# Driver Referrals

**Product RFC**

Driver Referrals | Last updated May 08, 2018

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UBER

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## REFERENCE LINKS

SENA Referral Research Report

Jakarta, Kuala Lumpur, Ho Chi Minh, Bangkok

Carbon Referral Design Usability Report

APACx UX Research

Carbon Platform Resources

Carbon resources site

Driver signup summit

Insights & evidence from regional Ops

Earnings Hub v2

Referral entry point

[Carbon] Driver Planning - Source of Truth

Design deck

# Context

**Referral products**

## Driver invites someone to drive

Empower all Drivers to earn more by helping others start earning.

## Rider invites someone to drive

Given the earning opportunity by inviting others to drive with uber.

# Uber

**40% of Driver First Trips** are from referrals, globally

Drivers referrals bring in **highest LTV** drivers. 16% ↑
$339 vs $298 for non-Referral - Global

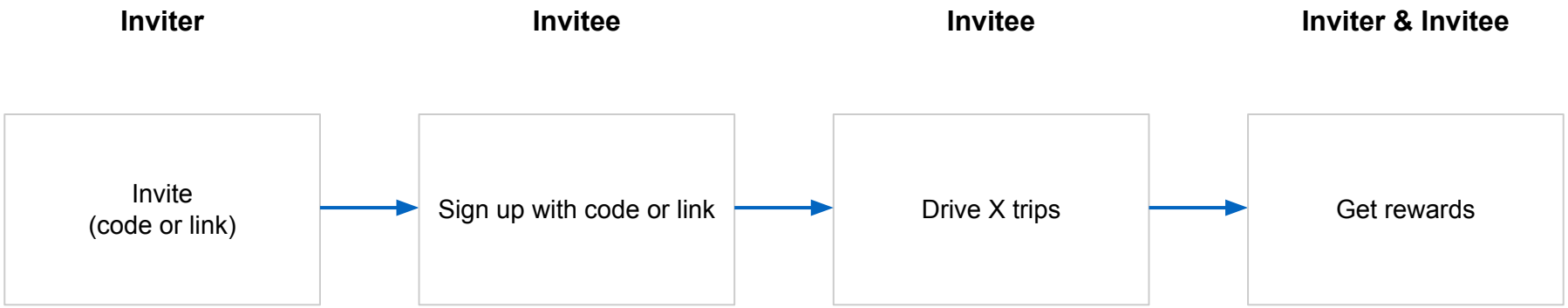
# Drivers

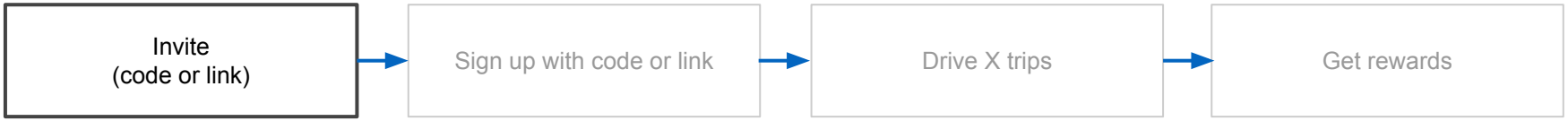
**The only non-trip activity** to make money with Uber

**More than 50%** of active driver base has referred someone and they drive 80% of referrals.

# Design referral hub in the new driver app.

**How does invite work?**
High level flow

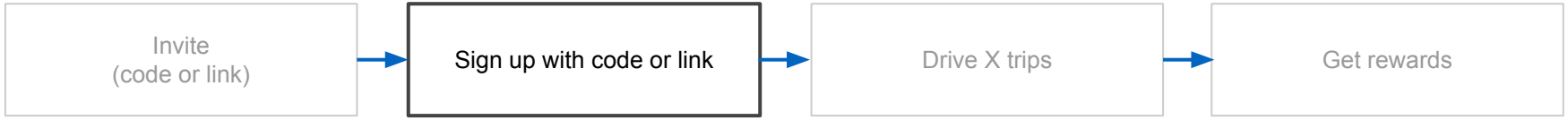





# Inviter

Inviter uses different ways to make sure invite can be successfully applied to invitee

| | | |
|---|---|---|
| Send code or link to invitee via SMS, Whatsapp and etc | Write down invite code | Pay to advertise own referral landing pages |
| | Take invitee to GLH | |
| Help to signup in person | Post on social media | Hire people to refer others |
| Print referral code | Ask invitee go to GLH | Unidentified ways |




# Invitee

How invitee signs up

Use referral link sign up via referral landing page

Use referral code on paid marketing landing pages

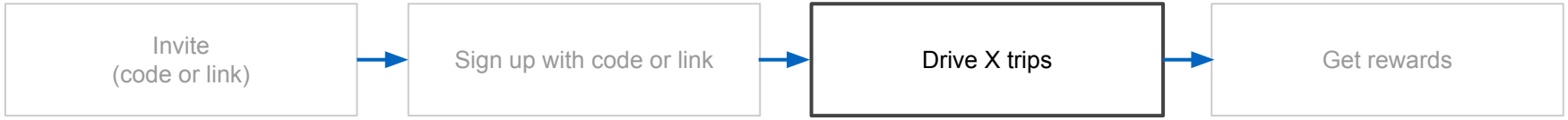
Use referral code on organic landing pages

Use referral code on region created landing pages

Sign up via GLH

Search referral code/link online

Sign up by inviter




# Invitee

How invitee drives

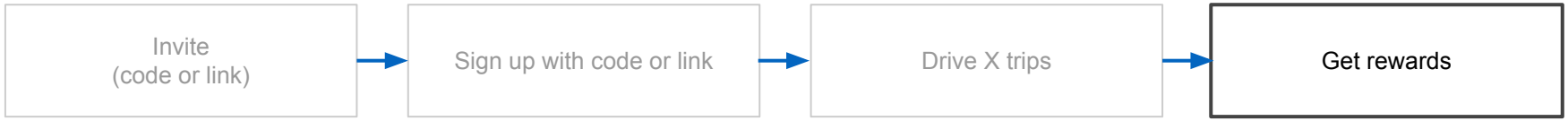
Trip numbers are varies by cities. Usually takes from 2 weeks to 7 weeks to complete trip requirements

San Francisco, $1,250 for 200 trips

New York, $800 for 100 trips

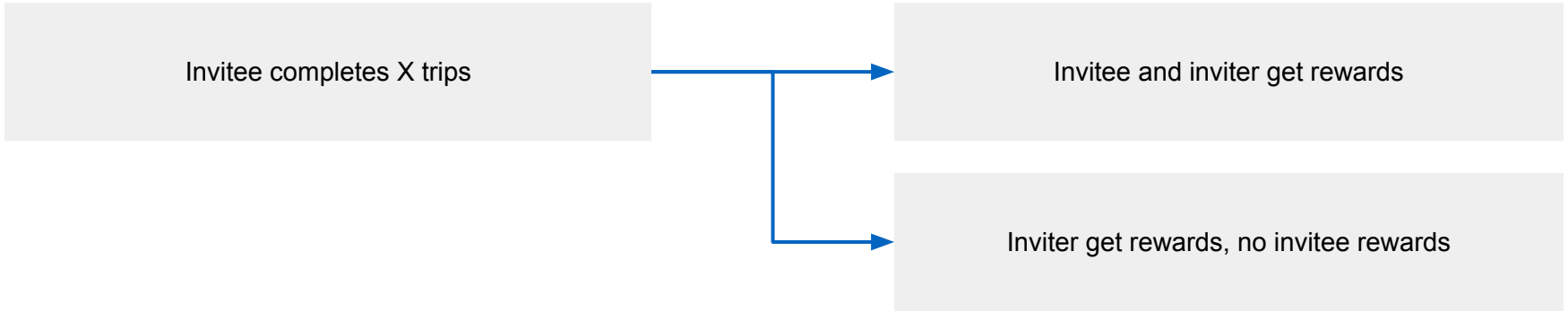
Los Angeles, $600 for 80 trips

No rewards

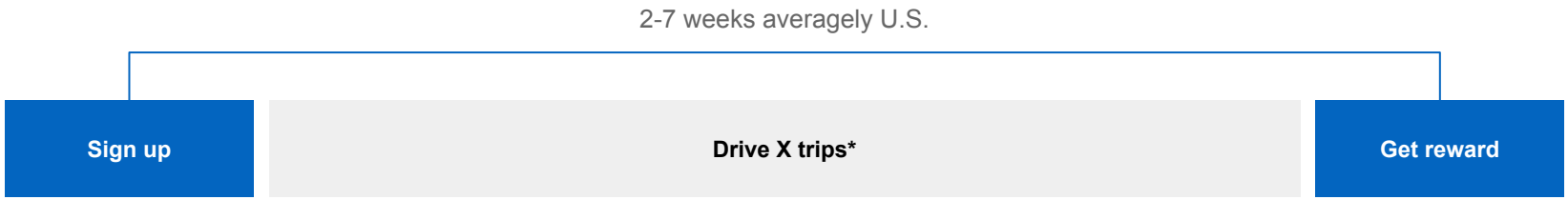



# Inviter & Invitee

Get rewards



# High level referral flow

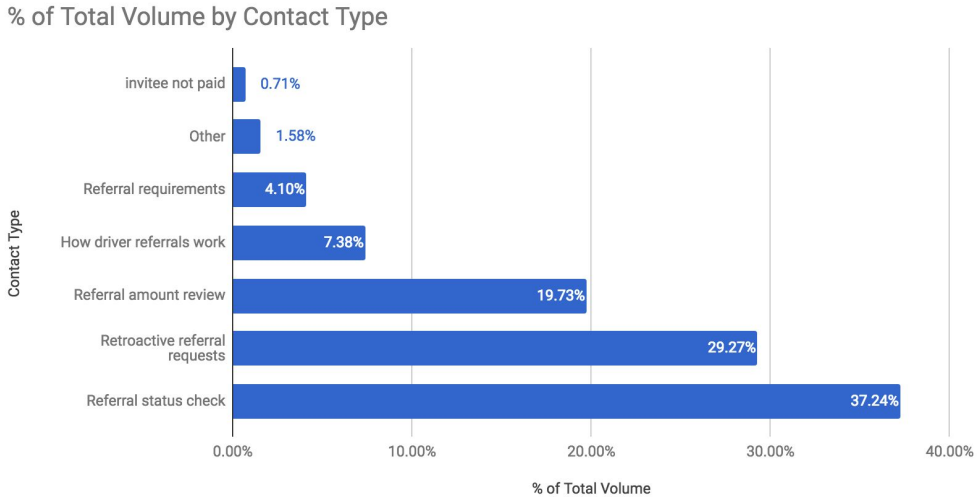



Trips requirements varies by cities

## Data - Volume

Volume - Top 3 Contact Types

- Referral Status Check - 37%
- Retroactive Referral Request -  29%
- Referral Amount Review - 20%




**Takeaway:** Referral Status Check takes up the most volume, but volume could probably be deflected with a simple status tracker for drivers.

