

How To – Processing Referral Bonus Emails

Step 1: Confirm the student referred to us is a New Student

Search CPR.Center for the customer who said someone referred them.

Verify that the student is a “new” customer and had not attended class with us in previous years.

If they are a new customer, move onto Step 2. If they have used us in prior years, then we will not issue a referral bonus to the person they entered on their order.

If they are a new customer that was referred by a previous customer, move onto Step 2 below.

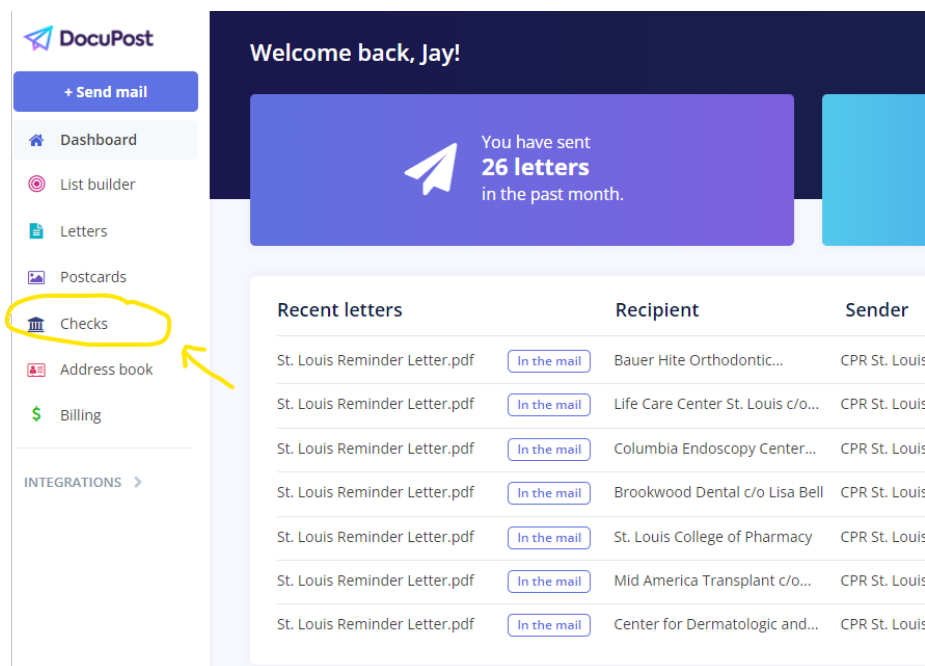
Step 2: Login to Docupost

URL- <https://docupost.com/>

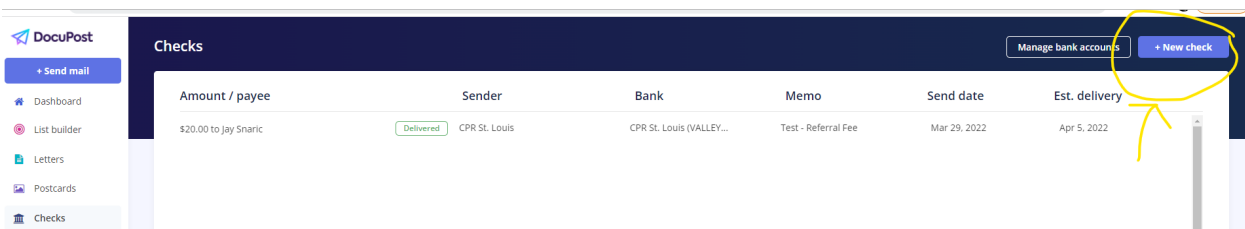
Username- jsnaric@gmail.com

Password- rxz2nsF77Tz@6^^q

Click “Checks” on the left side bar panel:



Click “+New Check” button at the top right of the screen:



Step 3: On the “Send Check” Screen fill in the following fields:

- Select “city” specific bank account from the drop-down menu by clicking the arrow at the right of the box
- Enter the \$ amount of the referral bonus \$20.00 (unless they referred more than 1 new customer and then you can put the total referral bonus amount \$20.00 X number of new customers they referred)
- Enter a Memo as follows:
Thank you for referring (insert first and last name of customer they referred)!
Example- Thank you for referring Tammy Baker!
- Check # (leave this one blank)
- Payee / recipient Address
This is the name and address for the person you are mailing the referral bonus. Make sure you enter the “shipping address” from their most recent order.
- Select SENDER from the dropdown menu (this is the “city” where the old and new customer took class)

The screenshot shows the 'Send check' form in the DocuPost interface. The form is divided into several sections:

