



# How to Refer a Friend or Business

Everything you need to know to start earning rewards.

With the *SurePayroll Referral Program*, customers are eligible to earn rewards for introducing new customers to our payroll product. You can earn up to \$300 for every new customer with the SurePayroll Referral Program. Plus, if you refer three or more business customers within a year, you may be eligible for a free year of payroll.\* It's easy to get started!

Please reference the [\\*Terms and Conditions](#) or connect with your sales representative.

## Step 1: Get Started & Login to Your SurePayroll Referral Account

Visit [SurePayroll Referral webpage](#) and select “Not a SurePayroll Customer” on the center of the screen.

- ✓ Click the “Create a new account” or “Login” (if you are already registered).

Support Search 877-954-7873 Already have an Account? Log in

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Small Business Nanny & Household Benefits & HR Accountants [Get My Payroll Quote](#)

Earn Up To \$300 For Each Referral  
Refer three businesses and enjoy free payroll for a year\*

Already a SurePayroll Customer **Not a SurePayroll Customer** 1

**1** No worries. Making a referral is easy.

1. Create a new account or Login to your existing referral account to start earning rewards
2. Share your personal link with friends, family, and social networks

Your referral will enjoy a free trial. When they run payroll, you get paid!\*

How does the program work?

- ✓ Refer a business customer for a \$300 reward
- ✓ Refer a household customer for a \$100 reward

Referring is Easy

SUREPAYROLL

\*Terms & Conditions Apply +

## Step 2: Register for A New Account or Login to Your Existing Account

If this is your first referral you need to create a new account. Enter your personal information in each of these form fields, then click the “**Register**” button.

### Already Have An Account?

Then just provide your email address and password and click “**Log In**” to access your referral account dashboard.

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### Referral Program Sign In

Email Address

Password

Register Log In

Forgot your password? 2

Or

Sign in with Google

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### Referral Program Registration

First Name

Last Name

Email Address

Password

Confirm Password

By checking this box, you agree to our Terms of Service

Sign in Register

Or 2

Register with Google

### Step 4: Send and Track Your Referrals in the Rewards Dashboard

Once you click the gift icon, the following pop-up will appear.

Just click the copy button and then share your unique URL with any friends or business colleagues who might be interested in SurePayroll. Or, you can click any of the three options below to share your referral URLs via your preferred social media platform:

- ✓ Email
- ✓ Facebook
- ✓ Twitter

The screenshot displays a pop-up window for sharing a referral link. At the top, it says "Earn up to \$300 for each referral." Below this, it provides details on rewards: "Refer a new business, and earn a \$300 reward. Refer a new household customer, and earn a \$100 reward.\* Share your custom link below." A text input field contains the URL "http://ssqt.co" with a copy icon and a "Copy" button. Below the input field are three buttons for sharing: "Email", "Facebook", and "Twitter". A blue callout bubble with the number "4" points to the "Copy" button. Below the sharing options is the "Rewards Dashboard" section, which shows a summary of referrals and earnings. The dashboard includes three main metrics: "9 FRIENDS REFERRED", "14 TOTAL REWARDS", and "\$23.00 DOLLARS EARNED". Below these metrics is a list of referrals with their status and rewards:

Name	Status	Reward
Remus	Signed up, referred 2 days ago	\$20.00 and 2 more rewards
Gellert	Trial user, referred tomorrow	Reward Pending
Your Friend	Signed up, referred now	Expired Reward

At the bottom of the dashboard, there are "Previous" and "View More" buttons, and a link to "\*Terms and Conditions".



## Step 5: Your Referral Contract Handles the Next Step

The process for your referral is simple once they click on your unique URL. They'll provide basic contact information to SurePayroll and have a chance to learn about our payroll solution. Once they become a customer and meet all referral requirements, you'll be approved to earn your reward.

