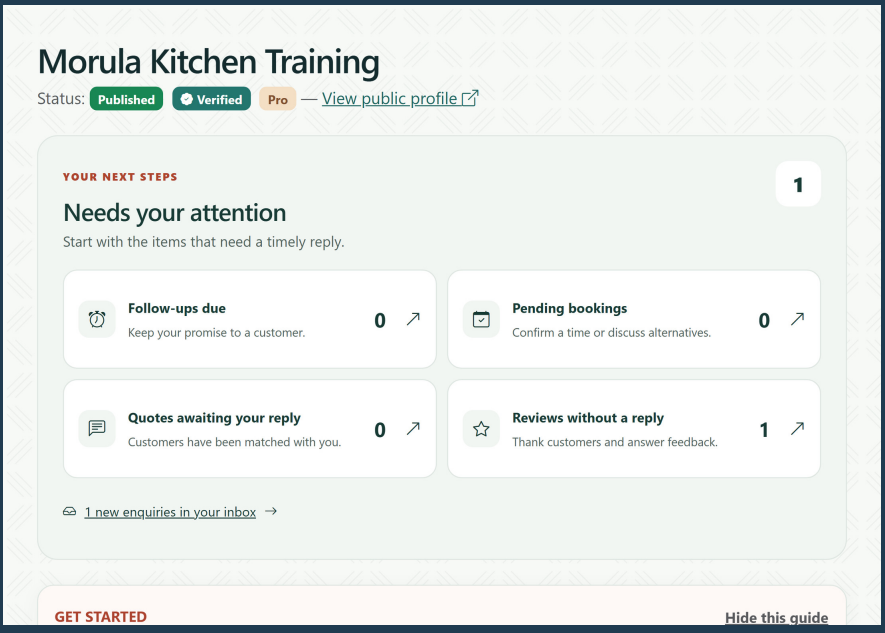
A PRACTICAL GUIDE FOR OWNERS AND THEIR TEAMS

Build your business. Run your next campaign.

Business owner training guide

From your first listing to useful marketing, customer follow-up and clear payment records. Numbered steps, real screens, worked examples and completion checks.



Edition 19 October 2026 | Owner edition | No administrator payment-verification procedures

Includes Growth Assistant, Marketing Copilot, Campaign Studio, leads, loyalty, adverts and billing.

ORIENTATION

Start here: your first working week

First session: set the foundation

Sign in with your own account. Choose the correct business, claim an existing listing rather than duplicate it, and check publication status. Complete contact details, hours, services and genuine photos.

Second session: prepare one useful campaign

Use Growth Assistant to fix gaps. Write a factual brief, use Marketing Copilot or Campaign Studio for drafts, review the words and choose an available publishing channel. Paid placement is purchased separately in Advertise.

Daily: respond and record the next step

Check new Leads, follow-up reminders, booking requests and reviews. Keep notes useful to the next staff member. Personal My bookings and customer bookings in a business dashboard serve different purposes.

Weekly: review value and records

Compare enquiry quality, quoted work, confirmed bookings and actual sales with profile/campaign activity. Review transaction history, payment orders, current plan and renewal settings.

Using this manual

Use the PDF bookmarks or the clickable task index at the end. Each lesson has numbered actions, an expected result and a practice task. Screenshots show fictional records in the actual local app. Current live prices, availability and permissions take precedence.

MARKETING MAP

Choose the right marketing tool

Growth Assistant: decide what to improve

Reads profile completeness and activity to suggest actions. Start here if you are unsure what to fix. Refreshing recommendations is different from publishing a post.

Marketing Copilot: draft one piece of copy

Select a content type and give context. Review variations, then copy them or deliberately post the approved variation to your business profile. Image upload/generation is a separate action.

Campaign Studio: keep a coordinated set of drafts

A single title and brief creates channel-specific wording. You choose which version to publish or copy. The captured Studio does not automatically schedule every channel.

Connected Accounts: authorise a destination

Allows supported provider connections where the platform is configured. A channel draft can exist even when direct publishing is unavailable.

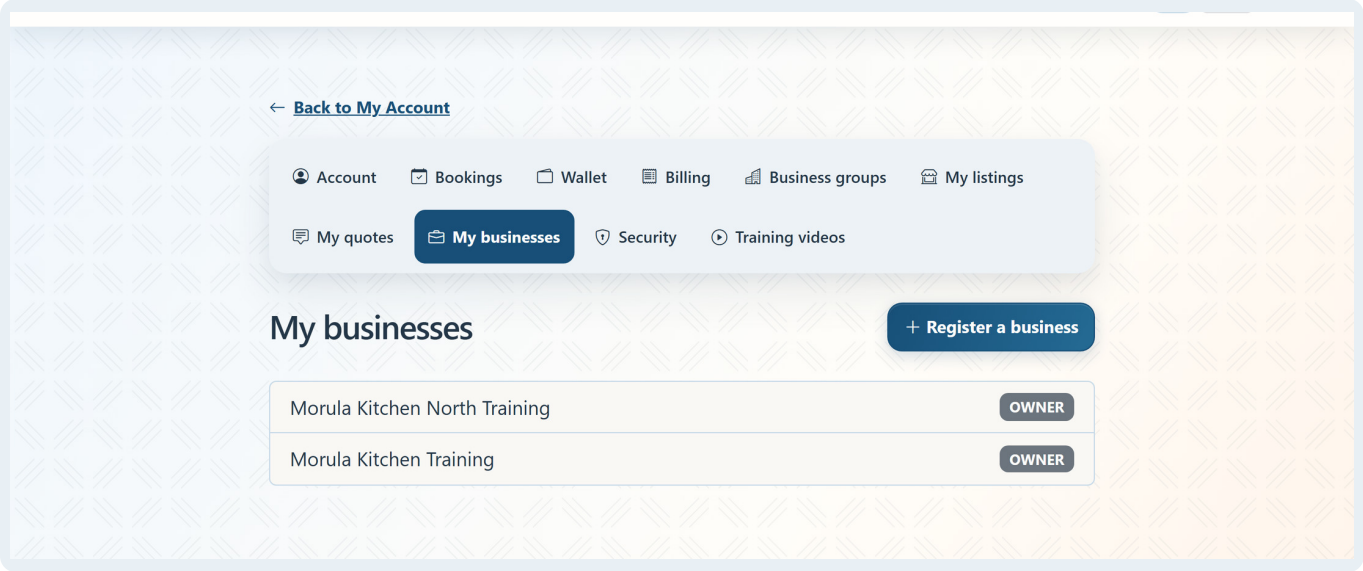
Advertise: purchase visibility

Choose a placement, creative, targets, dates and the current checkout price. A saved marketing draft or profile post does not itself fund an advert. Payment verification and campaign eligibility still apply.

01 / SET UP A BUSINESS

Choose the right business dashboard

One person may have access to several businesses or branches.



Open: Set up a business | Screenshot: fictional training business

1. Open Account > My businesses.
2. Read the business name and your access label.
3. Select the business you need to work on.
4. Check its name at the top of the dashboard before changing details or creating paid work.

CHECK THE RESULT

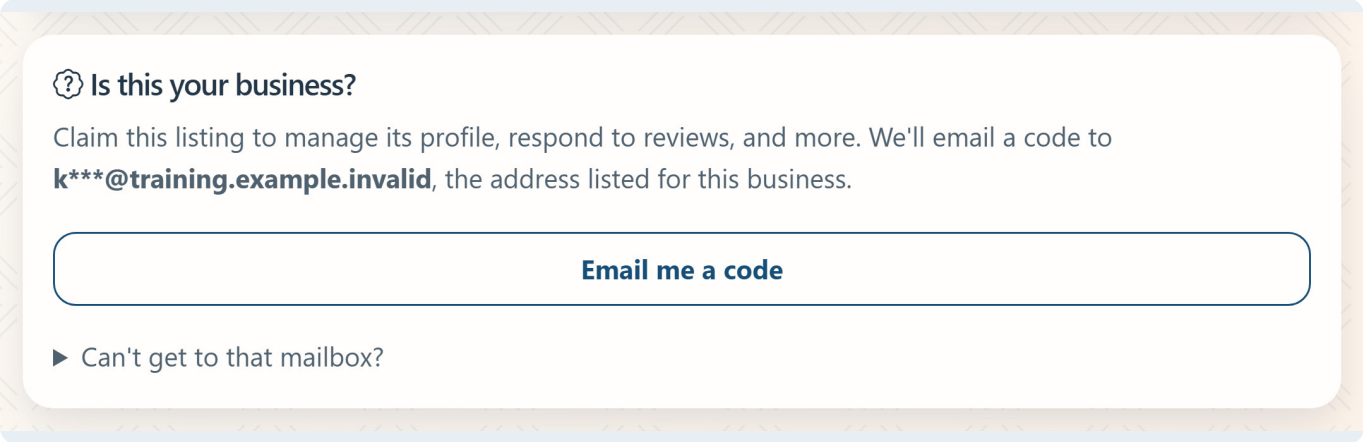
You are working inside the intended business.

Try it: Switch between the two example branches and identify which one is waiting for review.

02 / SET UP A BUSINESS

Claim an existing directory listing

Search for the business first to avoid creating a duplicate listing.



Open: Set up a business | Screenshot: fictional training business

1. Open the existing public profile and find Is this your business? while signed in.
2. If the listed mailbox belongs to the business and you can access it, choose Email me a code.
3. Enter the code received at that business mailbox to confirm the claim.
4. If there is no usable mailbox, open the manual route and explain your role with evidence the team can check. Wait for the review decision.

CHECK THE RESULT

Successful verification gives the correct account control of the listing.

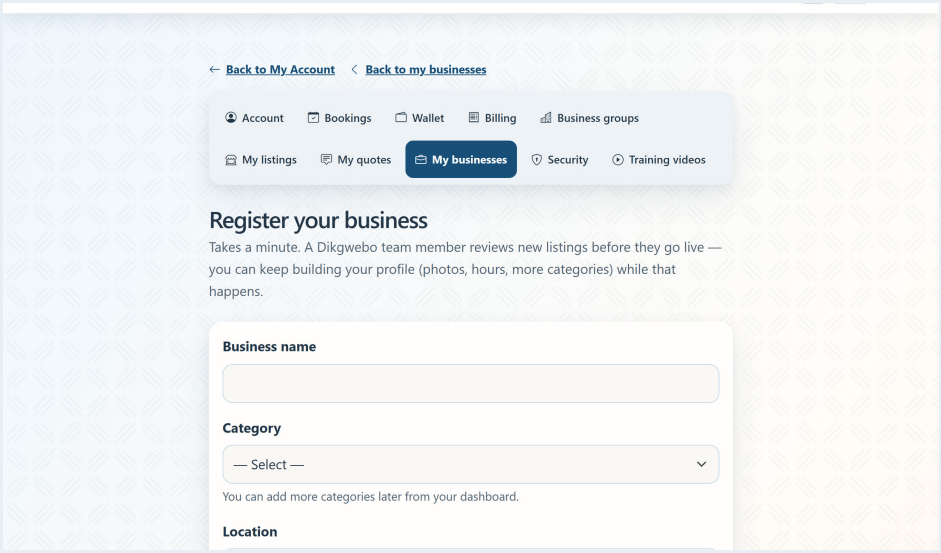
Try it: Explain why a code goes to the listed business mailbox rather than any email typed by a claimant.

Remember: The guide does not send claim emails. Use your own live listing and mailbox for a real claim.

03 / SET UP A BUSINESS

Register a business that is not listed

Use registration only after checking that the directory does not already contain the business.



Open: Set up a business | Screenshot: fictional training business

1. Open Account > My businesses > Register a business.
2. Enter the business name, category and town or district.
3. Add genuine contact details and any requested registration information.
4. Review the entry and submit it for review. Complete the remaining profile details from the dashboard while you wait.

CHECK THE RESULT

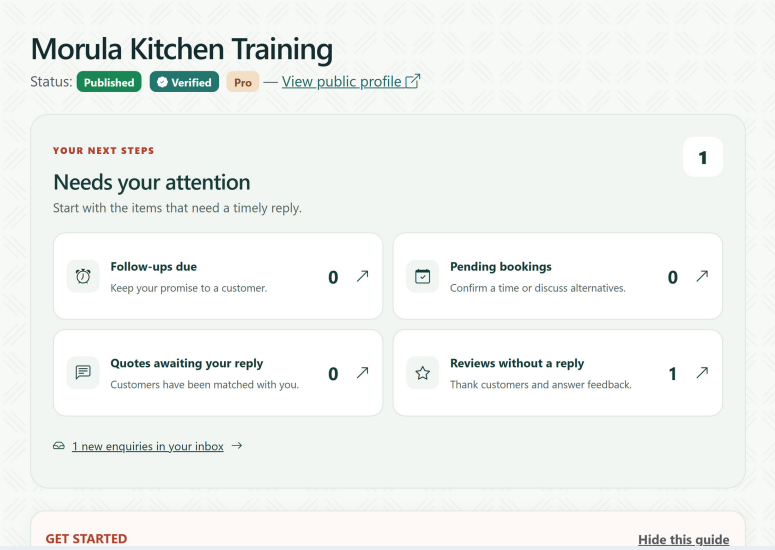
The business appears in your dashboard as awaiting review until published.

Try it: Prepare a business name, category, location, contact number and short description before registration.

04 / SET UP A BUSINESS

Read the business dashboard

The dashboard combines listing status with work that needs attention.



Open: Set up a business | Screenshot: fictional training business

1. Check the business name, publication status, verification and plan labels.
2. Use View public profile to compare what customers can see.
3. Open the attention cards for enquiries, follow-ups, bookings, quote replies or reviews.
4. Use the dashboard navigation to reach profile editing, products, marketing and business management.