- Bank account:** A dropdown menu showing 'CPR St. Louis (VALLEY NATIONAL BANK)' with a yellow circle around the dropdown arrow.
- Amount:** A text field containing '\$20.00' with a yellow underline.
- Memo:** A text field containing 'Thank you for referring T' with a yellow underline.
- Check #:** A text field containing 'Optional' with a yellow 'X' over it.
- Payee / recipient:** A section with a yellow underline. It includes a dropdown for 'Choose from address book...', a text field for 'Kimberly Snaric', and a text field for '10925 Oyster Bay Circle'. Below these are fields for 'Address line 2' (containing 'New Port Richey'), a state dropdown (set to 'FL'), and a ZIP code field (containing '34654'). A checkbox for 'Save to address book' is at the bottom right.
- Sender:** A section with a yellow underline. It includes a dropdown for 'CPR St. Louis - 8348 Little Road' with a yellow circle around the dropdown arrow. Below are text fields for 'CPR St. Louis', '8348 Little Road', 'Suite 199', and 'New Port Richey'. It also has a state dropdown (set to 'FL') and a ZIP code field (containing '34654'). A checkbox for 'Save to address book' is at the bottom right.
- Attachment document (optional):** A section with a blue button labeled 'Click to upload PDF' and a note: 'Attachments must be letter sized PDF format, have a maximum of 5 pages and will be printed in black and white, double-sided, 10MB max.'
- Check preview:** A section at the bottom showing a blue button labeled 'Send check' and the text 'Cost \$2.00 - 0 attachment pages'.

On the left side of the interface, there is a sidebar with the DocuPost logo and a list of navigation links: '+ Send mail', 'Dashboard', 'List builder', 'Letters', 'Postcards', 'Checks', 'Address book', 'Billing', and 'INTEGRATIONS >'. At the bottom left, there are links for 'Account' and 'Logout', and a balance display showing '\$280.30'.

Step 4: “Attachment document (optional)” -

Upload the “City” specific PDF Referral Bonus Thank you letter from Dropbox

How to access the attachment to upload:

Login to Dropbox (User - info@acsls-bls-nashville.com)

Go to Referral Folder = 1 – Referrals Folder

Click the city specific sub folder

Download the PDF file of the “mail letter” to upload

Upload the PDF mail letter under **Attachment document (optional)** seen below

DocuPost
+ Send mail

Dashboard
List builder
Letters
Postcards
Checks
Address book
Billing

INTEGRATIONS >

Account
Logout
\$280.30

Send check

Bank account: CPR St. Louis (VALLEY NATIONAL BANK)
Amount: \$20.00
Memo: Thank you for referring T
Check #: Optional

Payee / recipient
Choose from address book...
Kimberly Snario
10925 Oyster Bay Circle
Address line 2
New Port Richey FL 34654
Save to address book

Sender
Manage senders
CPR St. Louis - 8348 Little Road
CPR St. Louis
8348 Little Road
Suite 199
New Port Richey FL 34654
Save to address book

Attachment document (optional)
Click to upload PDF
Attachments must be letter sized PDF format, have a maximum of 5 pages and will be printed in black and white, double-sided, 10MB max.

Check preview
Send check Cost \$2.00 - 0 attachment pages

Step 5: Upload Image logo to Check

Scroll down the current page after uploading the mail letter PDF file until you see “Check preview” shown below

Check preview

CPR St. Louis
8348 Little Road
Suite 199
New Port Richey, FL 34654

VALLEY NATIONAL BANK

DATE 4/12/22

PAY 20.00

TO THE ORDER OF Kimberly Snario
10925 Oyster Bay Circle
New Port Richey, FL 34654

\$ 20.00

Memo: Thank you for referring
Tammy Baker!

Upload image

Check logo (optional)
Must be 100 x 100px. Requires DocuPost Premium.

Click the box next to the Check logo (optional) and upload the city specific logo downloaded from Dropbox

How to access the logo to upload to the check:

Login to Dropbox (User - info@acsls-bls-nashville.com)

Go to Referral Folder = 1 – Referrals Folder

Then click the sub folder 1 - City Check Logos for Docupost Referral Bonuses

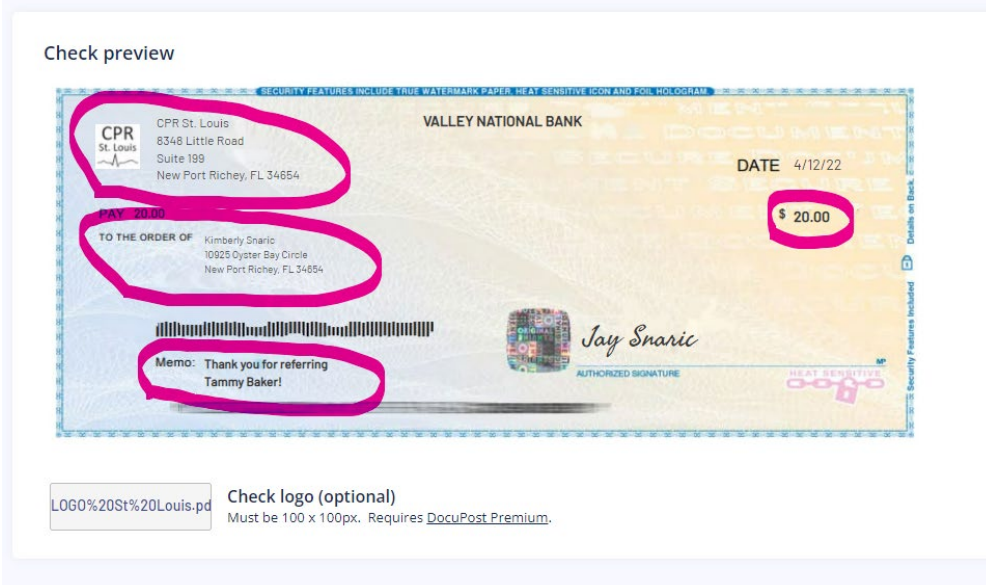
Download the city specific logo to upload to the check

