

1. Overview

The refer a friend module was created to ensure that we can give our customers the chance to refer their friends to your company and be rewarded with some credit if the customer signs up and their installation is **successfully** done.

Customers will be able to refer customers in one of two ways:

- By logging into their customer portal and clicking on the refer a friend button.
- By submitting a good rating (4 and 5-star ratings only).

When referring a potential customer, customer's will need to add the names and email addresses of the people that they would like to refer. The referees will now receive an email with a link. When they click on the link, they will be taken to the specials page. On the specials page, they can choose one of the specials that the ISP has created.

If they decide to choose one of the specials, then they will be redirected to a page where they will need to complete their customer details. This screen will look similar to the screen the customer will see when completing an online application from your website.

After the customer submits their details a new sales lead will be generated, and the lead will follow through the normal lead to receipt process. The referrer will now also be able to keep track of how far the lead has processed through the lead to receipt process.

Once the installation successfully takes place, credits will be allocated accordingly:

- **The referrer** will receive credit towards the full amount of the data product chosen by the referred.
- **The referred** will receive credit for the amount which is pre-determined by the relevant service provider. Should the service provider enter the amount of credit to be allocated as 0 (nil), then the referred client will not receive any credit.

The referred customer will be able to claim credit once they have paid their installation invoice in full. The referrer will receive their credit once the next recurring billing run takes place. Unlike the referred customer, the referrer will not need to pay the invoice before being able to claim the credit.

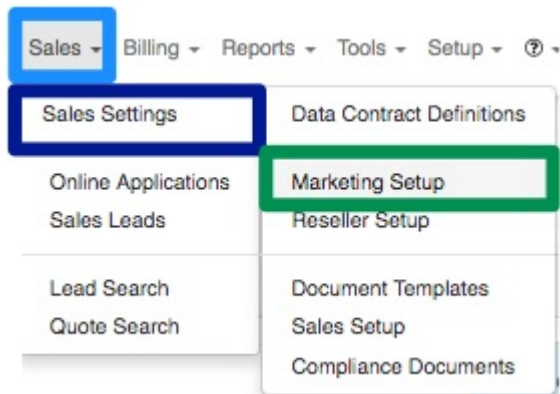
2. Setup

To start the setup, you will need to create an account in SageOne. This account should be named something along the lines of "Discount Allowed - Refer a friend". Once this has been done, you will need to submit a ticket to the data still support team. The support team will then enable the refer a friend module in your database and sync the new account with your HeroTill.

After this initial setup has been done, we will let you will need to complete the rest of the refer a friend set up.

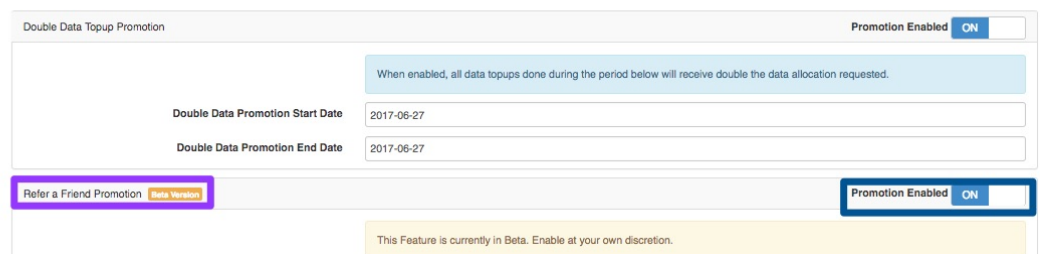
2.1. Finalising the refer a friend set up.

To finalise the refer a setup set up, go to "**Sales**" - "**Sales Settings**" and then click on the "**Marketing Setup**" option.



On the following screen, look for the “**Refer a Friend Promotion**” section and ensure that the “**Promotion Enabled**” button is switched to “**On**”.

Marketing Setup



Double Data Topup Promotion

Promotion Enabled **ON**

When enabled, all data topups done during the period below will receive double the data allocation requested.

Double Data Promotion Start Date 2017-06-27

Double Data Promotion End Date 2017-06-27

Refer a Friend Promotion **Beta Version**

Promotion Enabled **ON**

This Feature is currently in Beta. Enable at your own discretion.

You will need to check the following settings:

Refer a Friend Promotion Beta Version Promotion Enabled ☒

This Feature is currently in Beta. Enable at your own discretion.

When enabled, customers will be able to refer a friend and be credited with the amount equal to the recurring billing of the customer that has signed up through the refer a friend promotion. New Customers that are signing up through the refer a friend promotion will receive discount as a credit note specified below.

Refer a friend discount 350

Credit Note Default Item Type Account

Credit Note Default Item Code Depreciation

Credit Note Default Product Description Depreciation

Items that will be used on credit notes issued to referred customers when refer a friend discount above is allocated.

Debit Referral Credits on Bandwidth Products ☒ Yes

When enabled referral credits will only be debited by recurring bandwidth products. If disabled referral credits will debited against any recurring product.

Enable Specials Page ☒ Yes

When enabled a specials page will allow customers to select a pre-defined package for the refer a friend promotion.

Enable For Customer Category ☒ Yes

When enabled refer a friend will only appear on customers portals who are in customer categories with refer a friend enabled on the category. When disabled all customers will have refer a friend appear on their customer portal.

- Red:** In this section, enter the amount that the customers will receive for successfully signing up with your ISP after being referred by a friend. Should you not want to give credit to the customer signing up, then you can change this amount to 0 (nil).
- Orange:** Here you will need to choose “**Account**”.
- Pink:** In this section, you will need to choose the SageOne account that you created.
- Purple:** The description here will automatically be pulled through from the account that you have chosen. Should you wish to give it an alternative description, you can do so by entering the description here.
- Light Blue:** This switch will allow you to:
- a) Only use the credit notes on recurring bandwidth products (**Yes**).
 - b) Use the credit notes against any recurring products (**No**).
- Dark Blue:** When this switch is enabled (**Yes**), then you will allow customers to select from a pre-defined package which they can refer to their friends. If the switch is disabled (**No**), then the customer will be directed to a normal sales lead page where they can complete their contact information.
- Green:** If this switch is enabled (**Yes**), you will need to assign the virtual reseller category to the customer before they are able to refer a friend. This means that only specific customer will be able to refer friends. If this switch is disabled (**No**), then the refer a friend module will be accessible to all your customers. This means that all your customer will be able to refer friends.

Default E-mail Subject

Don't Miss Out On This Deal

What is the incentive

Refer a Friend and we will credit your account with the value of their first month's data spend. Would you like to have **FREE** internet every month? Well you can with the **{{company_name}}** **Refer a Friend Promotion**.

