Referral Tracker

Add Referral

Name: Name

Date: Date Selector

Referrals: Count

Save

Quick Add Referrer

Name: Name

Email Address: Email Address

Phone: Phone

☑ Special Type

Save

Quick Add Group

Name: Name

Contact Name: Contact Name

Email Address: Email Address

Phone: Phone

☑ Special Type

Save

Summary		
	Month	Year
April	12	100
March	23	96
Feb	35	80
Jan	20	90
Dec	5	75
Nov	5	80
Oct	10	85
Sep	5	70
Aug	10	60
July	15	65
June	5	80
May	5	75

Top Groups (past year)		
1	Smith Clinic	27
2	Family Med	23
3	Good Sam	15
4	Centura	12
5	Family Health	9

Top Doctors (past year)		
1	Dr. Davis	27
2	Dr. Smith	23
3	Dr. Stolte	15
4	Dr. Scott	12
5	Dr. Jones	9
6	Dr. Walburg	8
7	Dr. Tilford	6
9	Dr. Ward	3
10	Dr. Jensen	2

Special Groups (past year)		
1	Google	27
2	Website	23
3	Current Patient	15
4	Past Patient	12
5	Facebook	9

Referral Tracker

Start: 1/1/2014

Choose Group: Groups, Phys., Marketing

Include Prev. Yr.

Full report runs the MTD, YTD with previous year.

Full To Date Report

Pick only month and year

15

Limit to: All, Dr. Davis, Dr. Smith...

Run

▼ Dr. Davis

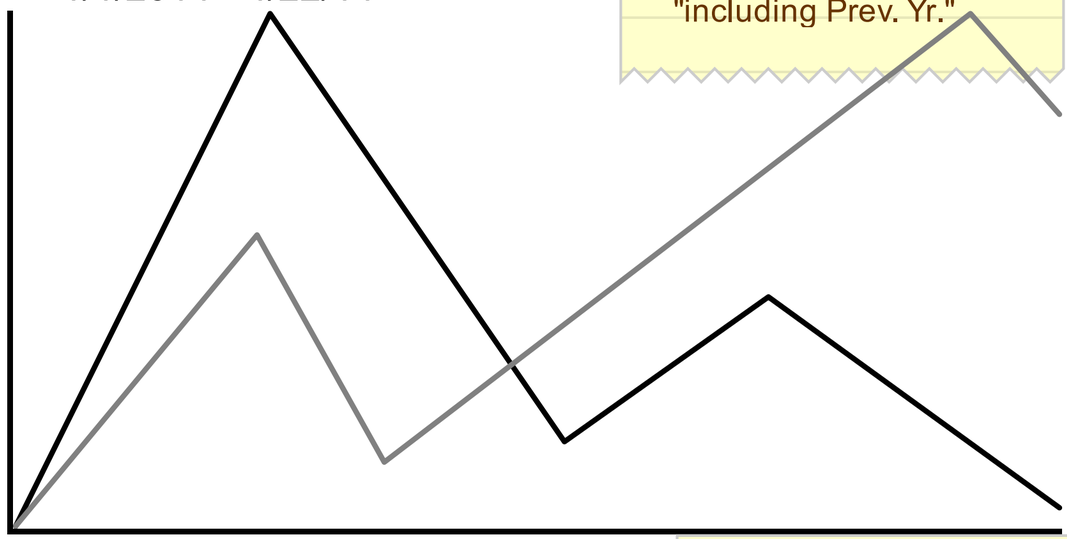
	Month	Month (prev)
Total	20	22
Jan	2	1
Feb	1	1
...	....	....
April	2	3

This table matches the plot data.

Dr. Davis

----1/1/2015 - 4/22/15

----1/1/2014 - 4/22/14

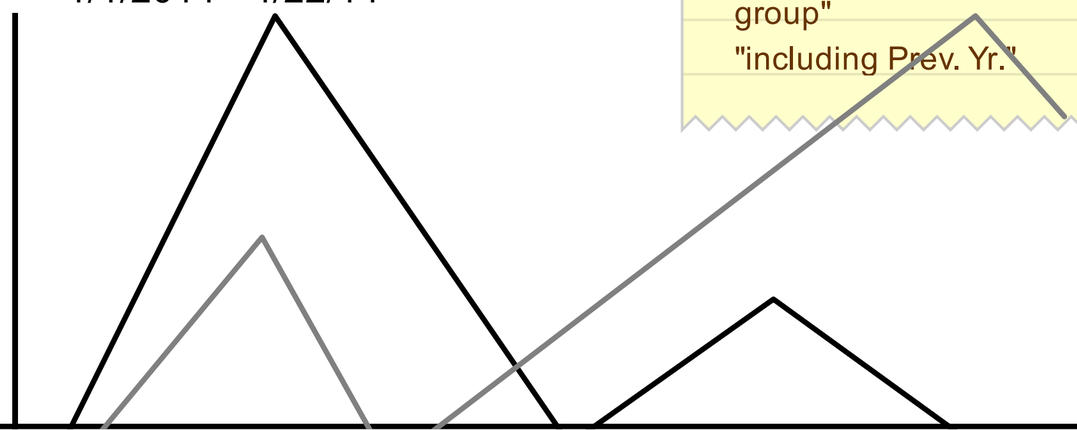


This example shows a "plot" of "Dr. Davis" "including Prev. Yr."

Family Health group

----1/1/2015 - 4/22/15

----1/1/2014 - 4/22/14



This example shows a "plot" of the "Family health group" "including Prev. Yr."