CHECK THE RESULT

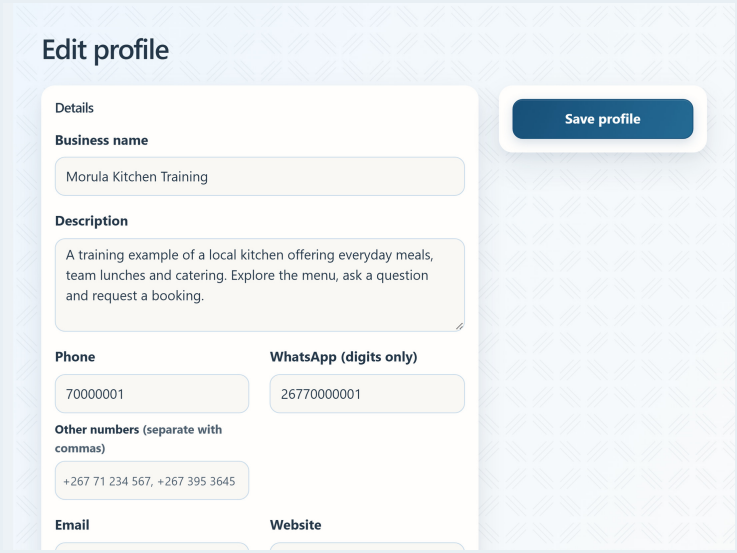
You know what is public and which customer work needs a response.

Try it: Choose the first task you would handle at the start of the day and explain why.

05 / SET UP A BUSINESS

Complete and maintain the profile

Correct contact details and useful descriptions matter more than a long sales pitch.



Open: Set up a business | Screenshot: fictional training business

1. Open Edit profile and check the business name and description.
2. Update the phone, WhatsApp, email, website, address, categories and operating hours where offered.
3. Upload a recognisable logo and a clear cover image. Check all details before saving.
4. Press Save profile, then open the public profile to verify the result.

CHECK THE RESULT

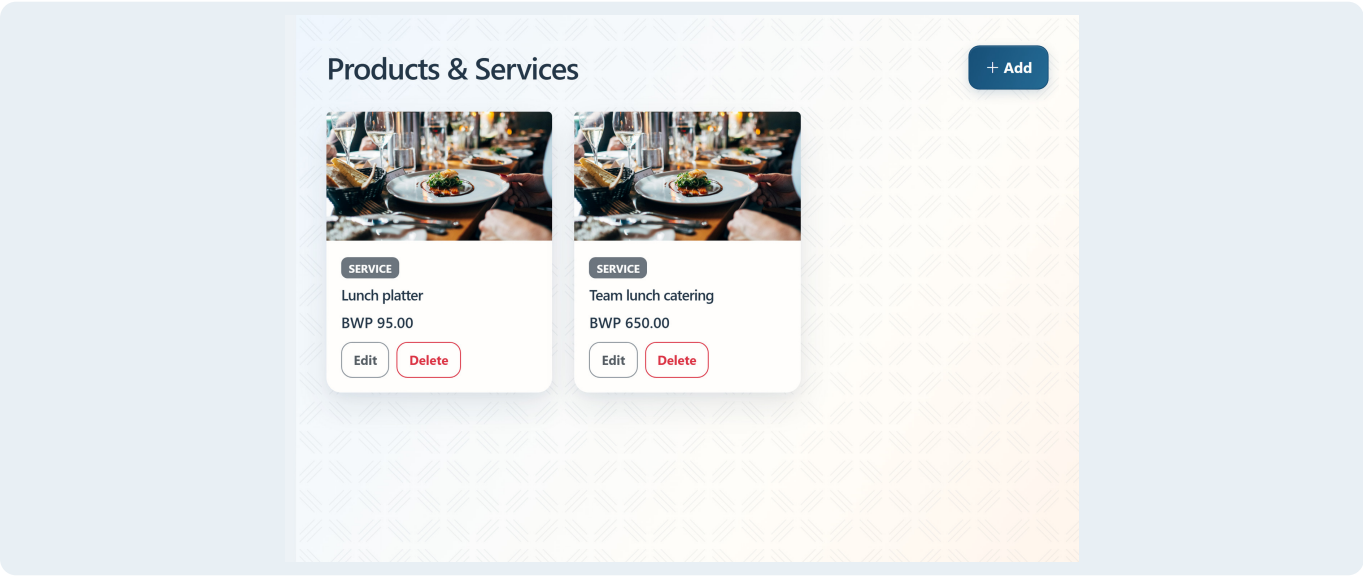
Customers see accurate, current information.

Try it: Review a profile for missing hours, a wrong location and an unclear description.

06 / SET UP A BUSINESS

Maintain products and services

Individual products and services make it easier for customers to understand the offer.



Open: Set up a business | Screenshot: fictional training business

1. Open Products & Services in the business dashboard.
2. Review each item name, type, photo and price.
3. Use Add for a new item or Edit to correct an existing one.
4. Remove an obsolete item only after checking the confirmation and any customer commitments.

CHECK THE RESULT

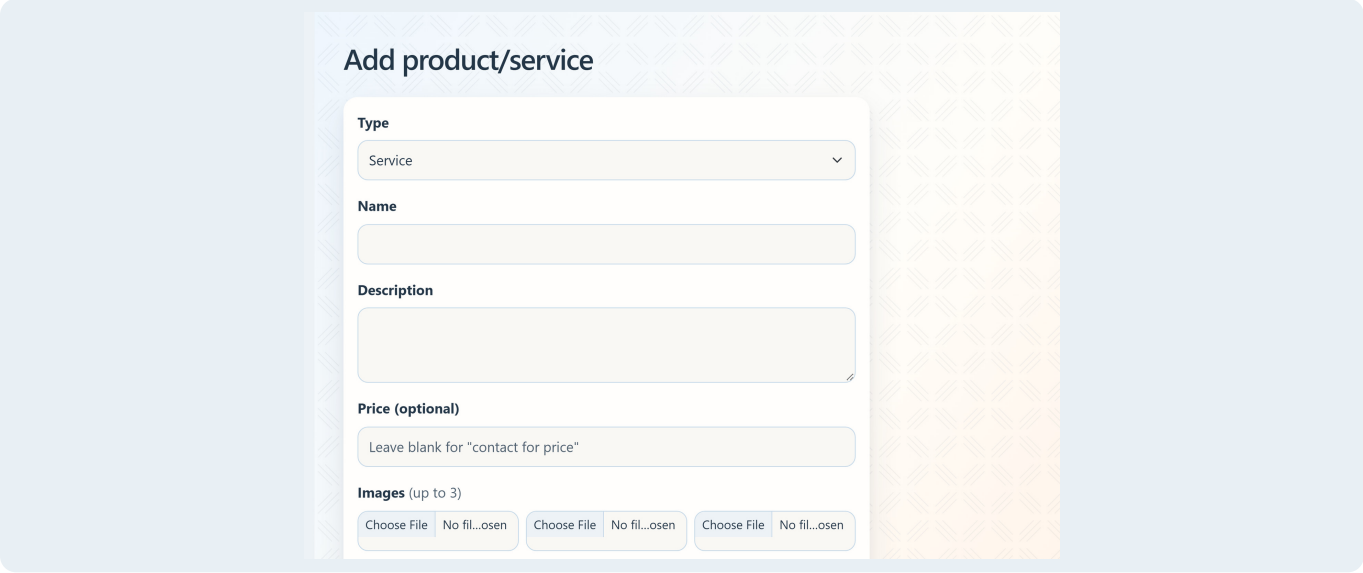
The public catalogue reflects what the business currently offers.

Try it: Compare a lunch platter with team catering and explain why separate entries help.

07 / SET UP A BUSINESS

Add a clear product or service

Create one focused entry for each offer the customer needs to understand.



Open: Set up a business | Screenshot: fictional training business

1. Choose Product or Service and enter a useful name.
2. Write what is included, who it suits and any conditions.
3. Enter a price if appropriate; leave it blank for contact for price when supported.
4. Add genuine photos and save, then check the public result.

CHECK THE RESULT

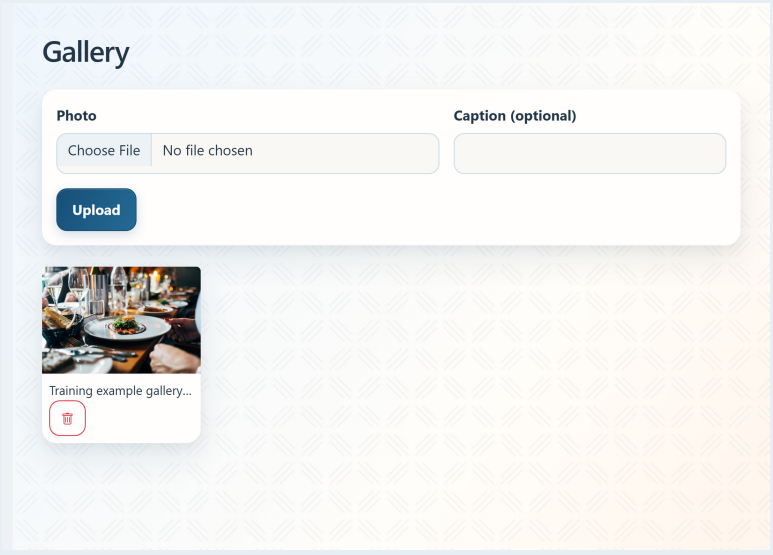
The item is available in the business catalogue and relevant customer selection fields.

Try it: Prepare a service description that explains quantity, lead time and what the price includes.

08 / SET UP A BUSINESS

Upload useful business photos

Use photos you are authorised to share and that accurately represent the business.



Open: Set up a business | Screenshot: fictional training business

1. Open Gallery and choose a clear photo from your device.
2. Add a short caption that explains what the customer is seeing.
3. Press Upload and check the new thumbnail and public profile.
4. Remove misleading or outdated images with care. Keep important subjects clear of the edges for use in advert crops.

CHECK THE RESULT

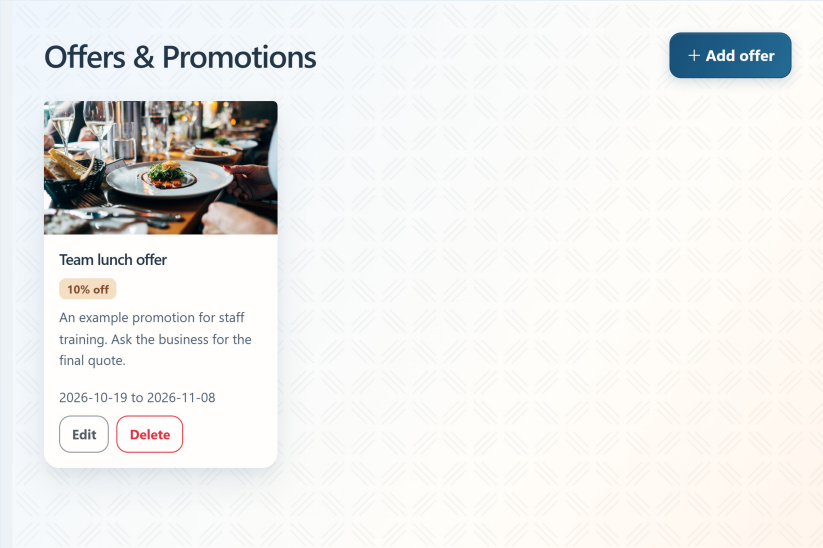
The gallery gives customers a credible view of the business.

Try it: Choose three useful photos: premises, an actual product and a service example.

09 / SET UP A BUSINESS

Publish an offer with clear terms

An offer should explain the value, availability and conditions.



Open: Set up a business | Screenshot: fictional training business

1. Open Offers & Promotions and choose Add offer.
2. Enter the title, description and any discount details requested.
3. Choose relevant dates and a suitable image; explain exclusions and booking requirements.
4. Save, then check the public offer. Edit or remove it when the promotion changes.

CHECK THE RESULT

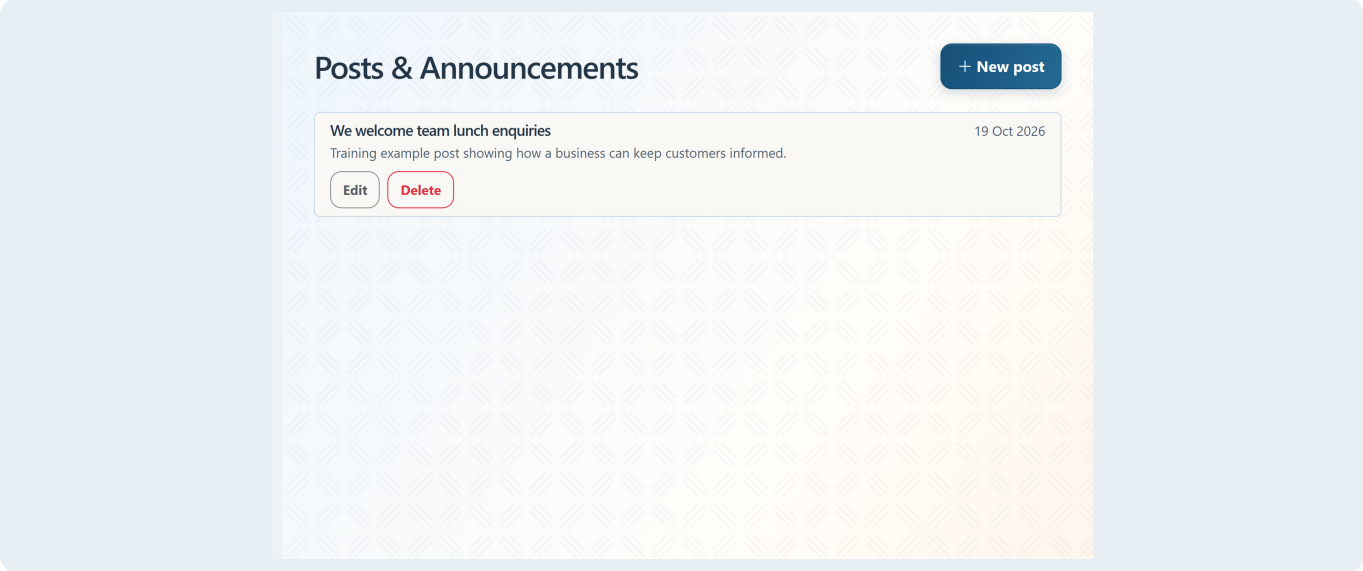
Customers can understand the offer before contacting the business.