If you refer a friend and they successfully sign up for a **{{company_name}}** internet service, we will provide a once off credit to your own account, to the same value as your friends monthly recurring billing. Your friend will also receive a **DISCOUNT** on his/her installation to the value of **{{discount_amount}}**. It's as simple as **1-2-3**

1. Send the below email to your friends to invite them to sign up with **{{company_name}}**.
2. Your friend applies for a **Heromany namell** internet service by using the link in the email that you sent them. This is very

Content that will appear in the Refer a Friend FAQ section when customers use refer a friend for the first time. Embed fields using **{{referred_name}}**, **{{referrer_name}}**, **{{apply_link}}**, **{{personalised_message}}**, **{{company_name}}**.

Email Content

Dear **{{referred_name}}**

{{personalised_message}}

I am delighted with my internet service from **{{company_name}}** and think you will be too.

If you would like to apply or to have an agent assist you, then please use this link here: **{{apply_link}}**.

This is super important, so that **{{company_name}}** know that I personally referred you and that you need to be treated like the VIP that

Email content to send to customers when they send out refer a friend e-mails. Embed fields using **{{referred_name}}**, **{{referrer_name}}**, **{{apply_link}}**.

Update

In this section, you will be able to see one of four message subjects that the customer will be able to use when sending the email to a friend. These email subjects are:

Purple:

- Don't miss out on this deal.
- Get connected with (your company name).
- Limited promotion: Refer a friend (your company name)
- Your friend needs you.

Dark Blue: In this section, you will be able to edit the refer a friend terms and conditions.

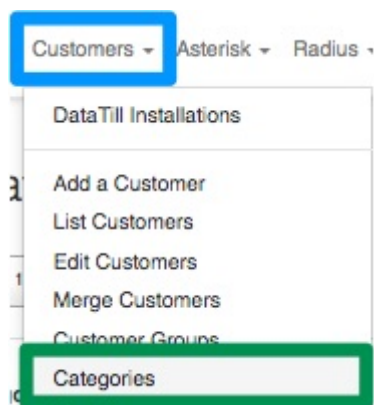
Light Blue: Here you will be able to see the email message that will be sent to the customer. If need be, you will be able to edit the message here.

After making any changes, remember to click on the “**Update**” button.

2.2. Categories

After you have completed the refer a friend setup, you will find that a new category has been created in your system. This category is called virtual resellers and you will use it to mark certain customers to be able to refer their friends. You will also be able to switch on the refer a friend module on other categories which are already linked to customers.

To do this, go to “**Customers**” and then click on the “**Categories**” option.



On the following screen, you will see a list of all your categories.

Categories

Size: 100 Rows

Normal Add Category Refresh

View Columns: Disabled Export Columns: CSV Export Columns: Base View: High Edit: None

Search:

Category Name	Category Description	Use for Customers	Use for Radius Users	Use for Billing	Use for Helpdesk	Use for Debtor Notes	Num Customers	Additional Inv Logo	Auto Data Rollover	
Ad-hoc	Ad-Hoc customers that use the internet only occasionally	Yes					18	Yes		Edit Delete Add
Bill		Yes		Yes			2	Yes		Edit Delete Add
Debt Collection Review	Debt Collection Review					Yes				Edit Delete Add
Do not edit	Do not edit	Yes					2			Edit Delete Add
Estate	Customers that live in a 100+ estate	Yes	Yes		Yes		2	Yes		Edit Delete Add
Friend	Family & friends	Yes					1	Yes		Edit Delete Add
Leased Line	All Leased Line Customers	Yes	Yes		Yes		1			Edit Delete Add
Master	Master	Yes								Edit Delete Add
Reseller	Customer is a Reseller	Yes					1	Yes		Edit Delete Add
Reseller	Resellers			Yes	Yes			Yes		Edit Delete Add
Statement sync pending	Do not change the category name NBI NBI	Yes								Edit Delete Add
Suspension						Yes				Edit Delete Add
Topup Rollover	Topup Rollover	Yes					1	Yes	Monthly Data & Topup	Edit Delete Add
Virtual Resellers	Customers who will be able to see refer a friend on their portal	Yes					4			Edit Delete Add

2.2.1. Adding new categories

To add new categories, click on the **"Add Category"** button found in the top right-hand corner.

Categories

Normal [Add Category](#) [Refresh](#)

Show 100 Rows

Search:

Category Name	Category Description	Use for Customers	Use for Radius Users	Use for Billing	Use for Helpdesk	Use for Debtor Notes	Num Customers	Additional line Logs	Auto Data Rollover	
Ad hoc	Ad hoc customers that use the internet only occasionally	Yes					18	Yes		Edit Delete Duplicate
bill		Yes		Yes			2	Yes		Edit Delete Duplicate
Debt Collection Review	Debt Collection Review:					Yes				Edit Delete Duplicate
Do not edit	Do not edit	Yes					2			Edit Delete Duplicate

After clicking on the “**Add Category**” button, you will see the following screen:

Add a new Category

Category Name
Category Title

Category Description
Category Description

Use for Customers
No

Use for Radius Users
No

Use for Billing
No

Use for Helpdesk Tickets
No

Use for Debtor Notes
No

Use for Refer a Friend
No

Auto Rollover Unused Monthly Data
No

Auto Rollover Unused Topups
No

Add Reseller Logo on Invoices
No

Cancel
Add Category

- Orange:** In this section, you can add a title and a description for the category that you are creating. Here you will need to decide which HeroTill aspects you would like to be able to use this category. For example, if you would like to be able to use this category on customers, switch the customer toggle switch to yes.
- Pink:**

*Please note that if you would like this specific category to enable refer a friend for certain customers, you will need to ensure that you have enabled the **“Use for Customers”** section as well as the **“Use for Refer a Friend”** section.

Click on the **“Add Category”** button after completing all the relevant details.

2.2.2. Editing categories



















To edit a category, click on the **“Edit”** button found on the right-hand side of the specific category.

Categories

Show 100 Rows

Normal + Add Category Refresh

Search:

Category Name	Category Description	Use for Customers	Use for Radius Users	Use for Billing	Use for Helpdesk	Use for Debtor Notes	Num Customers	Additional Inv Logo	Auto Data Rollover	
Ad-hoc	Ad-Hoc customers that use the internet only occasionally	Yes					18	Yes		  
bill		Yes		Yes			2	Yes		  
Debt Collection Review	Debt Collection Review:					Yes				  
Do not edit	Do not edit	Yes					2			  
Estate	Customers that live in a fiber estate	Yes	Yes		Yes		2	Yes		  
Friend	Family & friends	Yes					1	Yes		  

On the pop-up screen, you will see the same screen when adding a new category and you can update the details accordingly.

Edit Category #10

Category Name

Virtual Resellers

Category Description

Customers who will be able to see refer a friend on their portal

Use for Customers

Yes

Use for Radius Users

No

Use for Billing

No

Use for Helpdesk Tickets

No

Use for Debtor Notes

No

Use for Refer a Friend

Yes

Auto Rollover Unused Monthly Data

No

Auto Rollover Unused Topups

No

Add Reseller Logo on Invoices

No

Close

Update

After making any changes to the category, remember the click on the **“Update”** button.

