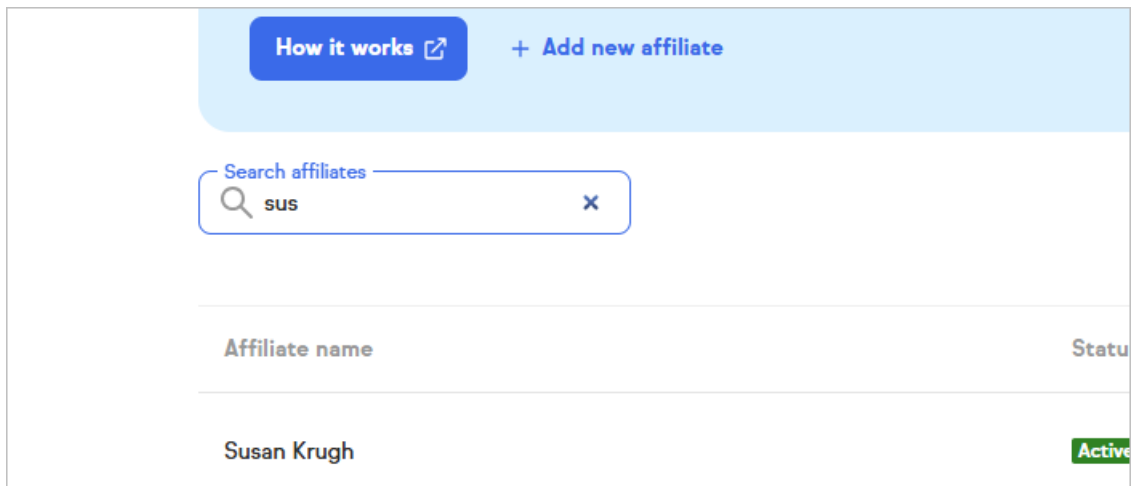
3. To add an affiliate, click the **Add new affiliate** button which will open the "Add a new affiliate" view.



4. Affiliates require a name, they need to be associated with a contact record, require a unique affiliate code, and should be set to **Active**. Once completed, click save and the newly created affiliate will appear in the list of affiliates.

This image shows a modal form titled 'Add a new affiliate' with a close button (an 'X') in the top left corner and a blue 'Save' button in the top right corner. The form is divided into sections. The first section is titled 'Info' and 'Affiliate information'. It contains four input fields: 1. 'Affiliate name*' with the value 'Susan Krugh'. 2. 'Associated contact*' with the value 'Ashton Woodward' and a dropdown arrow. 3. 'Affiliate code*' with the value 'abc123'. 4. 'Status*' with the value 'Active' and a dropdown arrow.

5. To find an affiliate on the affiliates page, you can use the search field to filter for the affiliate by name, or sort columns by "Name", "Status", "Code", or "Date added".