Try it: Write a lunch promotion with an end date and a clear statement of what is included.

10 / SET UP A BUSINESS

Keep customers informed with posts

Posts and announcements are useful for news, changed hours and new services.



Open: Set up a business | Screenshot: fictional training business

1. Open Posts & Announcements and choose New post.
2. Write a short title and helpful message.
3. Add any relevant image and publish using the form action.
4. Read the public post and update or remove information that is no longer current.

CHECK THE RESULT

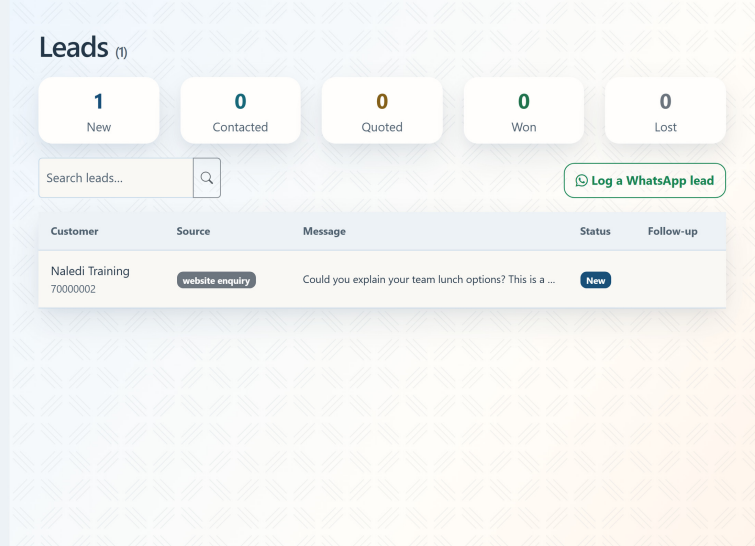
Customers see timely information on the business profile.

Try it: Draft an announcement about holiday hours and say when it should be updated.

11 / MANAGE CUSTOMER WORK

Work the enquiry and follow-up list

Leads brings customer enquiries and recorded follow-ups into one place.



Open: Manage customer work | Screenshot: fictional training business

1. Open Leads and review new items first.
2. Read the enquiry, contact details, source and any follow-up information.
3. Contact the customer through the agreed channel and update the lead status as work progresses.
4. Record the next follow-up. Use Log a WhatsApp lead for an enquiry received outside the website when appropriate.

CHECK THE RESULT

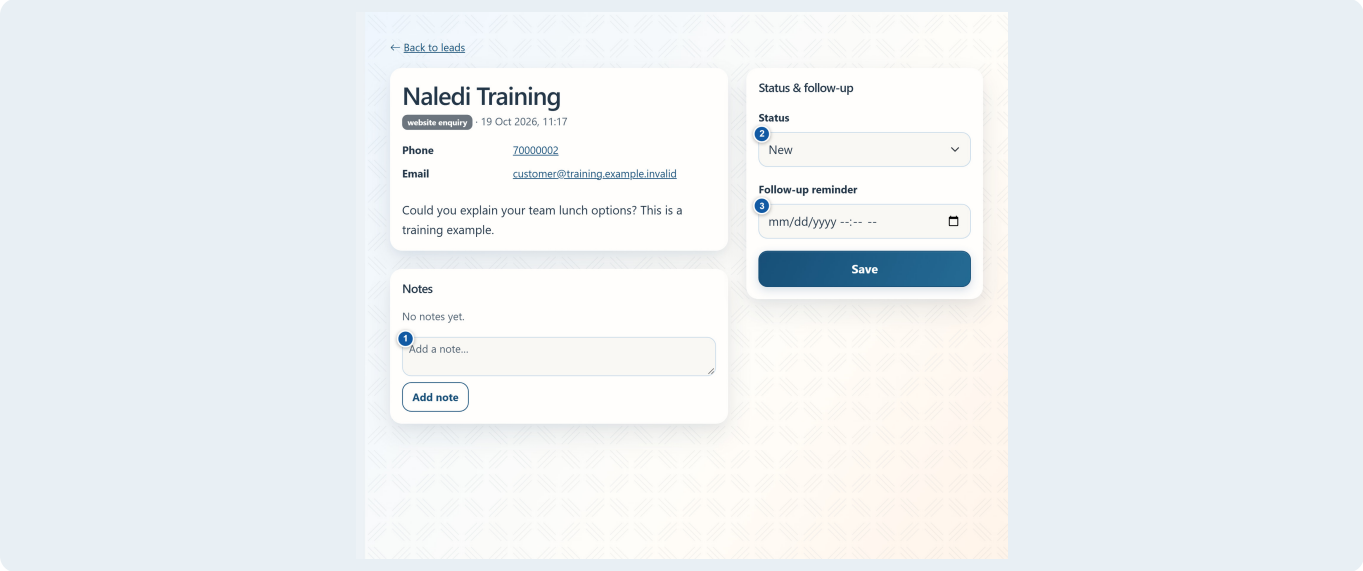
The team can see what has been handled and what still needs attention.

Try it: Move a practice enquiry through New, Contacted and Quoted verbally, explaining the next action.

12 / MANAGE CUSTOMER WORK

Update a lead, note and follow-up

Use one record to keep the team informed about the conversation.



Open: Manage customer work | Screenshot: fictional training business

1. Open Leads and select the customer row. Check the enquiry, customer contact and source before responding.
2. After speaking to the customer, enter a factual summary in Notes and choose Add note. Include the agreed next action.
3. Choose the status that matches reality: New, Contacted, Quoted, Won or Lost. Quoted means you supplied a quote; Won means the work was actually agreed.
4. Set Follow-up reminder to the next useful date and time. Choose Save in Status & follow-up. Adding a note and saving the status are separate actions.
5. Return to Leads, filter by the relevant status and confirm the reminder appears. Keep the customer informed through the agreed channel.

CHECK THE RESULT

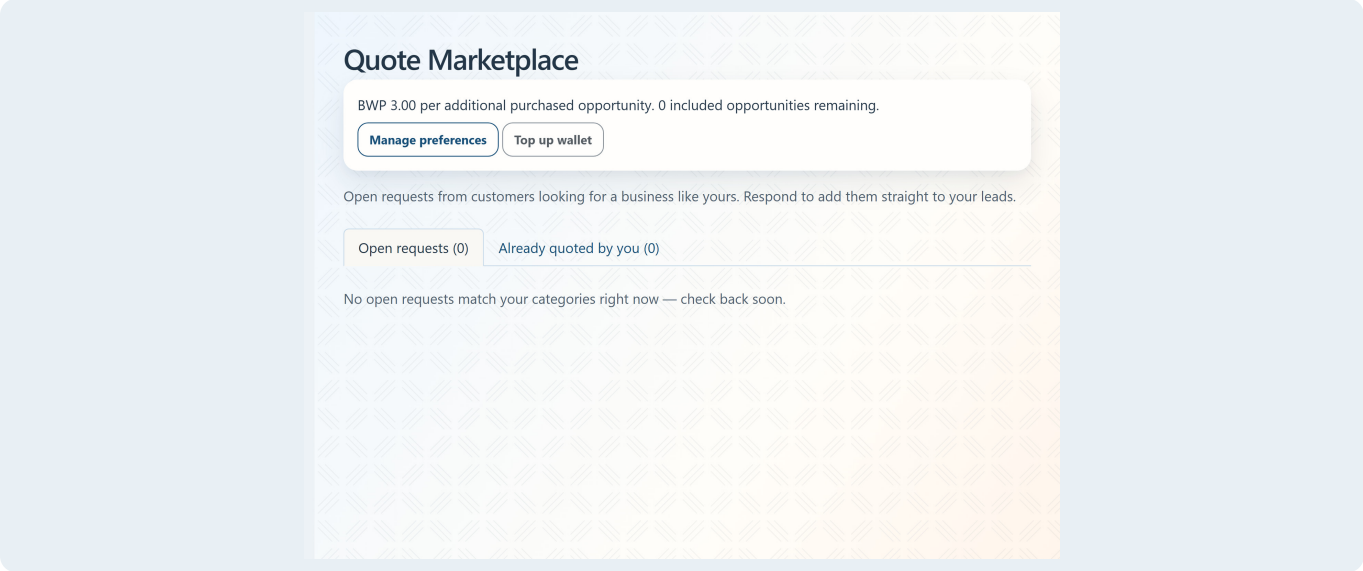
The note is saved, the status is accurate and the next follow-up is visible.

Try it: Write a catering follow-up note that records the headcount, date still to confirm and next call time.

13 / MANAGE CUSTOMER WORK

Respond to matched quote opportunities

The Quote Marketplace shows suitable customer requests when available.



Open: Manage customer work | Screenshot: fictional training business

1. Open Quote Marketplace and read the price, remaining included opportunities and request preview.
2. Check the job scope, location and timing before choosing a request.
3. Only purchase or use an allowance if the request suits the business. Read the current charge before confirming.
4. Reply with a clear scope and price, then track the conversation through the available lead and quote tools.

CHECK THE RESULT

The business responds to relevant requests and can track them in its customer workflow.

Try it: Explain why buying an opportunity does not guarantee a sale.

Remember: An empty request list is normal when no current request matches. Do not submit fake jobs to create demand.

14 / MANAGE CUSTOMER WORK

Set opportunity and deposit preferences

These settings control optional customer acquisition and booking payment features.



Open: Manage customer work | Screenshot: fictional training business

1. Open Customer opportunities or Opportunity preferences.
2. Read the current per-request price, included allowance and invalid-lead credit policy.
3. Choose whether to receive matched quote opportunities and save your preferences.
4. Review the booking-deposit section separately. Enable collection only when the platform offers it and the business accepts the displayed terms.

CHECK THE RESULT

The business understands which optional features and charges it has accepted.

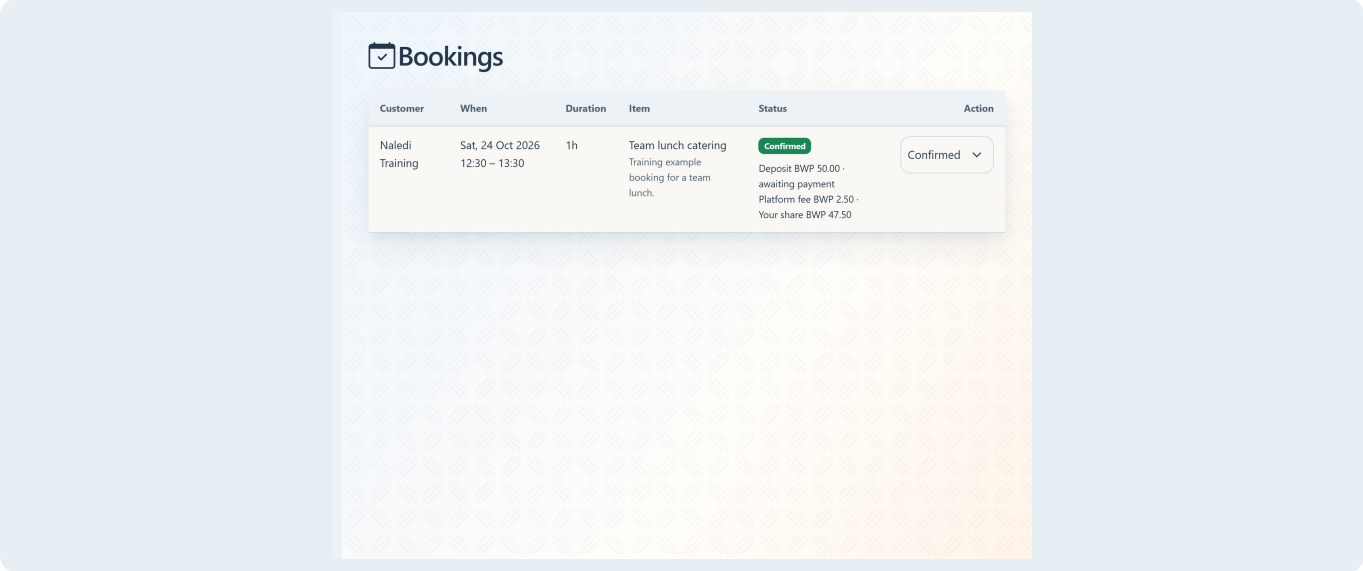
Try it: Explain the difference between a direct enquiry, a purchased opportunity and a booking deposit.

Remember: The captured local app says deposit collection needs merchant onboarding. Do not promise deposit collection until that setup is complete.

15 / MANAGE CUSTOMER WORK

Handle booking requests reliably

A timely decision helps the customer plan and keeps the calendar useful.



Open: Manage customer work | Screenshot: fictional training business

1. Open Bookings and check the customer, service, requested time and message.
2. Confirm availability before selecting the appropriate status action.
3. If a deposit is supported, read the amount, platform fee and provider share and follow the booking workflow.
4. Update completion or cancellation only when it reflects what happened. Keep the customer informed of changes.

