

# How to Set Up Referrals

By Zu Wei   Published Mar 19, 2026   Loyalty   3 min read

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## What Is This?

Referrals let your existing customers invite friends to join your loyalty programme. When a friend signs up (and optionally meets a spending condition), both the inviter and the invitee can receive rewards, points, or credits. It's word-of-mouth marketing powered by your loyalty system.

## Real-Life Example

**Kak Nadia** is a loyal customer of **Seri Anggun Salon** in Subang Jaya. She shares her referral link on WhatsApp to her friend **Ain**. Ain signs up through the link and makes her first purchase of RM 50. Ain receives a free hair treatment voucher (invitee reward), and Kak Nadia gets 100 bonus points (inviter reward). Everyone wins.












## How to Set Up Referrals

### Step 1: Open the Referral Configuration Page

From the Admin Panel sidebar, go to **Loyalty Program** → **Referral Configuration**. Click **Create** to set up a new referral programme.

## Pixalink

### Loyalty Program ^

-  Record Points
-  Transactions
-  Rewards
-  E-commerce Transactions
-  POS Transactions
-  Customer Portal Design
-  News Feed
-  **Referral Configuration**
-  Tier Configuration
-  Feedback
-  Paid Membership Types

## Step 2: Configure Invitee Rewards

On the **Information** tab, set up what the **new customer (invitee)** receives:

- **Invitee Reward** — Select a reward to give the new customer (optional)
- **Invitee Point Amount** — Bonus points for the new customer
- **Invitee Credit Amount** — Bonus credit for the new customer (if credit wallet is enabled)

**Invitee Rewards**

Invitee Reward

Free Hair Treatment ▼

Invitee Point Amount

☆ 0

Invitee Credit Amount

💰 0

### Step 3: Set Claim Conditions (Optional)

If you don't want to give rewards for free, set a **minimum spending condition**:

- **Require Minimum Spending** — Toggle on to require spending before rewards are given
- **Condition Type** — Choose from:
  - **First Purchase** — Must spend on their very first transaction
  - **Any Purchase** — Can be any single transaction
  - **Cumulative** — Total spending across all transactions must reach the target
- **Minimum Amount** — The spending threshold (in points or credit)
- **Trigger** — When does the referral count: on **Signup** or on **Purchase**

**Claim Conditions**

Require Minimum Spending

Condition Type

First Purchase ▼

Minimum Amount

50

Trigger

Purchase ▼

## Step 4: Configure Inviter Rewards

Switch to the **Inviter Settings** tab to set up what the **existing customer (inviter)** receives for each successful referral:

- **Inviter Reward** — Select a reward
- **Inviter Point Amount** — Bonus points per referral
- **Inviter Credit Amount** — Bonus credit per referral

The system provides **10 pre-created reward tiers** for inviters. Configure each tier with a reward, points, or credits. Leave unused tiers at 0 points with no reward selected. Tier 1 applies to the first successful referral, Tier 2 to the second, and so on.

### Inviter Settings

#### Tier 1

Inviter Reward  
Free Hair Treatment

Inviter Point Amount  
100

#### Tier 2

Inviter Reward  
RM10 Off

Inviter Point Amount  
50

#### Tier 3

Inviter Reward  
Select an option

Inviter Point Amount  
0

## Step 5: Customise the Referral Message

Switch to the **Configurations** tab to edit the message customers share with their friends:

Use these template variables in your message:

- `{{SPACE_NAME}}` — Your outlet's name
- `{{REFERRAL_LINK}}` — The unique referral link

A **preview panel** shows exactly how the message will look when shared.

## Referral Message

### Referral Message

Hey! I love {{SPACE\_NAME}} and I think you will too. Sign up using my referral link and we both get rewarded!

{{REFERRAL\_LINK}}

## Step 6: Set Up Notifications (Optional)

On the **Notifications** tab, configure automated notifications:

- **Inviter Notification** — Notify the inviter when their referral is successful
- **Claimable Notification** — If minimum spending is required, notify the **inviter** when the invitee meets the spending condition and the referral reward becomes claimable

Each notification supports WhatsApp attachments (images, videos, or PDFs up to 16 MB).

## Notifications

### Inviter Notification

Enable

#### Message

Great news! Your friend just signed up using your referral link. You've earned a reward!

### Claimable Notification

Enable

#### Message

Your friend has met the spending requirement! Your referral reward is now ready to claim.

## Step 7: Add Terms & Conditions

The **Terms** tab has pre-filled default T&C that you can customise to match your programme rules.

### Terms & Conditions

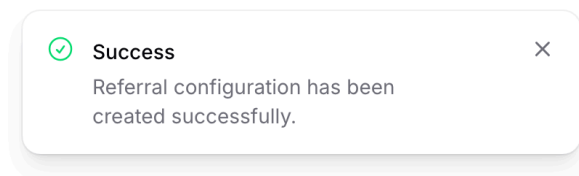
Terms and Conditions

**B** *I* U ~~ABC~~ x<sub>2</sub> x<sup>2</sup> H<sub>2</sub> H<sub>3</sub>

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## Step 8: Save

Click **Create** to save your referral configuration. Customers can now start sharing referral links from their portal.



## How the Referral Flow Works

flowchart LR

```
A[Inviter shares<br/>referral link] --> B[Invitee clicks<br/>link & signs up]
B --> C{Spending<br/>condition?}
C -->|No condition| D[Both get<br/>rewards instantly]
C -->|Has condition| E[Invitee must<br/>meet spending]
E --> F[Condition met:<br/>both get rewards]
```

## Good to Know

- **One referral link per customer** — Each customer gets a unique referral link they can share.
- **Multiple reward tiers** — You can set up to 10 different inviter rewards, rewarding customers more as they refer more friends.
- **WhatsApp integration** — If you've connected WhatsApp, referral notifications are sent automatically via WhatsApp.

- **Slot consumption** — Each inviter reward "slot" is consumed when a referral is successful. Tier 1 goes to the first referral, Tier 2 to the second, and so on.
- **Credit wallet** — Credit amounts only appear if the credit wallet feature is enabled for your organisation.