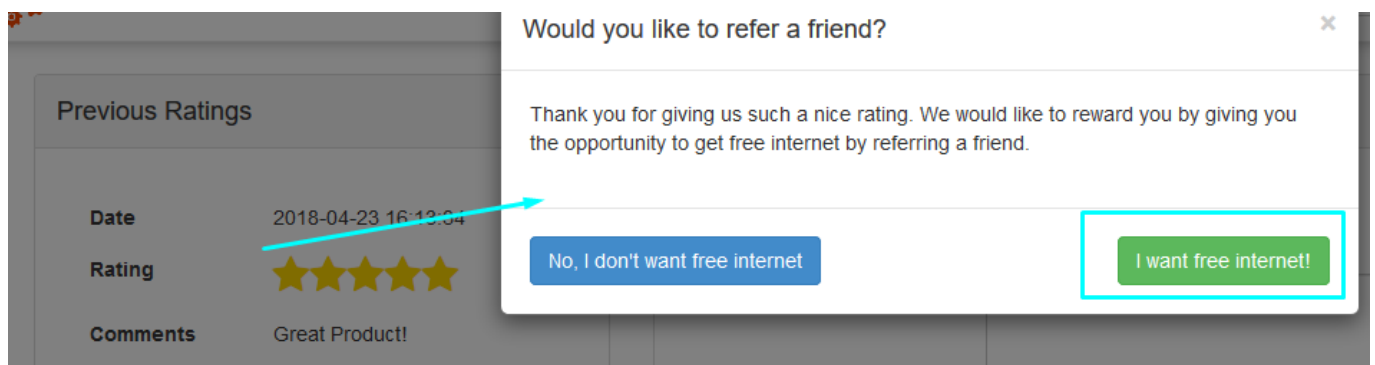


Webinar: [Refer a friend webinar](#)

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.