

INAA Referral Reporting System

Guidelines


1 referral = 1 client

Please note that throughout those guidelines and for the use of the referral reporting system in general:

1 referral equals 1 client

How do I report my referral work to INAA?

- ◆ The INAA Referral Reporting Tool is accessible on:
<http://referrals.inaa.org>



The screenshot shows the login interface for the INAA Referral Reporting Tool. At the top right is a red 'LOGIN' button. The header includes the INAA GROUP logo and the text 'AN INTERNATIONAL ASSOCIATION OF INDEPENDENT ACCOUNTING FIRMS'. Below the header is a navigation bar with 'INAA HOME' and 'REFERRAL REPORTING' (the latter is underlined). The main section is titled 'Log In'. A grey box displays an error message: 'Error: Access Denied' and 'You have requested an access restricted page. Please login.' Below this, there are input fields for 'Username:' (containing 'InaaGroup') and 'Password:' (containing '*****'). A 'Log In!' button is positioned below the password field. At the bottom, a link reads 'Click here if you have forgotten your password'.

- ◆ Log in with your username and password and click on 'Log In!'. If you do not remember your credentials, please contact the INAA Secretariat at referrals@inaa.org

- ◆ If you login for the first time, click on ‘PROFILE’



INAA GROUP
AN INTERNATIONAL ASSOCIATION OF INDEPENDENT ACCOUNTING FIRMS

[INAA HOME](#) [REFERRAL REPORTING](#)

Welcome, Group.

In the present quarter, you have invoiced €450.00 and been paid €450.00 for a balance of €0.00.

find within

 Incoming referrals [0 referrals]

There are not presently any incoming referrals or invoices matching your criteria.

find within

 Outgoing referrals [0 referrals]

There are not presently any outgoing referrals matching your criteria.

[INAA HOME](#) [REFERRAL REPORTING](#)

Member Profile

Member ID: 153233

Firm Name:

Address:

City:

State:

Zip:

Country:

Phone:

Email: ☐ join our mailing list?

Current Username: InaaGroup

New Username:

Password:

Verify Password:

VAT Number:



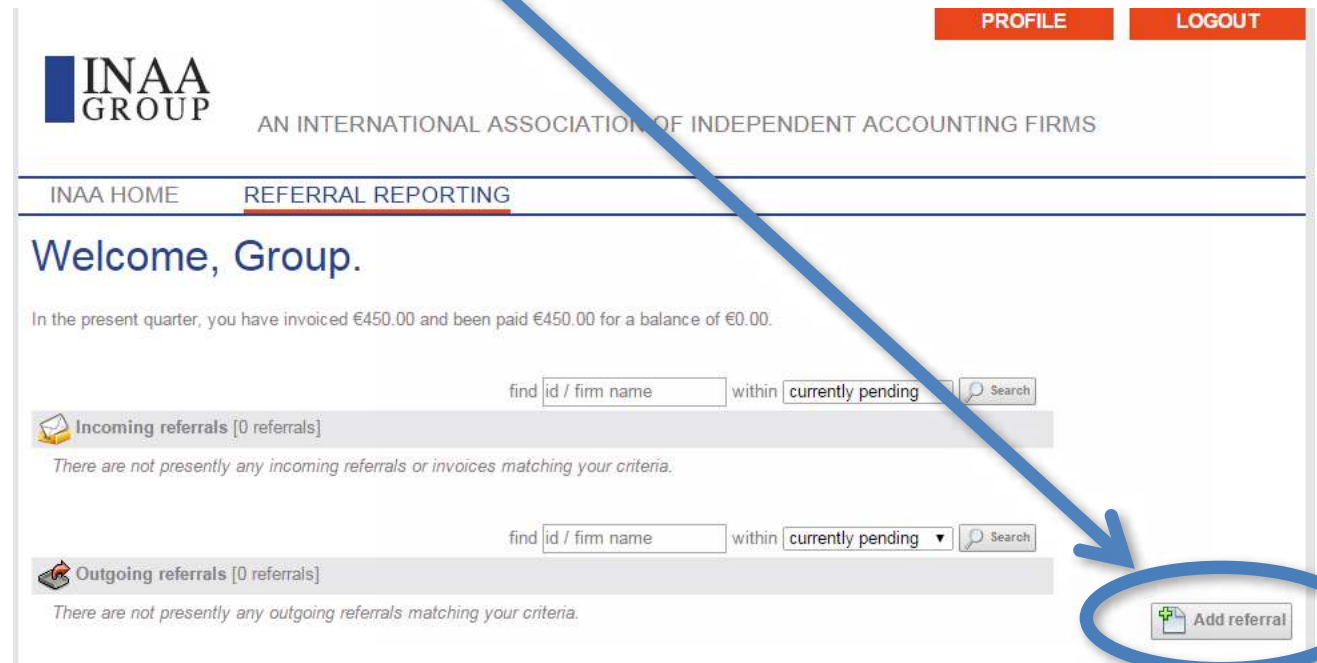
This window will allow you to:

