## fibrecrm OF THE PRACTIC

HEART PRACTICE

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## **Referrer Management**

When an **Organisation**/ • Person has referred you a business or person that they think will be a good fit for your firm add them into the CRM as a Lead.



In **Create Lead** use the select arrows to select the **C** • Person/Organisation who referred you the business and add them in the Referred by Person/Referred by Organisation section. Once you've entered all the information about the Lead select Save and Close.

Referred by Person:	R ×
Referred by Organisation:	k ×

The referral will now appear on the referrers **Person**/ **Organisation** record in the referrals panel. You can also view the **Opportunities** created and whether they were won or lost and their value.

Type	Prospective Client	Assigned User					
ead	Mr. John Smith	Fibre Administrator	02/17/2022 07:33				· N
rganisations	Fibrecrm Limited		01/22/2019 10:23	62.550.00	60.00	6872.00	63,422,00
rganisations	Fibrecrm Limited		01/22/2019 10:23	62,550.00	60.00	6872.00	

When you are • referring business to another Person or **Organisation** navigate to the Person/ **Organisation** record and on the **Referrals Out** panel select Create.

IAN ARMIT	AGE						
Business Card	Address	Keep In Touch	Personal	Categories	Personal Tax	Source	ACTIONS -
First Name:		Jan					Office Phone:
Last Name:		Armitage					Mobile:
Person ID:		A011					Email Address:
Client Manager:		RP					Department:
Client Partner:		Christian Pulln	nan				Person Type:
Sensitive Data:		Sensitive Data	for Janet Elizabeth	Armitage Edit	Record		
Trading as:							
Referrals Out							
CREATE							
Contacts	Account	Jan A	urmitage Accounts		Status	۰ ۱	/alue Estimate

In the Create Referral pop up the Referee Person is the Person **J** • you are sending to another business. The **Referee Organisation** is the Organisation you are sending to another business. Referred to Person is the Person that is receiving the referral. Referred to Organisation is the Organisation that is receiving the referral. Referred By is the person at your firm who facilitated the referral. Use the select arrows to select any of them. You can also add a Referred Date, Value Estimate and set a Status. Once filled in select Save.

teferee Person:		Referred To Perso	on:	K
deferee	X Smithy's	Referred to	×	
teferred date:	× 02/17/20;	Value Estimate:	×	
tatus:		Referred By:	Fibre Administrator	K

Once saved the referral will now appear in the **Referrals Out** • section so you can view who you have been referring work to.

CREATE							
Organisations	People	Fibrecrm Limited People	Status	Value Estimate	Referred date	Referred by	Action
			When	(1.000.00	01/26/2022	Fibre Administrator	0