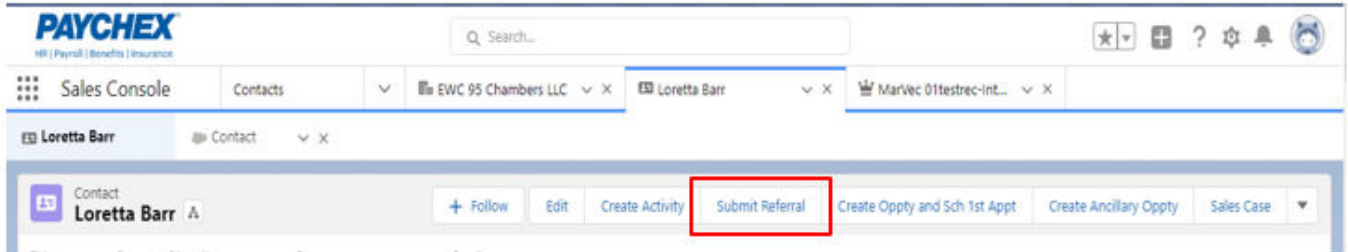




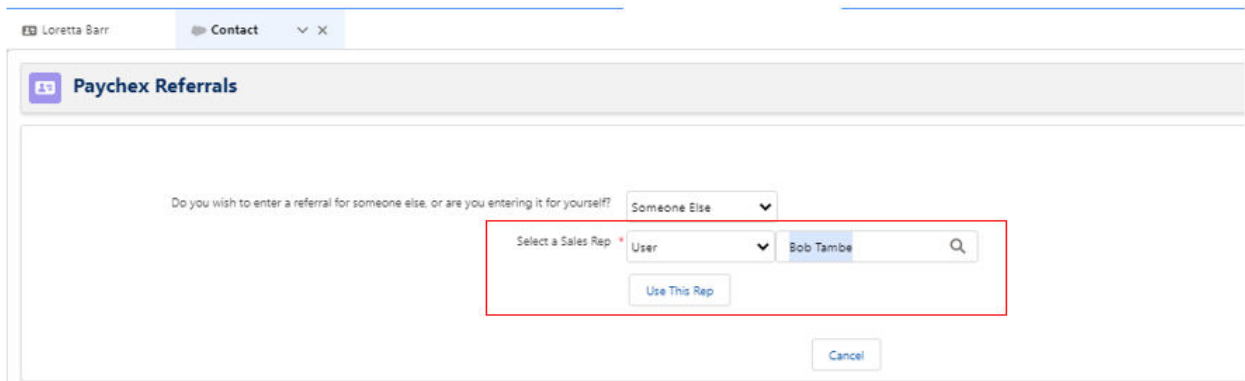
## Submit International Hiring and HR Services External Referrals through Salesforce

### How to Submit the Referral

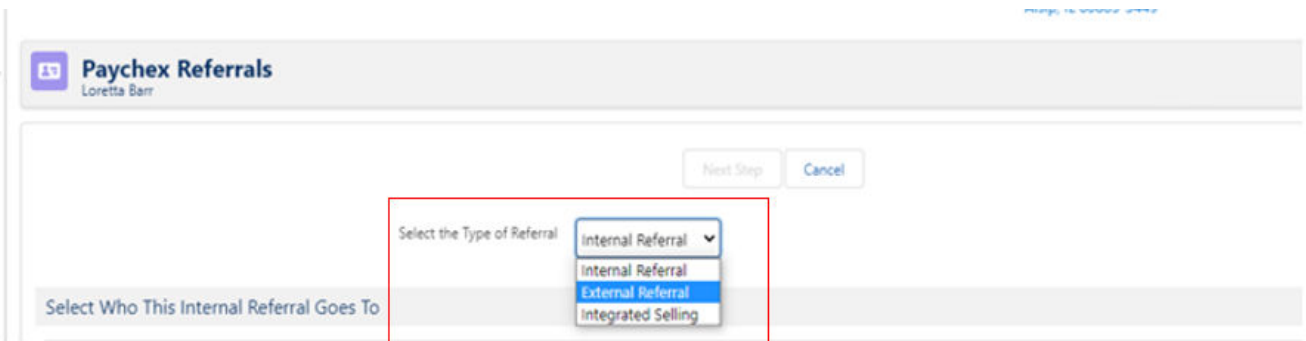
1. From the **Contact** record, click the **Submit Referral** button.



2. Sales Rep will choose themselves '**Myself**' or '**Someone Else**' if they are creating the external referral for another individual. You can search for the user's name using the magnifying glass. Then select **Use This Rep** (user will automatically be moved to the next screen...it takes a few seconds so be patient!)



3. Change the Type of Referral to **External Referral**.



4. **International Hiring and HR Services** will be displayed in the list of partner types.

