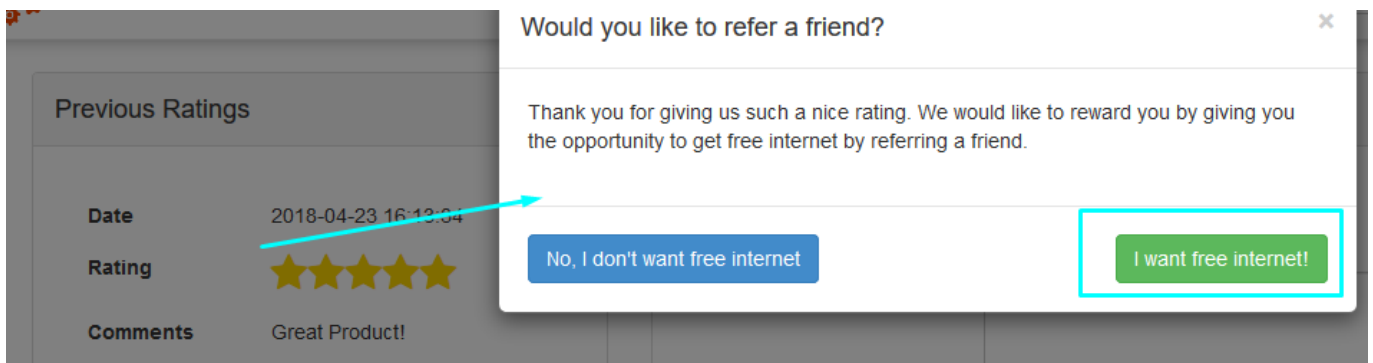**Webinar:** **Refer a friend webinar**

Included in version 1.3.01

When a user gives a 4 or 5 star rating for the first time, they will be directed to the Refer a Friend pop up.

Before customers who give good ratings can get the popup to refer a friend, it will need to be set up in one of the two ways:

Option 1:

Go to Sales – Sales Settings -Marketing settings

If "Enable for Customer Category" is set to **No,** all customers who submit good ratings will have the option to refer a friend.

Enable For Customer Category   No

When enabled refer a friend will only appear on customers portals who are in customer categories with refer a friend enabled on the category. When disabled all customers will have refer a friend appear on their customer portal.

Enable Referral Popup On Good Rating   Yes

When enabled a popup will appear when a 4 or 5 star rating is submitted by the customer, asking the customer if they would like to refer a friend.

Option 2:

Go to Sales – Sales Settings -Marketing settings

If "Enable for Customer Category" is set to **Yes,** only customers who belong to customer groups with Refer a Friend enabled, will have the option to refer a friend if they submit good ratings.

Enable For Customer Category   `Yes`

> When enabled refer a friend will only appear on customers portals who are in customer categories with refer a friend enabled on the category. When disabled all customers will have refer a friend appear on their customer portal.

Enable Referral Popup On Good Rating   `Yes`

> When enabled a popup will appear when a 4 or 5 star rating is submitted by the customer, asking the customer if they would like to refer a friend.

Auto Enable For Customer Category On Good Rating   `Yes`

> When Enable For Customer Category is checked, it will automatically add customers who submit good ratings to the customer category selected below.