

## What Is This?

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Referrals turn your happy customers into your sales team. When they invite a friend, both sides can earn rewards, points, or credits. You can also add **claim conditions** — rules that delay the **inviter's reward** until the new customer spends. Invitee rewards always land at sign-up. This guide covers invitee and inviter setup, **Slot Consumption Trigger**, and **Minimum Purchase Policy Types**.

## Real-Life Example

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**Wei Lin** runs **Kopi Lab**, a small café in PJ. She set up a referral where the new customer gets a free latte and the inviter earns 100 bonus points. To stop fake sign-ups, she added a claim condition: "Cumulative spending of RM30". Her regular **Ahmad** invites his colleague **Siti**. Siti gets her free latte at sign-up. Ahmad's 100 points stay pending. Siti spends RM18 on lunch, then RM15 the next day. Once her total crosses RM30, Ahmad's points land.

## How to Set Up Invitee and Inviter Rewards


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1. Go to **Admin Panel** → **Loyalty Program** → **Referral Configurations**, then click **Create**.


## Pixalink

 Dashboard

### Loyalty Program ^

 Record Points

 Transactions

 Rewards

 POS Transactions

 E-commerce Transactions


 Customer Portal Design

 News Feed

 Referral Configuration

 Tier Configuration

 Feedback

 Paid Membership Types

### Forms ∨

### Wallet Management ∨

### Reservation ∨

### CRM ∨

### General ∨

### Settings ∨

2. On the **Information** tab, set what the new customer (invitee) gets. Pick an **Invitee Reward**, set the **Invitee Point Amount**, and the **Invitee Credit Amount** if your credit wallet is on.

### Invitee Rewards

**Invitee Reward**

Free Hair Treatment ▼

**Invitee Point Amount**

☆ 0

**Invitee Credit Amount**

\$ 0

3. Switch to the **Inviter Settings** tab. You'll see 10 referral slots, each tied to one referral in order. Fill in the reward, points, or credits for each slot you want active and leave the rest at 0. Use **Bulk Assign** to apply one reward to all slots.

Referral Items				
Name	Inviter Point Amount	Inviter Credit Amount	Inviter Reward	Total Referral
Referral 1	100	RM 5.00	RM5 Voucher	24 <a href="#">Edit</a> <a href="#">Delete</a>
Referral 2	150	RM 7.50	RM5 Voucher	18 <a href="#">Edit</a> <a href="#">Delete</a>
Referral 3	200	RM 10.00	RM10 Voucher	9 <a href="#">Edit</a> <a href="#">Delete</a>
Referral 4	300	RM 15.00	RM10 Voucher	3 <a href="#">Edit</a> <a href="#">Delete</a>
Referral 5 (VIP bonus)	500	RM 25.00	Free Meal Set	1 <a href="#">Edit</a> <a href="#">Delete</a>

4. Back on the **Information** tab, turn on **Enable Conditional Referral** to require spending. Pick a **Minimum Purchase Policy Type** and set the **Minimum Purchase Amount**, then click **Create**.

### Claim Conditions

**Require Minimum Spending**

**Condition Type**

First Purchase ▼

**Minimum Amount**

50

**Trigger**

Purchase ▼

## What Is the Slot Consumption Trigger?

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Each successful referral uses up one slot from your inviter reward ladder. The **Slot Consumption Trigger** decides *when* that slot is used.

- **Signup** — the slot is consumed the moment the invitee registers. This caps total slot usage and stops inviters from spamming fake sign-ups to claim the same slot.
- **Purchase** — the slot is only used when the invitee makes a qualifying purchase. Slots aren't burned on invitees who sign up but never visit.

Pick **Signup** for high-value inviter rewards where abuse is a risk. Pick **Purchase** for small everyday rewards.

## The 3 Minimum Purchase Policy Types

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These decide when invitee spending unlocks the **inviter's reward** (invitee rewards always land at sign-up).

### 1. First — first transaction minimum amount

The invitee's very first purchase must hit the minimum. If their first visit is too small, the reward can never be unlocked — only that first transaction matters.

*Use case:* A salon sets **First, RM150** so only big-ticket first visits unlock the inviter's reward.

### 2. Any — any transaction minimum amount

Any single purchase at or above the minimum unlocks the reward.

*Use case:* A boutique sets **Any, RM100**. Siti's first visit is RM40 — no unlock. Her second is RM120 — unlocked.

### 3. Cumulative — cumulative transaction minimum amount

All of the invitee's purchases are added together. Once the total hits the minimum, the reward unlocks.

*Use case:* A café sets **Cumulative, RM50**. Farah spends RM12, RM18, then RM22 across three visits. The third visit pushes her total to RM52 — her inviter's reward unlocks.

## Good to Know

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- The claim condition only delays the **inviter's reward**. Invitee rewards never wait.
- Switch the currency from **Point** to **Credit** to require credit wallet spending instead of regular purchases.
- The inviter gets a notification the moment the claim condition is met.

## Need Help?

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Reach out to support for help picking the right combination.

## What's Next?

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- [How to Set Up Referrals](https://kb.pixalink.io/articles/how-to-set-up-referrals) (https://kb.pixalink.io/articles/how-to-set-up-referrals) — full walkthrough of the referral programme
- [Transaction Types Explained](https://kb.pixalink.io/articles/transaction-types-explained-how-points-flow-in-and-out) (https://kb.pixalink.io/articles/transaction-types-explained-how-points-flow-in-and-out) — see how referral transactions fit into the bigger ledger