CHECK THE RESULT

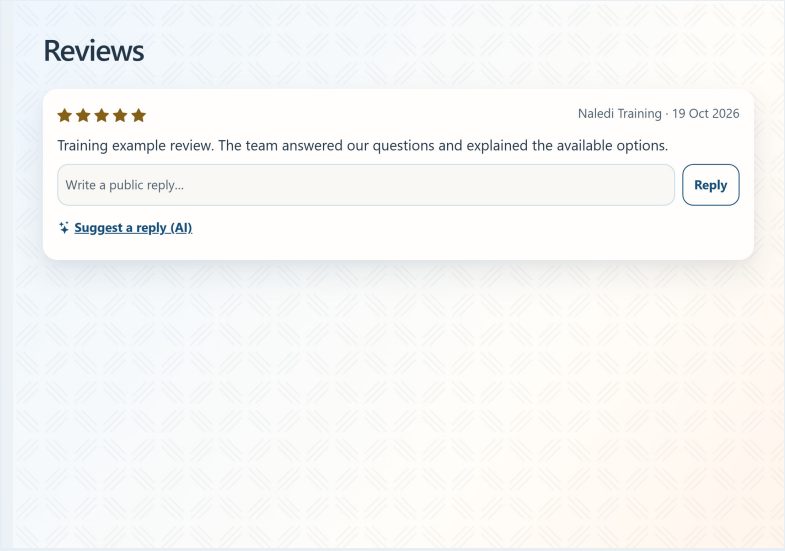
Both parties can follow an accurate booking status.

Try it: Explain how you would handle a requested time that is already full.

16 / MANAGE CUSTOMER WORK

Reply to reviews professionally

A useful reply acknowledges the experience and gives an appropriate next step.



Open: Manage customer work | Screenshot: fictional training business

1. Open Reviews and read the full review before replying.
2. Thank the customer, address the specific point and avoid private details.
3. Write a public reply and press Reply. Review any AI suggestion before using it.
4. Report abuse or spam through the supported route; do not promise that an unfavourable review will be removed.

CHECK THE RESULT

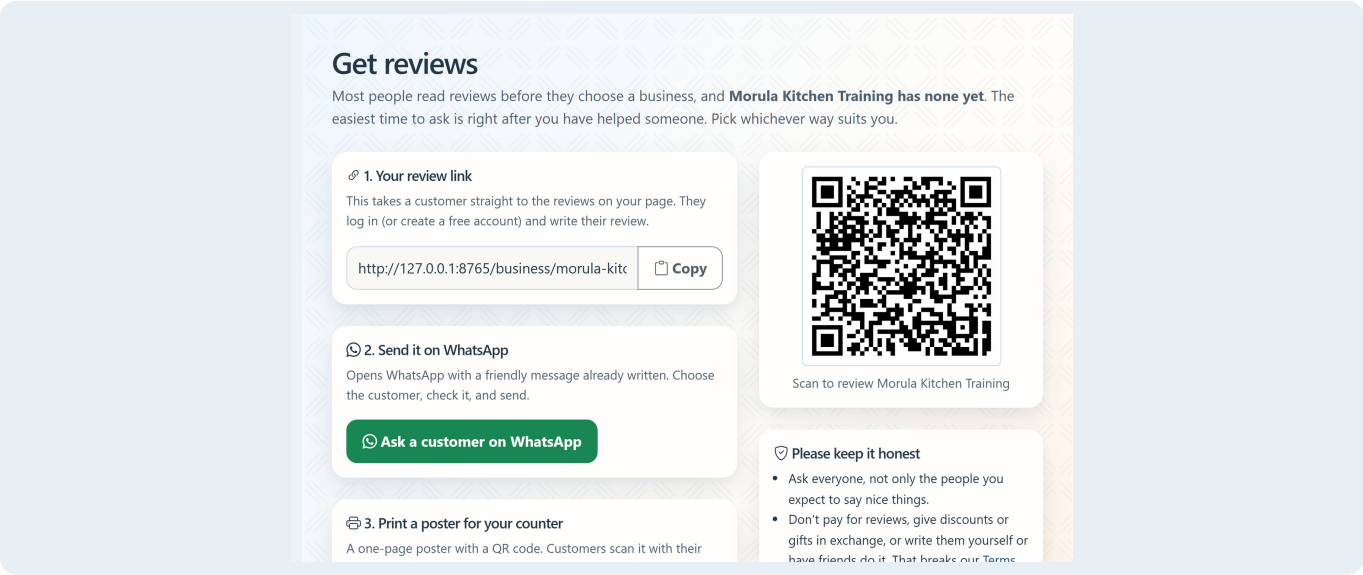
A clear reply appears with the review according to the app rules.

Try it: Draft a calm response to a complaint without blaming the customer.

17 / MANAGE CUSTOMER WORK

Invite genuine customer feedback

Ask customers after real service, using the same request regardless of whether you expect a positive rating.



Open: Manage customer work | Screenshot: fictional training business

1. Open Get reviews in the business dashboard.
2. Copy your review link or use the QR poster option.
3. If using WhatsApp, review the prepared message, choose the customer and send it yourself.
4. Tell customers to describe their honest experience. Do not offer discounts or rewards in exchange for a favourable review.

CHECK THE RESULT

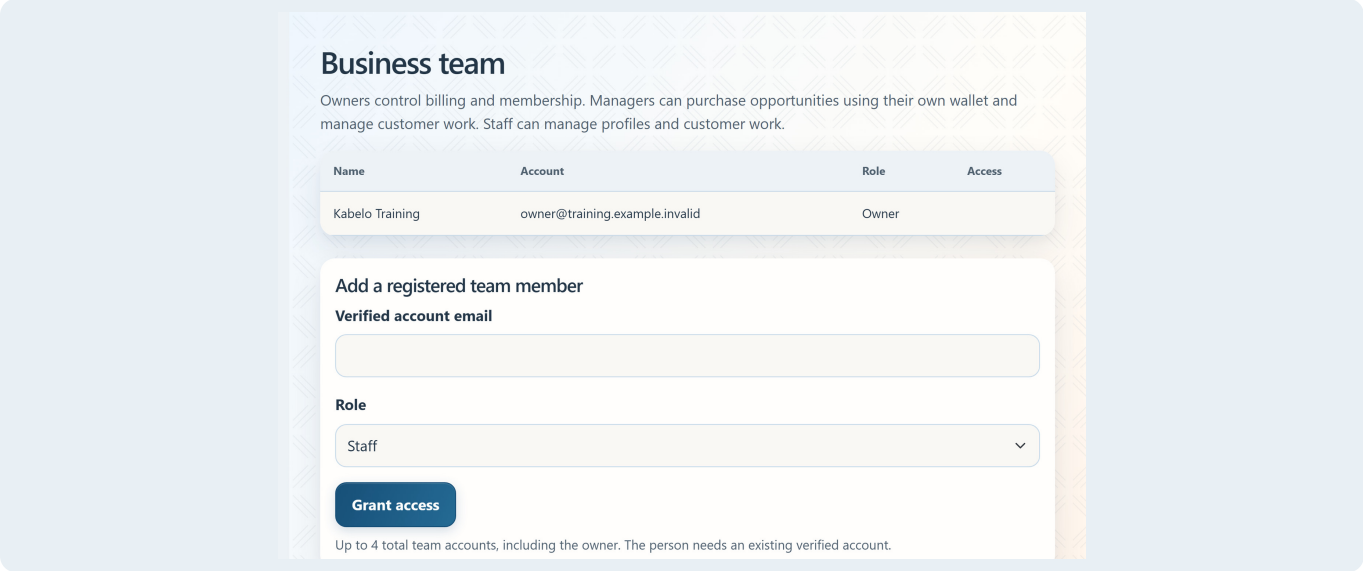
The customer can open the correct business review area after signing in.

Try it: Write a neutral review request. Use the live business link, not the example localhost QR code in this screenshot.

18 / MANAGE CUSTOMER WORK

Give staff the right access

Use individual accounts so staff actions remain attributable.



Open: Manage customer work | Screenshot: fictional training business

1. Ask the colleague to register and verify their own email first.
2. Open Business team as the owner and enter that verified account email.
3. Choose Staff for profile and customer work, or Manager where purchasing opportunities is appropriate, then Grant access.
4. Review access regularly and remove it when a person leaves. The owner controls billing and membership.

CHECK THE RESULT

The colleague sees only the businesses and capabilities granted to their account.

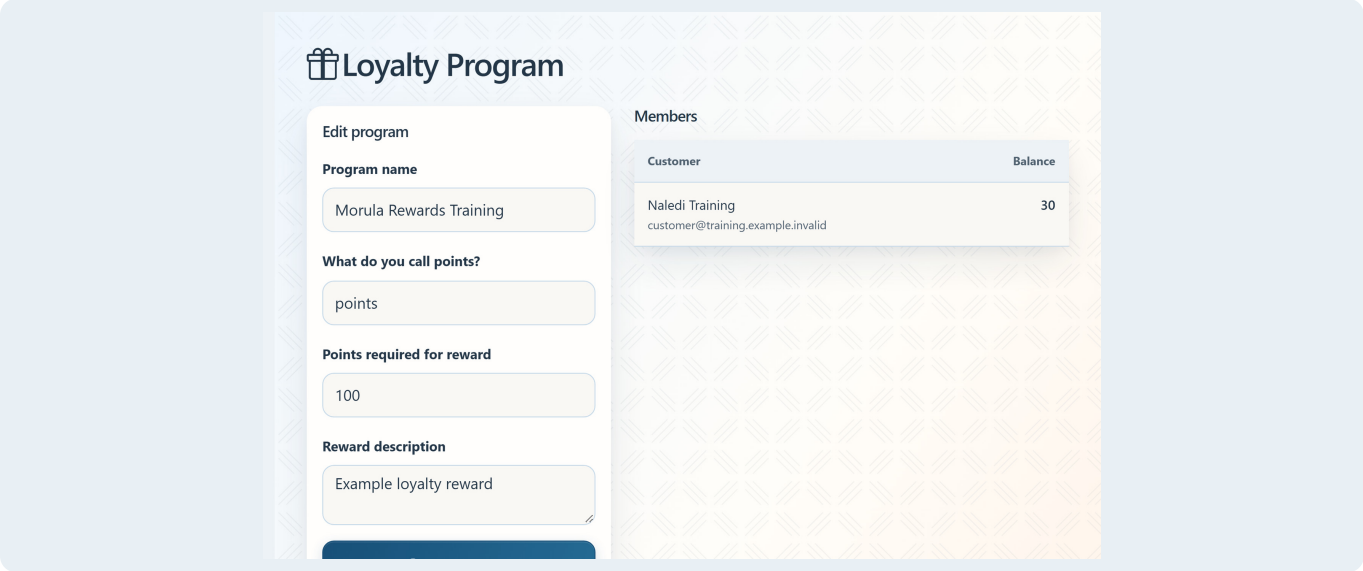
Try it: Choose the appropriate access for a receptionist and a business manager.

Remember: This form grants access to an existing verified account. It does not send an invitation email. Availability and team limits depend on the plan.

19 / MANAGE CUSTOMER WORK

Operate a loyalty programme

The programme records rewards according to the business rules.



Open: Manage customer work | Screenshot: fictional training business

1. Open Loyalty Program and enter Program name and What do you call points? Choose a term customers will understand.
2. Set Points required for reward and a precise Reward description. Decide and communicate your earning rules, exclusions and expiry policy outside this form.
3. Choose Save program. Review the saved name, threshold and reward before awarding points.
4. In Award points, enter the customer email or phone that matches their Dikgwebo account, the points earned and a useful Reason. Choose Award points only after the qualifying activity occurred.
5. Check Members for the recorded balance. If the account cannot be matched, verify the contact with the customer before retrying; avoid double awards.

CHECK THE RESULT

The programme and actual points awards are recorded consistently.

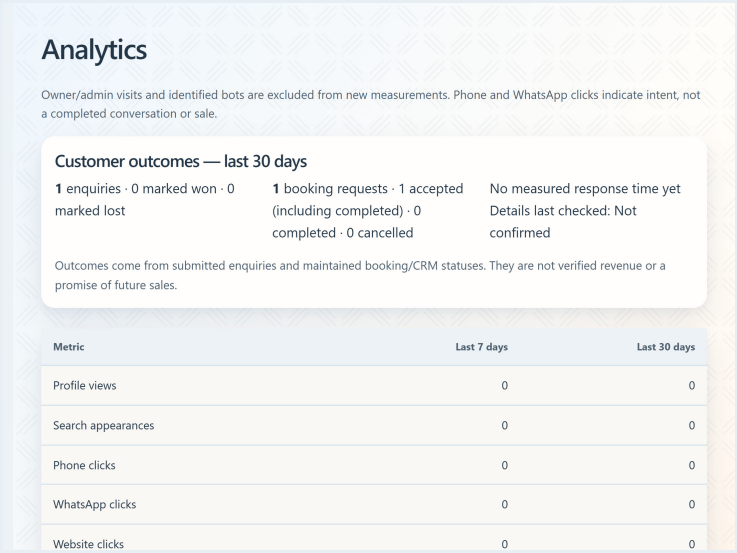
Try it: Explain the example threshold and reward without presenting training points as cash.

Remember: The current owner screen provides programme setup, points awards and member balances. It does not provide a redemption button; agree any redemption process with the platform before promising automated redemption.

20 / MANAGE CUSTOMER WORK

Read performance without overstating it

Analytics helps assess profile engagement and campaign activity.