2.2.3. Assigning customers to a category

You can easily assign multiple customers to a specific category by clicking on the **green** plus sign found on the right-hand side of the specific category.






Categories

Show 100 Rows

Normal + Add Category Refresh

Search:

Copy Columns Default Export Columns CSV Export Columns Excel Show/Hide Columns

Category Name	Category Description	Use for Customers	Use for Radius Users	Use for Billing	Use for Helpdesk	Use for Debtor Notes	Num Customers	Additional Inv Logo	Auto Data Rollover	
Ad-hoc	Ad-Hoc customers that use the internet only occasionally	Yes					18	Yes		
bill		Yes		Yes			2	Yes		
Debt Collection Review	Debt Collection Review:					Yes				
Do not edit	Do not edit	Yes					2			
Estate	Customers that live in a fiber estate	Yes	Yes		Yes		2	Yes		

After clicking on the **green** button, you will see the following pop-up screen:

Add Customers to Category #10

Category Name

Virtual Resellers

Customers to Add

Comma separated list of customer account codes

JAN005,JEN001,WON001

Close

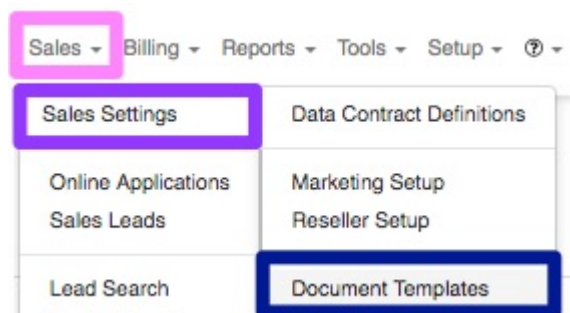
Add to Customers

In the **purple** section, add the customer codes, separated by a comma, that you would like to assign this category to. After adding the list of customers, click on the “**Add to Customer**” button.

2.3. Specials page

To setup the specials that the customer can choose from, you will need to go to “**Sales**” –

“**Sales Settings**” and then click on the “**Document Templates**” option. Please note that it is the ISP’s responsibility to create and keep these documents updated.



You will now see a list of all document templates.

Document Templates

Show 100 Rows

Search:

Normal

Option Name	Title	Payment Method	Document Type	
Option 1	Option 1: Free Install	Any	Quote	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
testany	testany	Any	Quote	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
testdebit	testdebit	Direct Debit	Quote	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
credit card	credit card	Credit Card	Quote	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
any	any	Any	Quote	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Refer 1	Refer 1	Any	Refer a Friend	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Super	Super	Any	Refer a Friend	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

2.3.1. Creating templates

To create a new document template, click on the “**Add**” button found in the top right-hand corner.

Document Templates

Show 100 Rows

Search:

Normal **+ Add** Refresh

Option Name	Title	Payment Method	Document Type
Option 1	Option 1: Free Install	Any	Quote
testany	testany	Any	Quote

After clicking on the “**Add**” button, you will now see the following pop-up screen:

Add a new Document Template

Option Name: Valentines day 1

Template Title: Half Price Installation Fee + .

Template Type: Refer a Friend

Payment Method: Any

Product Type	Product	Description	Qty	Incl Price	VAT Type	Recurring	Disc %	Discount	Excl Price	VAT	Total
Installation	INS001 - Standard I...	Standard Installation	1	1,250.00	15% ...	No	0.00	R 0.00	R 1,086.96	R 163.04	R 1,250.00
Data Products	4MBPS - 4Mb/s Unc...	4Mb/s Uncapped	1	749.00	15% ...	Yes	0.00	R 0.00	R 651.30	R 97.70	R 749.00

+ Add Another Line

Document Message

Total Discount: R 0.00

Total Exclusive: R 1,738.26

Total VAT: R 260.74

Total: R 1,999.00

Cancel

Create Template

Gold: Here, you need to give your template a name – the customer will not be able to see this.

Orange: In this section, you need to give template a title – the customer will be able to see this on the specials page.

Pink: Please be sure that you choose refer a friend in this section. If you do not choose refer a friend, then the option will not be displayed on your specials page.

Purple: If you would like, you can choose a default payment method here.

- Dark Blue:** In this section, you will need to add your document details i.e. the installation or data product on special.
- Red:** By clicking on the X, you will be able to remove a line item.
- Light Green:** By clicking on the “**Add another Line**” you will be able to add another line item.
- Light Blue:** In this section, you can view the total amount for the document.

After completing all information on your template, click on the “**Create Template**” button.

2.3.2. Editing templates

To edit your existing templates, you will need to click on the “**Edit**” button found on the right-hand side of the template.

Document Templates

Show 100 Rows

Search:

Normal

Copy Columns Export Columns Export Columns Show/Hide Columns

Option Name	Title	Payment Method	Document Type	
Option 1	Option 1: Free Install	Any	Quote	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
testany	testany	Any	Quote	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
testdebit	testdebit	Direct Debit	Quote	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
credit card	credit card	Credit Card	Quote	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

You will now see the same screen when you see when adding new templates.

Edit Document Template

Option Name: Valentines day 1 Template Title: Half Price Installation Fee + Template Type: Refer a Friend Payment Method: Any

Product Type	Product	Description	Qty	Incl Price	VAT Type	Recurring	Disc %	Discount	Excl Price	VAT	Total	
Installation	INS001 - Standard I...	Standard Installation	1	1,250.00	15% ...	No	0.00	R 0.00	R 1,086.96	R 163.04	R 1,250.00	<input type="button" value="Delete"/>
Data Products	4MBPS - 4Mb/s Unc...	4Mb/s Uncapped	1	749.00	15% ...	Yes	0.00	R 0.00	R 651.30	R 97.70	R 749.00	<input type="button" value="Delete"/>