*Note: Data is for Driver Referrals for September 2017 - December 2017*

**Scope**

Volume - Top 3 Contact Types

- Referral Status Check - 37% (P0)
- Retroactive Referral Request -  29% (P1)
- Referral Amount Review - 20% (P0)

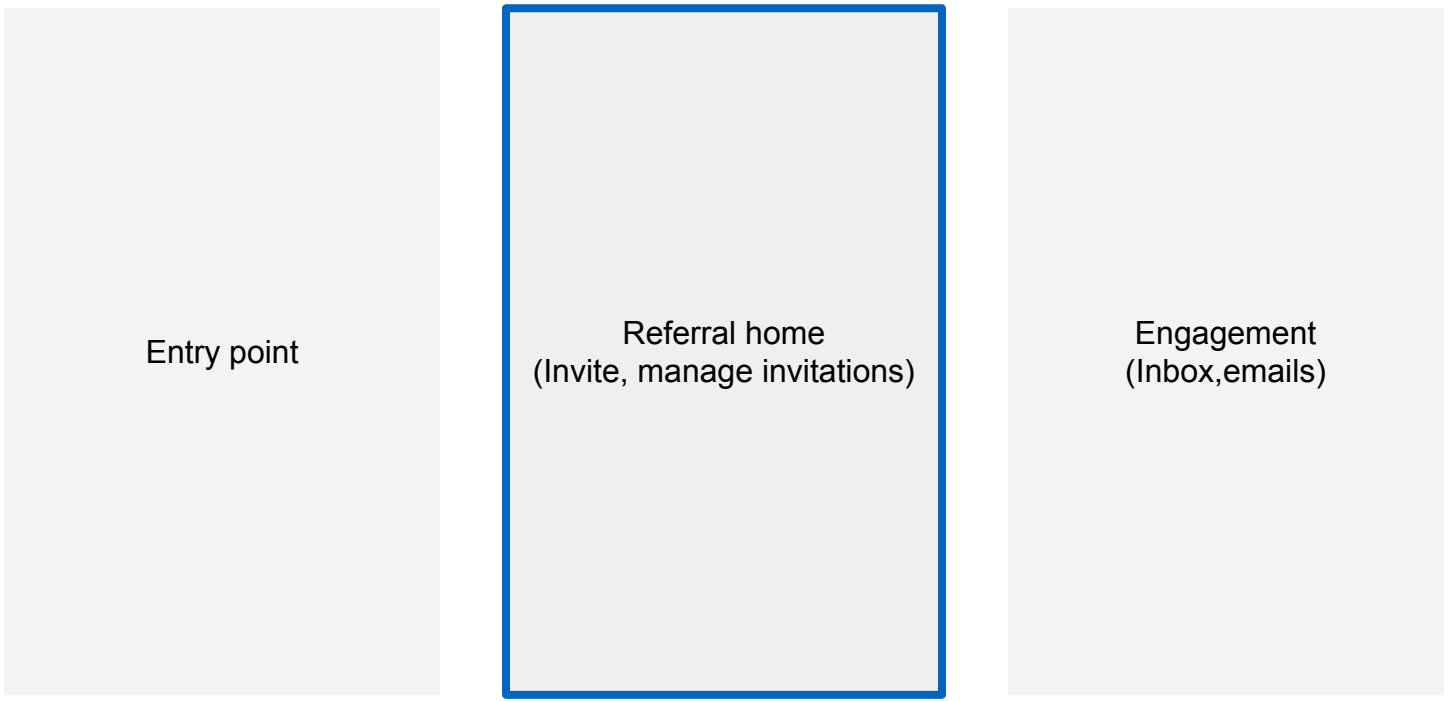
**Inviter segments**

Referral home needs to be used by all segments of drivers

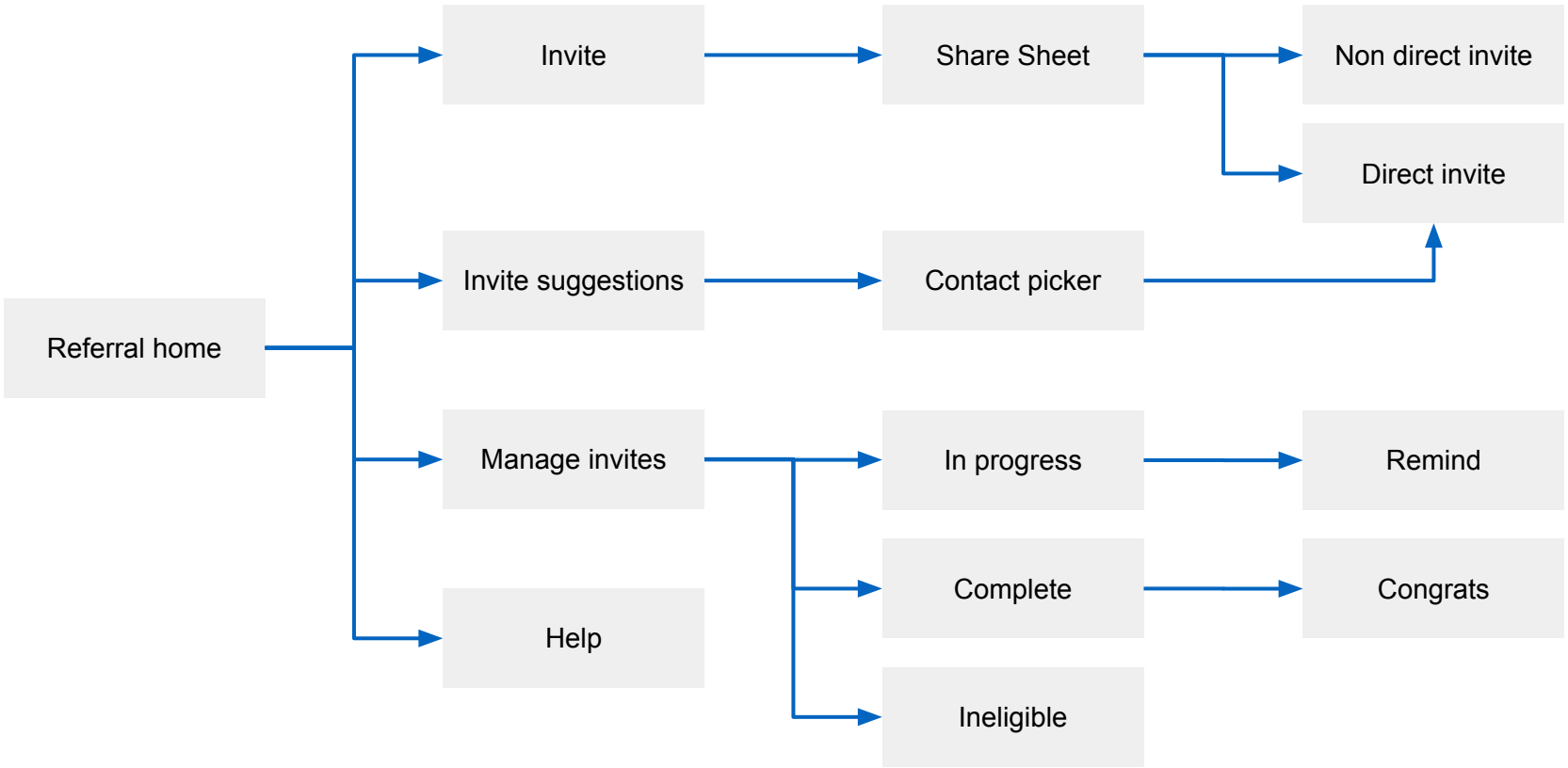
Roughly driver age range:
25 - 60

| | |
|---|---|
| Referees | Invite 25+ |
| Whales | Invite 10+ less than 25 |
| Veterans | Invite 1 and less than 10 |
| Rookies | Never invite |

## High level IA



## Referral dashboard IA



**Main use cases**

## Invite

I can send invitation directly to someone.
I can share my referral code/link on social media.

## Manage invitation

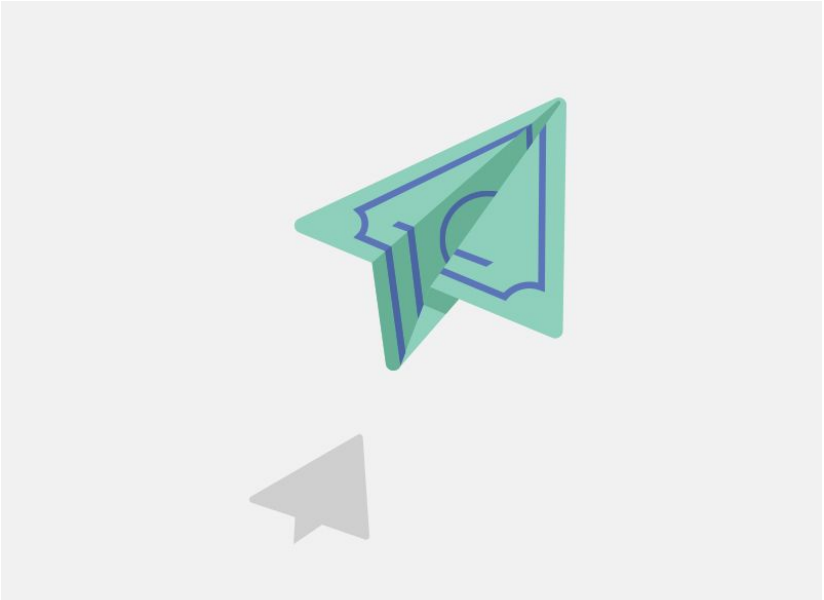
I want to know my invitee’s progress and when can I get my rewards.

