1120: TeamUp Referral Program

1100: All Sales Policies · https://milo.masseyservices.com/docs/1120-teamup-referral-program/

Section: Sales
Subject: TeamUp Referral Program
Approved by: Tony Massey
Effective Date: 6 June 2025
Last Reviewed Date: 6 June 2025
Policy Owner: VP Business Development

Policy

At Massey Services Inc., “We believe in building LONG-TERM, TRUSTING RELATIONSHIPS with Customers and Team Members.” In addition to the retention of our services and loyalty that develops over time, we know that customer referrals are a significant opportunity for us to grow and develop additional customer relationships. Currently, our company offers the PASS it ON referral program for residential referrals.

Purpose: The TeamUp referral program is designed to create an opportunity for businesses to refer their customers to our company. TeamUp is a business referral program that complements our residential referral program.

Program Rules

- The incentive includes a $50 referral incentive after the initial service has been started and paid; and an additional $20 incentive for each additional recurring service purchased by the same customer.
- Companies that refer their customer(s) to our company are eligible for a financial incentive after the referred customer has purchased our service(s).
- Companies with a business license are eligible for the program.

- Companies must provide a current W-9 to verify the business. (see Appendix A)
- The incentive is for recurring-revenue services over $200 in annual value.
- One-time sales over $300 are eligible.
- The incentive is for new customer acquisition only. A business who refers a customer who has service(s) with our company will not receive an incentive for that property except that:
  - A TeamUp referred Massey Services Inc., customer with only a pre-treat service will be treated as a “new customer” in the TeamUp program.
- The incentive cannot be combined with any other offers or discounts except for pay in advance (PIA).
- The incentive is only applicable for new services sold at full rate card.
- Any requests not submitted within 60 days must be reviewed by the regional manager prior to processing.
- Initial and retention referral incentives will be expensed to the Sales Promotion line of the profit and loss statement (P&L).

- Discounts may not be substituted for referral payout.
- The Remittance Form must be completed in its entirety and emailed to Customer Care at teamup@masseyservices.com for fulfillment.
- The new customer must be listed in ServicePRO for the referring business to receive their referral payout.
- The new customer must have paid for service and initial service has been completed for the referring business to receive their referral payout.
- Any TeamUp referrals that deviate from these guidelines are subject to approval and must be explained in detail.

Instructions

Signing up Service Providers:

1. The sales inspector or other team member meets with a TeamUp service provider candidate and covers the value of being part of our TeamUp program.

2. After covering the value, the team member covers the features, benefits, and rules of the program.
3. The team member then fills out the appropriate portions of the Sign Up Form and has the TeamUp Candidate complete the business information. (see Appendix B)
4. The team member secures a W-9 from the new TeamUp service provider.
5. Once completed, the team member signs and dates the Sign Up Form, covers it with the general manager at check-in, and scans/emails the Sign Up Form and W-9 to teamup@masseyservices.com.