Select the Type of Referral External Referral

Select Who This External Referral Goes To

SELECTED	PARTNER TYPE	PROSPECT-CLIENT CONTACT	REFER TO
<input type="checkbox"/>	Aflac (H&B Reps Only)	Loretta Barr	Aflac Referrals
<input type="checkbox"/>	Bank	Loretta Barr	
<input type="checkbox"/>	Biz2Credit	Loretta Barr	Biz2Credit Contact
<input type="checkbox"/>	Digital Marketing (formerly FreshLime)	Loretta Barr	FreshLime Contact
<input type="checkbox"/>	International Hiring and HR Services	Loretta Barr	International Hiring and HR Services Contact

5. Check the box next to **International Hiring and HR Services** and select **Next Step**

Next Step Cancel

Select the Type of Referral External Referral

Select Who This External Referral Goes To

SELECTED	PARTNER TYPE	PROSPECT-CLIENT CONTACT	REFER TO
<input type="checkbox"/>	Aflac (H&B Reps Only)	Loretta Barr	Aflac Referrals
<input type="checkbox"/>	Bank	Loretta Barr	
<input type="checkbox"/>	Biz2Credit	Loretta Barr	Biz2Credit Contact
<input type="checkbox"/>	Digital Marketing (formerly FreshLime)	Loretta Barr	FreshLime Contact
<input checked="" type="checkbox"/>	International Hiring and HR Services	Loretta Barr	International Hiring and HR Services Contact
<input type="checkbox"/>	Independent Insurance Agent	Loretta Barr	

6. **Referring Opportunity Information** - Entering data in the **Lead Source** field is not required. The Lead Source is how you came across the prospect. **Add** any additional information in the **Notes** field. Salesforce is already sending the vendor the basic referral information but including any additional insight or tips about the prospect in the Notes field will assist the vendor to assist the client. When you are done entering information, click **Next Step** to review the information before submitting.

Select the Type of Referral: External Referral

**Referring Opportunity Information**

Lead Source: Cold Call

Note: Choose the Lead Source that best fits the way that you as the referring rep generated this lead. This is not the Lead Source for the Selling Step.

Level 2: ---None---

Client Referral: [Searchable]

Frequency: 12

Employees Paid Per Payroll: \$

Referral Contact: [Searchable]

Referral Account: [Searchable]

Description: [Text Area]

**Select Who This External Referral Goes To**

SELECTED	PARTNER TYPE	PROSPECT-CLIENT CONTACT	REFER TO	NOTES
<input type="checkbox"/>	Afac (H&B Reps Only)	Loretta Barr	Afac Referrals	
<input type="checkbox"/>	Bank	Loretta Barr		
<input type="checkbox"/>	Bi2Credit	Loretta Barr	Bi2Credit Contact	
<input type="checkbox"/>	Digital Marketing (Formerly FreshLime)	Loretta Barr	FreshLime Contact	
<input checked="" type="checkbox"/>	International Hiring and HR Services	Loretta Barr	International Hiring and HR Services Contact	enter Notes here!

7. Click **Submit Referral(s)** to complete the process.

**Paychex Referrals**  
Loretta Barr

Submit Referral(s) Add Attachment Previous Cancel

Type of Referral: External Referral

**Please verify the following**

SELECTED	PARTNER TYPE	PROSPECT-CLIENT CONTACT	REFER TO	REFERRAL GENERATED	NOTES
<input checked="" type="checkbox"/>	International Hiring and HR Services	Loretta Barr	International Hiring and HR Services Contact	Email	

8. Once the external referral has been processed, the screen below will display. Selecting the *Complete Return to Contact Name* button will take you back to the Contact record page layout. Selecting the *Complete Return to My Opportunity* button will take you to the Opportunity that was just created for the external referral. An email will automatically be sent to **International Hiring and HR Services** with the prospect's information and any comments that were entered in the **Notes** field.

The screenshot shows the 'Paychex Referrals' interface for user 'Loretta Barr'. At the top, there are two buttons: 'Complete-Return to Loretta Barr' and 'Complete-Return to My Opportunity', which are highlighted with a red box. Below these buttons, the 'Type of Referral' is listed as 'External Referral'. The 'Referring Opportunity Information' section includes fields for 'Lead Source' (Cold Call), 'Level 2', 'Client Referral' (checked), and 'Frequency' (12). On the right side, there are fields for 'Employees Paid Per Payroll' (\$), 'Referral Contact' (checked), 'Referral Account' (checked), and 'Description'. The 'Referral Submission Complete' section contains a table with the following data:

SELECTED	PARTNER TYPE	PROSPECT-CLIENT CONTACT	REFER TO	REFERRAL GENERATED	SUBMISSION STATUS
<input type="checkbox"/>	International Hiring and HR Services	Loretta Barr	International Hiring and HR Services Contact	Email	Referral Record Successfully Saved!