**Referral home IA**

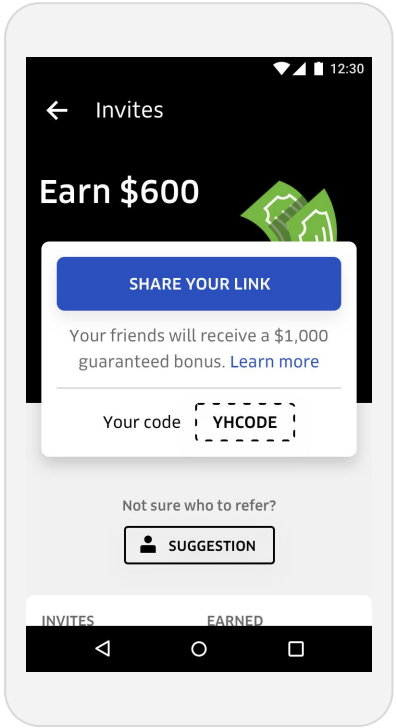
| | |
|---|---|
| Invite | I can refer whenever I want. |
| Invite suggestion | I do not know who to invite. Uber suggests me who might be interested in driving with Uber. |
| Manage invitations | I do not know when can I get my reward. Uber tells me the progress of my invitee progress. |

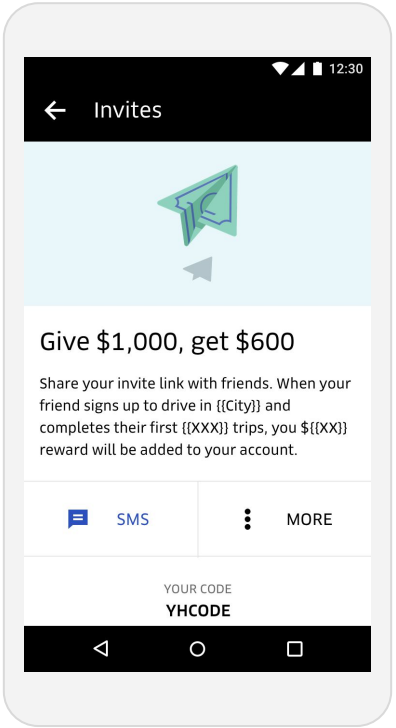
# Explorations

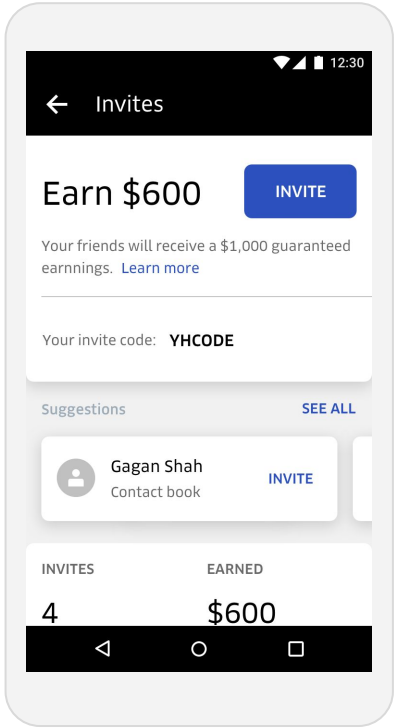
## Explorations 1 - Motivated by earning



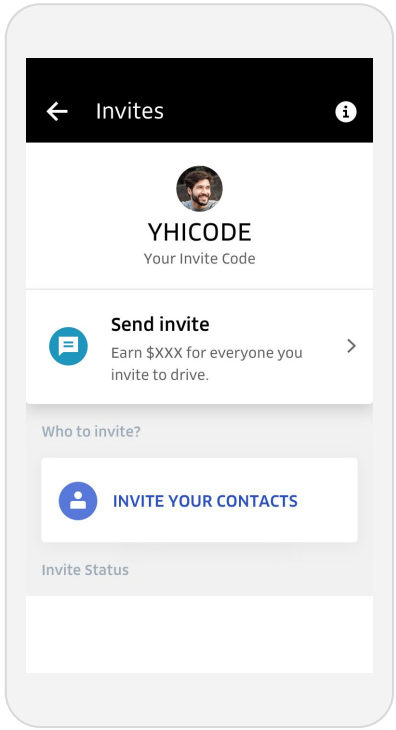
# Explorations 1 - Motivated by earning

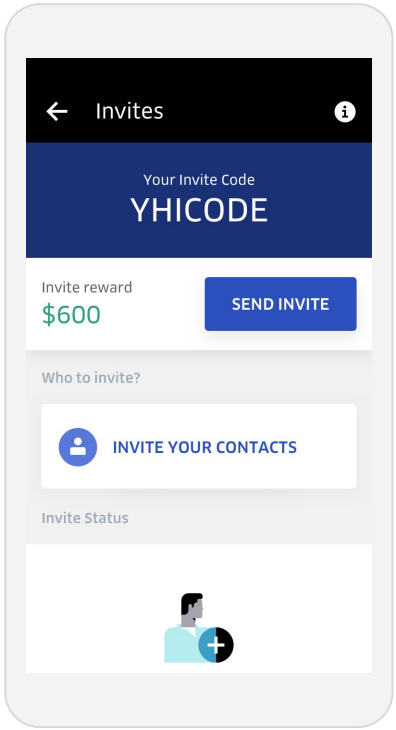


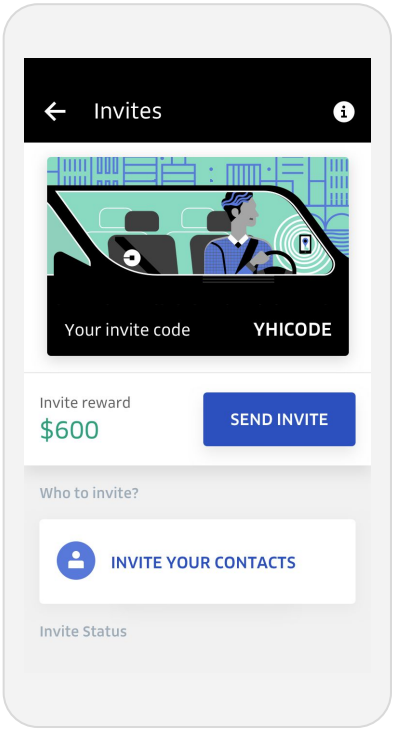



# Explorations 2 - Focus on functions



## Final

A user can send an invite via primary CTA that triggers native OS share sheet. Tap to copy the referral code on the header is the other way to invite others.

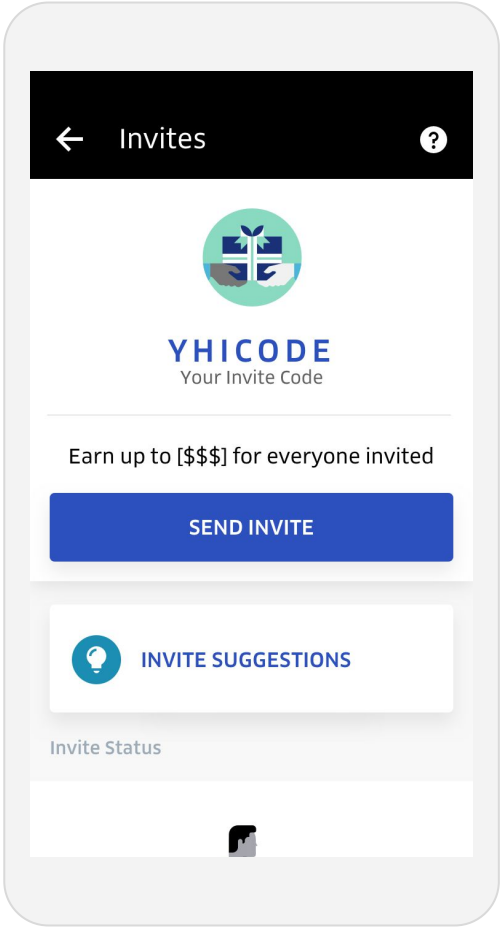
Value prop changes based on different reward states.

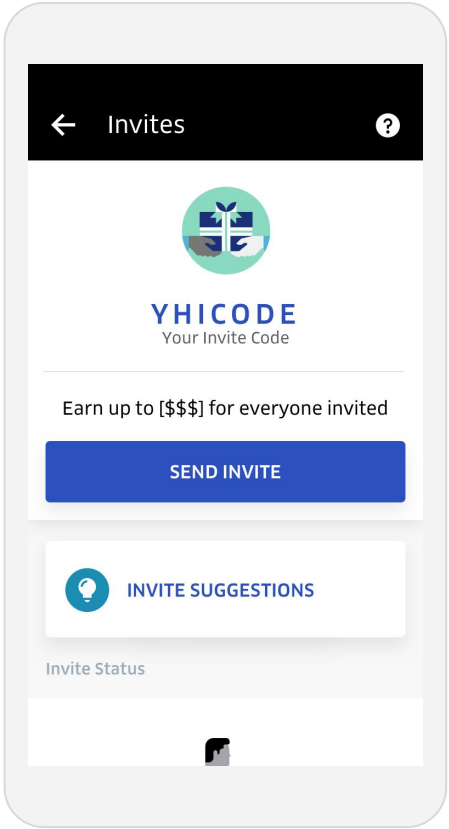
*Primary CTA(SEND INVITE) would be tested with contact picker vs native OS share sheet after Carbon launch.*