Entering a TeamUp Referral Sale

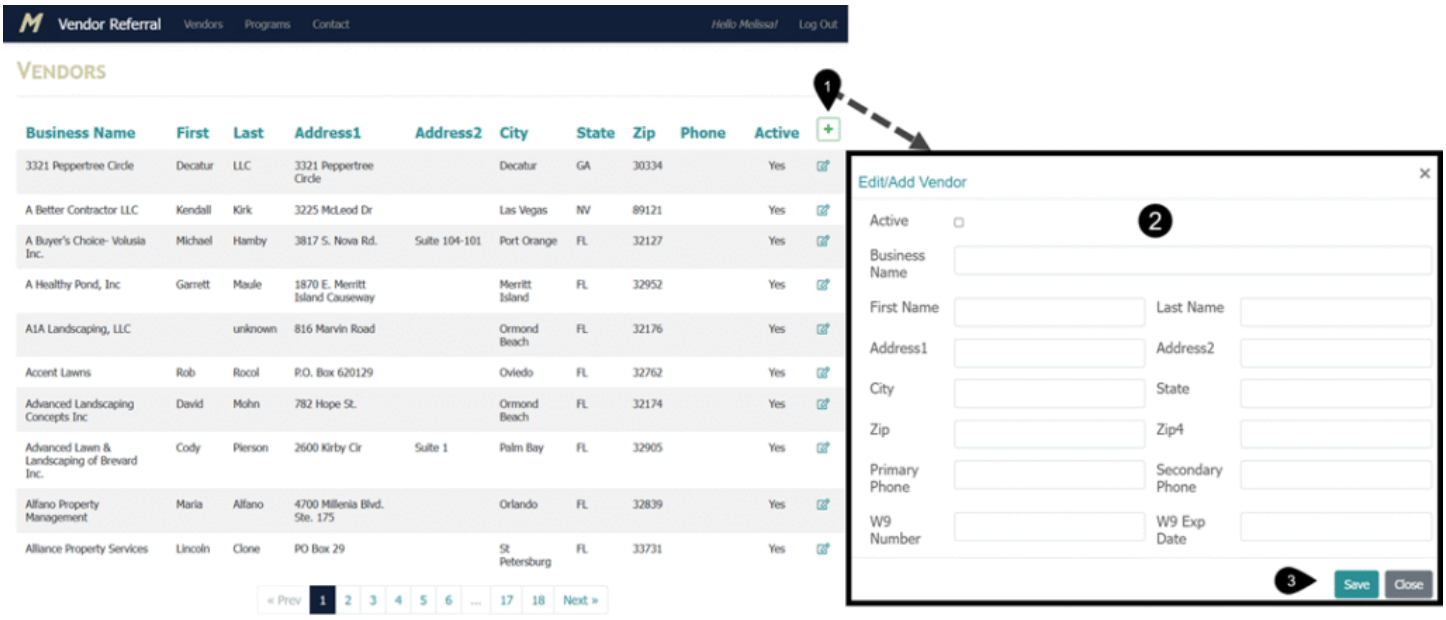
1. Following the sale of a TeamUp referred customer, the team member is to complete the TeamUp Remittance Form with the assistance of the office manager. (see Appendix C)
2. The office manager confirms the vendor is listed in the TeamUp Vendor Tracker.
    1. If not listed, add the vendor information. (see Example #1)
3. The office manager then scans and forwards the remittance form to CC at teamup@masseyservices.com.
4. Customer Care completes the following:
    1. Verify the vendor is listed in the vendor table in ServicePRO.
    2. Enter the vendor name, discount program (HRIS) and service start date in the site menu/site options section on the customer's ServicePRO account. (see Example #2)
        1. If there are multiple sites only enter the information on the corresponding site for the new service
    3. Verify the service has been started and paid, for each TeamUp incentive submitted.
    4. Enter the incentive request on the TeamUp tracker located in the TeamUp Program folder in the G:Drive.
        1. G:/CustomerCare/TeamUp.
5. All requests for the previous month must be filled in by the 2nd business day of the month.
6. Run the TeamUp Initial Sales Report located in Reporting services on the 3rd business day of the month.

7. Reconcile all requests received to the Initial Sales Report and the TeamUp Tracker.
8. Prepare an Accounts Payable voucher for each referring company for the previous month by the 4th business day of the month.
9. Enter the customer's name and account number in the explanation field of the voucher.
10. Forward to the regional manager for signature.
11. Upon approval, the regional assistant forwards to accounts payable for payment processing.
12. Initial referral incentives are paid by the 15th of the month.

Example #1: Adding a new or editing an existing TeamUp Service Provider.

Enter the address https://vendorreferral.masseyservices.com/ into your browser. In the Vendor Referral Tracker you can:

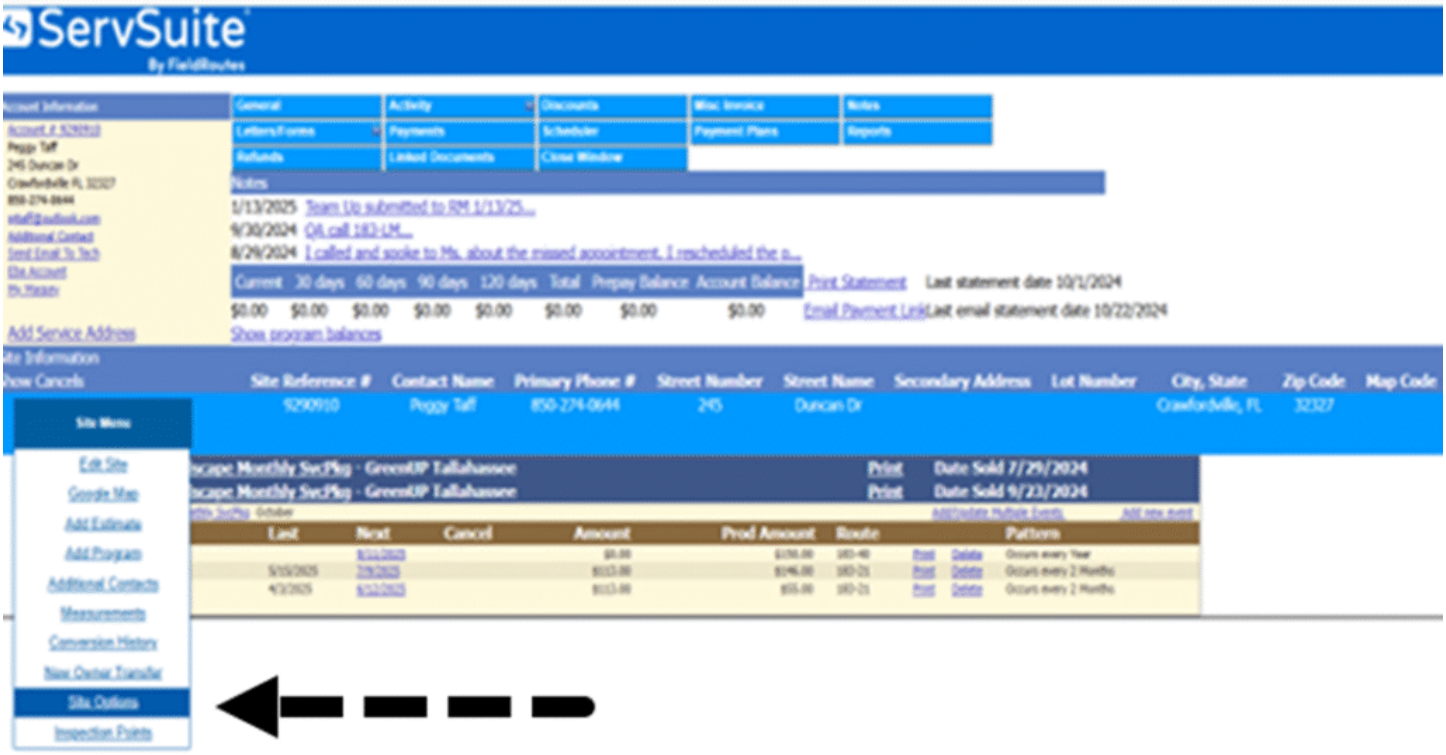
- View the list of vendors alphabetically by business name, first name, last name, address or city.
- Edit an existing vendor by selecting the edit symbol on the right side of the appropriate vendor record
- Add a new vendor by:
  - clicking the green plus sign on the tracker column captions,
  - entering the new partner's information into the tracker,
  - and clicking Save.



Example #2: Adding a vendor name, discount program and start date into the customer's ServicePRO account.

Select Site Menu and click on Site Options. In the Site Options screen:

- Select the TeamUp Partner's Vendor name from the Drop-down List
- Select the Discount Program HRIS
- Enter the start date for the program.
    - If there are multiple programs being started, use the latest program start date in the date field



Frequently Asked Questions

Submitting an AP voucher

- What do we use for the invoice number and invoice date?
    - Per Accounting, since there is no invoice number, we will just use the date submitted (the date the service center submitted it – by referencing the date on the form) for both fields.
- Is there a due date?

- Use the same date as the invoice date.

- What is the account description?
  - TeamUp (HRIS)

- What is the account code? Who gets billed?
  - 629300

General Issues

- What note should Customer Care put in the account?
  - A note should be entered on the customer’s account that the TeamUp incentive was received for processing.

- Under site options (Start Date), do we use the Initial date or Date Submitted?
  - We use the “Initial” date as this is also what reporting will use to generate the yearly reports for the 2nd payout.

