INAA Referral Reporting System

Guidelines

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

1 referral equals 1 client

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How do I report my referral work to INAA?

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

◆ 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**'

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INAA HOME   REFERRAL REPORTING

Member Profile

Member ID: 153233

Firm Name: INAA Group
Address: 300 Avenue de Tervueren

City: Brussels
State:
Zip: 1150
Country: Belgium
Phone: +32 (0)2 643 20 45
Email: inaa@mci-group.com   ☐ join our mailing list?

Current Username: InaaGroup
New Username: InaaGroup

Password: ••••••••
Verify Password: ••••••••

VAT Number:

Save
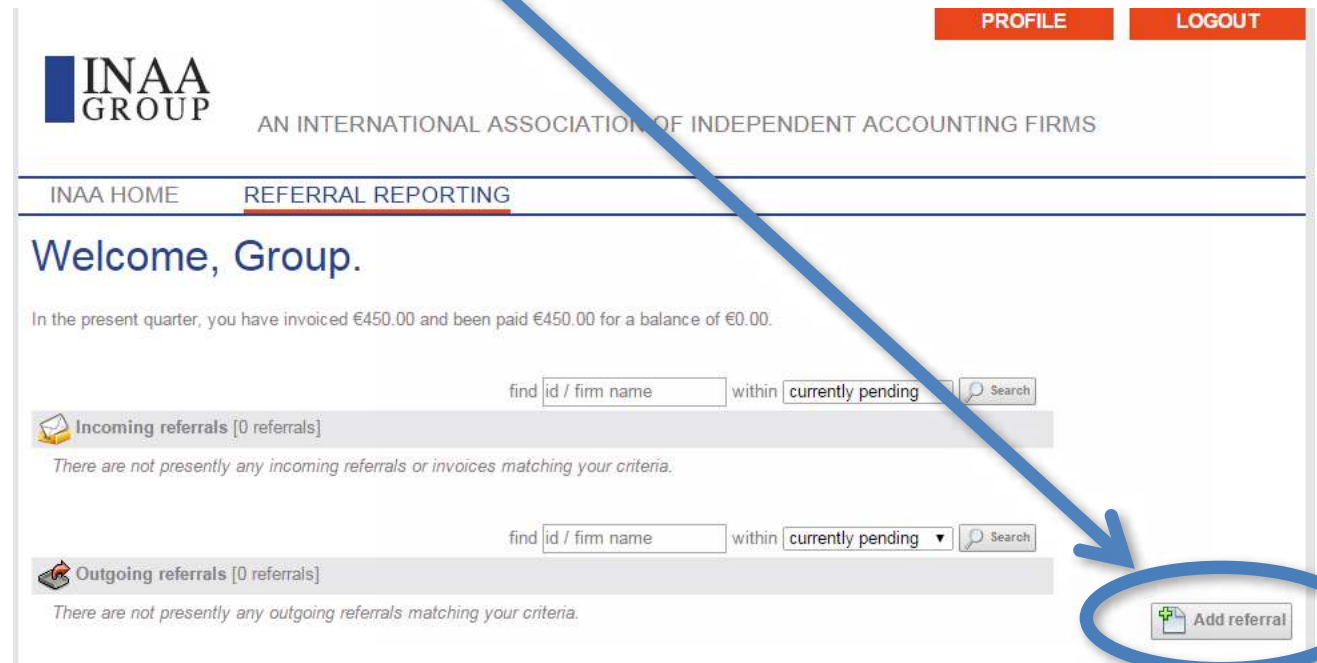
This window will allow you to:

- 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.

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◆ **(1) Click on '<u>Add referral</u>'** at the bottom of the page.

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◆ (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;

Note that all the fields marked in red are mandatory.

◆ (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.

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◆ (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.

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"

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◆ 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

◆ 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:

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◆ Hover the mouse curser 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:

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

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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.

◆ 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 [id / firm name] within [currently pending ▼] [🔍 Search]

✉ Incoming referrals [0 clients]

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

[🔍 View/Validate Report]

find [id / firm name] within [currently pending ▼] [🔍 Search]

✇ 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.*'

◆ 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 [id / firm name] within [present report ▼] [🔍 Search]

✉ 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.