- Complete your **invoicing** address
- Add your **VAT number** (for EU companies)
- Change your Username and Password

Click on Save once completed and click on Referral Reporting to go back to the home screen.

Refer a new client to another INAA member 1 / 6

- ◆ (1) Click on 'Add referral' at the bottom of the page.



PROFILE LOGOUT


INAA GROUP
AN INTERNATIONAL ASSOCIATION OF INDEPENDENT ACCOUNTING FIRMS

INAA HOME REFERRAL REPORTING


Welcome, Group.


In the present quarter, you have invoiced €450.00 and been paid €450.00 for a balance of €0.00.

find within

 Incoming referrals [0 referrals]
There are not presently any incoming referrals or invoices matching your criteria.


find within

 Outgoing referrals [0 referrals]
There are not presently any outgoing referrals matching your criteria.


 Add referral

Refer a new client to another INAA member 2/6


- ◆ (2) 'referred by': Insert the (i) First Name and (ii) Last Name of the person from your firm who is referring the new client to another INAA member;
- ◆ (3) 'refer to': Insert the (i) First Name and (ii) Last Name of the person working at the other INAA member firm you would like to refer the new client to;

 Add new referral

[cancel](#)

referred by	first	date of referral	 17
	last		type of work
refer to	first	client name	
	last		

inaa member


 Save

Note that all the fields marked in red are mandatory.

Refer a new client to another INAA member 3/6

- ◆ (4) **‘INAA member’** : in the drop down list, select the name of the other INAA member firm you would like to refer the new client to

➔ Please note that for members of a network, you will have to select the Network first. A second drop down list will appear and you will be able to select the member firm from the list.

 Add new referral

[cancel](#)

referred by

Marie
Mahieux

date of referral

17

type of work

▼


client name

refer to

Nadège
Mullier

inaa member

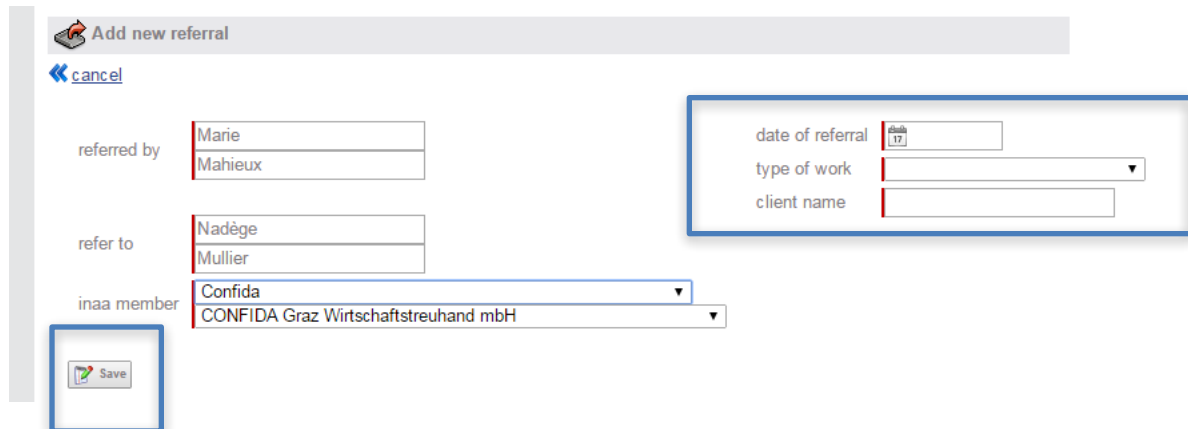
Confida
CONFIDA Graz Wirtschaftstreuhand mbH

 Save

Refer a new client to another INAA member 4/6

- ◆ (5) 'Date of referral': Click on the small calendar and enter the date the referral was made;
- ◆ (6) 'Type of work': select the type of work your client needs from the other member firm;
- ◆ (7) 'Client name': Enter the name of the client you are referring to another INAA member
- ◆ (8) Once you have completed all the fields, click on 'Save'.

