

Detail Customer Referral List Report Guide

The “Detail Customer Referral List Report” displays all the referrals that were made by existing customers within a specified date range.

When to create the report

Create as often as needed. This report is often used in conjunction with a referral and reward program.

How to create the report

1. From the SalonBiz/SpaBiz menu bar, click on the “Report” icon.
2. Double click on Detail Customer Referral List from the report side navigation. You will find it under the Referral and Reward category.
3. Enter the beginning date and ending date for the report

What it tells you

The report provides you with information on the following areas:

- New Customer - name of the new client that was referred to your business
- Referral Date - date they were referred into the location
- First Visit - date the new client experienced a service (ticket was processed)
- Total Visits - total number of visits by the new client
- Reward Date - date you rewarded the existing client, if applicable
- Referred by - referral type that was chosen in the new client’s file
- Reason - referral reason that was chosen in the new client’s file

How it’s used

This report is used to calculate the number of new client referrals given by an existing customer.



Detail Customer Referral List from 1/1/2008 to 12/31/2008

New Customer	Referral Date	First Visit	Total Visits	Reward Date	Referred by	Reason
Brittany B Jackson	1/2/2008	1/2/2008	1	No Date	Walk-in	No Reason
Estelle Winter	1/2/2008	1/2/2008	1	No Date	Walk-in	No Reason
David Dowden	1/2/2008	1/2/2008	0	No Date	Walk-in	No Reason
Melisa (Ma-Lisa) Powell	1/2/2008	1/3/2008	11	No Date	Walk-in	No Reason
Meagan Gillett	1/2/2008	1/5/2008	1	No Date	Walk-in	No Reason
Yolanda Toment	1/3/2008	1/3/2008	0	No Date	Walk-in	No Reason
Lesley St Germain	1/3/2008	1/24/2008	4	No Date	Walk-in	No Reason
Denis Hoerner	1/3/2008	1/3/2008	7	No Date	Walk-in	No Reason
Pj Kee	1/3/2008	1/3/2008	2	No Date	Walk-in	No Reason
Blayne Myers	1/3/2008	1/3/2008	0	No Date	Walk-in	No Reason
Rebecca Rebouche	1/3/2008	1/12/2008	2	No Date	Walk-in	No Reason
Laurie Conway Williams	1/4/2008	1/8/2008	3	No Date	Walk-in	No Reason
David Villareal	1/4/2008	1/4/2008	1	No Date	Walk-in	No Reason
Kip Hanks	1/4/2008	1/31/2008	1	No Date	Walk-in	No Reason
Lynda Woolard	1/4/2008	1/9/2008	2	No Date	Walk-in	No Reason
Brian Mansfield	1/4/2008	1/5/2008	1	No Date	Walk-in	No Reason
Jessica Skelly	1/5/2008	1/12/2008	1	No Date	Walk-in	No Reason
Molly Half	1/5/2008	1/5/2008	1	No Date	Walk-in	No Reason
Lindsay C Pick	1/5/2008	1/5/2008	1	No Date	Walk-in	No Reason
Lauren E. Fornoff	1/5/2008	1/5/2008	0	No Date	Walk-in	No Reason
Elizabeth Milvid	1/7/2008	1/9/2008	1	No Date	Walk-in	No Reason
Brent Applewhite	1/7/2008	1/7/2008	0	No Date	Walk-in	No Reason
Lisette Deboisblanc	1/7/2008	1/10/2008	1	No Date	Walk-in	No Reason
Aaron Ready	1/7/2008	1/8/2008	6	No Date	Walk-in	No Reason
Julia Pichette	1/7/2008	1/8/2008	2	No Date	Walk-in	No Reason
Chaske Rhirwindsoldier	1/7/2008	1/8/2008	1	No Date	Walk-in	No Reason
Anna M Arceneaux	1/7/2008	1/7/2008	1	No Date	Walk-in	No Reason
Joey Arceneaux	1/8/2008	1/8/2008	1	No Date	Walk-in	No Reason
Mandolin Mauldin	1/8/2008	1/11/2008	3	No Date	Walk-in	No Reason
Mary Ellen Forster	1/8/2008	1/17/2008	2	No Date	Walk-in	No Reason
Jennifer T. Tedesco	1/8/2008	1/12/2008	5	No Date	Walk-in	No Reason
Rebecca C Leonard	1/8/2008	1/10/2008	4	No Date	Walk-in	No Reason
Gail Hambrick	1/8/2008	1/10/2008	1	No Date	Walk-in	No Reason
Ella M. Bright	1/8/2008	1/10/2008	1	No Date	Walk-in	No Reason
Everard Lopez	1/8/2008	1/9/2008	1	No Date	Staff	Cassandra Kelley
Bett Garcia	1/9/2008	1/9/2008	1	No Date	Walk-in	No Reason
Kathy Moses	1/9/2008	1/24/2008	1	No Date	Walk-in	No Reason
Leah Sossaman	1/9/2008	2/1/2008	3	No Date	Walk-in	No Reason
Jill Graff	1/9/2008	1/9/2008	3	No Date	Walk-in	No Reason
Liz Deboisblanc	1/9/2008	1/10/2008	2	No Date	Walk-in	No Reason
Katie Pellerin	1/9/2008	1/10/2008	8	No Date	Walk-in	No Reason
Stephanie W. Cosse	1/9/2008	1/9/2008	0	No Date	Walk-in	No Reason
Beth C. Perry	1/10/2008	3/4/2008	2	No Date	Walk-in	No Reason
Nichole Vogel	1/10/2008	1/10/2008	1	No Date	Walk-in	No Reason
Fred Murrell	1/10/2008	9/9/2008	1	No Date	Walk-in	No Reason
Jeanne Carrant	1/10/2008	1/10/2008	1	No Date	Walk-in	No Reason
Jessica Hamann	1/10/2008	1/11/2008	2	No Date	Walk-in	No Reason
Kathy Degrandis	1/11/2008	1/11/2008	11	No Date	Walk-in	No Reason
Monica Mcglasson	1/11/2008	1/12/2008	2	No Date	Walk-in	No Reason
Loni Freeman	1/11/2008	1/22/2008	1	No Date	Walk-in	No Reason
Leslie Depula	1/11/2008	1/11/2008	0	No Date	Walk-in	No Reason
Ted Mehl	1/12/2008	1/14/2008	1	No Date	Walk-in	No Reason
Granville Kaynor	1/12/2008	1/15/2008	1	No Date	Walk-in	No Reason