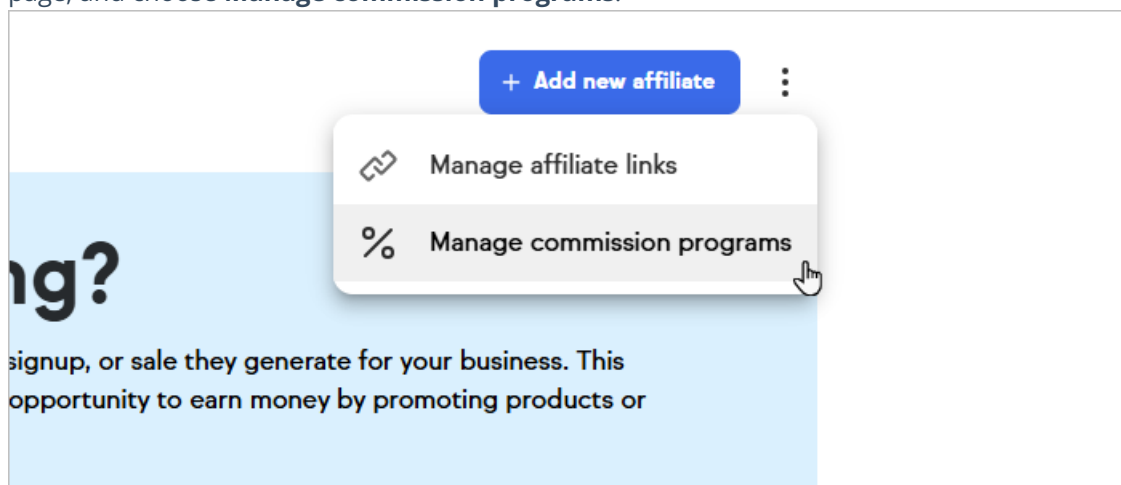
6. Clicking on an affiliate will allow you to view and manage individual affiliates, including the following updated sections:
- Info** - Basic info about the affiliate
 - Commission program** - Lists any commission programs the affiliate is associated with. We'll cover managing commission programs later in this guide.
 - Affiliate links** - Lists any affiliate links the affiliate is associated with. We'll cover managing affiliate links later in this guide.
 - Affiliate portal** - Provides user access to view the affiliate portal, where the affiliates can view their programs, links, and ledger activity also. More on this later.
 - The affiliate page also provides access to the simplified **Affiliate Ledger**
 - Can view historical referral activity that has resulted in sales
 - The ledger defaults to filtering by month to date, but can be manually adjusted to look further back.
 - Provides access to previously existing ledger & "referral partner" reports, which is accessible by clicking the **View ledger** button at the bottom of the simplified affiliate ledger view

Date Range February 1, 2025 to April 30, 2025				
Invoice #	Contact	Date	Type	Amount
599683	Harrison Frantic Ford	Mar 16 2025	Commission	\$90.00
599681	Benny Blanco	Mar 16 2025	Commission	\$74.55
599679	Carlito Brigante	Mar 16 2025	Commission	\$37.35
599677	James Tanaka	Mar 16 2025	Commission	\$52.35
599675	William Cressida	Mar 16 2025	Commission	\$134.85
599673	Jim Collins	Mar 13 2025	Commission	\$30.00
View ledger			Subtotal	\$419.10
			Clawbacks	\$0.00
			Total commissions	\$419.10

Managing your Commission program

Commission programs are the mechanism for specifying what commission(s) an affiliate can earn when they refer customers to your business. You can specify an amount they can earn per sale as a fixed dollar amount, a percentage of the sale, as well as customize it for particular products or subscriptions you offer.

1. To manage commission programs, click the **ellipses menu** from the top right corner of the Affiliate page, and choose **Manage commission programs**.



2. Once there, you'll be presented with a list of commission programs, as well as the ability to add a new commission program, or view an existing one.

Commission Program
Silver Level Affiliate Program
Gold Level Affiliate Program
Bronze Affiliate Program

3. To add a commission program, click the **Add a commission program** button which will open the "Add a commission program" page. When you've entered a commission name, press **Next**.

+ Add a commission program		
Id	Date Added	Actions
6	04/12/2017	⋮

Commission program name*
Starter Affiliate Program

Notes

Next

Cancel

4. Next you'll be taken to the "Edit Commission" page which will allow you to specify both your default commission, or add a custom commission. The default commission allows you to specify a percent

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Edit Commission

Basic Info

Title*

Starter Affiliate Program

Commission Description

Beginner Level - 5%

Default Commission

Use this if you pay the same commission amount or percentage for all or most of your products. Default commissions also apply to all new products and subscriptions that you add in the future unless you create custom permission.

Percentage

5

+

Dollar amount

0

Custom Commissions

A custom commission has the highest priority in the commission program. Note that when you edit a commission program it does not recalculate existing orders