➔ A notification will be sent to the member to inform them they have a new referral/client to accept or decline.



Add new referral

[cancel](#)

referred by

refer to

inaa member

date of referral

type of work

client name


Save

Refer a new client to another INAA member 5/6

Self-report a new client

In certain cases, you will have to self-report an incoming referral. This will be the case, for example, if you have to report a referral you received from an ex-INAA member or a referral received through the internet :

- ◆ (1) 'referred by': Insert the (i) First Name and (ii) Last Name of the person from the other member firm who referred the new client to you;
 - ◆ (2) 'refer to': Insert the (i) First Name and (ii) Last Name of the person working at **your** firm the new client has been referred to;
 - ◆ (3) 'INAA member': Select **your** firm in the dropdown list
- ➔ Once you have selected your firm in the INAA member field, a new field appears in the 'referred by' section. Choose the firm which referred this client to you or choose "ex-INAA members" or "Other"

 Add new referral

[cancel](#)

referred by

refer to

inaa member

referred by
 2

inaa member

refer to

inaa member 1

 Save

Refer a new client to another INAA member 6/6

- ◆ Once you have clicked on 'Save', a green window will appear informing you that your "Referral has been added successfully"
- ◆ Your referral will also appear on your 'Outgoing Referrals' list as shown on the screen shot below

Welcome, INAA Group.

 Referral 2996 added successfully.

In the present quarter, you have invoiced €450.00 and been paid €450.00 for a balance of €0.00.

find within  Search

 Incoming referrals [0 clients]

There are not presently any incoming referrals or invoices matching your criteria.

 View/Validate Report

find within  Search

 Outgoing referrals [1 referrals]:

ID	Date	Status	To	Client
2996	12/03/2015	NEW	Test	INAA


 Add referral

Accepting/declining an incoming referral 1 / 3

- ◆ When another INAA member refers a new client to you, you will receive a notification email.
- ◆ To accept or decline the new client, please follow the below instructions:
 - (i) **Log in to your firm profile**
 - (ii) On the homepage, you will see that a new referral is listed under the **‘Incoming Referrals’ List**:

Welcome, Test.

In the present quarter, you have invoiced €0.00 and been paid €0.00 for a balance of €0.00.

 Incoming referrals [1 clients]:

<div style="display: flex; justify-content: space-between; align-items: center;"> INAA <div> NEW! ✔ Accept ✘ Decline </div> </div>
--

find within currently pending ▼

 Outgoing referrals [0 referrals]

There are not presently any outgoing referrals matching your criteria.

find within currently pending ▼

Accepting/declining an incoming referral 2/3


- ◆ Hover the mouse cursor over the name of the firm who referred the new client to you and you will see all the information related to the client.
- ◆ Click on the client's name and click on edit to edit any parts of the referral such as the name of the client or stipulate if there is a letter of engagement or not:

The screenshot displays the INAA Group referral management interface. On the left, a sidebar shows 'Incoming' and 'Outgoing' referral counts. The main area displays a list of referrals. A referral from 'Marie Mahieux - INAA Group' is highlighted, showing details: Client INAA, Referral date 12/03/2015, To Nadège Mullier, Type of work Corporate consultancy, and Letter of engagement? False. A blue circle highlights the 'click to edit' link next to the referral. To the right, the 'Edit Referral 2996' form is shown, allowing editing of the client name, referral date, contact person, type of work, and letter of engagement status. The form includes 'Cancel' and 'Save' buttons.

Accepting/declining an incoming referral 3/3


- ◆ If you **accept** the referral, a green window will appear, informing you that you have successfully ‘stated’ the referral. The new client will now appear on your list of clients in the ‘All View’ window (more information on the following slides).

Welcome, Test.

 Stated successfully!