Click Upload image box in Docupost under the check shown below

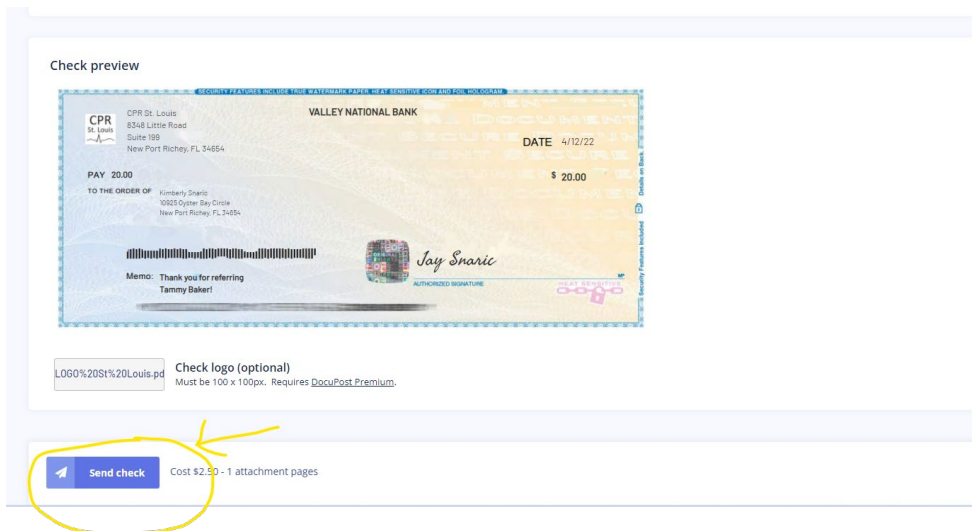


Step 6: Verify all information is correct on the check

- Correct City specific logo and City name/address in upper left corner of the check
- Correct \$ dollar amount for referral bonus
- Memo states the correct name of the person the referral awardee referred to us
- Check is made payable to the correct person and address who referred the new customer



Step 7: Click the “Send check” Button



Step 8: Add the Referral Bonus Issued to the Referral Tracker in Dropbox
 Login to Dropbox (User - info@acsls-bls-nashville.com)
 Go to Referral Folder = 1 – Referrals Folder
 Once there, click on 1 – Referrals Tracker Folder
 Then, click on the current year tracker
 Go to the city specific sheet on the tracker at the bottom

Referral Tracker					
City Columbus, OH		Start Date January 1, 2022			
Date	Check Number	Issued to	Amount	Who Was referred	
28-Jan	1151	Chelsea Mullins	\$20.00	Jo Ellen Braden	
28-Jan	1152	Aaron Corn	\$20.00	Nicholas Colangelo	
28-Jan	1153	Felix Botchway	\$20.00	Chika Madumelu	
28-Jan	1154	Pei Peng	\$20.00	Yu Gang Lai	
28-Jan	1155	Gwenyth Wiegand	\$20.00	Liam Wilson	
26-Feb	1003	Kaelyn Mcconnell	\$20.00	Terri Mcconnell	
20-Mar	PayPal	Margaret Musani	\$20.00	Yvonne Odoro	
20-Mar	PayPal	Farha Hassan	\$20.00	Ubah Warsame	
20-Mar	PayPal	Elizabeth Bauer	\$20.00	Tammy Hamilton	
20-Mar	PayPal	Irene Bediako	\$20.00	Cosmos Oppong	
20-Mar	1005	Fatima Khan	\$20.00	Puspa Dhimel	
20-Mar	1006	Karlie Martin	\$20.00	Karen Jehl	
20-Mar		Dominique Anchi	\$20.00	Dominique Anchi	

Enter the data for each column on the next line of the file for that city

- Date
- Docupost for payment method
- Student we sent Referral Bonus to
- \$ amount of referral bonus check
- Name of student they referred
- Enter an X in the column confirming the Referral Bonus letter was mailed