+ Add a custom commission

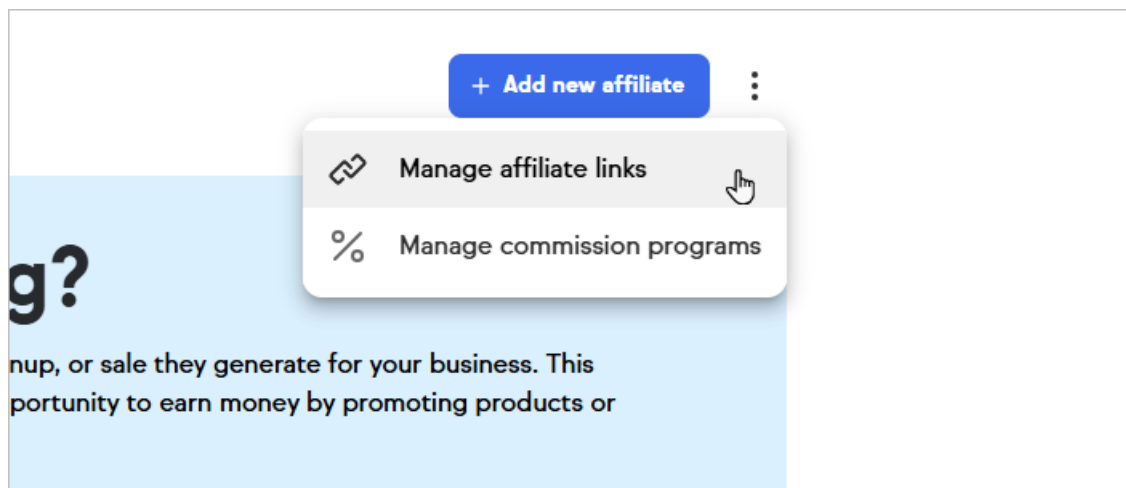
Save

Delete

Managing Affiliate links

Affiliate links are the mechanism for you to enable your affiliates to drive traffic to a particular page or site where you are selling one or more products.

1. Clicking affiliate links will likewise take you to a page where you can manage and create affiliate links



← Affiliate links + Add an affiliate link

Search affiliate links

Link name	Code	Web page	Date added	Actions
Premium Golf	pg	http://www.google.com	01/08/2018	⋮
Shopping Cart Storefront	123	https://martyc.infusionsoft.com/app/storeFront/showStoreFront	04/12/2017	⋮
Hair Care Landing Page	haircare	http://www.haircareproductslp2.com	04/12/2017	⋮

2. Creating a link has been streamlined significantly to be less complicated without a reduction in functionality

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Create an affiliate link

How Affiliate Links Work

An affiliate tracking link is a special URL that contains a unique identifier that allows you to track the traffic from your affiliates. When a customer clicks the affiliate link a tracking code is added to the customer, who is then redirected to your website URL (selected in the form below). If the customer makes the purchase, the affiliate will be credited with the sale.

Link name*

Keap

Give this link a name so you can easily find it later

Website address (URL)*

http://www.keap.com

This is usually your business website, Landing page, Checkout form or other webpage that customers visit to purchase your product or services.

Link code*

keap123

This will be included in the URL so keep it short.

☒ Make available to all affiliates

☐ Associate with an affiliate

☐ Associate with commission program

Create affiliate link

Cancel

3. Affiliate links can be associated in three ways, similarly to how they previously worked
 - a. **All affiliates** - Makes the link accessible to all affiliates
 - b. **A particular affiliate** - Essentially let's you create a link for use with just one affiliate
 - c. **A commission program** - This is the standard and most recommended way to associate affiliate links - by tying the link to one or more programs you can use the program itself for managing access to the relevant referral links

Affiliate Portal

The affiliate portal is a place where affiliates can access their affiliate program information. This includes a history of their referral activity and commissions earned, referral links, and commission program information. This is all accessed via the redesigned and simplified Affiliate portal.

1. The affiliate portal allows access to information regarding
 - a. Basic affiliate information on the affiliate
 - b. Affiliate links available
 - c. Commission programs available
 - d. Commission ledger - Works similarly to what's available on the affiliate record, however it contains a limited amount of information about the customer.
2. The affiliate portal no longer requires a login - as such, the amount of information about a referred customer is limited.
 - a. You can provide your affiliates access to their portal by accessing the affiliate record and sharing their affiliate portal link with them directly, or alternatively...
 - b. send out an email to one or many affiliates and include the Affiliate Site ID merge field. The url would be constructed in three parts with a base url, an app id, and an affiliate site id, for example: "https://affiliate.keap.page/?app_Id=APPNAME&siteId=". This custom affiliate portal url is all they need for access.