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◆ <u>To report your referral work to INAA, please follow the below instructions:</u>

◆ (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

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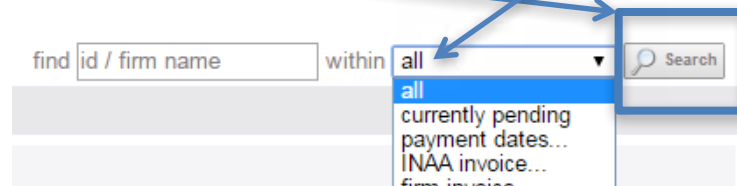
◆ **(2) You will then have access to all your clients data with the corresponding invoices listed under the client's name: (here, the clients are 'INAA' and 'Semkhor')**

◆ **(3) Click on '<u>New invoice</u>'** next to the client to whom you issued (an) invoice(s) in the past quarter.

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◆ (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**;
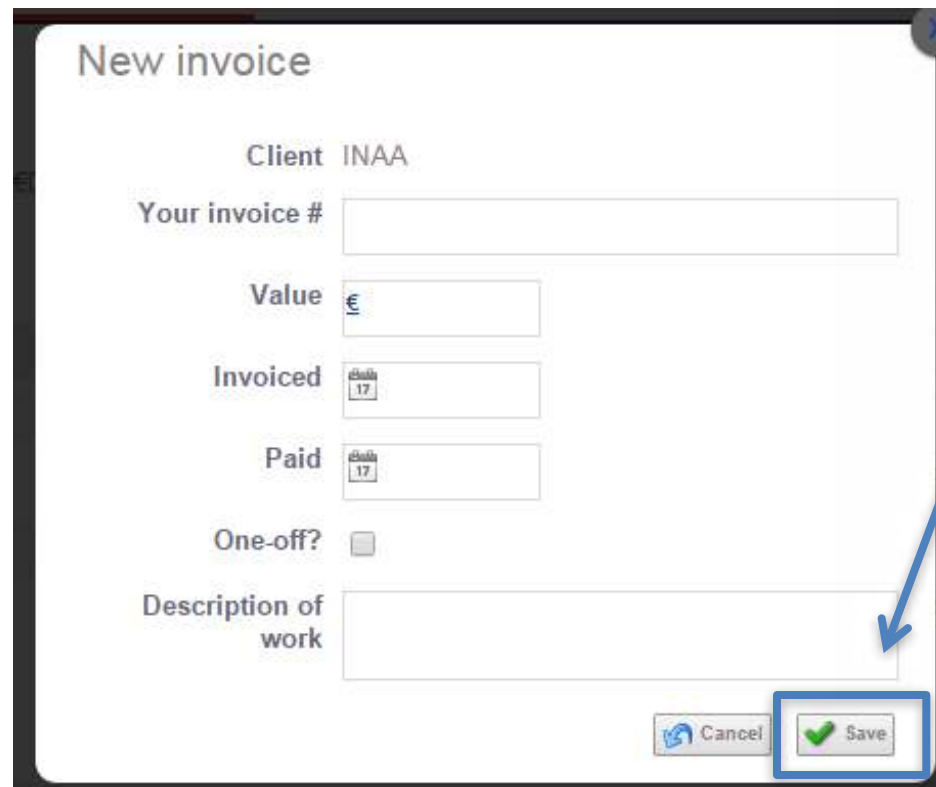
New invoice

Client INAA

Your invoice #

Value €

Invoiced 17

Paid 17

One-off?

Description of work

Cancel   Save

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◆ (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**'

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INAA GROUP

◆ 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.

◆ Once you have been paid, please click on '**Mark Paid**' next to the corresponding invoice.

◆ 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.

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◆ 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 id / firm name   within currently pending ▼   🔍 Search

✉ Incoming referrals [0 clients]

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

🔍 View/Validate Report

find id / firm name   within currently pending ▼   🔍 Search

✏ Outgoing referrals [0 referrals]

There are not presently any outgoing referrals matching your criteria.

➕ 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 [id / firm name] within [present report ▼] 🔍 Search

✉ Incoming referrals [1 clients]:

MCI   ✅ Validate report

📄 757   25/03/2015   €350.00

📄 752 / ftghrftg   13/02/2015   €100.00

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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!

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