+ Add Another Line

Document Message

Total Discount: R 0.00

Total Exclusive: R 1,738.26

Total VAT: R 260.74

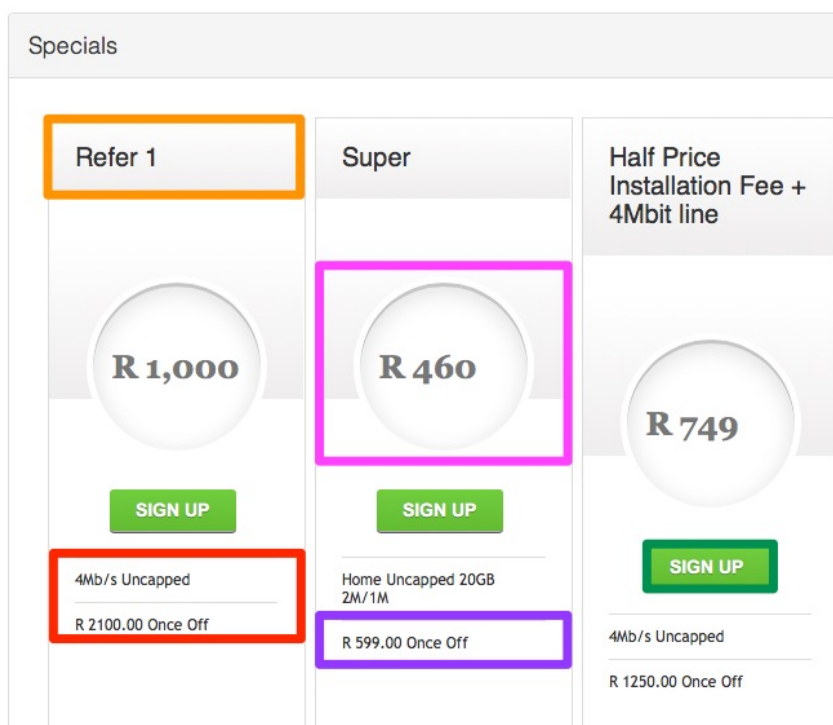
Total: R 1,999.00

Close

After making any changes to the details, remember to click on the **“Update Template”** button.

2.3.3. What will the specials page look like?

Your specials page that the customers see will look similar to the screenshot below.



The screenshot displays a 'Specials' page with three promotional offers. Each offer is presented in a card format with a title, a price in a large circle, a 'SIGN UP' button, and details about the offer and its cost.

Offer Title	Price	Details	Cost
Refer 1	R 1,000	4Mb/s Uncapped	R 2100.00 Once Off
Super	R 460	Home Uncapped 20GB 2M/1M	R 599.00 Once Off
Half Price Installation Fee + 4Mbit line	R 749	4Mb/s Uncapped	R 1250.00 Once Off

- Orange:** In this section, you can see the template title.
- Red:** Here you can see all items listed on your template.
- Pink:** This is the price of your data product.
- Purple:** Here you can view the price of the installation.
- Green:** If the customer likes one the options that they see, then they can click on the

Please note that the screenshot above is just an example. You will need to set up your own document templates according to your specials.

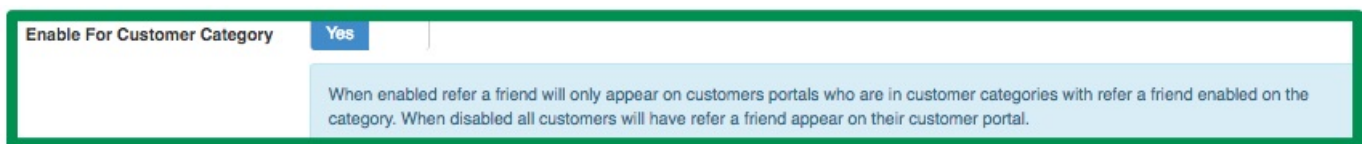
3. Marking the customer for refer a friend.

When marking customers to be able to refer a friend, you can do it in three different ways:

- Mark all your customers to be able to refer a friend.
- Mark single customer to be able to refer a friend.
- Mark multiple customers to be able to refer a friend.

3.1. Marking all customers for refer a friend.

For more information on how to enable the refer a friend module on ALL of your customers, please refer to the “**Enable for Customer Category**” section found under the setup settings in 2.1.

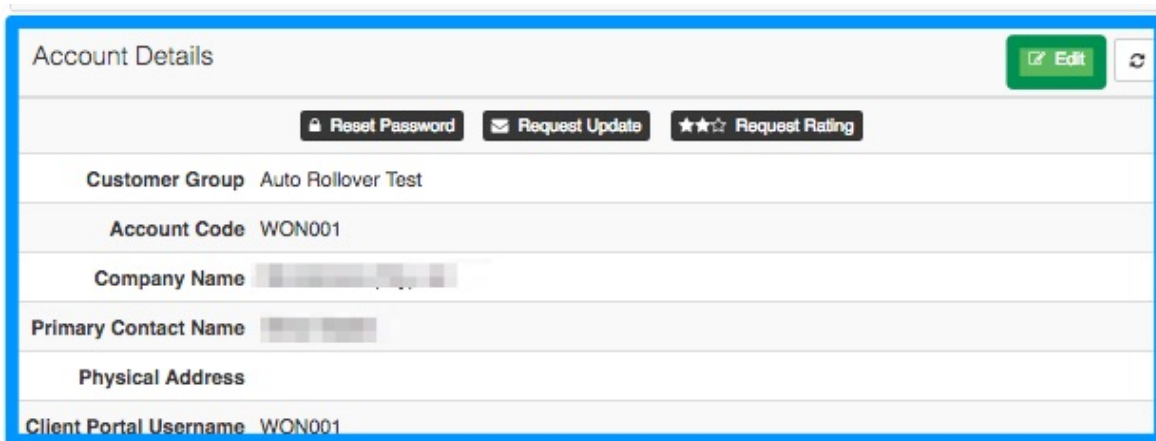


The screenshot shows a toggle switch labeled "Enable For Customer Category" with a blue "Yes" button selected. Below the toggle, a light blue box contains the text: "When enabled refer a friend will only appear on customers portals who are in customer categories with refer a friend enabled on the category. When disabled all customers will have refer a friend appear on their customer portal."

3.2. Marking single customers for refer a friend.

If you would only like to enable the refer a friend module for customers who request such a feature, you can do this by individually tagging them with a category which has the refer a friend module enabled on it.


To do this, start by going to the customer's profile. Once you are on the customer's profile, look for the “**Account Details**” section and then click on the “**Edit**” button.



The screenshot shows the "Account Details" section of a customer profile. At the top right is a green "Edit" button. Below it are three buttons: "Reset Password", "Request Update", and "Request Rating". The details are listed in a table-like format:

Customer Group	Auto Rollover Test
Account Code	WON001
Company Name	[Redacted]
Primary Contact Name	[Redacted]
Physical Address	[Redacted]
Client Portal Username	WON001

On the pop-up screen, look find the “**Categories**” section and the add the relevant category(ies) here.

Edit Customer #339 - 

Account Detail

Address Detail

Contacts

Portal Login

Billing

SageOne

Account Expiry

Master

Customer Group

Auto Rollover Test

Billing Group

Netcash Run 1

Categories

x Virtual Resellers

After making the necessary changes, remember to click on the “**Save Changes**” button found at the bottom right-hand side of the screen.

3.3. Marking multiple customers for refer a friend.

For more information on how to enable the refer a friend for multiple customers simultaneously, please refer to the assigning customers to a category section in 2.2.3.

Add Customers to Category #10

Category Name

Virtual Resellers

Customers to Add

Comma separated list of customer account codes

JAN005,JEN001,WON001

Close

Add to Customers

In the **purple** section, add the customer codes, separated by a comma, that you would like to assign this category to. After adding the list of customers, click on the “**Add to Customer**” button.

