



### 3.005 Referral Rewards Program Policy

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## Policy Purpose and Scope

The purpose of this policy is to outline the process used for clients that are eligible to receive account credit (virtual credit) for referral business to PhotoBiz.

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## Roles and Responsibilities

The Billing Manager is responsible for maintaining and updating this policy to ensure the process is accurately defined and contains the most current information.

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## Operational Procedures

The Referral Rewards Program is utilized by PhotoBiz in an effort to encourage existing clients to recommend our services to others.

If a client refers our services to a new client and the new client keeps an active PhotoBiz account for at least sixty (60) days, the referring client is eligible to receive \$20 in PhotoBiz account credit.

The following terms and conditions apply:

- Only active PhotoBiz clients are eligible to receive PhotoBiz referral account credit.
- The referred PhotoBiz client must remain an active client for at least sixty (60) days. After 60 days, the PhotoBiz referral account credit will be issued to the referring client's account.
- The referred client must be a first-time client. That is, they must have never had a PhotoBiz account in the past.
- Subsequent accounts opened by the referring client are not eligible for the referral PhotoBiz account credit.
- Referral PhotoBiz account credits are not eligible to members of the same household.
- The referred client must not have received any promotional discounts when opening their account. If a promotional code was used or a discount applied, the referring client is not eligible for the referral PhotoBiz account credit.

Referral account credits are generated by the Billing Specialist using the following procedure:

1. The Referral Specialist will generate the referral report by selecting the accounts to be reviewed in the "Billing and Referral Management" option within the billing system. This report indicates those clients which may be eligible for the referral PhotoBiz account credit.
2. The Referral Specialist will export this report into excel and using the criteria outlined above, determine which clients are eligible for the PhotoBiz referral account credit.
3. Once all eligible clients have been identified, the Referral Specialist will present the referral management report to the Billing Manager for approval. Approval from the Billing Manager must be obtained prior to any PhotoBiz referral account credits being issued.



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4. After approval has been obtained from the Billing Manager, the Referral Specialist will issue the \$20 virtual credit to the client's account in the billing system. Add a note using the "Referral" category in the Virtual credit and on the account. *Example: 11/20/12: \$20 VC for Rebecca Jones Referral*
5. A ticket is created for the account of the client receiving the account credit that has referred our service to send the following acknowledgement email.

Dear ,

Thank you for referring PhotoBiz to your colleagues and friends. Our goal is to provide the most outstanding service possible to our clients, who then tell their friends and business associates. We work very hard to make this happen every day.

We value you as a member and to show our appreciation for your support, we have added a \$20 credit to your PhotoBiz account. This account credit can be used to purchase any PhotoBiz product or the credit will automatically go towards your next membership payment. You can view your account credit balance by clicking on "My Account" in your control panel and choose "Virtual Credit".

If you are not already part of our testimonials, we would be very grateful for your participation. Just send your testimonial to [testimonials@photobiz.com](mailto:testimonials@photobiz.com) along with your picture (optional) or company logo.

Thanks again for your continued patronage.

Debra Britton  
Billing Manager  
US Toll Free: 866-463-7620 Option 3

6. The Referral Specialist will mark all referral credit accounts as "paid" in "Billing and Referral Management" option in the billing system. This will remove the credited clients from subsequent Referral Management reports.
7. Finally, mark all of the other accounts "not apply" that are not eligible to receive the referral credit.

The billing system will automatically apply the PhotoBiz referral credit to the client's next product purchase or to the next monthly membership fee - whichever occurs first.

PhotoBiz referral account credits are typically generated twice monthly or more often depending on the number of eligible accounts in order to ensure that credits are issued in a timely manner.

Please see Page 8 of the Billing Procedures Outline for detailed instructions.