In the present quarter, you have invoiced €0.00 and been paid €0.00 for a balance of €0.00.

find
within

 Incoming referrals [0 clients]

There are not presently any incoming referrals or invoices matching your criteria.

find
within

 Outgoing referrals [0 referrals]

There are not presently any outgoing referrals matching your criteria.

End of the quarter reporting 1/6

You will receive two notification emails informing you that it is time for you to **report your referral work to INAA**.

- ◆ (1) The first reminder will be sent on the first day of the reporting month (which is the month following the corresponding quarter;
- ◆ (2) The second reminder will be sent one week before the end of the reporting month.

End of the quarter reporting 2/6

Nothing to report 1/2

- ◆ If you have nothing to report, please log in and click on 'View/Validate Report'

In the present quarter, you have invoiced €0.00 and been paid €0.00 for a balance of €0.00.

find within

Incoming referrals [0 clients]

There are not presently any incoming referrals or invoices matching your criteria.

 View/Validate Report

find within

Outgoing referrals [0 referrals]

There are not presently any outgoing referrals matching your criteria.

 Add referral

- ◆ The following sentence should appear '*There are not presently any incoming referrals or invoices matching your criteria.*'

End of the quarter reporting 3/6

Nothing to report 2/2

- ◆ If this is correct, click on 'Validate Report' to confirm that you have nothing to report to INAA for the corresponding quarter: Please note that the button will only be visible during the reporting month.

In the present quarter, you have invoiced €0.00 and been paid €0.00 for a balance of €0.00.


find within

 Incoming referrals [0 clients]

There are not presently any incoming referrals or invoices matching your criteria.

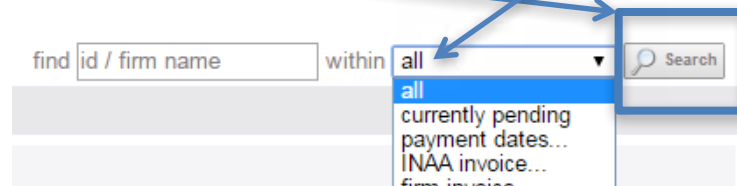
 Validate report

- ◆ You will then see a confirmation message with the date of the day you validated your report:

 **Thanks!**
You validated your
report ~~March 23,~~ 2015.

End of the quarter reporting 4/6

- ◆ To report your referral work to INAA, please follow the below instructions:
- ◆ (1) On the home screen of the reporting tool, select the 'All' view in the drop down list and then click on 'Search' to have your current list of clients



End of the quarter reporting 5/6

- ◆ (2) You will then have access to all your clients data with the corresponding invoices listed under the client's name: (here, the clients are 'INAA' and 'Semkhor')

find within

 Incoming referrals [2 clients]:

[INAA](#)

 New invoice

[Semkhor](#)

 New invoice

 View/Validate Report

find within

 Outgoing referrals [0 referrals]

There are not presently any outgoing referrals matching your criteria.


 Add referral




inaa.org

End of the quarter reporting 5/5


- ◆ (3) Click on 'New invoice' next to the client to whom you issued (an) invoice(s) in the past quarter.

find within


 Incoming referrals [2 clients]:

INAA	 New invoice	 View/Validate Report
Semkhor		

find within

 Outgoing referrals [0 referrals]

There are not presently any outgoing referrals for this quarter.