Your referred contact must complete the following requirements:

- ✓ Become a SurePayroll customer
- ✓ Process their first payroll
- ✓ Remain active for 60 days following their initial payroll

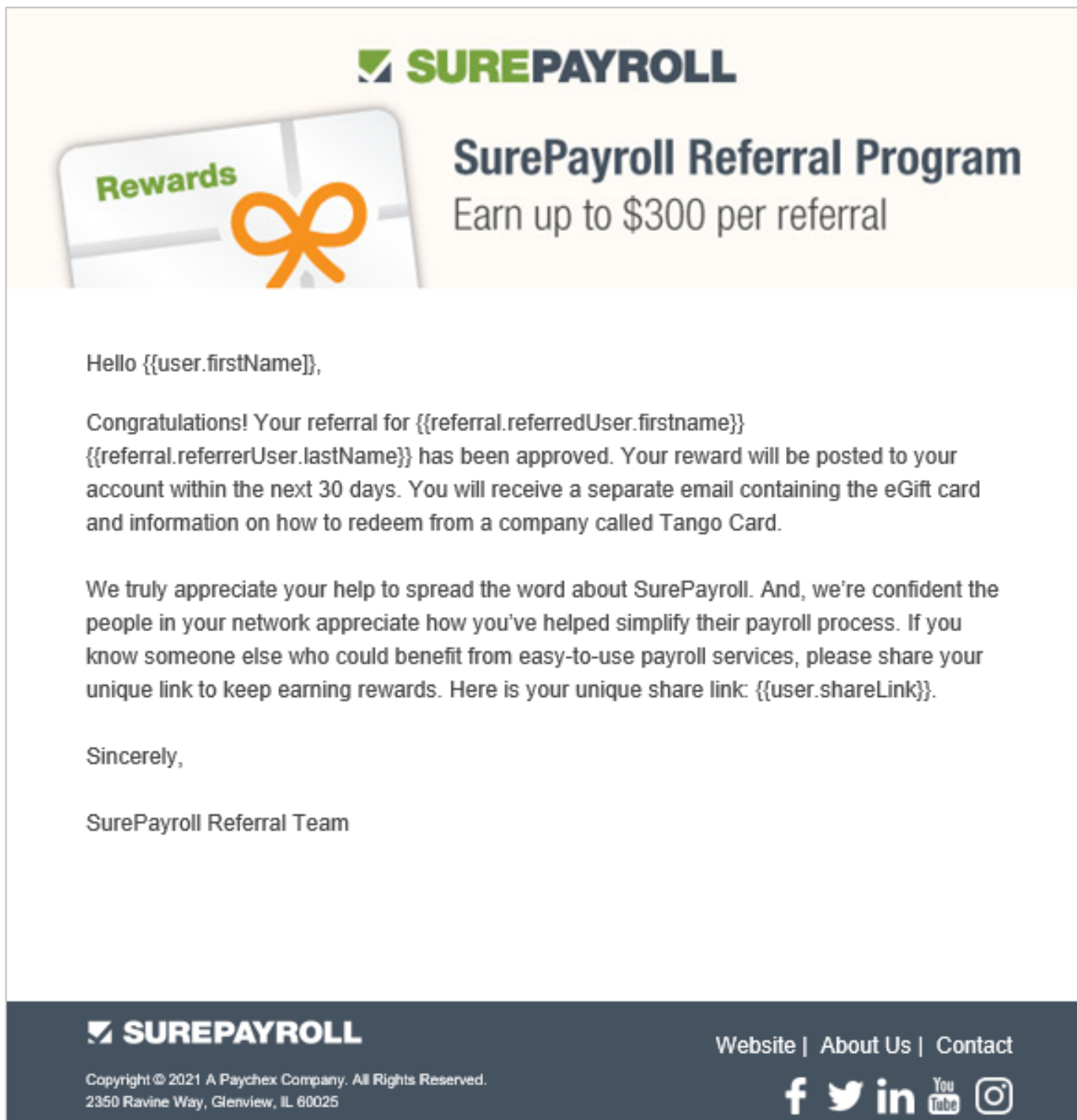
Then you will be approved to earn your reward. The following rewards are available for successful referrals:

- ✓ New businesses payroll referrals earn a **\$300 gift card**
- ✓ New household payroll referrals earn a **\$100 gift card**
- ✓ Earn **one year FREE PAYROLL** for referring three new businesses in a calendar year

**There is no limit to the number of rewards you can earn.**

## Step 6: Your Referral is Approved

Once your contact has completed the landing page, you will receive the following email to confirm your pending referral.



