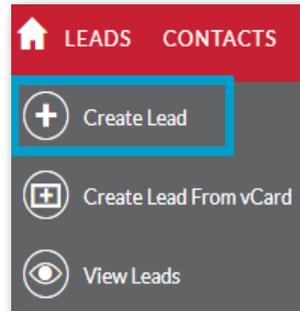


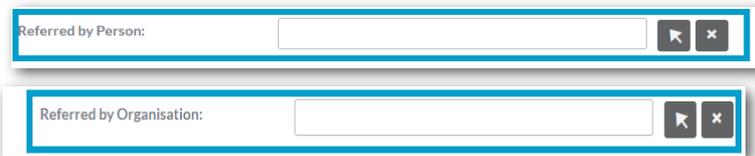
Visit [support.fibrecrm.com](http://support.fibrecrm.com) for more info or contact your CRM Manager

## Referrer Management

**1.** 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**.



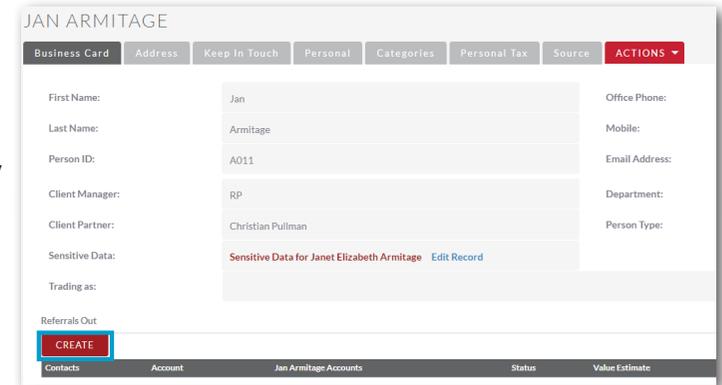
**2.** In **Create Lead** use the select arrows to select the **Person/Organisation** who referred you the business and add them in the **Referred by Person/Referred by Organisation** section. Once you've entered all the information about the **Lead** select **Save and Close**.



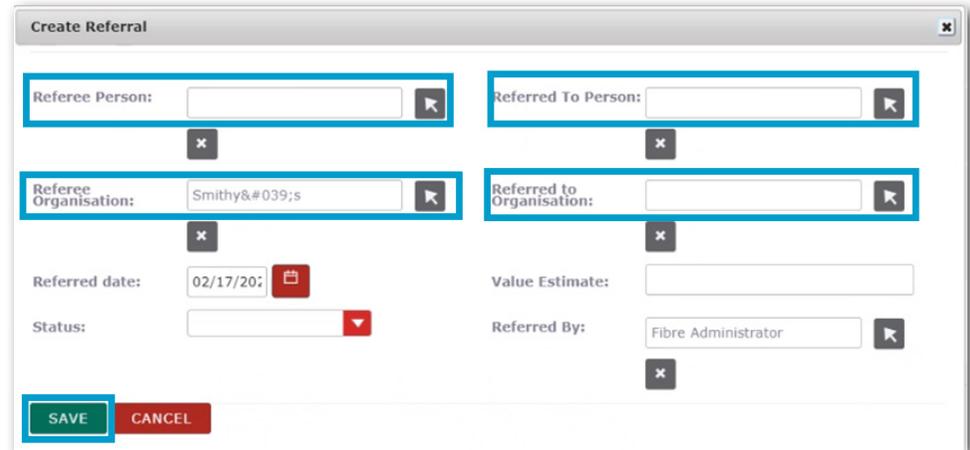
**3.** The referral will now appear on the referrers **Person/Organisation** record in the referrals panel. You can also view the **Opportunities** created and whether they were won or lost and their value.

Type	Prospective Client	Assigned User	Created date	Won	Lost	Active	Total Value
Lead	Mr. John Smith	Fibre Administrator	02/17/2022 07:33	-	-	-	-
Organisations	Fibrecrm Limited		01/22/2019 10:23	£2,550.00	£0.00	£872.00	£3,422.00

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



**5.** In the **Create Referral** pop up the **Referee Person** is the **Person** 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**.



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

Organisations	People	Fibrecrm Limited People	Status	Value Estimate	Referred date	Referred by	Action
Smithy's			Won	£1,000.00	05/26/2022	Fibre Administrator	