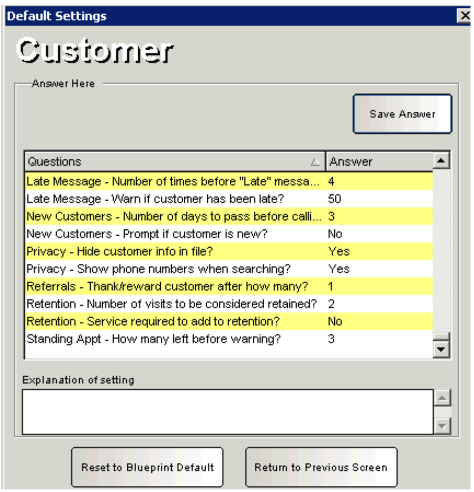
referrals

This document will explain how to setup and issue rewards from client referrals.

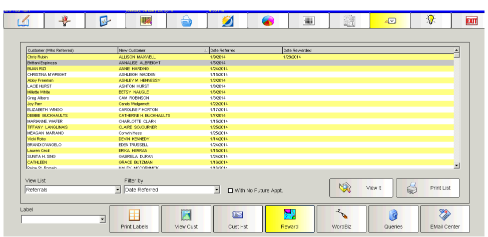
Note: Clients receive referrals when a new client is added to the system and the existing client is selected in the 'referred by' section.



Referral Tracking

Follow these steps to setup referral tracking.

1. From the menu bar, click on the Blueprints icon.
2. Click on the Customer button.
3. Click the Set Default Settings button.
4. Click on: Thank reward customer after how many? Enter how many referrals your existing clients need to make to send a "Thank You".
5. Click Save Answer.
6. Click Return to Previous.



Rewarding Referrals

Follow these steps to issue customers a "Thank You" for their referrals.

1. From the Communication icon, select Referrals from the View List drop down menu.
2. Enter in the date range you would like to view. This will populate a list of the referred by clients as well as the new client referred.
3. Select the client you want to reward, click the View Customer Button.
    - You can assign reward points to the clients file by clicking on the Rewards icon to the bottom left.
    - You can assign a store credit to the clients file by clicking on the Personal Info tab. Under Financial Information click on Edit Balance and give the client a positive balance for their referrals.
4. Click Return to Previous.
5. With the clients name highlighted, click the Reward button to "Thank" them and document the date in the clients file.