Invite

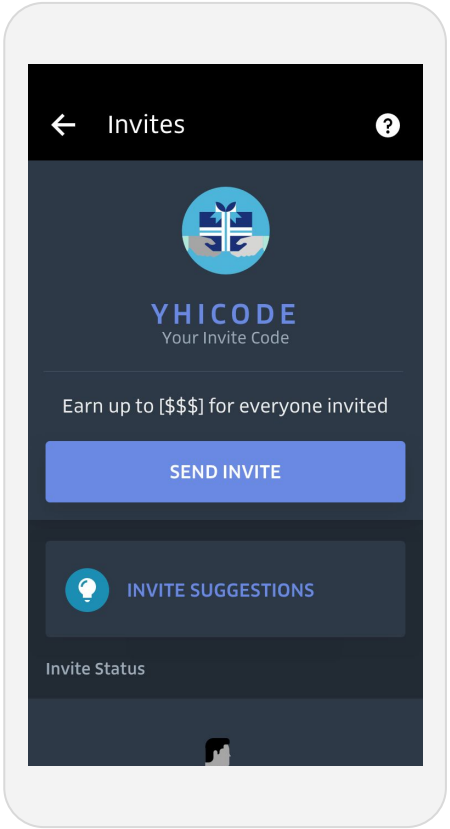
Invite suggestion

Manage invitations





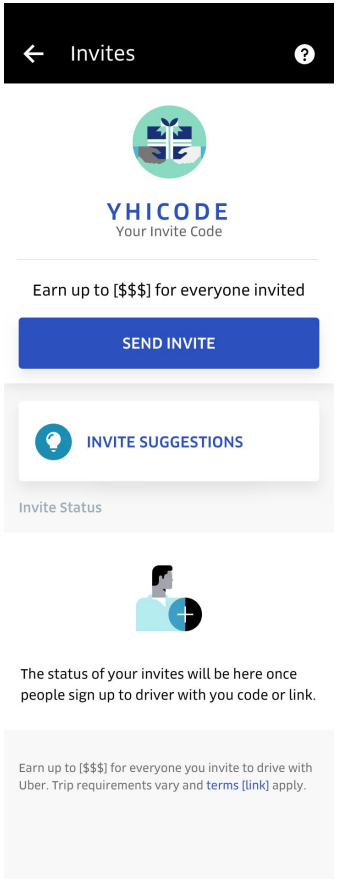

**Day mode**




**Night mode**

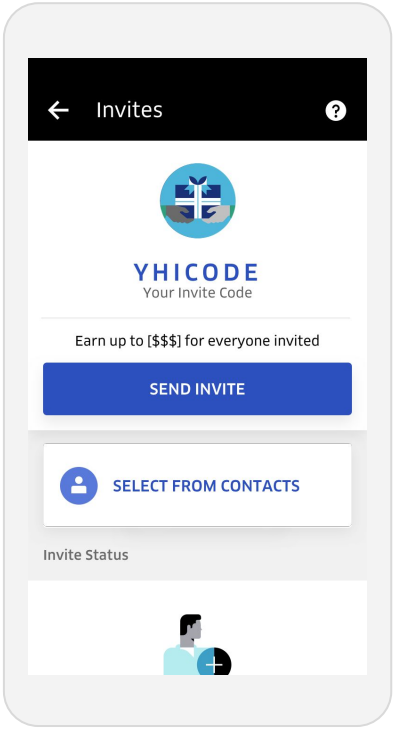
# Final referral icon

Gift box icon is the final referral icon for referral home.

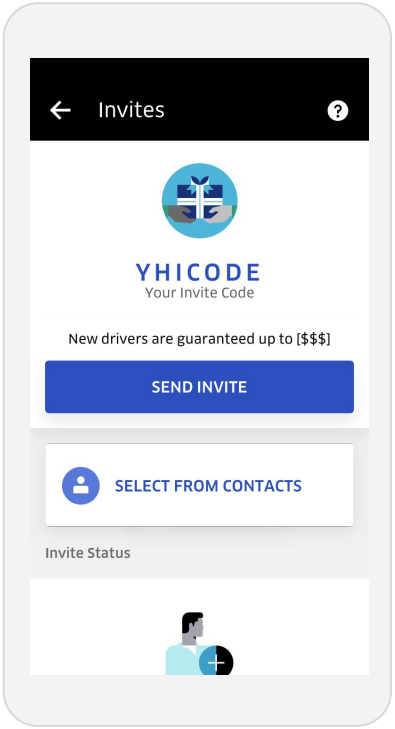



**Final referral icon**

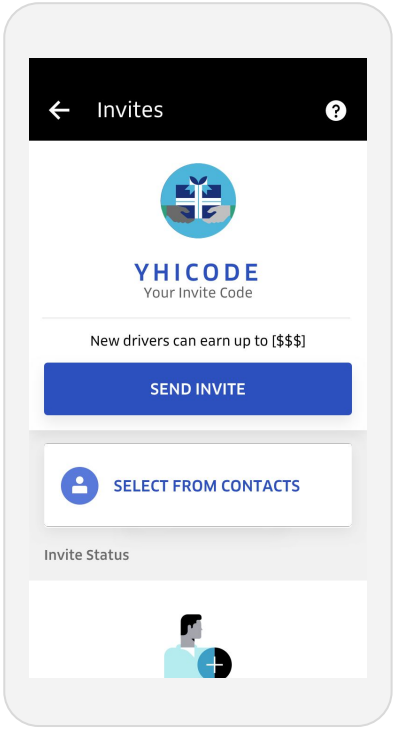
# Referral reward states



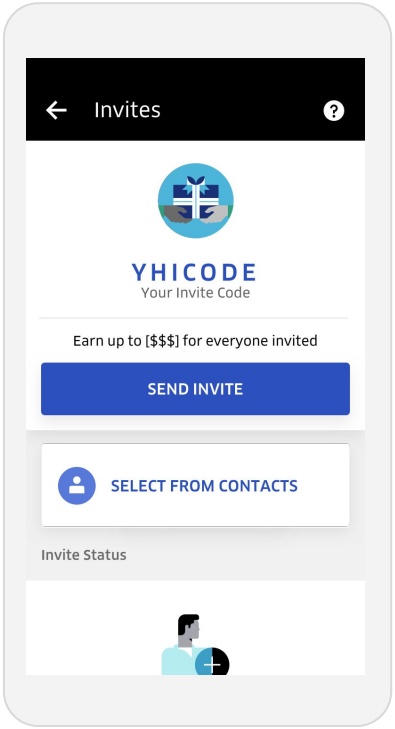

Default reward




No inviter reward
(Guaranteed)

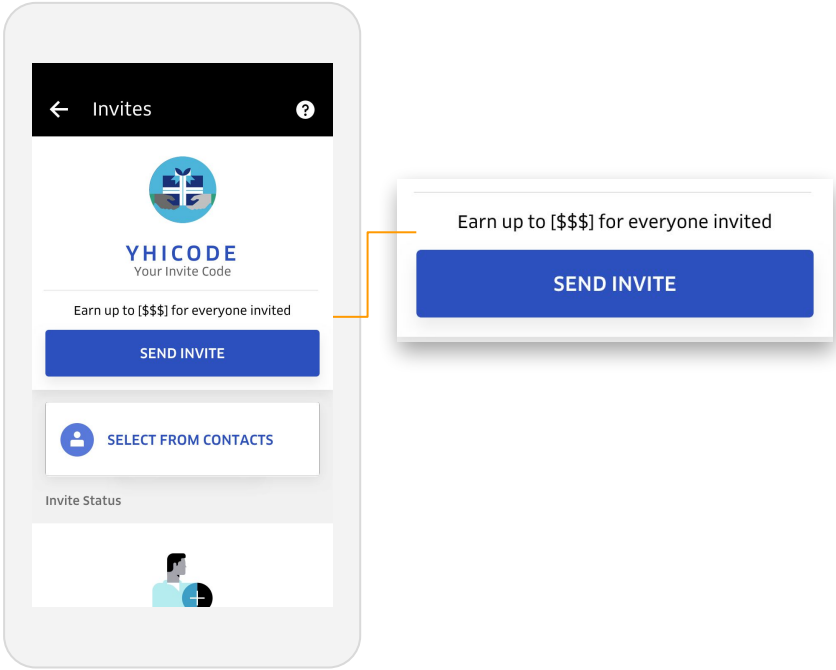



No inviter reward
(Traditional)




In targeted campaigns.
Show campaign reward

# Referral home reward copy

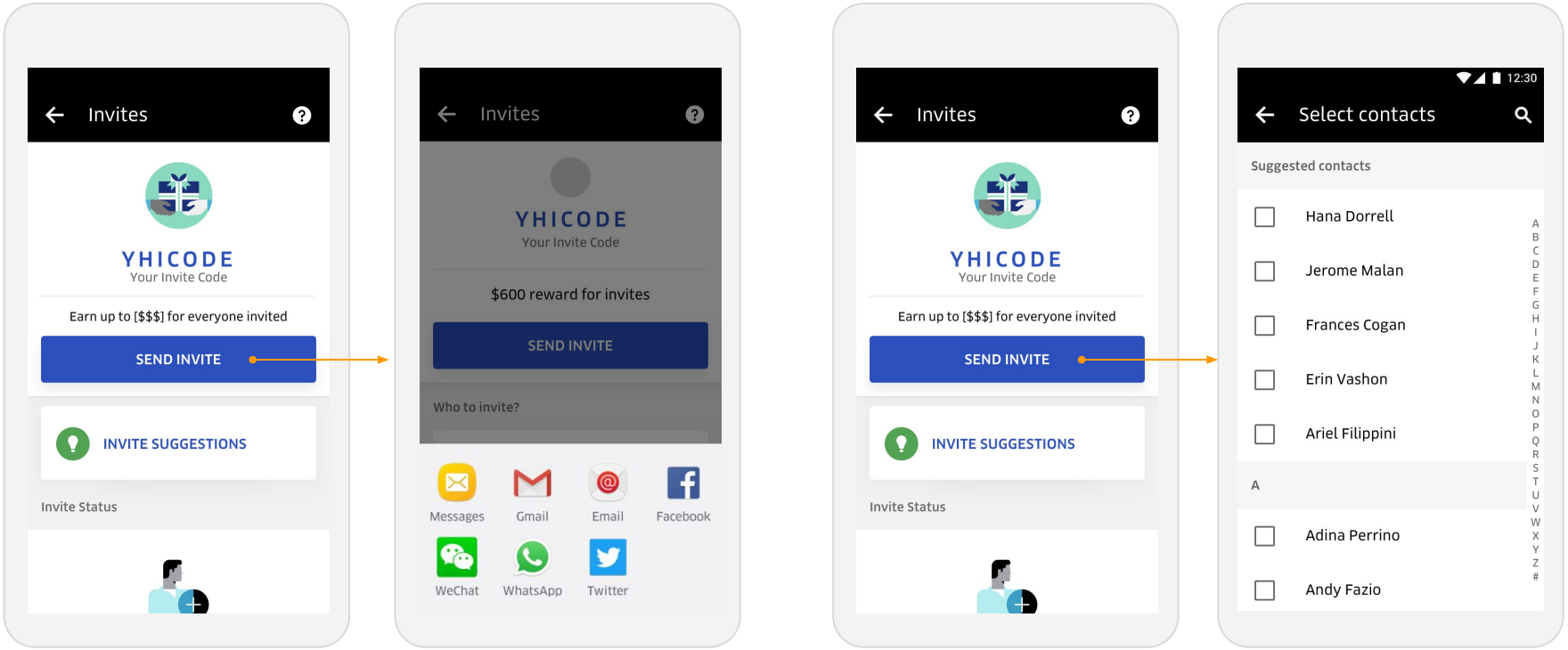



| Guaranteed referral | Referral home |
|---|---|
| Has inviter reward and invitee reward | Earn up to [$$$] for everyone invited |
| No inviter, has invitee reward | New drivers are guaranteed up to [$$$] |
| No inviter reward, no invitee reward | |

| Traditional referral | Referral home |
|---|---|
| Has inviter reward and invitee reward | Earn up to [$$$] for everyone invited |
| No inviter, has invitee reward | New drivers can earn up to [$$$] |
| No inviter reward, no invitee reward | |

