

Customer Referral Type Summary Report Guide

The Customer Referral Type Summary report gives you a summary of your customer referral activity.

When to create the report

We recommend reviewing this report quarterly.

How to create the report

1. From the SalonBiz/SpaBiz menu bar, click on the Report icon.
2. Double click on Customer Referral Type Summary from the report side navigation. You will find it under the Referral and Reward category.
3. Enter the beginning date and ending date for the report.

What it tells you

The report is separated into 3 distinct areas:

- Referral Type - there are 3 predefined referral types in the system
 - Walk In Customer (default)
 - Customer Referral - customers who are referred by another customer
 - Staff Referral - customers who are referred by a staff member
- Referral Reason - customers who were noted with your customized referral reasons
- Promotion - customers who were noted with your customized promotion reason

How it's used

This report is used to track how customers are referred to your business as well as what they have spent with you and if they are retained. It also tracks how well your promotions are attracting in new customers & how well your marketing efforts are paying off.



Customer Referral Type Summary for 5/5/2008 to 5/29/2008

| Referral Type | # of Customers | Total Visits | Total Product | Total Service | Retained | % Retained |
|-------------------|----------------|--------------|-------------------|-------------------|----------|--------------|
| Walk-In Customer | 68 | 60 | \$1,475.00 | \$3,068.00 | 0 | 0.00% |
| Customer Referral | 6 | 6 | \$22.00 | \$349.00 | 0 | 0.00% |
| Referral Reason | 3 | 3 | \$35.00 | \$140.00 | 0 | 0.00% |
| Total | 77 | 69 | \$1,532.00 | \$3,557.00 | 0 | 0.00% |

Referral List

| Referral Reason | # of Customers | Total Product | Total Service | Total Visits | Retained | % Retained |
|-----------------|----------------|----------------|-----------------|--------------|----------|--------------|
| AQUAINTANCE | 2 | \$0.00 | \$88.00 | 2 | 0 | 0.00% |
| WORD OF MOUTH | 1 | \$35.00 | \$52.00 | 1 | 0 | 0.00% |
| Total | 3 | \$35.00 | \$140.00 | 3 | 0 | 0.00% |

Promotion List

| Promotion | # of Customers | Total Product | Total Service | Total Visits | Retained | % Retained |
|--------------|----------------|---------------|---------------|--------------|----------|--------------|
| Not Listed | | \$0.00 | \$0.00 | 0 | 0 | |
| Total | 0 | \$0.00 | \$0.00 | 0 | 0 | 0.00% |