4. How the process works: ISP

Customers will be able to refer a friend in one of two ways (depending on your setup):

- Logging into the customer portal and clicking on the refer a friend button.
- When the customer gives a 4- or 5-star rating from their customer portal.

The customer will need to add the potential customer's name and email address.

4.1. The email

After the referrer has entered all his friend's details, they will receive an email similar to the one below.

DataTill Development
One byte at a time

Dear [REDACTED]

I am delighted with my internet service from DataTill Development and think you will be too.

If you would like to apply or to have an agent assist you, then please use this link here: https://dev.datatill.com/sales/show_specials/Vn1dmUjga

This is super important, so that DataTill Development know that I personally referred you and that you need to be treated like the VIP that you are! Using this link unique link to apply will also ensure that get the discount for your installation worth R 350.00 FREE - you can thank me later...

Go on, apply today by using this link https://dev.datatill.com/sales/show_specials/Vn1dmUjga

Best Regards

[REDACTED]

DataTill Development Fan

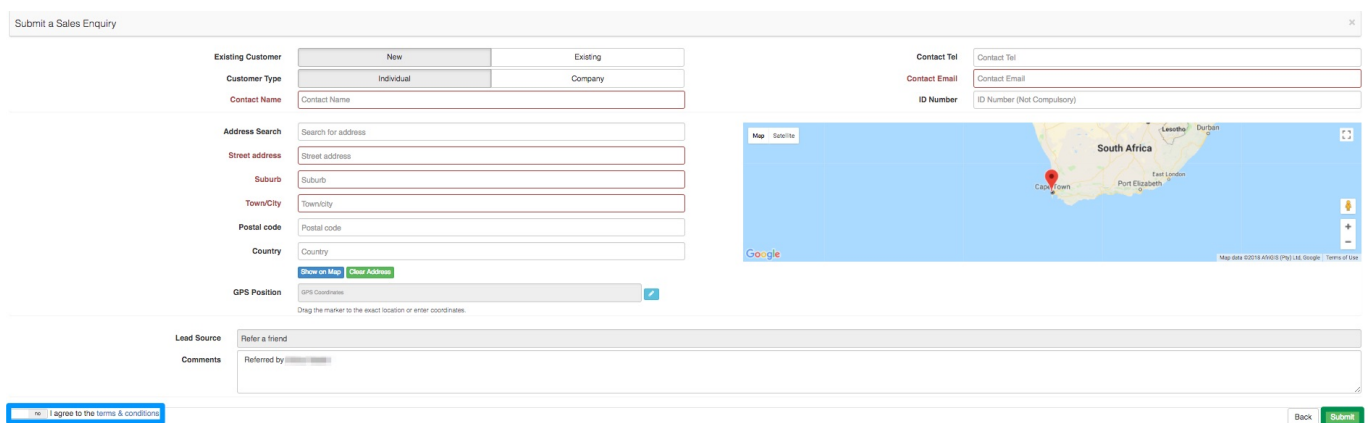
In this email, there will be a “**Link**” re-directing the referred to the specials page.

Specials

Refer 1	Super	Half Price Installation Fee + 4Mbit line	Custom Package
R 1,000	R 460	R 749	Custom
SIGN UP	SIGN UP	SIGN UP	SIGN UP
4Mb/s Uncapped	Home Uncapped 20GB 2M/1M	4Mb/s Uncapped	Sign up for a Custom Package
R 2100.00 Once Off	R 599.00 Once Off	R 1250.00 Once Off	

The referred will now choose the option which looks most appealing to them by clicking on the “**Sign Up**” button. After clicking on the “**Sign Up**” button, they will be re-directed to the sales lead page where they will need to complete all their information.

*Please note that above screenshot is just an example. Your specials page should **not** be created according to the above example. Please refer to section 2.3.3. for more information on how to do this.



Submit a Sales Enquiry

Existing Customer: ☐ New ☐ Existing

Customer Type: ☐ Individual ☐ Company

Contact Name:

Contact Tel:

Contact Email:

ID Number: (ID Number (Not Compulsory))

Address Search:

Street address:


Suburb:

Town/City:

Postal code:

Country:

GPS Position:

Map: 

Lead Source: Refer a friend

Comments:

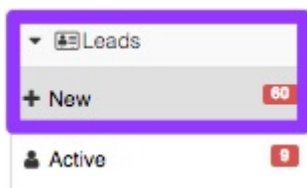
☐ I agree to the terms & conditions

Blue: In this section, the customer will need to accept the terms and conditions.

Green: After they have completed their information and have accepted the terms and conditions, they need to click on the submit button.

4.2. Lead to Receipt

After the sales query has been submitted, a new lead will be generated and can be found in under sales “**Leads**” – “**New**”.



When you open the lead, you will be able to see a blue banner to mention that this is a “**Refer a Friend Lead**”.

Edit Sales Lead #453

Refer a Friend Lead

Summary Quotes Address Details Messages Audit

Customer Type

Individual Company

Contact Name

Mad Hatter

Contact Tel

Contact Tel

Contact Email

ID Number

ID Number (Not Compulsory)

Lead Source

Refer a friend

Update Contact Details

Customer

Please select a customer

Assignee

Assign To Me

Sales Agent

No Sales Agent

Reseller

No Reseller

Assign Customer

Assign Lead

Assign Reseller

Close

The process will now flow through the lead to receipt process just like any other lead would have. As the lead moves through the different workflow phases, the customer portal will be updated, and the customer will be able to track the progress for the friend that they have referred.

4.2.1. Quoting the customer

Once the lead is in the quotes - new phase, a quote will automatically be generated according to the special that the customer originally chose. You will still be able to edit this quote before sending it to the customer.

Please always ensure that the chosen data package is on the quote. If there is no data package on the quote, then credits will not be applied to customer accounts.

4.2.2. Invoicing the customer

The customer will be invoiced as per the normal lead to receipt process. All information from the quote and the job card will pull through to the invoice and if applicable, pro-rata will also be calculated. After the SageOne invoice has been generated, the new customer will need to pay the invoice in full before credit can be allocated.

4.3. Allocating credits

When explaining the process to the customer, it is important to mention to them the following:

- Credit is only applied IF the new customer's installation is successful.
- The refer will receive their credit once they have fully paid their next recurring invoice.
- The referred will only receive credit once they have fully paid their installation invoice.

4.3.1. For the referrer

A credit note will automatically generate for the customer once:

- The customer they referred has paid their installation invoice in full.
- The next billing run is completed.

After the invoice has been generated, the ISP admin users will still need to manually push the credit note to SageOne.