The image shows a preview of an email from SurePayroll. At the top, there is a header with the SurePayroll logo and the text "SurePayroll Referral Program Earn up to \$300 per referral". Below this, the email body contains a personalized greeting, a congratulatory message about a referral being approved, and an invitation to share the referral link. The footer includes the SurePayroll logo, copyright information, and social media links.

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**SurePayroll Referral Program**  
Earn up to \$300 per referral

Hello {{user.firstName}},

Congratulations! Your referral for {{referral.referredUser.firstname}}  
{{referral.referrerUser.lastName}} has been approved. Your reward will be posted to your account within the next 30 days. You will receive a separate email containing the eGift card and information on how to redeem from a company called Tango Card.

We truly appreciate your help to spread the word about SurePayroll. And, we're confident the people in your network appreciate how you've helped simplify their payroll process. If you know someone else who could benefit from easy-to-use payroll services, please share your unique link to keep earning rewards. Here is your unique share link: {{user.shareLink}}.

Sincerely,

SurePayroll Referral Team

**SUREPAYROLL**



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2350 Ravine Way, Glenview, IL 60025

f t in YouTube Instagram

## Step 7: Payment Is On It's Way

Your contact has completed all requirements and a payment is on its way.



### SurePayroll Referral Program


Earn up to \$300 per referral

Hello {{user.firstName}},


Congratulations! Your referral {{referral.referredUser.firstname}}  
{{referral.referrerUser.lastName}} has been approved. Your reward will be posted to your account within the next 30 days. You will receive a separate email containing the eGift card and how to redeem from a company called Tango Card.

We truly appreciate your help to spread the word about SurePayroll. And, we're confident the people in your network appreciate how you've helped simplify their payroll process. If you know someone else who could benefit from easy-to-use payroll services, please share your unique link to keep earning rewards. Here is your unique share link: {campaign\_link}

Sincerely,  
SurePayroll Referral Team

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## Step 8: Enjoy Your Reward

Success at last. Congratulations! The last step is receiving your rewards email with the instructions on how to redeem your gift card.

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**Rewards**

**SurePayroll Referral Program**  
Earn up to \$300 per referral

Thank you for referring a new customer to SurePayroll. We're thrilled to provide you with the following reward:

**\$0.00**



Code: ABCD-EFGH-HUK

**To Redeem**

1. Click the redemption link above to claim your reward.
2. Select a Virtual Visa Card, ready for immediate use online or over the phone anywhere Visa debit is accepted, or select a Physical Visa Card to be mailed to you.
3. The redemption site will ask you to provide your name, address, email and mobile phone number to be associated with your card.
4. Agree to the Cardholder Agreement to complete the redemption.

**NOTE:** You must select your card within 4 months from the date this email was sent. Your right to the payment expires after that time. Once redeemed, you'll have 7 months to use your Visa prepaid card wherever Visa debit is accepted.

The redemption website provides balance information and transaction history to help you keep track of all your rewards. Please note that some merchants may choose not to accept out of country currency at their own discretion. If this occurs, pay for your purchase by another payment method and use your Visa prepaid card at a different merchant.

**SurePayroll Referral Program**

If you have any problems or questions, please visit [help.tangocard.com](http://help.tangocard.com).



This reward is non-refundable. The full terms and conditions are available on the digital rewards claim site.

Your reward will be delivered via email with instructions for claiming your Visa prepaid card. You must claim your card within 4 months from the date these instructions are sent via email. Your right to the payment expires after that time. Use your Visa prepaid card anywhere Visa debit cards are accepted around the world. Card is issued by The Bancorp Bank, Member FDIC, pursuant to a license from Visa U.S.A. Inc. Your use of the prepaid card is governed by the Cardholder Agreement, and some fees may apply. This is not a gift card. Please note that prepaid cards are subject to expiration, so pay close attention to the expiration date of the card.

Reference ID: RC123456-789-0-1 (ID used only for troubleshooting purposes.)



## Questions?



If you still have questions regarding *SurePayroll's Referral Program* or issues with a pending referral, send an email to [referrals@surepayroll.com](mailto:referrals@surepayroll.com).

For questions about your rewards gift card, visit: [help.tangocard.com](https://help.tangocard.com).