## Marketing - Referral Rewards

**Overview:** Automation allows for recording of clients that have referred work to a repair facility, the operator can reward the referrer on a dollar basis. The client card contains a referrer tab when selected the display lists by dollar value referred work including the value of any rewards "paid" to the referrer. Version 4.0.0 software allows you to communicate in various ways with the referrer client including email and SMS.

**Referral, Recording**: Recording the referrer is an option on the booking form, select the button to the right of the referrer field, highlight the referrer client from the listing, select OK to insert the name into the field

Client	Riseley	Details Current odometer	Details Current odometer -1			Work Done Prior faults Comments Here Is The Work Done For Job 95.			
Vehi From To Promotion Referrer	Cle availability Date Time 24/10/24 8:00AM 24/10/24 5:00PM	Grad Humber	● 6 months ⊃ 12 months der						
Services		Client/Company	First Name	Account No	Home Phone	Work Phone	Mobile /		
Service		Booth	Soon	C20	08 0451 4024				
Engine D	iagnosis Carburettor	Burgess	Doug	4	100 5451 4054		0412951377		
Major Se	rvice	Cannington Denture Cli		15		08 9451 1477			
		Howard [@]	Fred	C26	9874 9977	9656 9889	0413 587 456		
Cancel	Create job Job ca	ard D Cancel /ehicles	Show	inactive		MyAC	SMS Paymen		

**Referral, Viewing Transactions:** Referral dollars are allocated to the referrer based on the total value of the job, an allocation is posted when the job is closed. To view allocations, open the referrers client form, click on the referrals tab, a list of transactions relating to referred jobs is visible, the screen also displays any rewards that have been credited to the client, a total balance of referral dollars available is at the bottom of the screen.

It is possible to view the details of a reward by pointing and clicking on the line item, if you wish to view a job point and click on the line and the job details will display.

vincent			] Private	Business	Parent	(None)		
Contact details	Profile	History		Tasks	Com	ments	Referrals	Drivers
Date	Туре				Amount			
05/12/24	Reward				\$50.00			
09/11/24 08/11/24	Reward	details		1	*****		<b>×</b>	
07/11/24 05/11/24	Title	The Amazing Rewa	rd					
	Details	Thank You For Ref	erring Vol	r Friends To II		rvices We	Are Pleased	
		To Reward You W Regards, The Servi	ith A Fifty	Dollar Discoun	t On Your	Next Servic	e.	

**Referrals, Processing a Reward:** Rewards are allocated via the marketing display, click on marketing at the top of screen the data extraction criteria displays. In the center of the form you will see a database filter titled Referrals.



To filter for referrers, select the tick box to the left of the field and enter the minimum referral value into the field to the right, to filter select OK (F12) from the bottom of the data extraction options a list of clients that match your search criteria is displayed from the bottom of the marketing list select the reward option.



A form is displayed requires you to complete details of the reward including your communication method, if there are clients you do not wish to contact in the list simply un-flag the record by selecting the box to the right of the record.

Reward	details 🔀
Title	The Amazing Reward
Date	05/12/24 Value \$50.00
Details	Thank You For Referring Your Friends To Use Our Services, We Are Pleased To Reward You With A Fifty Dollar Discount On Your Next Service. Regards, The Service Team.
	Contact method Email v
Canc	el OK

It is also possible to print a list of referrers for marketing purposes from the list. Selecting the print option from the bottom of screen displays a record list that can be sent to the printer. Alternatively, you can export the list in text format by selecting the export option

**Referrers, Communications:** Select your communication method from the options displayed, records can be merged in Word, used for to email or send an SMS.