Affiliate portal

Affiliate info

Affiliate name
praneeth Mara

Affiliate code
MP123

Status
active

My Affiliate Links

Affiliate link
siugdwhi
<https://fi181stge.isrefertest...>
[Copy link](#) [Open in new tab](#)

Affiliate link
<https://fi181stge.isrefertest...>
[Copy link](#) [Open in new tab](#)

Affiliate link
DateExpiresLinkTest
<https://fi181stge.isrefertest...>
[Copy link](#) [Open in new tab](#)

Affiliate link
DateExpiresLink
<https://fi181stge.isrefertest...>
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Commissions

Date Range
February 1, 2024 to February 29, 2024

Invoice #	Contact	Date	Type	Amount
2707	praneeth ref test	Feb 16 2024	Commission	\$466.00
2705	praneeth	Feb 12 2024	Commission	\$882.00
2705	praneeth	Feb 12 2024	Commission	\$276.00
2705	praneeth	Feb 12 2024	Commission	\$242.20
2705	praneeth	Feb 12 2024	Commission	\$1,048.00
2705	praneeth	Feb 12 2024	Commission	\$42.00
2705	praneeth	Feb 12 2024	Commission	\$66.00
Subtotal				\$3,014.20
Clawbacks				\$0.00
Total commissions				\$3,014.20

Tracking Commissions

Commission tracking is an important aspect of managing an affiliate or referral program. This collection of reports and features has not been updated but continues to provide value. For information on accessing and using these reports you can learn [more here](#)

As mentioned above as part of the 'Managing affiliates' section, tracking commissions on an individual affiliate can be done via the new simplified affiliate ledger accessible from an individual affiliate. Clicking **View ledger** will take you to the existing Referral ledger view which additionally allows you to view and manage payments in addition to the referral ledger.

Commissions

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View ledger

Subtotal

\$419.10

Clawbacks

\$0.00

Total commissions

\$419.10

Settings

Settings have been reduced and simplified to focus on tracking, compared to what was available in Referral Partners in Classic. They can be accessed by going to **Settings > Referral Partner Defaults** and give you access to specify the following tracking related settings:

	Product Interest Bundles Add and edit product bundles for your customers.
Referral Partner	
	Referral partner defaults View and edit options for partners who expand you reach. 
Marketing	
	Default Thank-You pages Manage thank-you messages for your customers.

1. **How to choose Referral Partner** - Allows you to specify whether the Latest or First referring referral partner should get credit when a sale happens. Helps the system determine credit when multiple affiliates were involved.
2. **Referral Partner tracking method** - Controls whether only cookies or referral history + cookies will be used to determine if an affiliate should get credit for a sale
3. **Use IP address** - Allows you to specify whether an IP address can be used for determining if a record of a referral exists that should receive credit. IP address can be very unreliable due to the fact that multiple users can be active from the same IP address resulting in false positive matches.

Referral Partner Defaults

Tracking

How to choose Referral Partner: Latest referring

Referral Partner tracking method: Referral history and cookies

Use IP address? Yes ☒ No ☐

Save

1700.820452-N-202506171311

What's not included

There is more that we'd like to update related to Affiliates in Keap, and we could use your help by providing in-app feedback both on what you think is missing in terms of the old capabilities as well as additional features you'd like to see. Currently, some areas have not received updates, particularly the report and ledger related functionality. Please share your feedback regarding what features you'd like to see included.

Additionally, some settings and options were removed, notably:

- Commission programs
 - **Levels** - There is only a single level currently available.
 - **Pay if unused** - Given the change to levels, Pay if unused is no longer necessary and has not been included.
 - **Lead** - Currently, we are only tracking commissions against sales, not leads.
 - **Priority** - Existing priority will be honored, but when assigning Commission programs to an affiliate going forward, only one program can be added at a time. As a result, Priority will not be displayed or specifiable as an option.
- Feature compatibility - These updates have not addressed tracking referral to some of the newer features such as checkout forms, updated landing pages, etc.

