

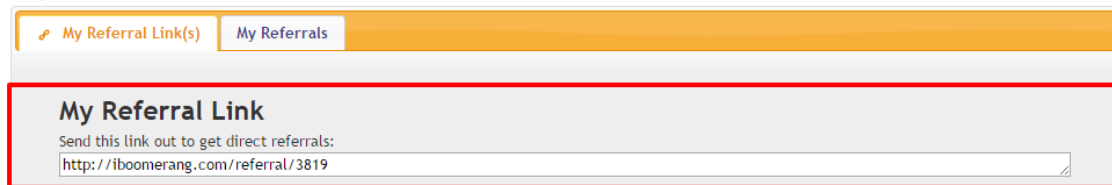
HOW TO:

Use iBoomerang's Referral Area

Where can you find your referral link?

- Log in to your iBoomerang Back Office (<http://my.iboomerang.com>)
- Go to the **Bonus Area (My Tool Set-->Bonus Area)**
- Your referral link will be located under the **My Referral Link(s) tab** (See image below)

My Referrals

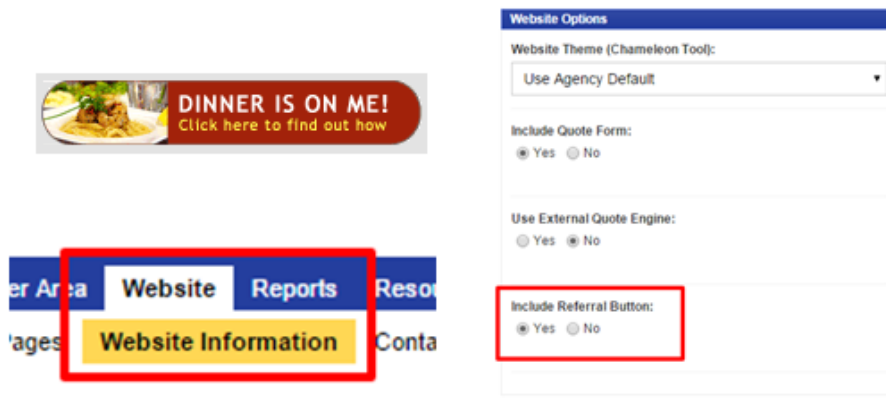


Where can you add your referral link?

- **Agent Website**-You can add a custom link to your website navigation
- **E-mail Signature**-Every e-mail you send will have the referral link embedded in your e-mail signature
- **E-mail Template**- Use the Referral Template in your drip marketing to current clients
- **QR Code**- Use the QR Code Generator to create a QR code for your referral link

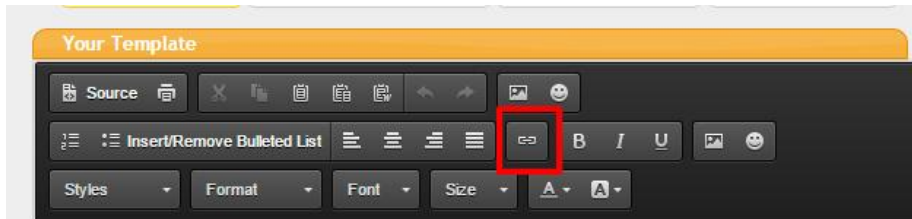
How to add the referral link to your Agent Website

- Log in to the Agency Back Office
- Click on **Website** on the navigation task bar and then **Website Information**
- In the **Website Options** section, click **Yes** to **Include Referral Button**
- A referral button will now appear on your website that leads straight to your referral link



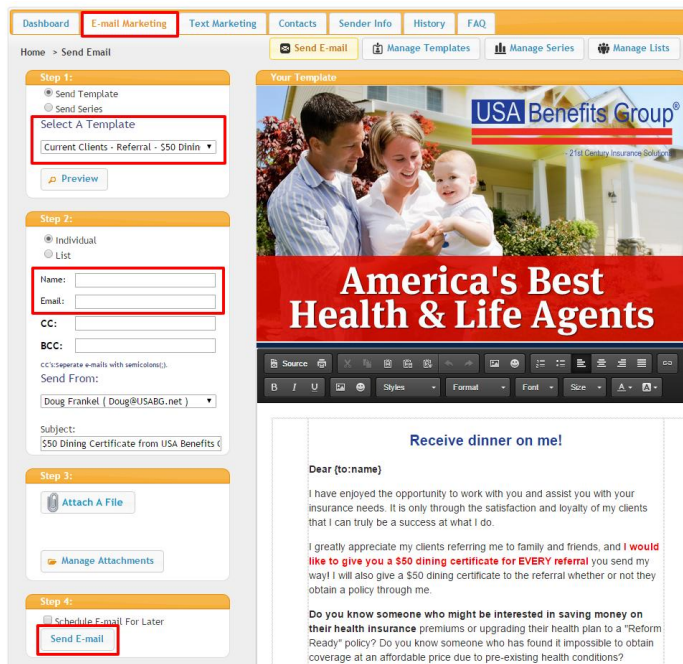
How to add the referral link to your E-mail Signature