Open: Manage customer work | Screenshot: fictional training business

1. Open Analytics and compare the available reporting periods.
2. Read profile views, search appearances and contact or directions clicks separately.
3. For campaigns, compare funded spend with visible impressions and valid clicks.
4. Use the findings to improve photos, descriptions and follow-up. Check actual enquiries and sales separately.

CHECK THE RESULT

You can explain what the figures measure and their limits.

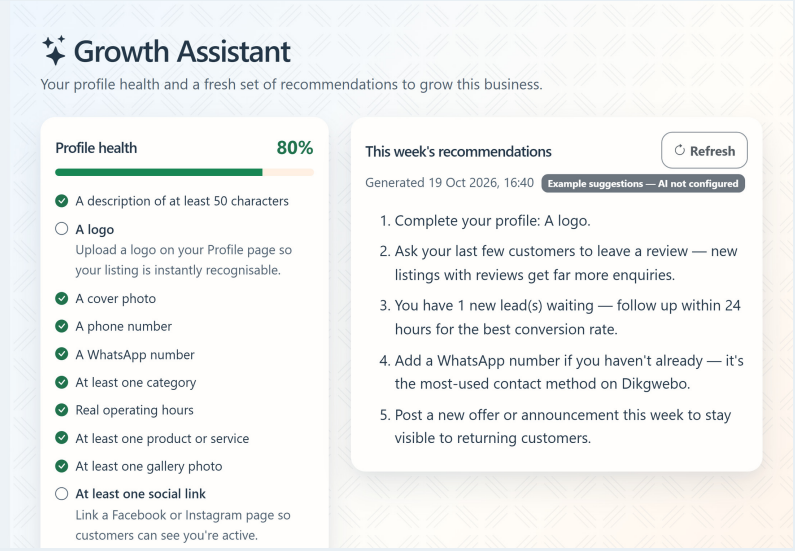
Try it: Explain why a WhatsApp click is not proof of a completed sale.

Remember: The app excludes owner/admin visits it can identify from view measurements. Counts can still differ from a business own records.

21 / MARKETING TOOLS

Use the Growth Assistant

Growth Assistant turns profile gaps and activity into suggested next actions.



Open: Marketing tools | Screenshot: fictional training business

1. Open Growth Assistant and read the profile health checklist.
2. Fix factual gaps such as missing hours, contact details, logo or a useful photo.
3. Read the recommendations and choose one action you can complete today.
4. Refresh when needed and verify that any suggestion fits the real business.

CHECK THE RESULT

The profile becomes more complete and the team has a practical action list.

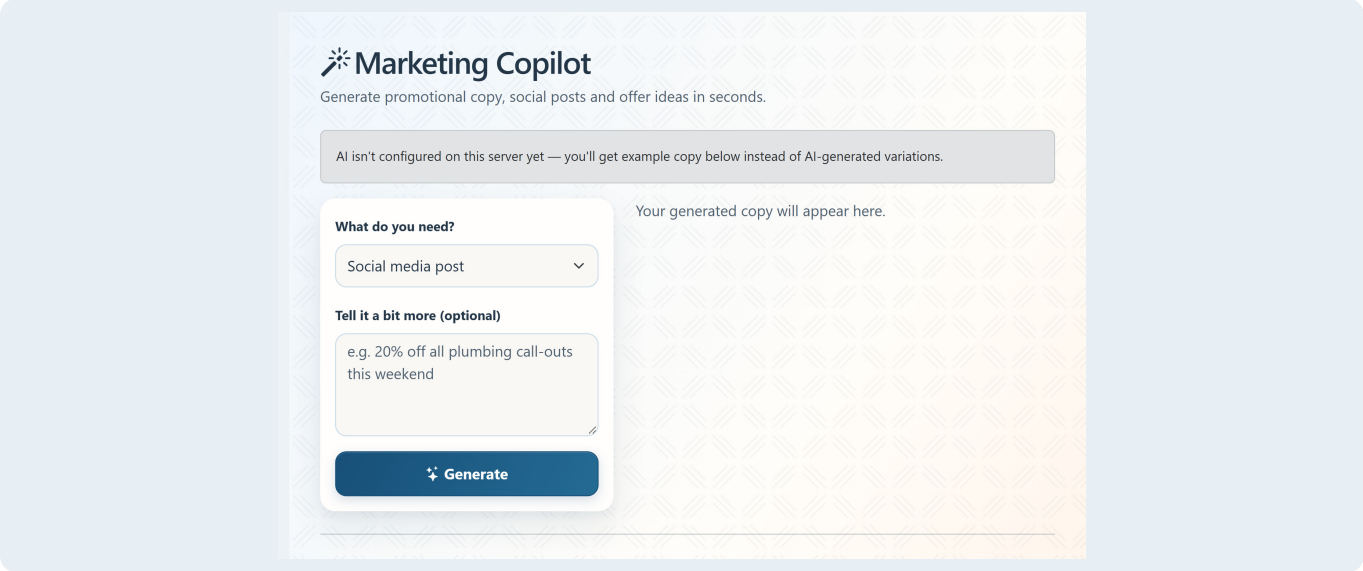
Try it: Pick one profile improvement and one customer follow-up from the screen.

Remember: The training server has no AI credentials. It shows example suggestions rather than connected AI output.

22 / MARKETING TOOLS

Prepare copy with Marketing Copilot

Generated wording is a draft for a person to review.



Open: Marketing tools | Screenshot: fictional training business

1. Open Marketing Copilot in the selected business. Under What do you need?, choose Social media post, Offer / promotion description or Product/service promo.
2. In Tell it a bit more, describe the real service, audience, town, offer conditions and desired next action. Ask for the tone and length you need.
3. Choose Generate. Read the source label; Example copy is a fallback, while AI-generated indicates the configured service returned the draft.
4. Read every variation. Check spelling, prices, dates, exclusions and unsupported claims. Copy the wording to edit it elsewhere when corrections are needed.
5. Post to my profile publishes the displayed variation. Use it only after reviewing that version; otherwise create a post with your corrected wording.
6. For an image, use Upload your own or the available AI image form below. Review the displayed credit/charge first; the image enters your gallery for later use in Advertise.

CHECK THE RESULT

You have reviewed marketing copy suitable for the real business.

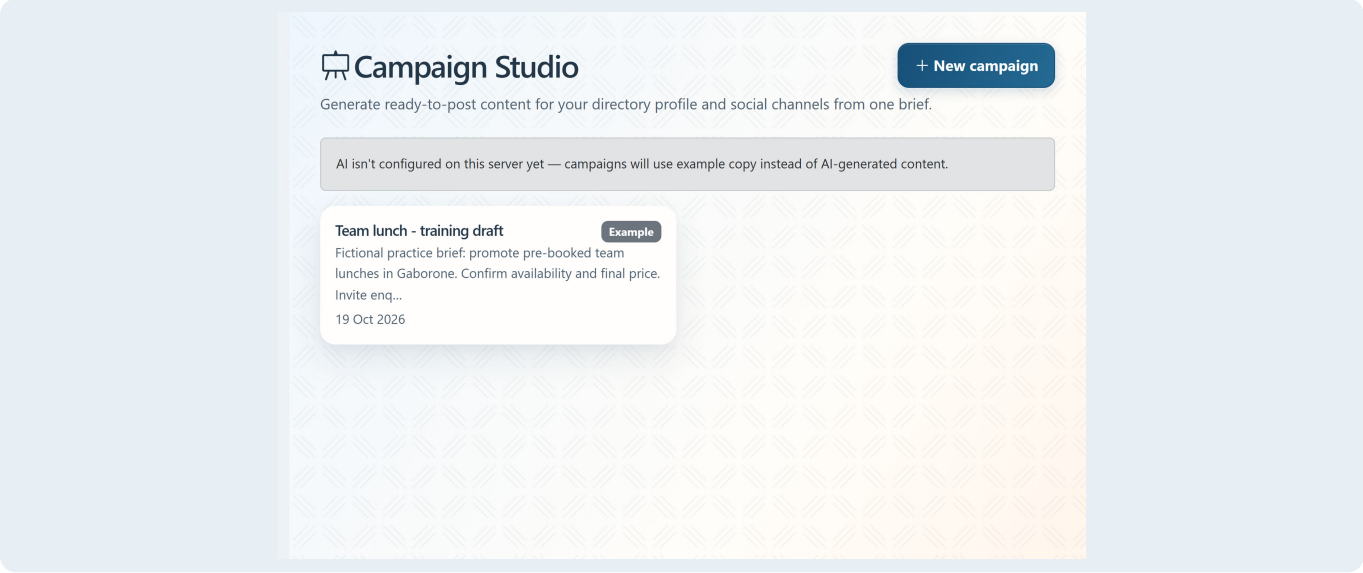
Try it: Draft a 60-word team-lunch post for Gaborone with an enquiry call to action and no invented discount.

Remember: Text drafts and image generation are different actions. A profile post does not purchase a paid advert.

23 / MARKETING TOOLS

Plan content in Campaign Studio

Campaign Studio helps prepare coordinated directory and social content.



Open: Marketing tools | Screenshot: fictional training business

1. Open Campaign Studio and start a new campaign.
2. Provide a specific brief about the real promotion.
3. Review the resulting drafts, images, destinations and schedule where available.
4. Approve factual content before publishing or scheduling. Check credits and charges displayed by the app.

CHECK THE RESULT

The team has a reviewed content plan rather than unapproved automatic claims.

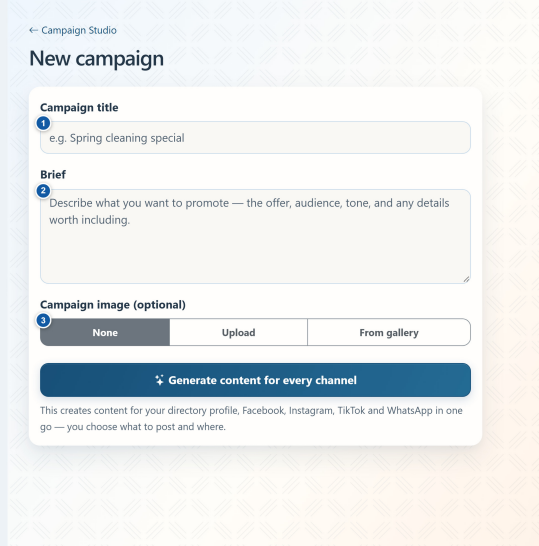
Try it: Prepare a campaign brief with an audience, offer, deadline and desired customer action.

Remember: Campaign Studio creates content drafts. Advertise separately purchases placement. There is no campaign scheduling control on the captured Studio screen; publish manually when ready.

24 / MARKETING TOOLS

Create a campaign from a clear brief

Campaign Studio drafts content for several channels. It does not buy a paid advertising placement.



Open: Marketing tools | Screenshot: fictional training business

1. Open Campaign Studio, then New campaign. Enter a short Campaign title that your team can recognise later.
2. In Brief, include the product or service, audience, town, truthful offer, dates, tone and one customer action. State any exclusions.
3. Choose Campaign image: None, Upload, From gallery or Generate with AI where available. For a gallery image, select the actual photo; for AI, read its credit or wallet charge first.
4. Choose Generate content for every channel. Check the Example copy or AI-generated label on the resulting campaign.
5. Read each channel version separately. Creating the drafts does not automatically publish them or create a paid Advertise campaign.

CHECK THE RESULT

A saved campaign opens with separate channel drafts ready for human review.

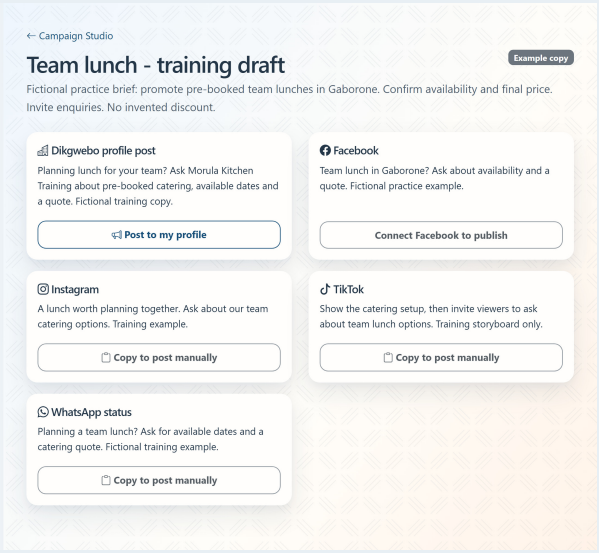
Try it: Use the campaign worksheet later in this guide to write a complete brief.

Remember: The training account has no AI credentials. Its example drafts demonstrate the screen, not a live AI connection.

25 / MARKETING TOOLS

Review and publish the right channel draft

Check the words and destination before choosing a publishing action.



Open: Marketing tools | Screenshot: fictional training business

1. Open the saved campaign and read its original brief, source label and every channel card. Verify prices, dates, claims and contact details.
2. Dikgwebo profile post: Post to my profile publishes the displayed directory copy. If wording needs correction, copy it into a new reviewed post instead of publishing an inaccurate original.
3. Facebook: connect the authorised Page in Connected Accounts. When the account is connected and configured, use Publish to Facebook only after checking the Page and the copy.
4. Instagram, TikTok and WhatsApp: Copy to post manually copies the text. Review and publish it yourself using the appropriate service; copying is not publishing.
5. Check the actual public destination after publishing. Avoid clicking a publish button repeatedly, which can create duplicate posts.

CHECK THE RESULT

Only approved text reaches the intended channel, and you can find the public result.

