

Reward Your Customer Referrals

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So you'd like to say thanks to a current customer for sending you a new customer with some token of appreciation; how and where do you register this referral activity between these customers? You can do this without generating an order; just follow these steps:

Go to **Utilities** menu to open **Customer screen**.

- 1) Click on **Name** to access new customer's record. (example Bob Peterson)
- 2) Open the **Referred By** drop-down list and select **Friend** as the Referral type.
- 3) Click on **Referral Lookup** to open the customer rolodex.
- 4) Select existing customer (example Pam Johnson) from list.
- 5) Click **OK** to accept the selection. Referred By should now display *Pam Johnson*.
- 6) Click on Customer Screen **Exit** button.
- 7) Answer **Yes** to 'Save Changes to Customer Information?'

Now when the Referral-Customers report is run it will include referral (Bob Peterson referred by Pam Johnson).

Posted by: [Tim McDonnell](#) - Fri, May 8, 2009 at 5:45 PM. This article has been viewed 1686 times.

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