Edit Credit Note #31779

Customer Original Invoice INV0000565 Document No Pending

Customer Reference Referrer Credit Credit Note Date 2018-03-16 Process Date Pending

Product Type	Product	Description	Qty	Incl Price	VAT Type	Recurring	Disc %	Discount	Excl Price	VAT
Account	Discount Allowed - ...	Discount Allowed - Refer a Friend pron	1	1,060.00	Stan...	No	0.00	R 0.00	R 929.82	R 130.18

+ Add Another Line

Categories

Credit Note Message

Select One or more Labels

Total Discount R 0.00

Total Exclusive R 929.82

Total VAT R 130.18

Total R 1,060.00

Close Update

On the credit note, you will be able to see the “**Customer Reference**”, the credit note **details** and the “**Total**” amount of credit that the customer will receive.

The referrer will receive a discount amount that equals the price of the package that the new customer has chosen. In other words, if the referred chose a data package of R749, the referrer will receive credit for the amount of R749.

4.3.2. For the referred

The new customer that has been referred to your ISP, will need to pay their installation in full before they can receive their credit. After the invoice has been fully paid and the midnight cron has ran, the system will automatically create a credit note for the customer.

Edit Credit Note #31756

Customer

Original Invoice
INV0000561

Document No
Pending

Customer Reference
Refer a Friend Discount

Credit Note Date
2018-03-15

Process Date
Pending

Product Type	Product	Description	Qty	Incl Price	VAT Type	Recurring	Disc %	Discount	Excl Price	VAT
Account	Discount Allowed - ...	Discount Allowed - Refer a Friend prom	1	300.00	Stan...	No	0.00	R 0.00	R 263.16	R 36.84

+ Add Another Line

Categories

Credit Note Message

Select One or more Labels

Total Discount
R 0.00

Total Exclusive
R 263.16

Total VAT
R 36.84

Total
R 300.00

Close

Update

On the credit note, you will be able to see the “**Customer Reference**”, the credit note **details** and the “**Total**” amount of credit that the customer will receive. Referred customers will receive the amount of credit as per your setup in section 2.1.

5. How to refer a friend:

To refer a friend, you will need to start by logging into your customer profile.

Sign In with your DataTill Development Account

Username or Email


Username or Email Address

Password

Password

☐ Remember Me

? Forgot Password

 Sign In

Orange: In this section, add your username (customer code) or your email address.

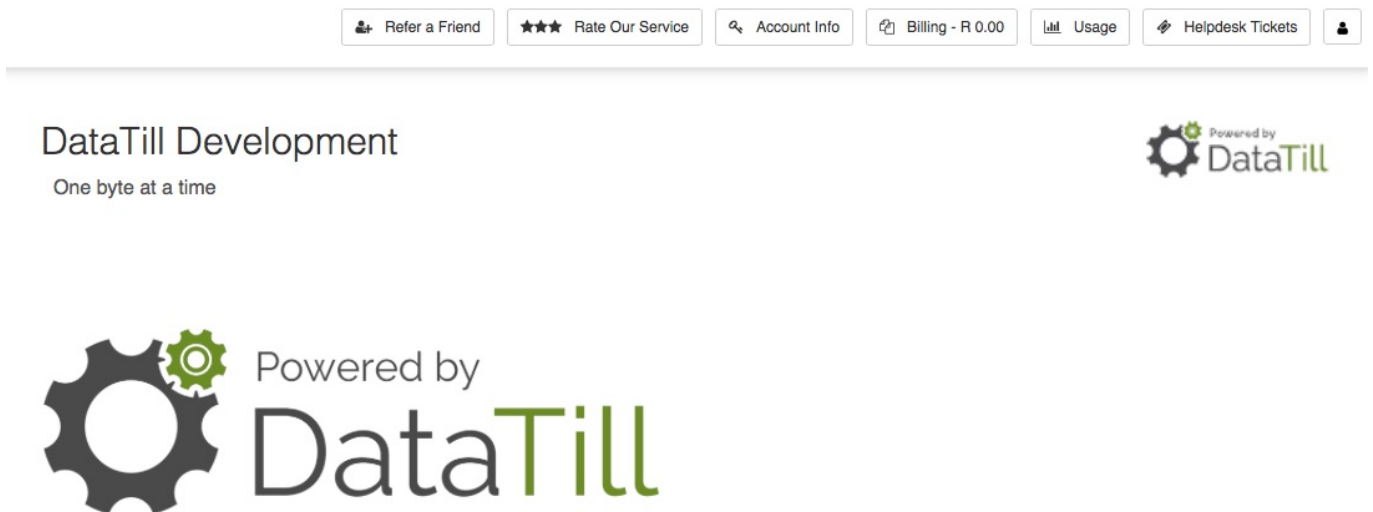
Red: Here you will need to enter your password. Please note that passwords are case-sensitive.

Pink: After completing the above details, click on the sign in button.

Purple: If you do not know what your login details are, click on the forget password button and then follow the steps.

If you do not have the link to your customer portal, ask your ISP to please send you a password reset mail.

After you have successfully logged in, you will see a page similar to the following screenshot.



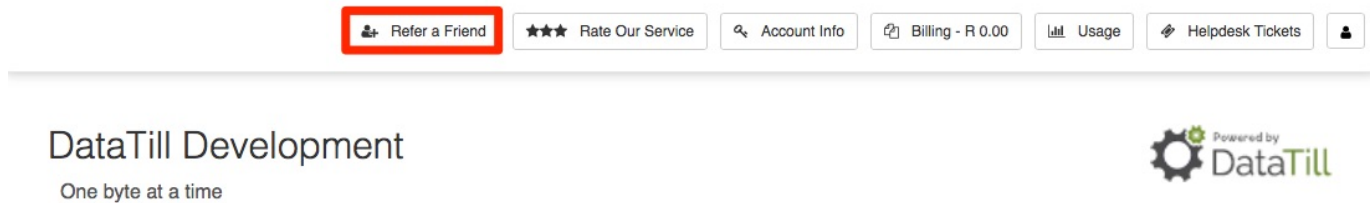
5.1. Refer a friend screen

Customers will be able to refer a friend in one of two ways (depending on your setup):

- Logging into the customer portal and clicking on the refer a friend button.
- When the customer gives a 4- or 5-star rating from their customer portal.

5.1.1. Referring a friend

To start the refer a friend process, click on the “**Refer a Friend**” button found at the top. If you do not see this button, please contact your ISP and ask them to enable the refer a friend module for you.



After clicking on the “**Refer a Friend**” button, you will see the following screen giving you a breakdown of how the refer a friend process works. If you have read through the information, click on the close button.

Refer a Friend Information ✕

Refer a Friend and we will credit your account with the value of their first month's data spend. Would you like to have **FREE** internet every month? Well you can with the **DataTill Development Refer a Friend Promotion**.