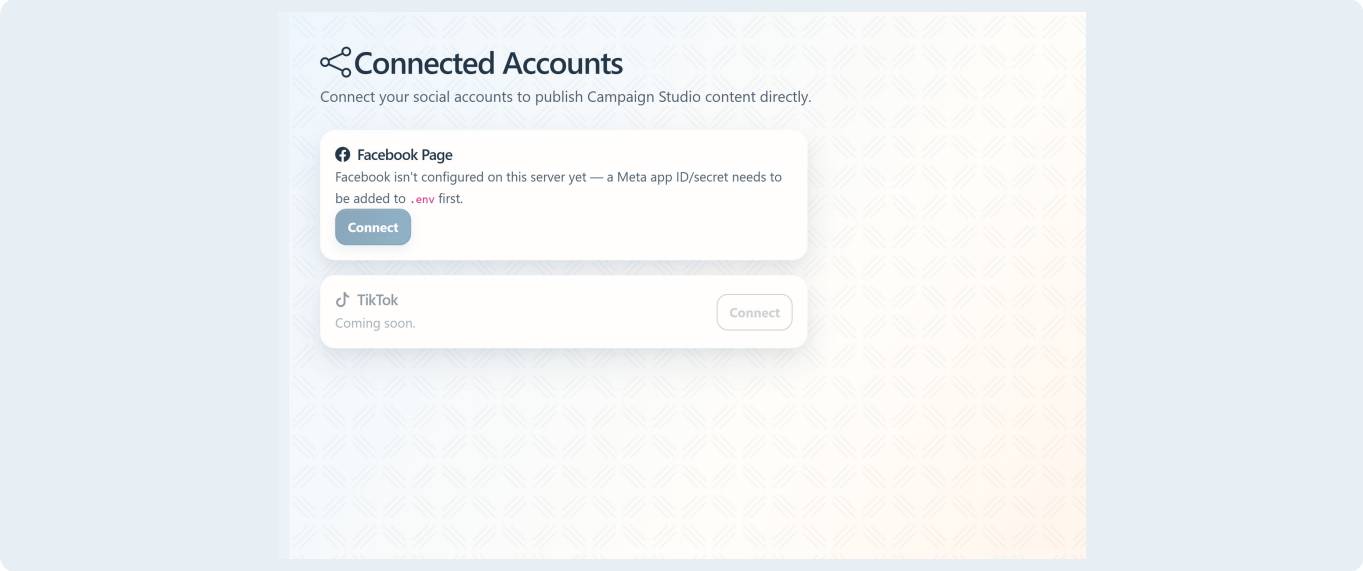
Try it: Explain which action publishes immediately and which only copies text.

Remember: The captured Facebook connection is unavailable and TikTok is marked coming soon. Drafting channel text does not mean every channel supports direct publishing.

26 / MARKETING TOOLS

Check connected social accounts

A social connection needs both platform configuration and permission to the correct business account.



Open: Marketing tools | Screenshot: fictional training business

1. Open Connected Accounts.
2. Read whether the provider is configured and available. A disabled button means setup is still needed.
3. When available, connect through the provider sign-in and select the authorised page.
4. Verify the destination before publishing content and remove access when no longer needed.

CHECK THE RESULT

You know which social channels can actually be used.

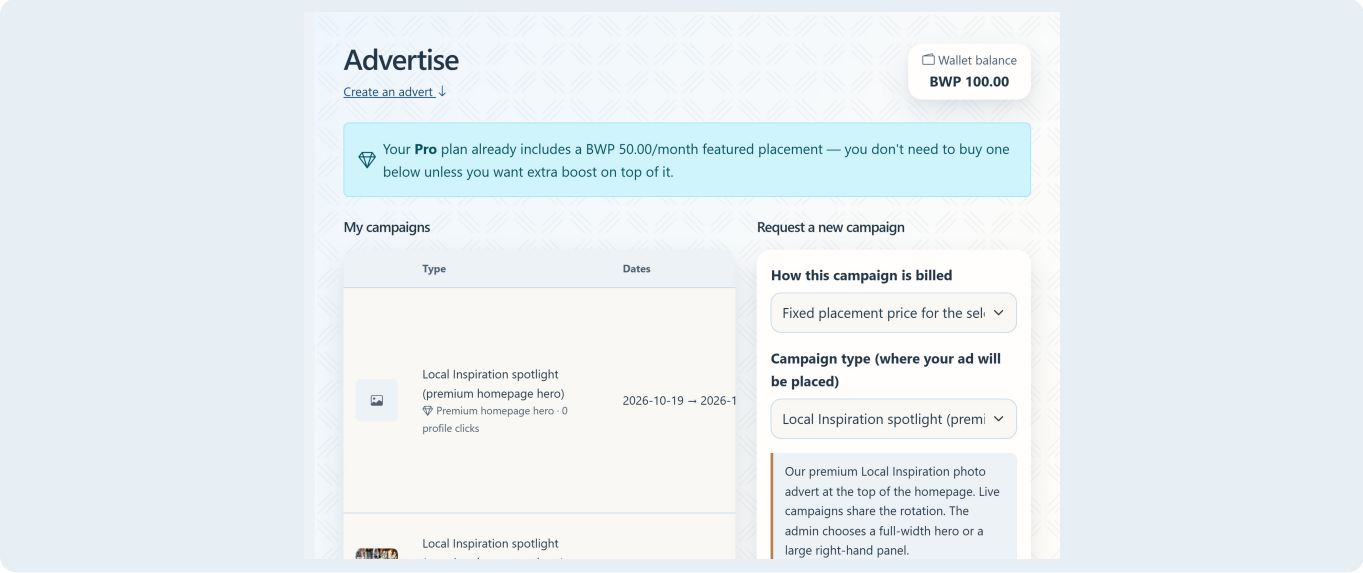
Try it: Explain why the captured Facebook and TikTok buttons cannot currently publish.

Remember: A disabled or unavailable Connect option needs platform setup. Owners should contact support rather than edit server credentials. TikTok is marked coming soon; Instagram/WhatsApp text can be copied manually from Studio.

27 / PREMIUM ADVERTS

Choose an advert placement

Advertising purchases visibility in a specific placement. It does not guarantee enquiries or sales.



Open: Premium adverts | Screenshot: fictional training business

1. Open Advertise and review existing campaigns, plan-included placement and available wallet funds.
2. Choose a campaign type: Local Inspiration, featured listing, sponsored search listing, category sponsorship, location sponsorship or promoted offer.
3. Read what the selected placement does and whether it needs a category, location or offer target.
4. Use current dates and price information to prepare the campaign before paying.

CHECK THE RESULT

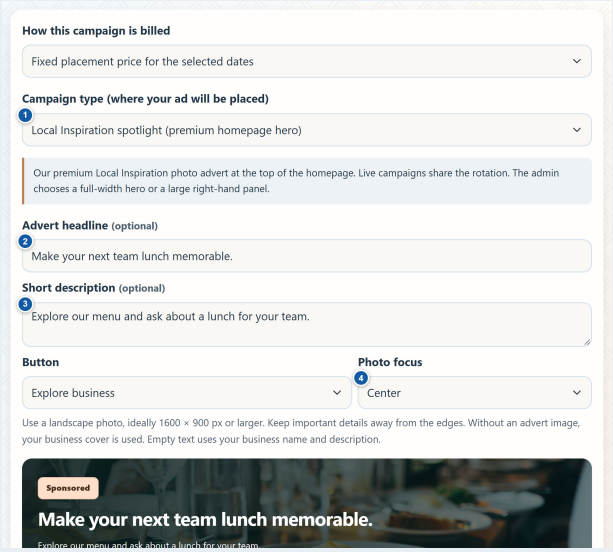
You understand what placement you are buying and whether another campaign already covers the need.

Try it: Choose the correct placement for a large homepage photo and for a district-focused promotion.

28 / PREMIUM ADVERTS

Write a strong Local Inspiration advert

Local Inspiration is the premium photo placement at the top of the homepage.



Open: Premium adverts | Screenshot: fictional training business

1. Choose Local Inspiration spotlight as the campaign type (marker 1).
2. Write a short, truthful headline (2) and a useful description (3).
3. Select a prominent button that matches the next step the customer should take.
4. Choose Photo focus (4) and inspect the live creative preview before proceeding.

CHECK THE RESULT

The preview shows the headline, description, button and Sponsored label together.

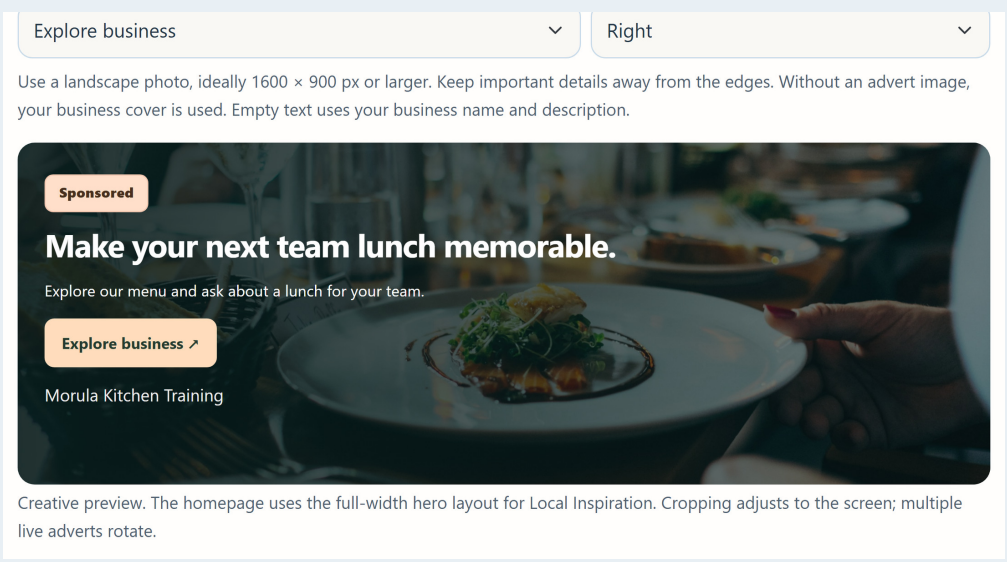
Try it: Create a headline that gives the customer one clear reason to visit the business.

Remember: The admin chooses full-width or a right-hand panel for the homepage globally. The advertiser does not buy a separate layout setting.

29 / PREMIUM ADVERTS

Preview the photo and adjust the crop

The preview updates as you edit. Cropping changes with the screen size.



Open: Premium adverts | Screenshot: fictional training business

1. Use a clear landscape image, ideally 1600 x 900 pixels or larger.
2. Keep faces, products and other important details away from the edges.
3. Try Photo focus positions and check that the subject and overlaid wording remain clear.
4. Check the finished page on a phone and a wide screen after activation.

CHECK THE RESULT

The creative is readable and the main subject survives responsive cropping.

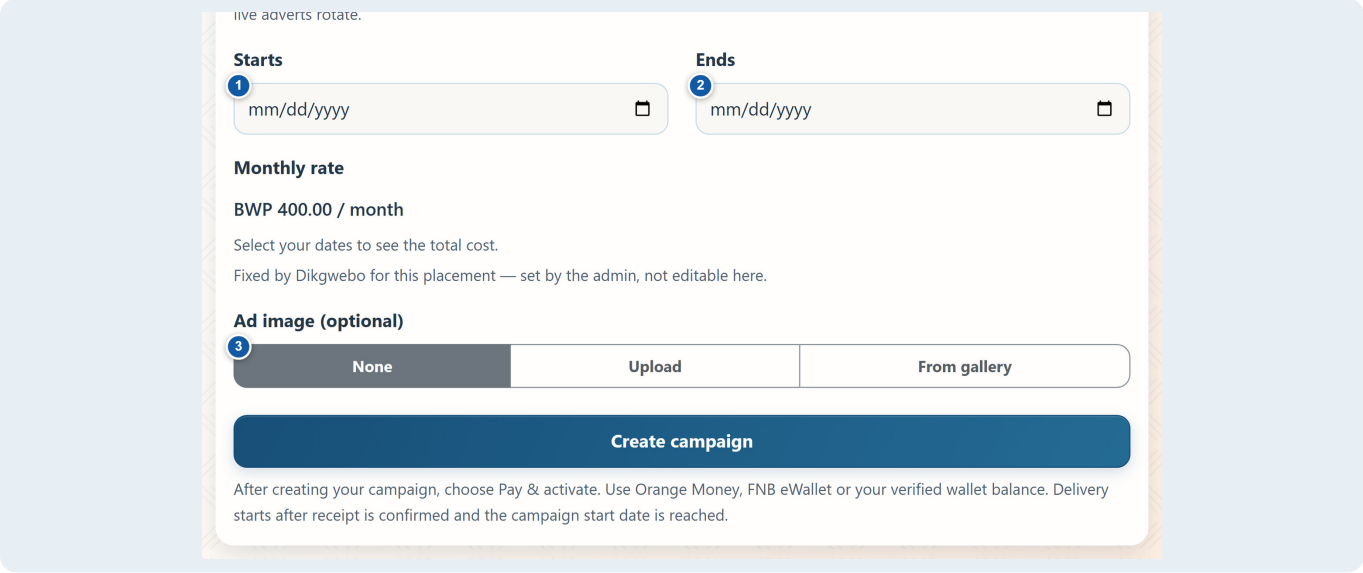
Try it: Compare Center and Right focus for the same photograph.

Remember: Photo focus controls the visible crop. The screenshot preview is not a guarantee of identical cropping on every screen. Without a separate advert image, the business cover is used.

30 / PREMIUM ADVERTS

Set dates, image source and campaign price

Check the purchased period and image before creating the order.



