



TRIPS

Referrals

Set up the per-agency referral program, share links from any contact, and track inquiry → booked → rewarded.

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On this page

- [Turning the program on](#)
- [How a referral becomes a reward](#)
- [Where to see referral activity](#)
- [Getting a referral link](#)
- [Common questions](#)
 - [Can I run more than one promotion at a time?](#)
 - [What if the referred friend was already in my contacts?](#)
 - [Does Trips automatically pay the reward?](#)

The Referral program turns happy clients into your most cost-effective marketing channel. Every contact gets a unique referral link they can share; when a friend clicks it and submits your inquiry form, the lead lands in Trips already credited to the referring contact.

Turning the program on

Settings → Referrals. The program is OFF by default — flip the master switch when you are ready to start sharing links.

Required settings before you can enable it:

- Public offer headline — the one-liner clients see on their referral page (e.g. "Refer a friend and get \$100 off your next booking.")
- Fine print / terms — your eligibility rules, payout schedule, anything legal
- Inquiry form — which Trip Inquiry-kind form the referral link should drop people into
- Promotion status — which trip status flips a referral from "inquiry" to "booked" (typically Confirmed, Deposit Paid, or Booked)

How a referral becomes a reward

1. Your client shares their referral link with a friend
2. Friend clicks the link, which gets tracked as a referral_link_click
3. Friend submits your inquiry form. A contact_referral row is created with status=inquiry, linked to the referring contact
4. When the referred friend's trip reaches your configured promotion status, the referral flips to status=booked automatically
5. You manually mark the referral as "rewarded" once you have paid out (from the contact page or the /referrals dashboard). Trips does not handle the payout itself — just the bookkeeping

Where to see referral activity

- /referrals is the agency-wide dashboard. Every referral, every click, every reward state.
- Per-contact tab. Open any contact and look for the Referrals section to see what this person has sent you and what credit they have earned.
- Public stats page (optional). If you enabled `public_stats_enabled`, referring contacts see their own progress bar on their referral landing page.

Getting a referral link

Every contact automatically has a referral link generated the first time it is requested. To grab a link for a specific client, open their contact card — the link sits near the top. The URL format is `/r/{code}`; that short code is the `contact_referral_links` row tied to that contact.

Common questions

Can I run more than one promotion at a time?

Not today. The program is single-tier — one headline, one set of rules. Multi-tier programs are on the roadmap.

What if the referred friend was already in my contacts?

The inquiry form still creates a `contact_referral` row tracking the click. The referral is credited based on whoever shared the link, regardless of whether the new lead was previously known to you.

Does Trips automatically pay the reward?

No — payouts are off-platform. Trips tracks the inquiry → booked → rewarded lifecycle so you can see who is owed; you handle the actual reward (gift card, statement credit, cash) yourself.