If you refer a friend and they successfully sign up for a **DataTill Development** internet service, we will provide a once off credit to your own account, to the same value as your friends monthly recurring billing. Your friend will also receive a **DISCOUNT** on his/her installation to the value of R 350.00. It's as simple as **1-2-3**

1. Send the below email to your friends to invite them to sign up with **DataTill Development**.
2. Your friend applies for a **DataTill Development** internet service by using the link in the email that you sent them. This is very important, as the link will notify us that the application has come from your referral.
3. If your friend completes an application and enters into a monthly service with **DataTill Development** then we will credit your account with the referral fee. The referral fee is equal to the monthly data subscription value of the person that you referred to **DataTill Development**.

This excludes any once off costs like **hardware** and **installations**. The referral process is deemed to have been successful after we have collected any upfront costs and the first months' billing from your friend. Your account will be credited within 10 days from this date. There is **no limit** to the number of friends you can refer.

There is **no limit** to the credit that can accumulate on your account. Credit may **not** be exchanged for **cash** or a **refund**. Credit may only be utilized against your **own** data usage and cannot be shared across accounts. **DataTill Development** reserves the right to amend or terminate this promotion at any time and at its own discretion.

What are you waiting for, go on... Refer some Friends! **DataTill Development T&C's apply**.

[Close](#)

After clicking on the close button, you will see the following page:

Referrals

FAQ

Refer a Friend

Referral Code: Vn1dmUigla

100 records per page

Search:

Show / Hide Columns

Name	E-mail	Potential Credit	Referral Status
Alice Liddle			<div><div>1</div><div>2</div><div>3</div><div>4</div><div>5</div></div> <div>E-mail SentAppliedQuotedInstalledCredit Applied</div>

Showing 1 to 1 of 1 entries

Previous

1

Next

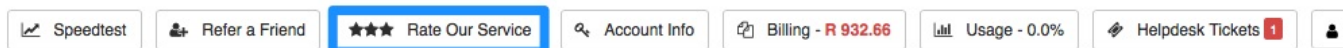
Blue: Click on the FAQ button to view the refer a friend information.

Purple: If you have previously submitted any referrals, then you will be able to view and track their progress here.

Green: If you have not previously referred any friends, click on the refer a friend button to submit your first referral.

5.1.2. Customer Ratings

Customers who submit 4 or 5-star ratings will have the option to refer a friend. To do this, the customer will need to log into their portal and then click on the “**Rate Our Service**” button.




The customer will now need to give their rating and comments and then click on the “**Submit Ratings**” button.

Rate Our Service

Rating

5 star(s)



Comments

Great!

Cancel

Submit Rating

After submitting the rating, the customer will see the following screen:

Would you like to refer a friend? ×

Thank you for giving us such a nice rating. We would like to reward you by giving you the opportunity to get free internet by referring a friend.

No, I don't want free internet

I want free internet!

If the customer would like to refer a friend, they will need to click on the “**I want free internet!**” button.

5.1.3. Refer a friend

To refer a friend, click on the “**Refer a Friend**” button. You will now see the following page:

Refer a Friend

Your NameJennifer du Plessis

E-mail SubjectDon't Miss Out On This Deal

Customise the introduction of the e-mail message to be sent to your friend(s)

Friend's email(s)

NameE-mail

+ Add another

Preview Email

Send Invite

Close

- Orange:** Your name will automatically be added in this field.
- Red:** Here you can choose one of four email subjects. Click on the drop-down menu to choose the one that you want as your email subject.
- Pink:** In this section, you will be able to add a personalised introduction in the email for your friend.
- Purple:** Enter the names and e-mail address of the friends that you would like to refer here.
- Dark Blue:** If you would like to refer more than one friend, click on the add another button and then enter their contact details.
- Light Blue:** This button will allow you to view a preview of the message that will be sent to your friend.

After you have completed the details as above, click on the **“Send Invite”** button.

5.1.4. Keeping track of your friend's progress

Once the email has been sent to the customer, you will be able to keep track of their progress in your customer portal. You will be able to view the following:

- When the email has been sent
- When your friend has applied
- When your friend has been quoted.
- When their installation is done.
- And when credit is received.

Referrals				FAQ	Refer a Friend
Referral Code: Vn1dmUigla					
100	records per page			Search:	Show / Hide Columns
Name	E-mail	Potential Credit	Referral Status		
Alice Liddle			<div><div>1</div><div>2</div><div>3</div><div>4</div><div>5</div></div> <div>E-mail SentAppliedQuotedInstalledCredit Applied</div>		

5.2. Credits

5.2.1. If you referred a friend

When you refer your friend to us, you will be able to get credit. This is however depended on whether or not we can successfully provide them with our services. If we cannot complete the installation for the customer, you will not receive any credit. If we can successfully do the installation for the customer, then you will receive credit on your account.

5.2.1.1. How much credit will I get?

The amount of credit you receive will be determined by the data package that your friend chooses. For example: If your friend chooses a data package worth R749, you will receive a once off credit amount of R749.

5.2.1.2. What needs to happen before I can get my credit?

Before you can receive your credit the following needs to happen:

- Your friend's installation needs to take place.
- Your friend needs to pay their installation invoice in full.
- You need to wait until the next monthly billing run.
- Once the billing run has been completed, your credit note will be generated.
- Then credit will be allocated to your account.

5.2.1.3. How will I know the credit has been allocated to my account?

After the credit has been allocated to your account, you will receive a credit note looking similar to the one below:

CREDIT NOTE



CREDIT NOTE NUMBER: CRN0000016
ACCOUNT CODE: JEN004
CREDIT NOTE DATE: 2018-03-16

FROM
DataTill Training (Pty) Ltd

VAT NO: 4650267513

POSTAL ADDRESS:

P.O. Box 10949
George
6530

PHYSICAL ADDRESS:

123 Mitchell St
George
6530

TO

CUSTOMER VAT NO:

POSTAL ADDRESS:

PHYSICAL ADDRESS:

Type	Description	Qty	Incl Price	Disc %	Incl Total	VAT	Excl Total
Account	Discount Allowed - Refer a Friend promotion	1.00	R 1,060.00	0.00%	R 1,060.00	R 130.18	R 929.82



Total Exclusive: R 929.82
Total VAT: R 130.18
Total Inclusive: R 1,060.00

5.2.2. If you are being referred by a friend.

If you have signed up with our service provider and we are able to successfully complete your installation and provide you with our services, we will allocate some credit to your account. Please note that you will however only receive this credit once your installation invoice has been paid in full.

5.2.2.1. How much credit will I get?

Your service provider will pre-determine the amount of credit that they give to new customers who sign up through the refer a friend promotion. In the refer a friend email that your friend has sent you, you will be able to view the amount of credit that you can receive.

5.2.2.2. What needs to happen before I can get my credit?

Before you can get your credit applied to your account, the following will need to happen:

- You need to sign up using the link in the email.
- Your installation needs to take place successfully.
- You need to pay your installation invoice in full.