- Log in the iBoomerang Back Office (<http://my.iboomerang.com>)
- Go to **E-mail Marketing+**
- Click on the **Sender Info** tab
- Click on the link icon under **E-mail Signature** (See image below)
- Paste your referral link and click 'OK'
- Save your signature



How to send the Referral E-mail Template

- Log in the iBoomerang Back Office (<http://my.iboomerang.com>)
- Go to **E-mail Marketing+**
- Click on the **E-mail Marketing** tab
- Fill out **Recipient Name(s)** and **E-mail(s)**
- Select a template: **Current Clients-Referral**
- Paste your individual referral link in the referral link section of the e-mail
- Click **Send E-mail** button to finish (See image below)




How to make a referral link QR Code

- Log in the iBoomerang Back Office (<http://my.iboomerang.com>)
- Go to **My Tool Set>Bonus Area**
- Click on the **QR Code Generator**
- Paste your referral link in the URL spot and click **Generate**
- **Download** your QR Code image and save it to your computer
- You can now add this QR image to your website, e-mail templates, business cards, flyers posters, and other printables!

My Forms **QR Code Creation**

1. Type in your website URL
2. Click Generate
3. Download the QR Code and save to your computer
4. Add the QR image to your website, e-mail templates, business cards, flyers, posters, print mailers, ads, etc

URL:



How to Manage the Referral Area

- Log in to the iBoomerang Back Office (<http://my.iboomerang.com>)
- Go to **My Tool Set>Bonus Area**
- Two tabs will appear

My Referral Link(s) Tab

- This tab will display a list of all received referrals from your referral link. To delete any unwanted referrals, check the box in the **Delete** row and click the **Delete Selected Referrals** button (See image below)

My Referrals

My Referral Link(s) **My Referrals**

Name	Contact Info	Comment	Referred By	Referred On	Sender	Delete
Mary Smith	mary.smith@gmail.com 999-999-9999	Mary and her family need insurance coverage.	Joe Brown e.joe@gmail.com p: 999-999-9999	September 8, 2015 - 3:15pm	Rachael Potlner rpotlner@iboomerang.com	<input type="checkbox"/>

My Referral Link(s) Tab

- This tab will display your referral link for every sender in your e-mail template tool.
- The **Edit Referral Form** allows you to customize your referral message if you wish to display something other than the default text. You can also choose whether or not you would like the **“Offer FREE Gift”** text to display on your referral form (See image below)

My Referrals

The screenshot shows the 'My Referrals' interface. At the top, there are two tabs: 'My Referral Link(s)' (highlighted with a red box) and 'My Referrals'. Below the tabs, there are four user profile cards for Doug Frankel with different email addresses. The main content area is divided into two sections: 'My Referral Link' and 'Edit Referral Form'. The 'My Referral Link' section shows a text input field containing the URL 'http://iboomerang.com/referral/1865'. The 'Edit Referral Form' section (highlighted with a red box) contains the following information: Name: Doug Frankel, E-Mail: Doug@USABG.net, Offer FREE Gift? (radio buttons for Yes and No, with Yes selected), and a Custom Message text area containing the text: 'Thank you for the referral. I will be forwarding you a \$50.00 restaurant certificate for each one provided.' At the bottom of the 'Edit Referral Form' section, there are two buttons: 'Save Referral Form' and 'Preview Referral Form'.

- Once you have finished edits to the referral form, you will need to click the **Save Referral Form** button.
- To preview changes made to the referral form click the **Preview Referral Form** button (See image below)

The image shows a preview of a custom referral form for USA Benefits Group. The form has a green header with the USA Benefits Group logo and a 'THANK YOU' banner. The main text reads: 'Tell your friends about USA Benefits Group and receive a FREE gift!* Thank you for the referral. I will be forwarding you a \$50.00 restaurant certificate for each one provided. Representative: Doug Frankel - Doug@USABG.net'. Below this, there are two sections: 'Your Information' and 'Referral #1'. Each section has input fields for Name, E-mail, and Phone. The 'Referral #1' section also has a 'Comments' field. At the bottom, there are two buttons: 'Add More Referrals' and 'SUBMIT REFERRALS'. A small asterisk at the bottom reads: '* To get a gift your referrals have to be legitimate referrals.'

Preview of Custom Referral Form

Questions?
Call us at 937-387-0655
E-mail us at
support@iboomerang.com