Open: Premium adverts | Screenshot: fictional training business

1. Choose the start and end dates. Check the monthly rate and calculated total shown by the form.
2. Choose the supported image source: business cover, Upload or From gallery. AI options appear only where available.
3. For targeted placements, verify the selected category, location or offer.
4. Press Create campaign after reviewing all details. Open Pay & activate for the resulting campaign.

CHECK THE RESULT

The campaign has a recorded placement and dates; it still needs funding before delivery.

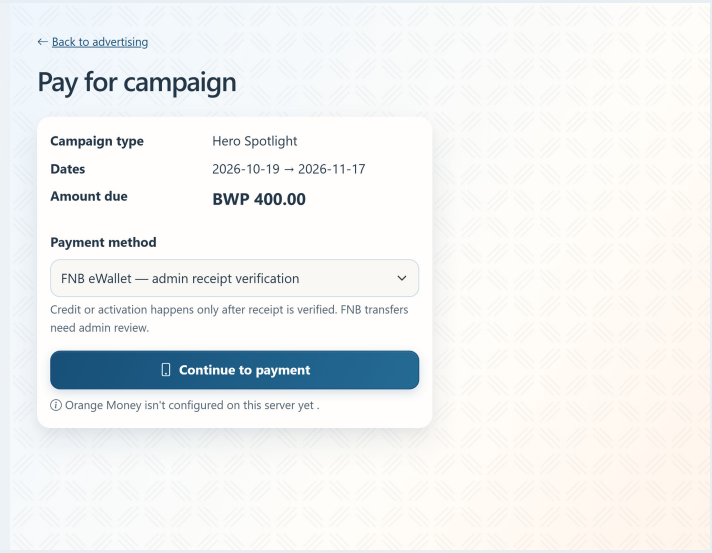
Try it: Explain why creating a campaign is different from paying for and activating it.

Remember: Placement prices are configured by the platform. Read the current calculated amount; do not quote the training price as a permanent rate.

31 / PREMIUM ADVERTS

Pay and check campaign activation

The checkout names the campaign, period and amount due.



Open: Premium adverts | Screenshot: fictional training business

1. Open Pay & activate and match the campaign type, dates and amount to your order.
2. Choose an available payment method, including verified wallet funds where offered.
3. Continue to payment and follow the receipt instructions for that method.
4. After receipt is verified, check the campaign status and start date. Open the public placement to inspect the creative.

CHECK THE RESULT

A funded campaign becomes eligible to deliver within its valid dates and the app placement rules.

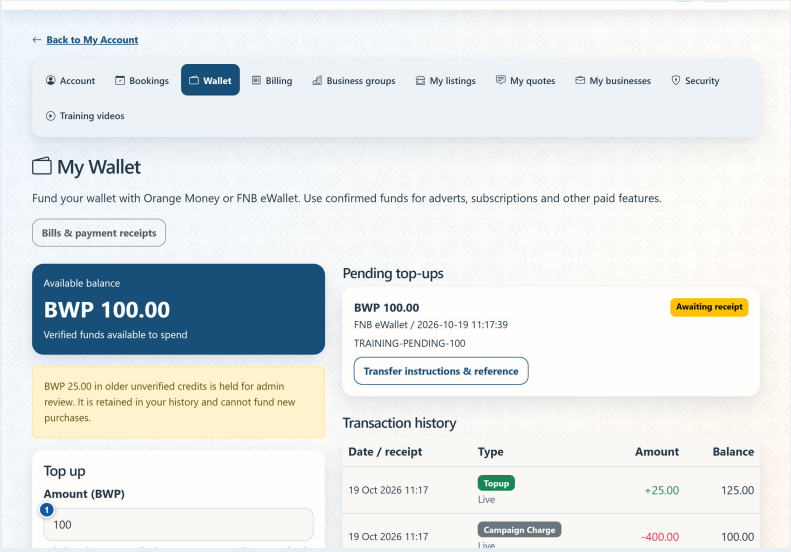
Try it: Explain why an awaiting-payment campaign should not appear as a paid advert.

Remember: A future start date can keep a paid campaign scheduled. Other campaigns may share the rotation; this is not a promise of exclusive homepage ownership.

32 / WALLET AND PAYMENTS

Understand verified wallet funds

The wallet is an account balance used for eligible paid app features.



Open: Wallet and payments | Screenshot: fictional training business

1. Open Account > Wallet and read Available balance.
2. Read any held or historical credit separately. Held credit cannot fund new purchases.
3. Review Pending top-ups and Transaction history before starting another payment.
4. Enter the amount to top up, select an available method and continue.

CHECK THE RESULT

You know what can be spent now and which funds are still awaiting verification.

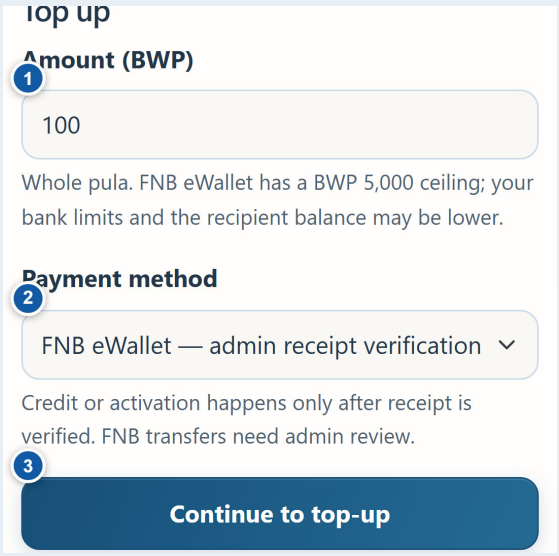
Try it: Explain why the BWP 100 pending example does not increase the available balance.

Remember: Wallet funds belong to the signed-in account. A business group statement does not merge every member wallet into one shared balance.

33 / WALLET AND PAYMENTS

Create the correct wallet top-up order

A top-up order records the intended amount and collection method before any money is received.



Open: Wallet and payments | Screenshot: fictional training business

1. Enter the amount in whole pula (marker 1), within the limits displayed by the app.
2. Choose FNB eWallet or another available method in Payment method (2). Read the receipt-verification notice.
3. Check that this is a wallet top-up, then press Continue to top-up (3).
4. Read the resulting order instructions before transferring money. Start a direct purchase from its own checkout instead when that is your intended payment.

CHECK THE RESULT

The app creates a pending payment order with its own amount, purpose and reference.

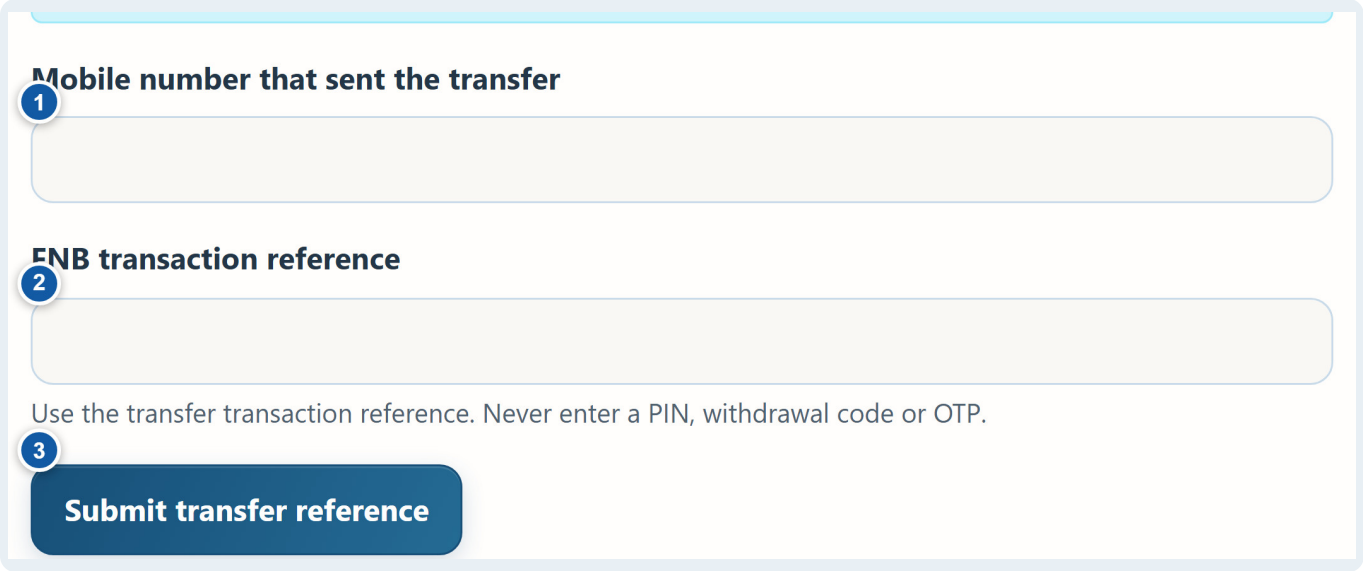
Try it: Identify the amount, method and continue button without making a real transfer.

Remember: FNB limits and the recipient balance can affect a transfer. Never split or repeat a payment just to get around an error; ask support to investigate the existing order.

34 / WALLET AND PAYMENTS

Submit a transaction reference safely

The reference helps the admin locate a transfer. It is not independent proof that funds arrived.



Open: Wallet and payments | Screenshot: fictional training business

1. Open the pending order receipt from Wallet or Billing.
2. Enter the mobile number that sent the transfer (marker 1).
3. Enter the FNB transaction reference (2), not a PIN, withdrawal code or OTP.
4. Press Submit transfer reference (3). Keep the order ID and wait for admin receipt verification.

CHECK THE RESULT

The order reports that a reference was submitted. The wallet or purchase remains pending.

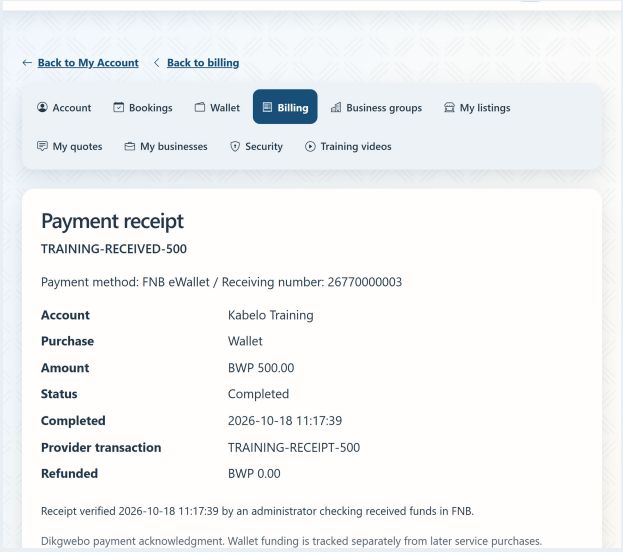
Try it: Explain what to send support: order ID, amount, sender, reference and time, without sharing security codes.

Remember: The receiving number in the screenshots is a fictional practice example. Use only the recipient displayed on your own current payment order.

35 / WALLET AND PAYMENTS

Read a completed payment receipt

Use the receipt to check the payment purpose and verification outcome.



Open: Wallet and payments | Screenshot: fictional training business

1. Open Billing or a wallet transaction and choose View receipt.
2. Match the account, purchase, order ID, amount and receiving number.
3. Check Completed, the completion time and provider transaction reference.
4. Keep the receipt for reconciliation. Report a mismatch through the support process with the order ID.

CHECK THE RESULT

You can distinguish a completed verified payment from a pending record.

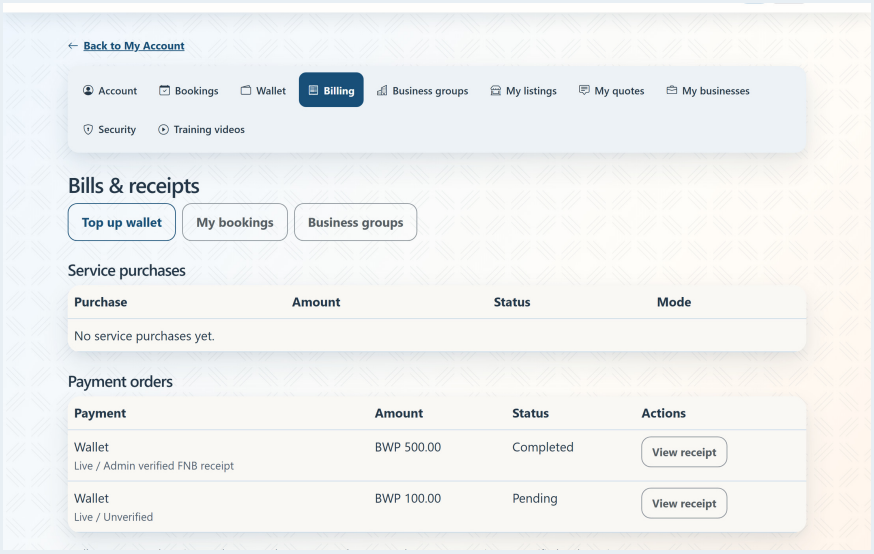
Try it: Identify the amount and verification method on this example receipt.

Remember: TRAINING-RECEIVED-500 is a separate completed BWP 500 example. It is not the BWP 100 pending order from the previous lesson becoming a BWP 500 payment.

36 / WALLET AND PAYMENTS

Find bills, purchases and receipts

Billing brings service purchases and payment orders together.



Open: Wallet and payments | Screenshot: fictional training business

1. Open Account > Billing.
2. Read Service purchases separately from Payment orders.
3. Check the status and mode before using a row as evidence of payment.
4. Use View receipt for details, or the section links to return to Wallet, Bookings or Business groups.