# Send invite

# Primary invite CTA

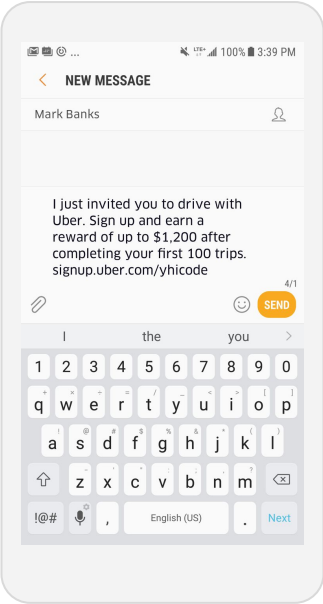



**Test A**
**Native share sheet**

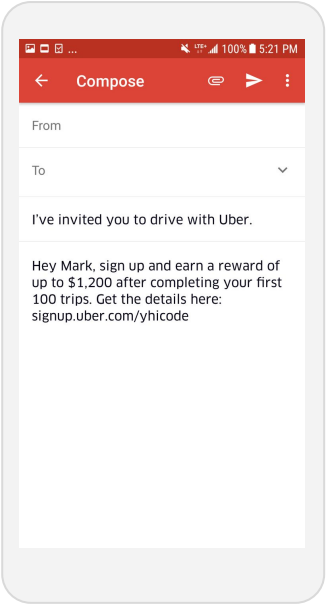
**Test B**
**Contact picker**

# Invite via native share sheet

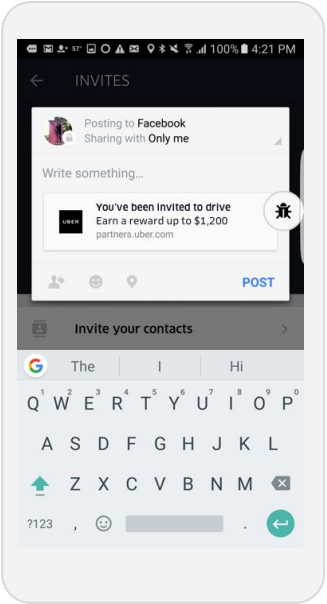
Guaranteed referral



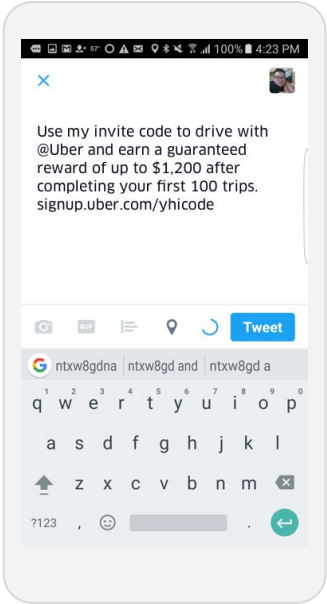

SMS



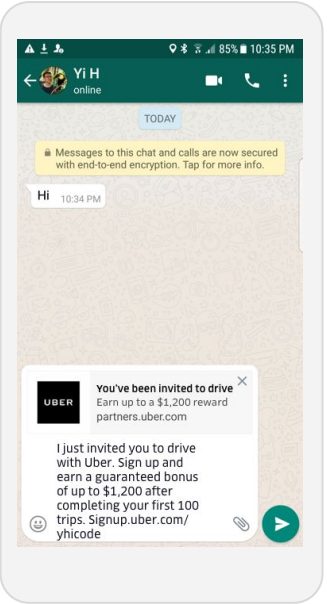

Email




Facebook



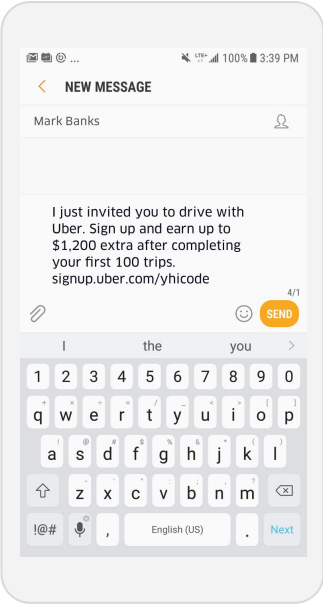

Twitter



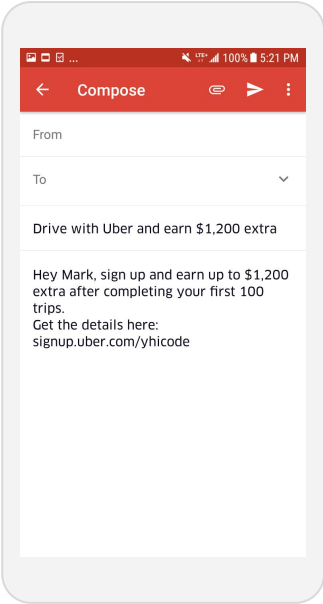

Whatsapp

# Invite via native share sheet

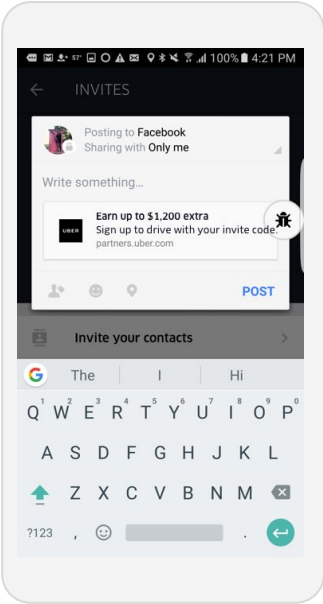
Traditional referral



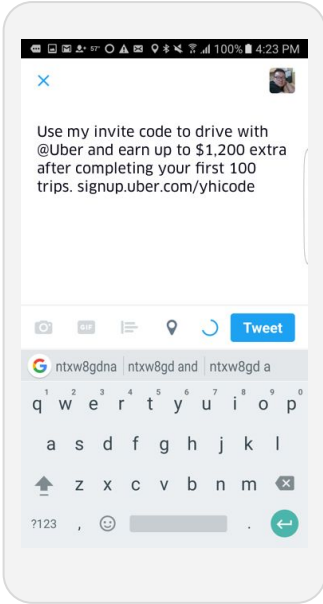

SMS



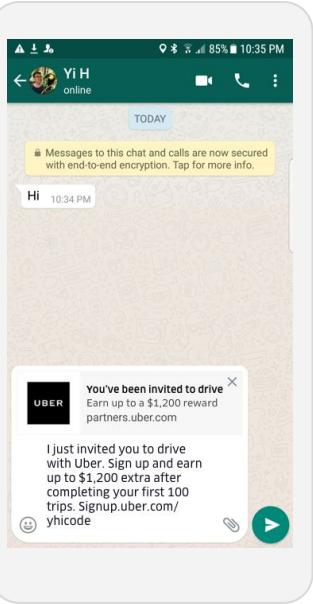

Email




Facebook

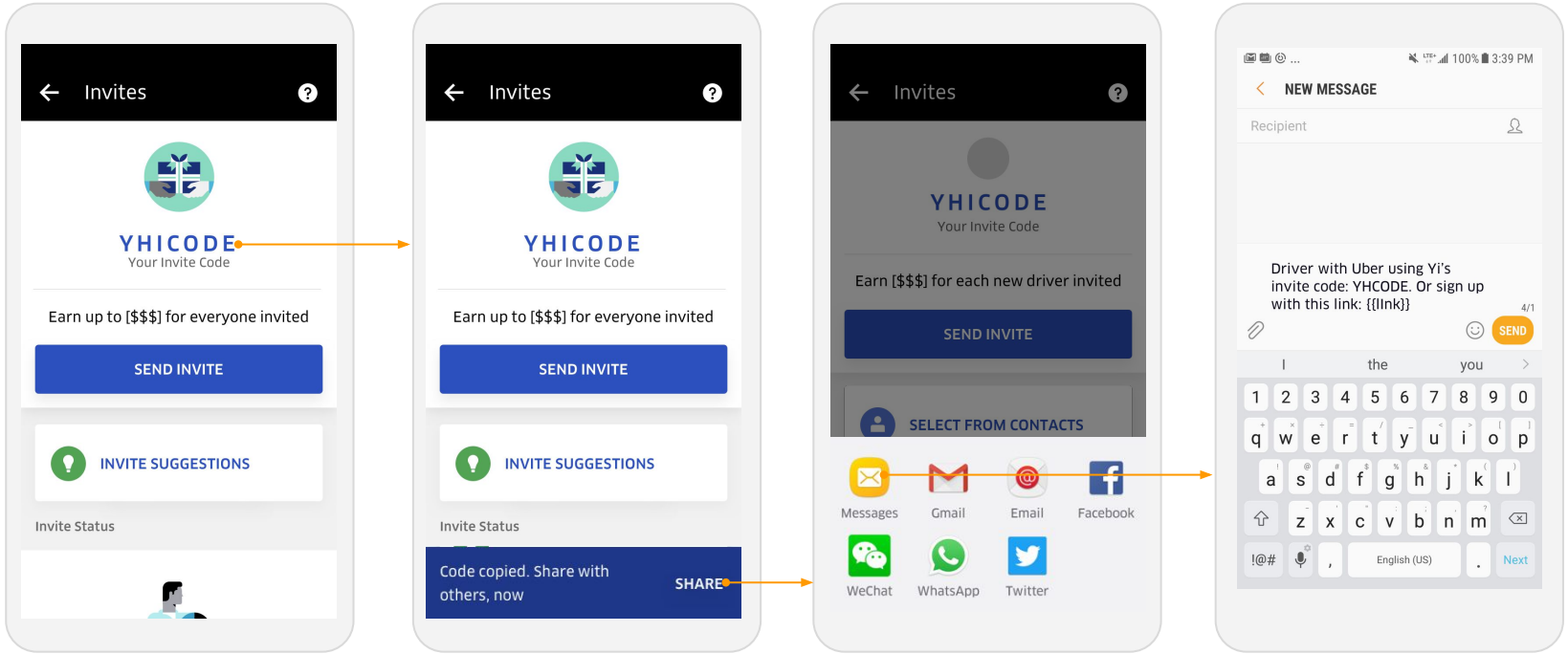



Twitter




Whatsapp

# Copy invite code




Toast

Share sheet

SMS

