

Last Updated: 13.10.2022

DSA Referral Plan Communication

Instructions:

- Templates that are meant to be sent as WhatsApp messages are highlighted in **Blue**.
- Templates that are meant to be sent as emails are highlighted in **Green**.
- For emails, please ensure you have your email signature set up as per our brand guidelines.
- Text in **red** are variables and need to be replaced with the necessary information (i.e., partner name, deal ID, links, etc.)
- In the email templates, please change the colour of the variable text to **black** before sending the email.
- Remember to replace the link (highlighted in **yellow**) in the After Registration email with the correct corresponding unique link for the partner.
- Please do not make any modifications to the templates.

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1. **Initial message telling RPs that we have started our Referral Partner Programme (WhatsApp)**

Hi {{first name}},

CreditEnable invites you to register as a Referral Partner to help your clients get business loans 2x faster. Save time – know your client's eligibility instantly, get regular updates on your files, talk to a dedicated RM, while getting paid competitively!

Register in 4 easy steps and start making money! Click on this link to start <https://bit.ly/3g00abr>.

Team CreditEnable
www.creditenable.com

2. **Reminder to Submit Documents (WhatsApp)**

Hi {{first name}},

We are glad to see you become a CreditEnable partner! You are only one step away from making money faster and more efficiently.

Share your documents on partner@creditenable.com to get your Referral Partner code.

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Commented [AM1]: Gupshup Template name: Referral_Partners_01_Introduction_Message

Commented [AM2R1]: Template ID: 6526193

Commented [AM3]: Gupshup Template name: Referral_Partners_02_Document_Submission_Reminder

Commented [AM4R3]: Template ID: 6525898

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3. **Email - Complete Registration**

Hi {{first name}},

We're glad to see that you have opted to be a CreditEnable partner.

Our Referral Partner programme helps you save time by knowing your client's eligibility instantly, get regular updates on your files and an instant line to your dedicated RM, while getting paid at competitive rates!

Here's our slab-wise pay out structure for monthly disbursements for Unsecured Business Loans:

Buckets	Pay Out
0-50L	1.25%
51L-1Cr	1.50%
1 Cr - 3 Cr	1.65%
> 3Cr	1.90%

Please email us the following documents partner@creditenable.com to get your Active Referral Partner code.

1. PAN Card
2. Aadhar Card
3. GST (if registering as a business)
4. Cancelled Cheque
5. Signed agreement (attached)

We will share the MIS within 15 days of month end for you to raise an invoice. Payments for disbursals will be made 30 days after you raise an invoice. Please raise the invoice in the name of **Oktober6 Insights Pvt Ltd.** and email it to accounts@creditenable.com.

Feel free to reach out to us on partner@creditenable.com for any queries.

We look forward to working with you!

Warm regards,

Team CreditEnable

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4. **Email - After Registration Completed**

Hi {{first name}},

Welcome to the CreditEnable network! We are excited to partner with you and enable efficient growth for you.

Attached to this email is a Welcome Kit with the following information:

1. Training document explaining the digital process to log in files and the CreditEnable process
2. Product note for Business Loans
3. Countersigned Agreement
4. Key Information Sheet to be emailed to us with every file you log in
5. Commercials

Please see the following link that has your referral code embedded. Please use ONLY this link to log in files for your customer.

https://www.creditenable.com/dsq-loan-application/?utm_source=RP&utm_campaign=RPCODE

Please email us on partner@creditenable.com if you have any queries or call on +91 84509 67207.

Thanks,

Team CreditEnable

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5. **Email – DSAs who reach out to us**

Hi {{first name}},

Thank you for your interest in becoming a CreditEnable Referral Partner! We're glad to see our network of Partners grow!

Our Referral Partner programme helps you save time by knowing your client's eligibility instantly, get regular updates on your files and an instant line to your dedicated RM, while getting paid competitively!

Please fill in the registration form on [this link](#) and email the following documents to us at partner@creditenable.com to get your Active Referral Partner code.

1. PAN Card
2. Aadhar Card
3. GST (if registering as a business)
4. Cancelled Cheque
5. Signed agreement (attached)

Feel free to reach out to us on partner@creditenable.com for any queries.

We look forward to working with you!

Warm Regards,

Team CreditEnable

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6. **Status Messages to Referral Partner (WhatsApp):**

Approval Messages (MANUAL)

- **Update on your referred application {{CE ID #}}:**

Documents have been verified and the file is now being credit assessed using CreditEnable's proprietary algorithm. We will keep you posted on any updates.

- **Update on your referred application {{CE ID #}}:**

The file has been assessed by credit and shared with a lender partner. We will keep you posted on any updates.

- **Update on your referred application {{CE ID #}}:**

Congratulations! A business loan has been approved in the name of your referred client. The next steps are agreement signing and loan disbursement. We will keep you posted on any updates.

- **Update on your referred application {{CE ID #}}:**

Congratulations! A business loan has been disbursed for your referral. Please raise an invoice for this once you receive the details from Finance and email it to us at accounts@creditenable.com. We will ensure your payment is processed within 30 days of receiving it.

Please reach out to your RM in case of any questions.

Approval Messages (AUTOMATED)

- **Update on your referred application {{CE ID #}} | {{Business Name}}:**

Documents have been verified and the file is now being credit assessed using CreditEnable's proprietary algorithm. We will keep you posted on any updates.

- **Update on your referred application {{CE ID #}} | {{Business Name}}:**

The file has been assessed by our Credit Experts and shared with a lender partner We will keep you posted on any updates.

- **Update on your referred application {{CE ID #}} | {{Business Name}}:**

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Congratulations! A business loan amount of **{{X}}** **{{Lakhs/Crores}}** has been approved by **{{Lender name}}** in the name of your referred client. The next steps are agreement signing and loan disbursement. We will keep you posted on any updates.

- **Update on your referred application **{{CE ID #}}** | **{{Business Name}}**:**

Congratulations! A business loan amount of **{{X}}** **{{Lakhs/Crores}}** has been disbursed through **{{Lender name}}** for your referral. Please raise an invoice for this once you receive the details from Finance and email it to us at accounts@creditenable.com. We ensure your payment will be processed within 30 days of receiving it.

Please reach out to your RM in case of any questions.

Rejection Messages (MANUAL)

- **Update on your referred application **{{CE ID #}}**:**

We regret to inform you that we are unable to proceed with this application at this point. Please connect with your RM to get further details if required.

Rejection Messages (AUTOMATED)

- **Update on your referred application **{{CE ID #}}**:**

We regret to inform you that we are unable to proceed with this application due to inconsistent or insufficient documents. Please connect with your RM to get further details on the file if required.

- **Update on your referred application **{{CE ID #}}**:**

We regret to inform you that we are unable to process this application further due to credit qualifiers. Please connect with the RM to get further details on the file if required.

- **Update on your referred application **{{CE ID #}}**:**

We regret to inform you that we are unable to proceed with this application due to lender-specific criteria not being met. Please connect with the RM to get further details on this.

- **Update on your referred application **{{CE ID #}}**:**

We regret to inform you that we are unable to process this application further as the borrower has chosen to withdraw their application from the process.

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Messages to borrowers:

We can use the existing messages that go out to borrowers.