 Add referral

New invoice

Client INAA

Your invoice #

Value €

Invoiced

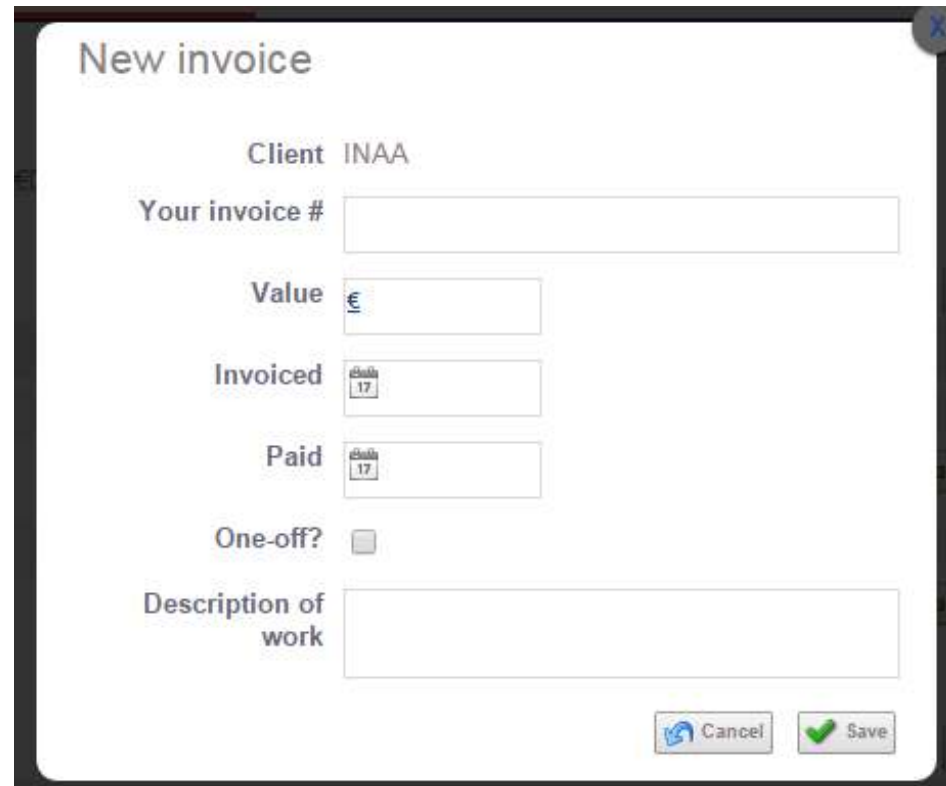
Paid

One-off? ☐

Description of work

Add new invoices to your clients 1/4

- ◆ (4) Verify that the **client name** is correct;
- ◆ (5) Enter your **invoice number** (please note that this field is only for your own purpose, to help you identify your invoices);
- ◆ (6) Enter the **amount Invoiced** in EURO;
- ◆ (7) Enter the **date** when you issued the invoice;
- ◆ (8) If the invoice has already been paid at the time you create the invoice in the referral reporting tool, please enter the **date of payment**;

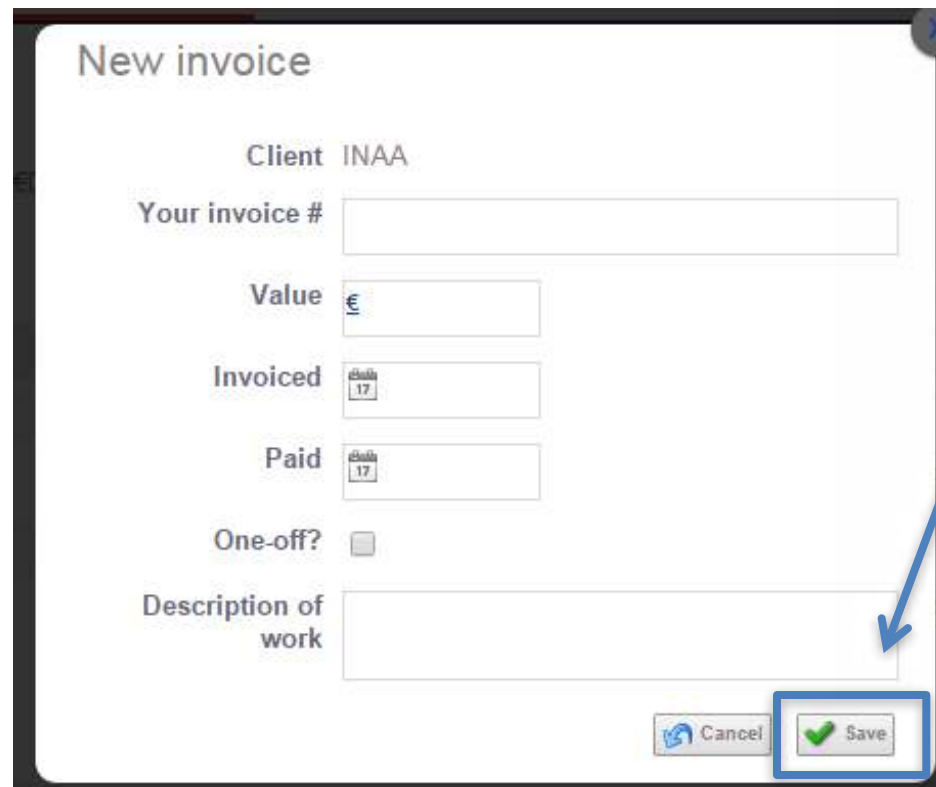


The screenshot shows a web form titled "New invoice". It contains the following fields and controls:

- Client**: A dropdown menu showing "INAA".
- Your invoice #**: A text input field.
- Value**: A text input field with a Euro symbol (€) on the left.
- Invoiced**: A date picker showing the date "17".
- Paid**: A date picker showing the date "17".
- One-off?**: A checkbox that is currently unchecked.
- Description of work**: A large text area for describing the work.
- Buttons**: "Cancel" and "Save" buttons at the bottom right.

Add new invoices to your clients 2/4

- ◆ (9) If the work performed only occurred once, please click on 'One-off';
 - ◆ (10) Please enter a brief description of the work performed for the client;
- ➔ Once you have entered all the information on the new invoice, click on 'Save'



The screenshot shows a 'New invoice' form with the following fields and controls:


- Client:** INAA
- Your invoice #:** [Text input field]
- Value:** € [Text input field]
- Invoiced:** [Calendar icon] 17
- Paid:** [Calendar icon] 17
- One-off?:** ☐
- Description of work:** [Text input field]
- Buttons:** Cancel (with a circular arrow icon) and Save (with a green checkmark icon). The 'Save' button is highlighted with a blue box, and a blue arrow points to it from the right side of the slide.

Add new invoices to your clients 3/4




- ◆ If the invoice has not been paid yet, it will appear on the ‘currently pending’ view and will be listed on your home screen every time you will log in to your profile until the invoice is statused as paid.


In the present quarter, you have invoiced €350.00 and been paid €0.00 for a balance of €350.00.

find within


 Incoming referrals [1 clients]:

[INAA](#)


 760 / INAA001	23/03/2015	€350.00		
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find within

 Outgoing referrals [0 referrals]

There are not presently any outgoing referrals matching your criteria.





- ◆ Once you have been paid, please click on ‘Mark Paid’ next to the corresponding invoice.

Add new invoices to your clients 4/4

- ◆ The invoiced amount will be automatically calculated for each new invoice entered in the system.

In the present quarter, you have invoiced €350.00 and been paid €0.00 for a balance of €350.00



- ◆ Similarly, every time you will mark an invoiced as 'paid', the paid amount will automatically be updated.
- ◆ The balance amount, informs you of the amount of invoices you issued to your clients and have entered in the system but that you haven't marked as being paid yet.

Please note that the 'invoiced' and 'paid amounts' will automatically re-start at '0' on the first day of every new quarter, while the balance informs you of the amount invoiced in past quarters but that haven't been marked as paid yet.


Validate your report

- ◆ When you have entered all your information (invoices issued and paid) for the quarter, click on '[View/Validate Report](#)'

Welcome, INAA Group.


In the present quarter, you have invoiced €450.00 and been paid €450.00 for a balance of €0.00.

find within

 Incoming referrals [0 clients]

There are not presently any incoming referrals or invoices matching your criteria.

find within

 Outgoing referrals [0 referrals]

There are not presently any outgoing referrals matching your criteria.

 View/Validate Report

 Add referral

Accepting/declining an incoming referral

- ◆ This view is a summary of your quarterly report. If the information is correct, please click on '[Validate report](#)'. Please note that you will only be able to validate your report **once**. The Validate Report button is only visible during the reporting month.
- ◆ If any information is incorrect, please go back to the 'All view', select the invoice you would like to update, click on it and correct it.

In the present quarter, you have invoiced €450.00 and been paid €450.00 for a balance of €0.00.

find within

 Incoming referrals [1 clients]:

MCI

	757	25/03/2015	€350.00
	752 / ftghrftg	13/02/2015	€100.00

 **Validate report**

Thank you for your attention!

We remain at your complete disposal for any questions you might have or any assistance you might need at this stage (for any questions, please contact secretariat@inaa.org)

We thank you for your attention and for your active involvement in the Association!