# Invite suggestion

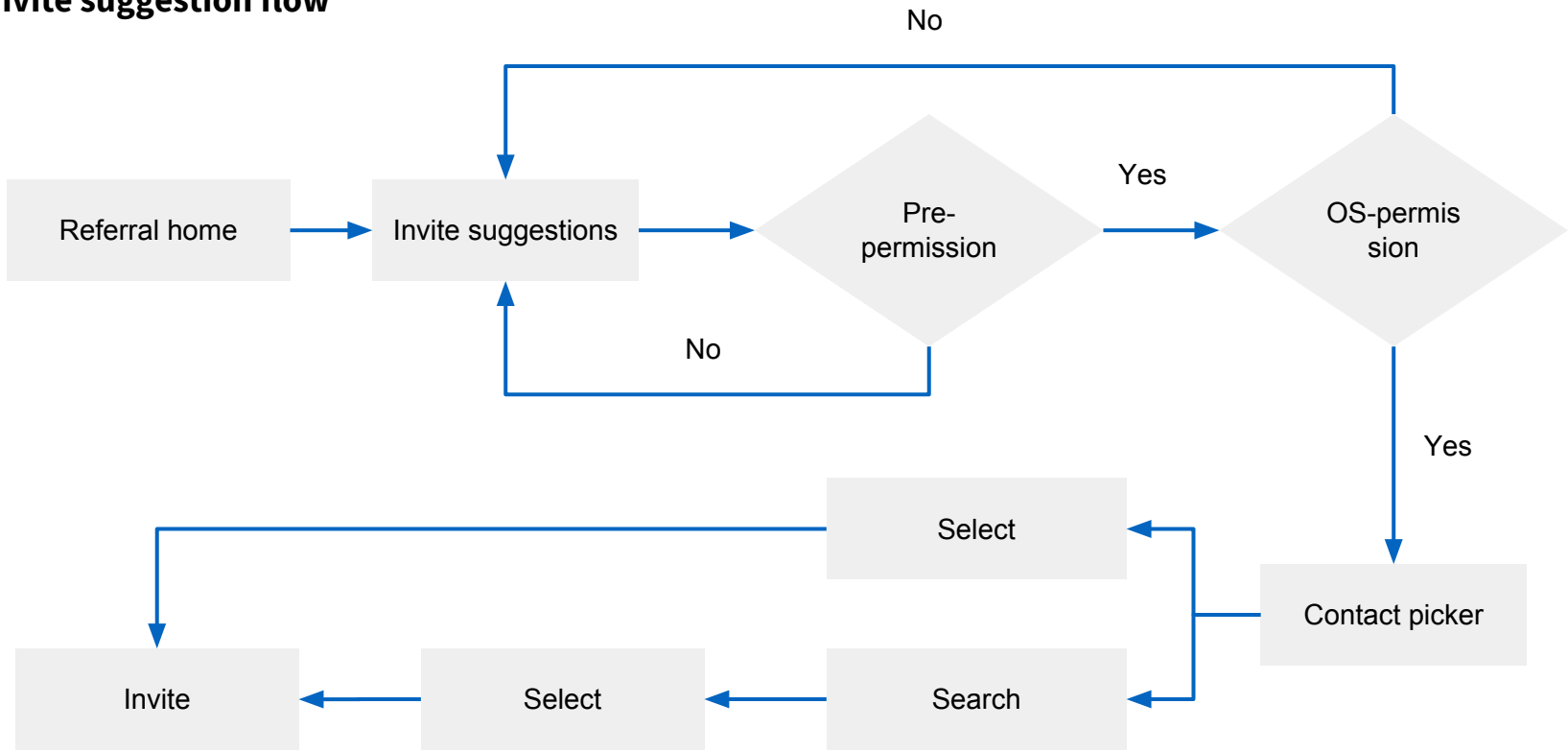
An algorithm created by Data scientists that can identify potential users who might be interested in driving with Uber from user’s contacts book data.

**Invite suggestion**

Use case

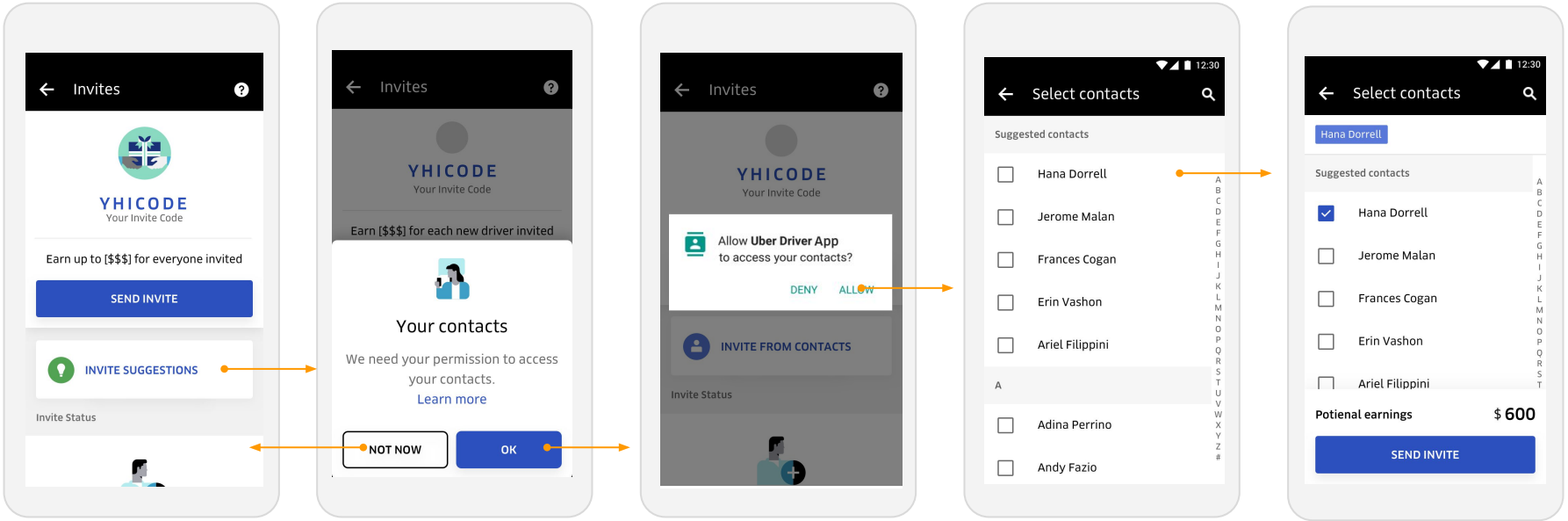
I do not know who to invite. Uber suggests me who might be interested in driving with Uber.

## Invite suggestion flow



# Invite contacts

Contact permission flow




Uber Pre-permission

OS permission

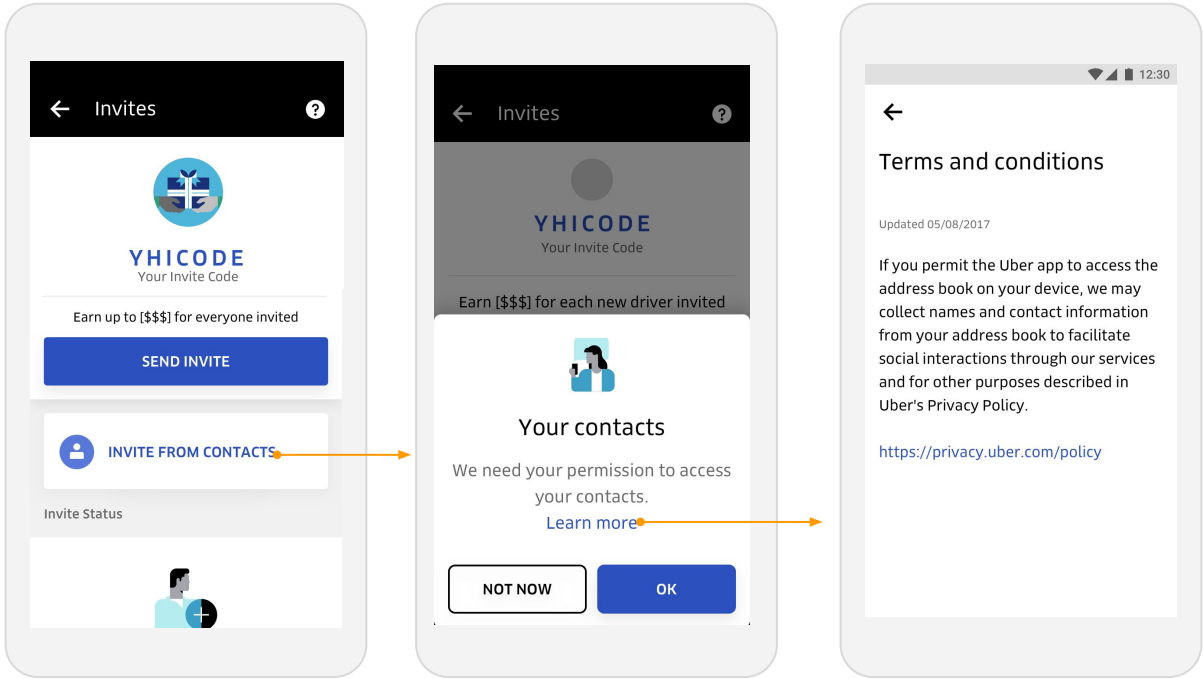
Contact picker

# Invite contacts

Contact Permission to Legal page

Uber needs to ask contacts permission to access users contacts.

If users click “NOT NOW” CTA, it will back to referral home screen. The pre-permission will show up again after user tap from the entry point next time.