CHECK THE RESULT

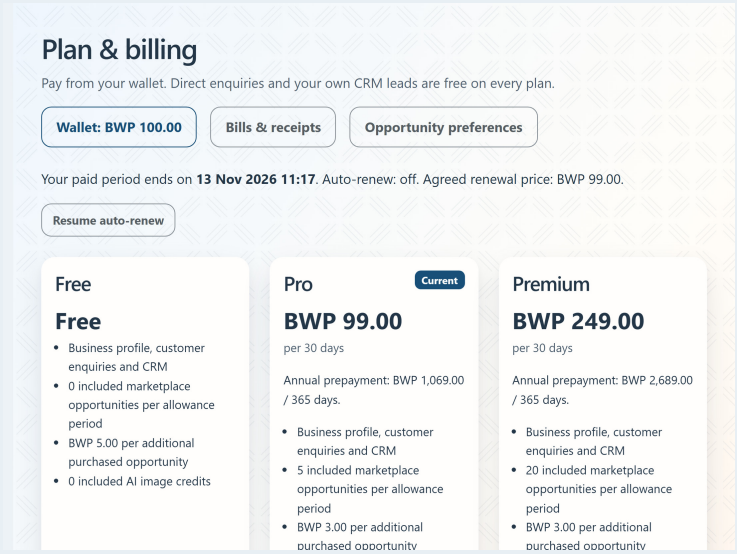
You can find the correct order and describe what it paid for.

Try it: Find one completed order and one pending order without treating both as received money.

37 / WALLET AND PAYMENTS

Choose a plan and understand renewals

Plan & billing shows the current subscription, term and available options.



Open: Wallet and payments | Screenshot: fictional training business

1. Open Plan & billing inside the correct business.
2. Compare the current plan with the displayed features, limits and prices.
3. Read the billing period and renewal state before selecting an upgrade or renewal.
4. Check the purchase confirmation and resulting plan period after payment completes. Review auto-renew controls and the agreed renewal price.

CHECK THE RESULT

The owner understands the current term and what a future renewal will cost.

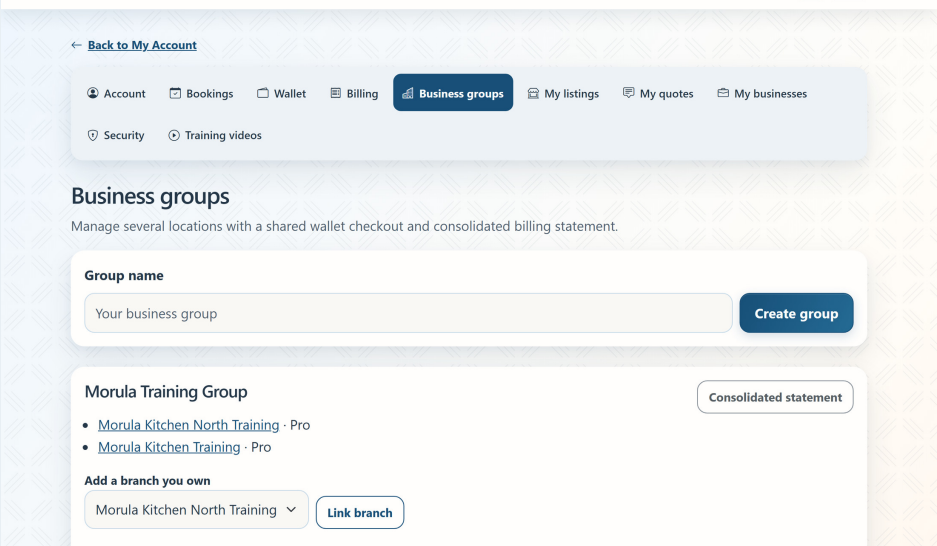
Try it: Explain the difference between a 30-day plan and an annual prepayment.

Remember: An auto-renew switch is not evidence that a payment has already been received. Insufficient verified funds or failed collection can prevent renewal.

38 / WALLET AND PAYMENTS

Organise several business branches

Business groups help one owner organise branches and consolidated reporting.



Open: Wallet and payments | Screenshot: fictional training business

1. Open Account > Business groups.
2. Create a group with a useful name.
3. Choose a branch you own and use Link branch where offered.
4. Open Consolidated statement to review group purchases, or use the account navigation to return.

CHECK THE RESULT

Branches are grouped for the supported management and statement views.

Try it: Group the example kitchen branches and identify which owner account is responsible.

Remember: Grouping is not a transfer of funds or automatic pooling of employee wallets.

CAMPAIGN WORKSHEET

Worked example: a useful campaign brief

Scenario

Morula Kitchen Training wants more team-lunch enquiries in Gaborone. The objective is five qualified enquiries during the next working week. This is a fictional planning target, not a promised result.

Example brief to adapt

Promote pre-booked team lunches for office teams in Gaborone. Use a friendly, practical tone. Ask customers to send their headcount, preferred date, dietary needs and collection/delivery requirements for a quote. Do not invent a discount, a fixed price or guaranteed availability. Keep the main social post under 80 words.

Use it in Copilot

Choose Social media post, paste the reviewed brief into the context box and Generate. Compare variations against the business facts. Copy a version if it needs editing. Publish only the reviewed text.

Use it in Studio

Choose New campaign, name it Team lunches - October enquiries, supply the same brief and select an authorised real photo. Generate channel content, then review each version. Copy manual-channel versions into the appropriate service.

Choose the next step

Use a directory post for a profile update. If paid reach is appropriate, create a separate Advertise campaign with a defined budget and period. Keep the same truthful message and match the button to the intended customer action.

MARKETING QUALITY CHECK

Review the draft before it becomes public

Facts

Can the business actually deliver every claim? Are prices, dates, location, opening hours and contact details accurate? Are exclusions and booking conditions visible? Remove invented awards or unsupported best-in-town claims.

One message and one next action

Keep the headline specific. Explain what the customer receives and how to ask, book or visit. An enquiry button is useful when scope and price still need discussion.

Photo and destination

Use a photo the business is allowed to publish. Check the crop on a phone and desktop. Confirm the intended profile, offer or connected Page before using a publish action.

Publishing versus copying

Post to my profile and Publish to Facebook are deliberate publishing actions. Copy to post manually only copies text. Open the real destination afterwards to confirm the post; do not assume generation meant publication.

Availability and charges

Example copy is not connected AI output. A disabled provider is not a working connection. Read image-generation charges, paid-plan terms and the advert checkout before confirming a purchase.

LEAD FOLLOW-UP EXERCISE

From enquiry to repeat customer

New enquiry

A customer asks for lunch for 12 people. Read the request and confirm the date, headcount, location, dietary requirements, delivery and budget before quoting.

Contacted

After the first actual conversation, change the lead to Contacted. Add a factual note: Spoke to customer; 12 people; vegetarian option required; date awaiting confirmation. Save a useful follow-up reminder.

Quoted

Send a clear quote through the agreed channel with inclusions, exclusions, validity and payment arrangements. Record that the quote was sent, then choose Quoted. Do not use Won merely because a price was discussed.

Won, Lost and bookings

Use Won when the customer actually agrees. Manage any booking in the business Bookings screen and follow its current deposit rules. Use Lost when appropriate, with a short factual reason. Keep notes and status aligned.

After the service

Mark completion only when the work happened. Ask for an honest review using the correct business link. If your loyalty rules apply, award the earned points once and verify the member balance.

PAYMENT WORKSHEET

Read the money trail without confusion

Example: a wallet top-up

A fictional BWP 500 completed payment funds a wallet. A separate BWP 100 order remains pending. The pending reference does not increase available funds. Never pay a tutorial order or reuse its example recipient.

Example: a later service purchase

If BWP 120 is later charged to the funded wallet for a service, it is a spend of existing funds, not a second BWP 120 bank transfer. Compare the wallet ledger with the service purchase record.

What to compare

Check the order ID, amount, purpose, status and verification details on the receipt. Check positive top-ups and negative charges in Transaction history. Use Bills & receipts for purchases and payment orders.

If something is pending

Open the existing order, keep the submitted reference and contact support with its order ID. Do not send a second transfer simply because verification is not yet complete. Never share bank PINs, withdrawal codes or OTPs.

Renewal and plan review

Read the selected plan, billing period, agreed renewal price, renewal date and auto-renew state. A low wallet balance or expired paid period can affect paid features. Use current screen prices rather than the amounts in examples.

OPERATING CHECKLIST

Daily, weekly and monthly owner routine

Every business day

Open the correct dashboard. Answer new enquiries, review overdue follow-ups and booking requests, and check any customer promises. Record what happened and the next action.

Before publishing or paying

Check the business, message, image, destination, dates, current amount and available verified funds. Confirm the action you are taking: saving a draft, copying, publishing or purchasing.

Every week

Check profile hours and offers, review photos and enquiries, inspect campaign dates/status, and assess which activity produced useful customer conversations. Follow up on quotes without repeatedly contacting people who declined.

Every month

Review plan/renewal terms, bills, receipts, staff access, connected accounts and loyalty balances. Remove former team access. Update expired promotions and review whether the campaign objective was achieved.

Ask the trainee to demonstrate

Choose a business; identify a profile gap; write a campaign brief; explain draft versus paid advert; update a lead and reminder; find a receipt; explain pending versus available funds. Use a practice copy for exercises.

TROUBLESHOOTING

When a workflow does not behave as expected

A business is missing or not public

Confirm the account and selected business. A pending listing is not yet published; submit accurate details and follow the review process. Search before registering a duplicate.

A customer booking seems missing

Personal Account > My bookings contains your own requests as a customer. Business dashboard > Bookings contains customer requests for the selected business. Check the business name and current filters.

AI or a connected account is unavailable

Read the source and availability labels. Example copy is a fallback. Ask platform support about disabled connections; do not request customer passwords or edit server credentials.

An advert is not visible

Check campaign status, start/end dates, payment verification, selected placement and targets. A paid placement may rotate with other eligible campaigns. A saved creative or pending payment does not prove delivery.

A payment or balance does not match

Compare the exact order, receipt and ledger entries. Historical ledger balances and held credits differ from current verified available funds. Keep the order ID for support and avoid duplicate transfers.

COMPANION VIDEOS

Watch, practise, then check the result

Manage the business

Open Training videos from Account or the dashboard. Start with Manage your business, enquiries and bookings, then practise selecting the correct business and handling the next customer task.

Create an advert

Watch the Local Inspiration advert guide for headline, description, photo focus, period and checkout. Use the chapter list to return to the step you need.

Understand payments

Watch the wallet top-up and Transactions, bills and receipts guides. Explain why a submitted reference is still pending until receipt is verified.

Use the guide at your own pace

Keep the PDF open beside your account. Use the clickable task index or PDF bookmarks. Check your own current screen for prices, permissions and provider availability.

About this edition

Screens were captured from the real local app using fictional records on 19 October 2026. Older companion materials may show earlier screens. No real money transfer, customer message or external social publication was performed to create this guide.

CLICKABLE CONTENTS

Find the task you need

Start here: your first working week 2
Orientation

Choose the right marketing tool 3
Marketing map

Choose the right business dashboard 4
01 / Set up a business

Claim an existing directory listing 5
02 / Set up a business

Register a business that is not listed 6
03 / Set up a business

Read the business dashboard 7
04 / Set up a business

Complete and maintain the profile 8
05 / Set up a business

Maintain products and services 9
06 / Set up a business

Add a clear product or service 10
07 / Set up a business

Upload useful business photos 11
08 / Set up a business

Publish an offer with clear terms 12
09 / Set up a business

Keep customers informed with posts 13
10 / Set up a business

Work the enquiry and follow-up list 14
11 / Manage customer work

Update a lead, note and follow-up 15
12 / Manage customer work

CLICKABLE CONTENTS

Find the task you need

Respond to matched quote opportunities 16
13 / Manage customer work

Set opportunity and deposit preferences 17
14 / Manage customer work

Handle booking requests reliably 18
15 / Manage customer work

Reply to reviews professionally 19
16 / Manage customer work

Invite genuine customer feedback 20
17 / Manage customer work

Give staff the right access 21
18 / Manage customer work

Operate a loyalty programme 22
19 / Manage customer work

Read performance without overstating it 23
20 / Manage customer work

Use the Growth Assistant 24
21 / Marketing tools

Prepare copy with Marketing Copilot 25
22 / Marketing tools

Plan content in Campaign Studio 26
23 / Marketing tools

Create a campaign from a clear brief 27
24 / Marketing tools

Review and publish the right channel draft 28
25 / Marketing tools

Check connected social accounts 29
26 / Marketing tools

CLICKABLE CONTENTS

Find the task you need

Choose an advert placement 30
27 / Premium adverts

Write a strong Local Inspiration advert 31
28 / Premium adverts

Preview the photo and adjust the crop 32
29 / Premium adverts

Set dates, image source and campaign price 33
30 / Premium adverts

Pay and check campaign activation 34
31 / Premium adverts

Understand verified wallet funds 35
32 / Wallet and payments

Create the correct wallet top-up order 36
33 / Wallet and payments

Submit a transaction reference safely 37
34 / Wallet and payments

Read a completed payment receipt 38
35 / Wallet and payments

Find bills, purchases and receipts 39
36 / Wallet and payments

Choose a plan and understand renewals 40
37 / Wallet and payments

Organise several business branches 41
38 / Wallet and payments

Worked example: a useful campaign brief 42
Campaign worksheet

Review the draft before it becomes public 43
Marketing quality check

CLICKABLE CONTENTS

Find the task you need

From enquiry to repeat customer 44
Lead follow-up exercise

Read the money trail without confusion 45
Payment worksheet

Daily, weekly and monthly owner routine 46
Operating checklist

When a workflow does not behave as expected 47
Troubleshooting

Watch, practise, then check the result 48
Companion videos