- Is it necessary to have Customer Care and the regional manager sign the form?
  - Customer Care still needs to sign and date the form as this gives visual confirmation to the RM that it has been verified by Customer Care for the pertinent documents and information.

- Where are the forms on-line for the service center to access?
  - X-Drive > Sales

- Who secures the W-9 and at what time?
  - The team member is to secure the W-9 at time of referral.
  - The service center is responsible for ensuring this is forwarded to Customer Care also with the Service Provider Sign Up form.

Appendices

-

Form **W-9**
(Rev. March 2024)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Go to *www.irs.gov/FormW9* for instructions and the latest information.

Give form to the requester. Do not send to the IRS.

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See Specific Instructions on page 3.

1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)

2 Business name/disregarded entity name, if different from above.

3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor ☐ C corporation ☐ S corporation ☐ Partnership ☐ Trust/estate

☐ LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) . . . . .

Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.

☐ Other (see instructions)

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any)

Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any)

(Applies to accounts maintained outside the United States.)

3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions . . . . . ☐

5 Address (number, street, and apt. or suite no.). See instructions.

Requester's name and address (optional)

6 City, state, and ZIP code

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

___ – ___ – ____

or

Employer identification number

__ – _____

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here | **Signature of U.S. person** | **Date**

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to *www.irs.gov/FormW9*.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

Appendix A: W-9 Form

-

Service Provider Sign Up Form

Send to: Customer Care **Date Signed Up:** _____

Scan and Email to: teamup@masseyservices.com

Phone#: 1-866-316-8020

Referring Business: To receive $50 at the time of purchase and $20 for each additional service purchased.

Business Name: _____

Contact: _____

Address: _____

City, ST, Zip: _____

Tax ID #: _____

IMPORTANT NOTE: You must send in a copy of the W-9 form in order for payments to be sent.

PROGRAM RULES

- Referring business receives $50 for the first service a customer purchases and $20 for each additional service purchased.
- To qualify, the new customer must purchase a minimum of $200 in annual recurring services or a minimum of $300 for a one time service.
- A referring business cannot refer their own residential property.
- Discounts may not be substituted for referral payout.
- The referring business' account, if any, must be in good standing before the referral payout is issued.
- Any TeamUp Home Service Referrals that deviate from these guidelines are subject to approval and must be explained in detail.

Team Member Signature: _____ **Date:** _____

Appendix B: TeamUp Service Provider Sign Up Form

-

Remittance Form

Send to: Customer Care

Scan and Email to: teamup@masseyservices.com

Phone#: 1-866-316-8020

Service(s) Sold: Lawn/Irrigation $ _____ Pest $ _____ Termite $ _____

Date Signed Up: _____

Service Center: _____

Referring Business: To receive $50 at the time of purchase and $20 for each additional service purchased.

Business Name: _____

Contact: _____

Address: _____

IMPORTANT NOTE: If this is a new business partner, you must send in a copy of a W-9 form in order for payments to be sent.

New Customer Information

Name: _____

Address: _____

City, ST, Zip: _____

Account #: _____

PROGRAM RULES

- Referring business receives $50 for the first service a customer purchases and $20 for each additional service purchased.
- To qualify, the new customer must purchase a minimum of $200 in annual recurring services or a minimum of $300 for a one time service.
- A referring business cannot refer their own residential property.
- Discounts may not be substituted for referral payout.
- This form should be completed in its entirety and scanned to Customer Care at teamup @masseyservices.com on the same day service is sold. Any requests for a service that was purchased longer than 1 month ago requires approval by the Regional/Division Manager.
- The new customer must be listed in Service Pro in order for the referring business to receive their referral payout. If they have not been entered into Service Pro and paid for service, we will not be able to mail out their referral payout until such time.
- The referring business' account, if any, must be in good standing before the referral payout is issued.
- Any TeamUp Home Service referrals that deviate from these guidelines are subject to approval and must be explained in detail.

Customer Care Signature: _____ **Date:** _____

Downloads

Embedded media: https://milo.masseyservices.com/wp-content/uploads/2025/09/1120-TeamUP-Referral-Program.pdf

1120 TeamUP Referral ProgramDownload