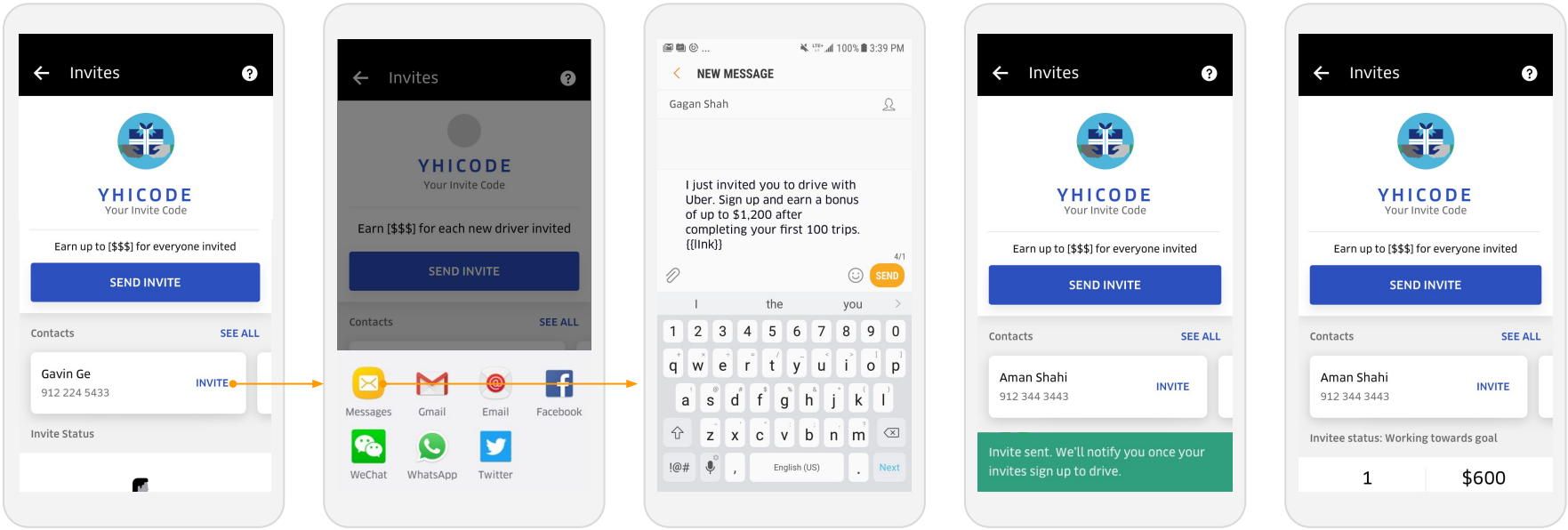



**Uber Pre-permission**

**Legal**

# Invite contacts

After giving access permissions




Show contacts on home page

OS share sheet

SMS

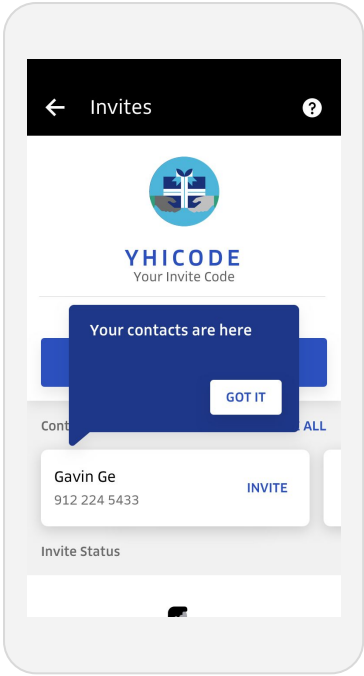
Toast

Show next contact

## Invite contacts

After giving access permissions

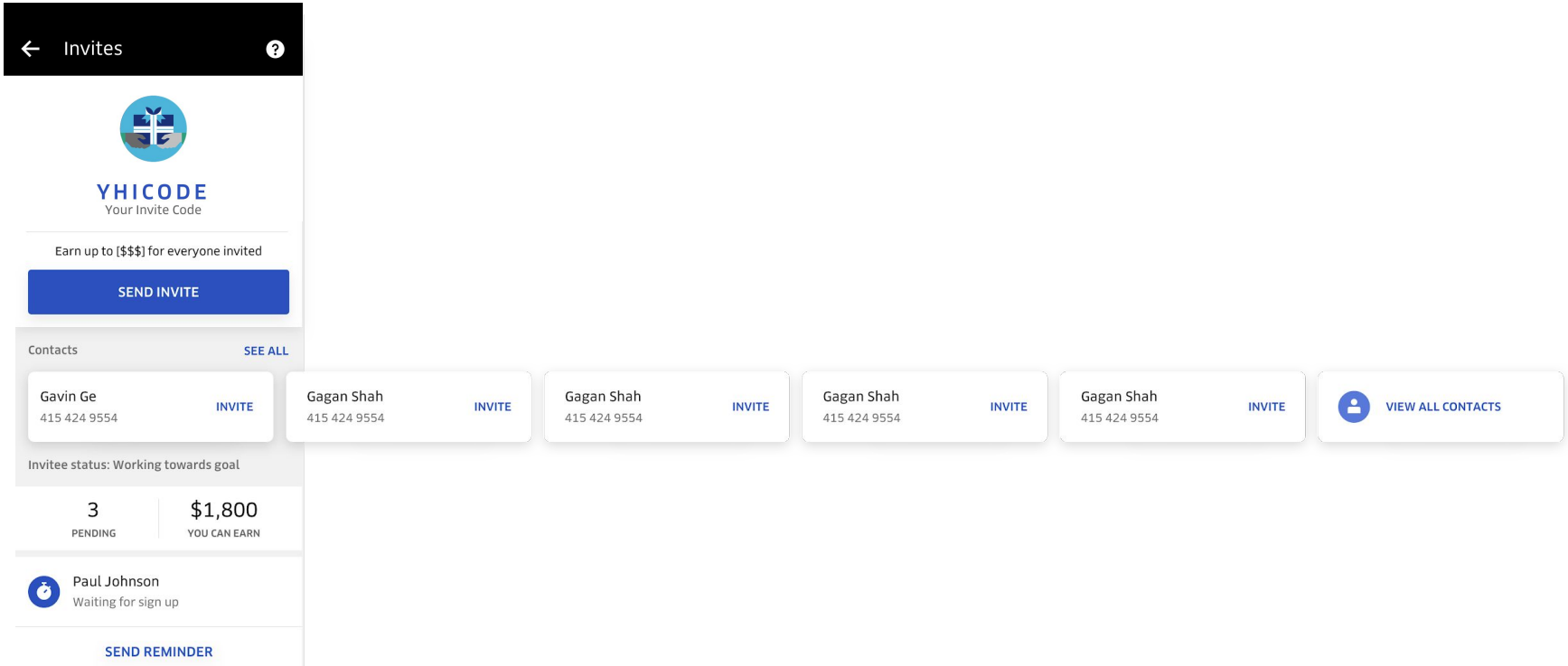
Show Tooltip after giving the access permission




