

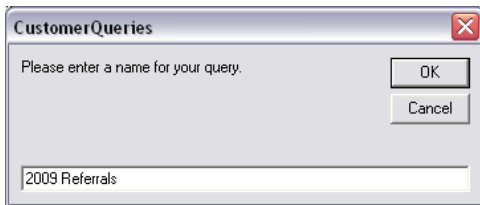
customer referral query

Find all customers that have referred a certain number of clients in a particular time frame.

Add the Query

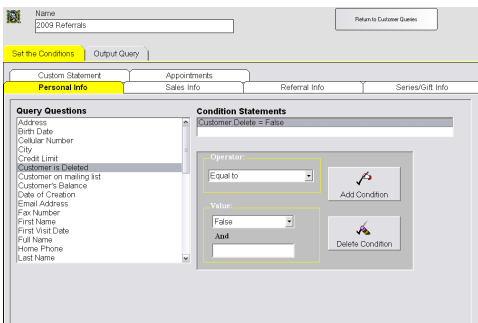
This query will generate a list of your clients who have referred a predetermined number of clients in a particular time frame.

1. From the SalonBiz®/SpaBiz® menu bar, click on the Communications icon (Envelope).
2. Click on the Queries button.
3. Click the Add button.
4. Type in the name of the query.
5. Click the OK button.

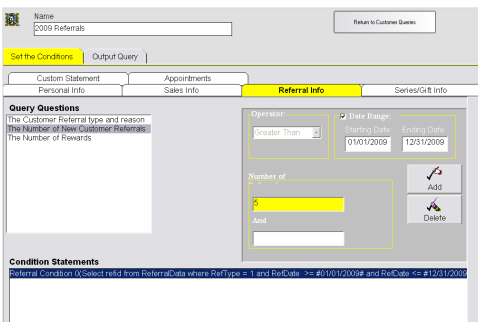


Set the Conditions

1. In the Personal Info tab, highlight by clicking once on Customer is Deleted in the Query Questions field.
2. Select Equal to in the Operator drop down menu.
3. Select False in the Value drop down menu.
4. Click the Add Condition button. You should see the condition in the box under Condition Statements. *Adding this condition will eliminate those clients who have been previously deleted from your database from the list.*



5. Click the Referral Info tab.
6. Highlight by clicking once on The Number of New Customer Referrals in the Query Questions field.
7. Select Greater Than in the Operator drop down menu.
8. Type in the number of referrals you are looking for, for example, we are looking for clients who have referred more than "5" new clients.
9. Place a check in the Date range box. Type in the desired date range. Note: It is easiest to highlight over the entire date range and then type in your new date.
10. Click the Add button. You should see the condition in the box under Condition Statements.



Name
2009 Referrals Return to Customer Query

Set the Conditions | Output Query

Custom Statement | Appointments | Personal Info | Sales Info | **Referral Info** | Series/Call Info

Query Questions
The Customer Referral type and reason
The Number of New customer referrals
The Number of Rewards

Operator: Greater Than | Unit Range: Selected Date: 01/01/2009 | End Date: 12/31/2009

Number of: []

Add | Delete

Condition Statements
SELECT * FROM ReferralData WHERE RefType = 1 AND RefDate >= #1/01/2009# AND RefDate <= #12/31/2009#

Output Query

1. Click the Output Query tab.
2. Select the desired output in the Output Type field by clicking once on the box. The box will be highlighted yellow.
3. If you are printing labels, select a label from the drop down menu.
 - If you are planning on mailing to the list place a check in the box Require an Address?
 - If you are planning on mailing to the list place a check in the box Exclude customers with 'Do NOT mail' option?
4. In the Field to Print box, double click on the fields you wish to print. There should be an "X" in the Print column.
5. Select by clicking once on the desired output in the Output Format field. Until you familiarize yourself with queries it is good practice to print to the screen. This allows you to check that you have properly set the conditions without wasting paper or labels.