5.2.2.3. How will I know the credit has been allocated to my account?

After the credit has been allocated to your account, you will receive a credit note looking similar to the one below:

CREDIT NOTE



CREDIT NOTE NUMBER: CRN0000017
ACCOUNT CODE: MAD006
CREDIT NOTE DATE: 2018-03-15

FROM
DataTill Training (Pty) Ltd

VAT NO: 4650267513

POSTAL ADDRESS:
P.O. Box 10949
George
6530

PHYSICAL ADDRESS:
123 Mitchell St
George
6530

TO
Mad Hatter

CUSTOMER VAT NO:

POSTAL ADDRESS:

PHYSICAL ADDRESS:
48 Cradock Street
George South
George
6529
South Africa

Type	Description	Qty	Incl Price	Disc %	Incl Total	VAT	Excl Total
Account	Discount Allowed - Refer a Friend promotion	1.00	R 300.00	0.00%	R 300.00	R 36.84	R 263.16

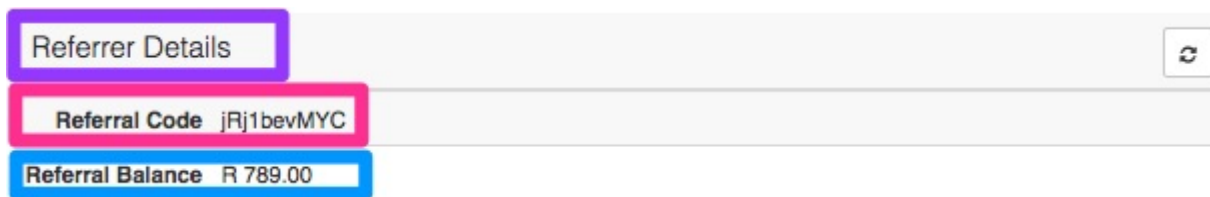
Total Exclusive: R 263.16

Total VAT: R 36.84

Total Inclusive: R 300.00

5.2.3. Viewing the customer's credit balance

Should the customer contact you to ask how much credit they still have on their profile, then you will be able to view this on the customer's profile. You will find the "**Referrer Details**" section underneath the recurring billing section.



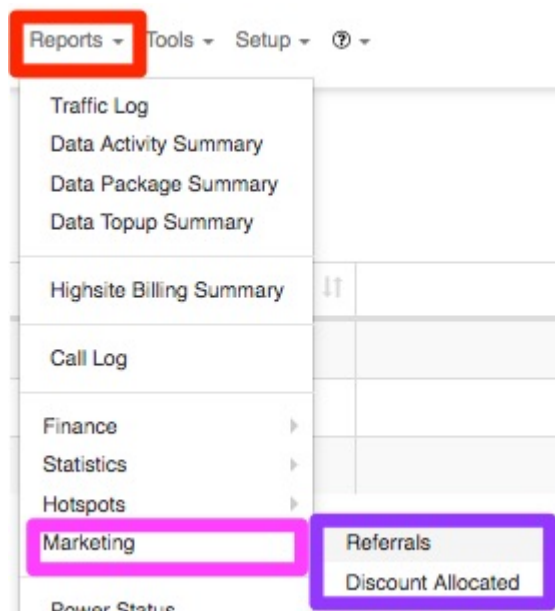
Referrer Details	
Referral Code	jRj1bevMYC
Referral Balance	R 789.00

Here you will be able to see the customer's "**Referral Code**" as well as the "**Referral Balance**".

Please note: Credit is only issued to the full amount of the customer's current billing in consecutive order should their friend choose a package that is above their recurring monthly bill.

6. Reports

There are two reports that you can pull for the refer a friend module. To find these reports, go the “**Reports**” – “**Marketing**” and then click on either the “**Referrals**” or the “**Discount Allocated**” report.



6.1. Referrals

On this screen, you will be able to view a list of all referrals that have taken place. This list will provide you with customers who:

- Have received the email (invite sent)
- Application submitted
- Quote Accepted
- Installed
- And commission paid out.

Referrals							Referrals			
Show	100	Rows					Search:	Order Columns	Export Columns	Export Columns
Referrer Name	Name	E-mail	Potential Credit	Referral Status	Workflow Status	Paid Out				
J.D. Oberholster	J.D. Oberholster	jdbdline@gmail.com	R 0.00	Invite Sent						
J.D. Oberholster	J.D. Oberholster	jdbdline@gmail.com	R 1,000.00	Paid Out	Leads Success	Yes				
J.D. Oberholster	J.D. Oberholster	jdbdline@gmail.com	R 0.00	Invite Sent						
J.D. Oberholster	J.D. Oberholster	jdbdline@gmail.com	R 1,000.00	Paid Out	Leads Success	Yes				
J.D. Oberholster	J.D. Oberholster	jdbdline@gmail.com	R 1,099.00	Quote Accepted						
J.D. Oberholster	J.D. Oberholster	jdbdline@gmail.com	R 460.00	Application Submitted	Leads New					
J.D. TEST DISCOUNT										

Yellow: This filter function will allow you to filter the list per customer.

Orange: Here you can search for names or email address etc.

Red: This section will allow you to export the information of allow you to add additional information fields.

Pink: Here you can see which customer it was that referred their friend.

Purple: In this section, you can see the name of the friend that has been referred.

Dark Blue: This section will give you the referee's email address.

Light Blue: Here you will be able to view the potential credit that will be given to the customer.

Light Green: In this section, you will be able to view in which status the lead currently is.

Dark Green: This section will enable you to view the workflow status.

Brown: Here you can see whether the customer's commission has been paid out.

Black: If the button is green, it will take you to the original lead after you click on it. If the button is greyed out, it means that the referred potential customer has not yet accepted the invite that has been sent to them.

6.2. Discount Allocated

This report will give a breakdown of all discount that have been allocated to customers because they referred a friend.

Discount Allocated To Referrer

Show 100 Rows

ID	Discount Type	Customer Name	Discount Amount	Allocated	Date Allocated
3	referral discount	J.D Oberholster	R 1,000.00	Yes	2017-12-12 13:04:10
2	referral discount	J.D Oberholster	R 1,000.00	Yes	2017-12-12 12:40:20
1	referral discount	J.D Oberholster	R 1,000.00	Yes	2017-12-12 12:37:40

Search: [] Columns: Discount, ID, Email, Name, Phone, Ref, Status, Username, YTD, Zaid. Refresh

Yellow:

This filter function will allow you to filter the list per customer.

Orange:

Here you can search for names or email address etc.

Red:

This section will allow you to export the information of allow you to add additional information fields.

Pink:

Here you can view the discount type.

Purple:

In this section, you can see to which customer the discount was granted.

Dark Blue:

Here you will be able to see the amount of discount allocated to the customer.

Light Blue:

This will indicate whether the discount has been allocated to a specific invoice or not.

Green:

In this section, you can see the date on which the discount was allocated.

Black:

These buttons will allow you to either view the discount or take you to the customer profile.