Tooltip

# Invite contacts

Show contacts after given permission

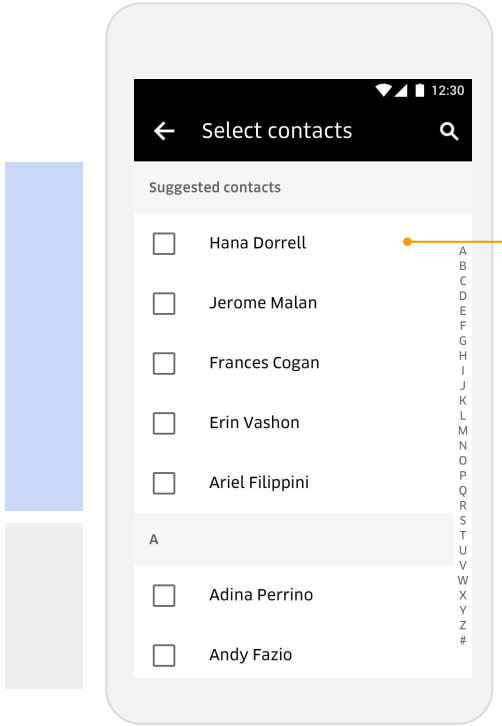


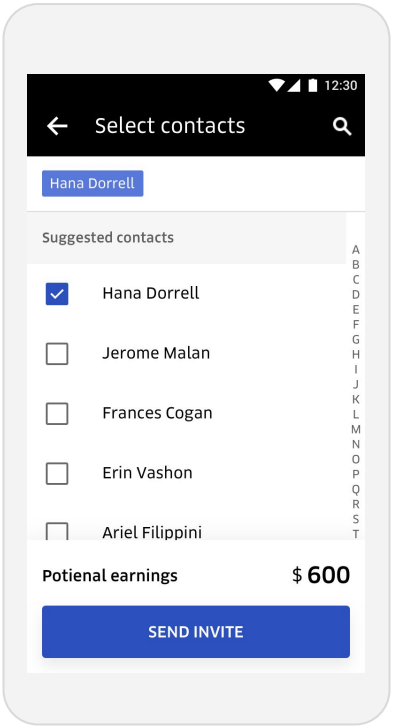

Show view all contacts CTA after 5  contacts cards

# Contact picker

Invite suggestions

Contacts

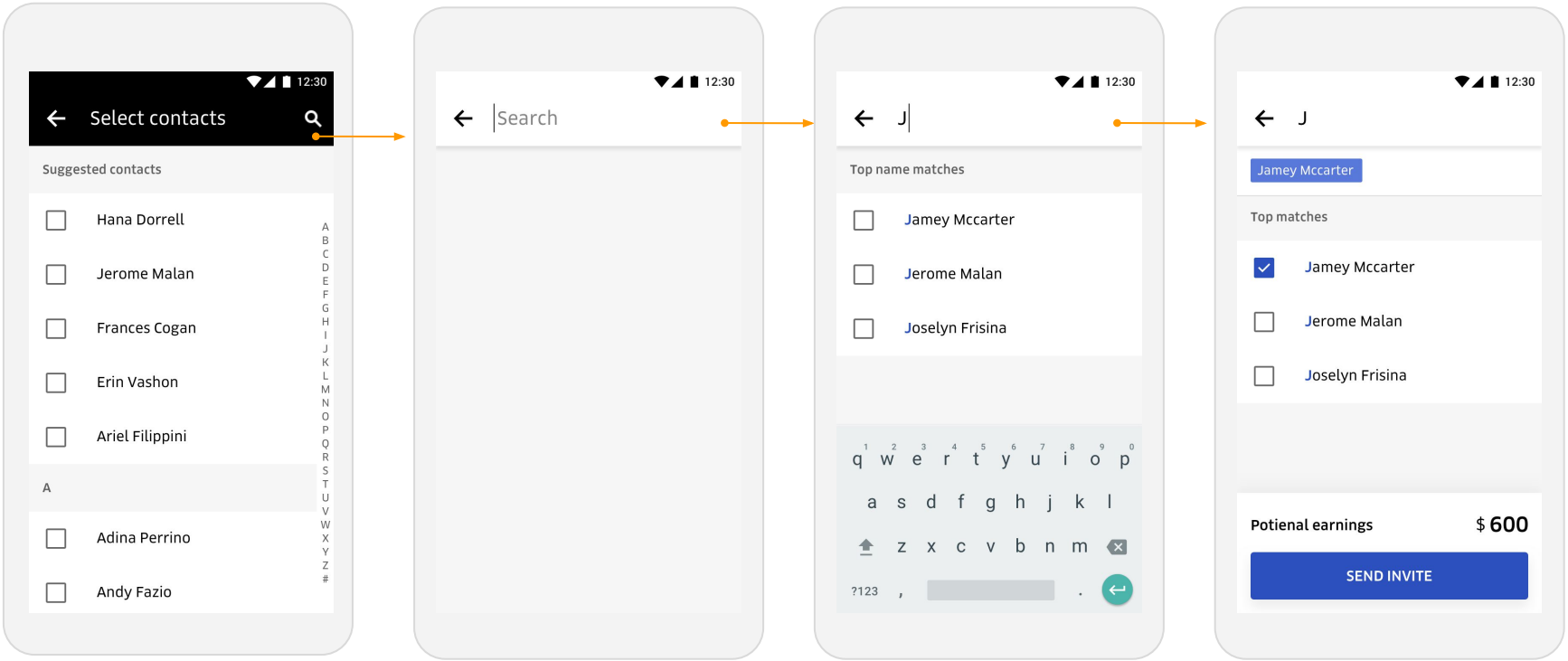



Android

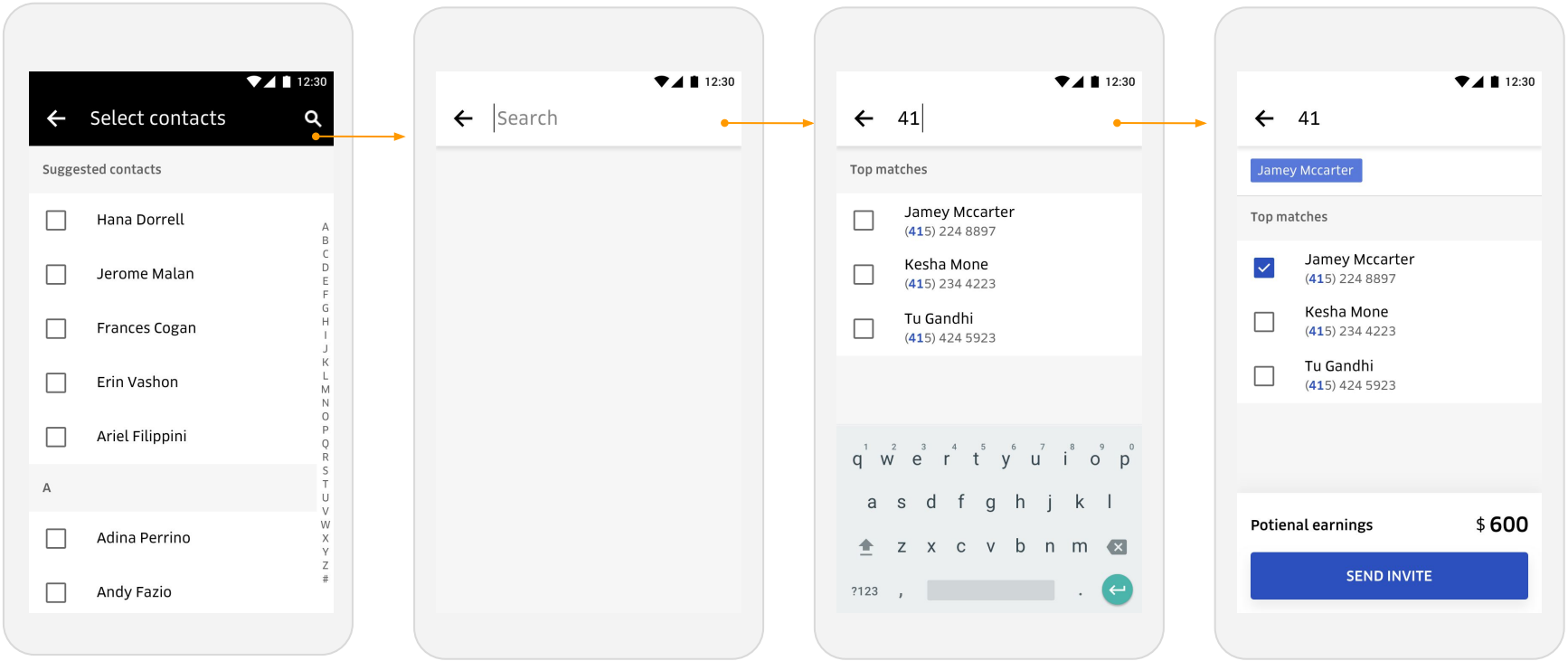
# Contact picker

Search by name flow



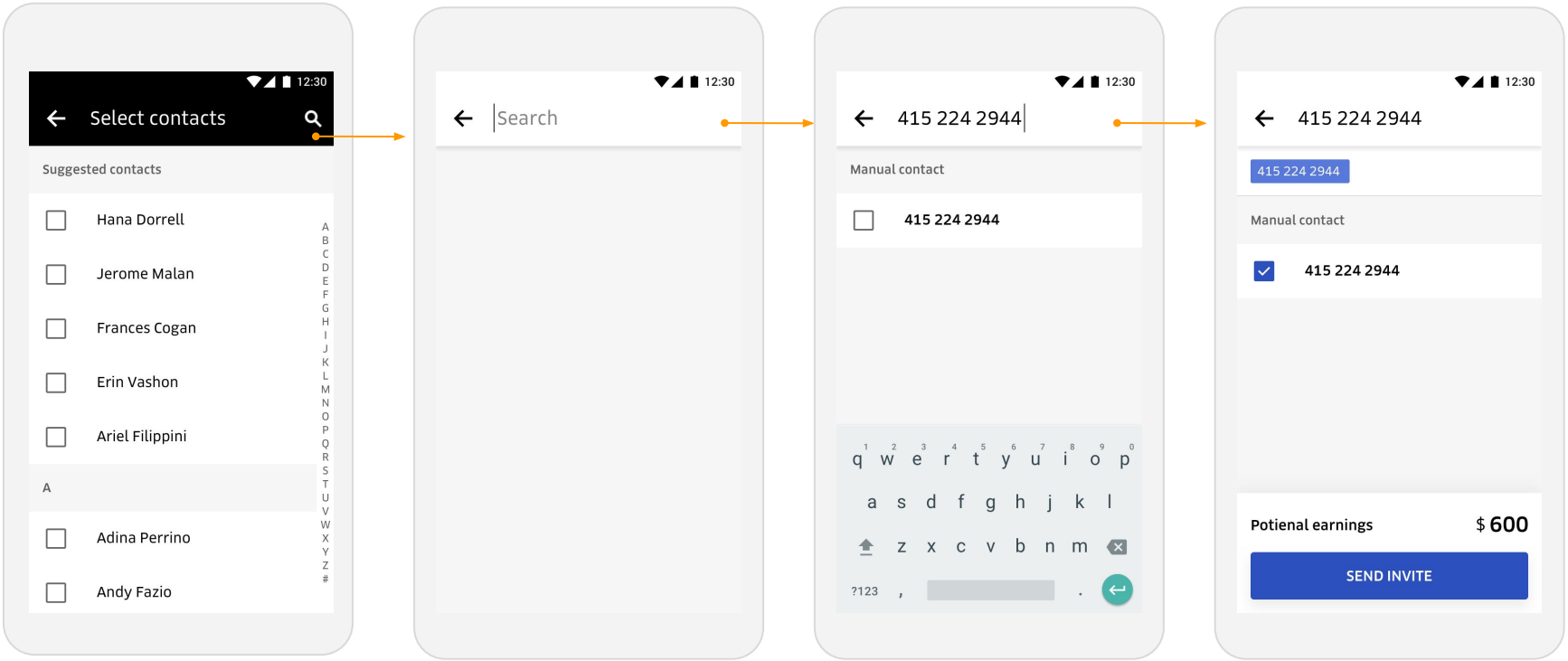
# Contact picker

Search by phone number flow



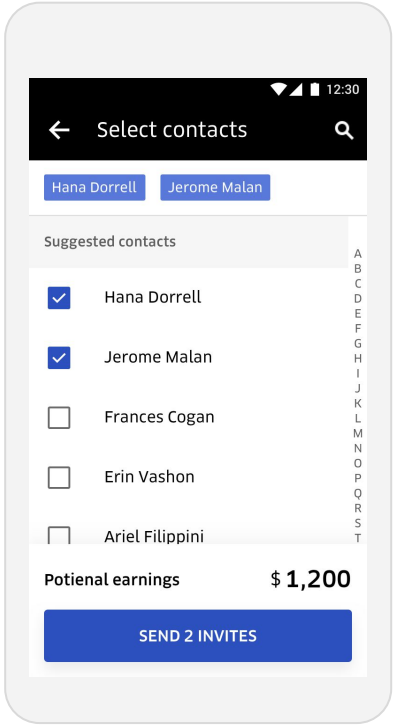
# Contact picker

Search by manual contact flow

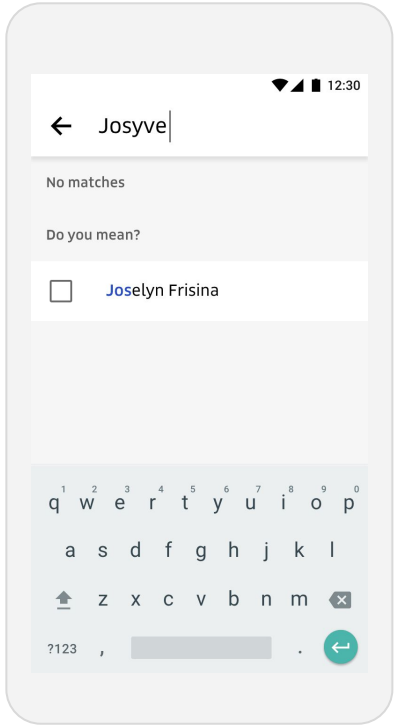


# Contact picker

Other use cases

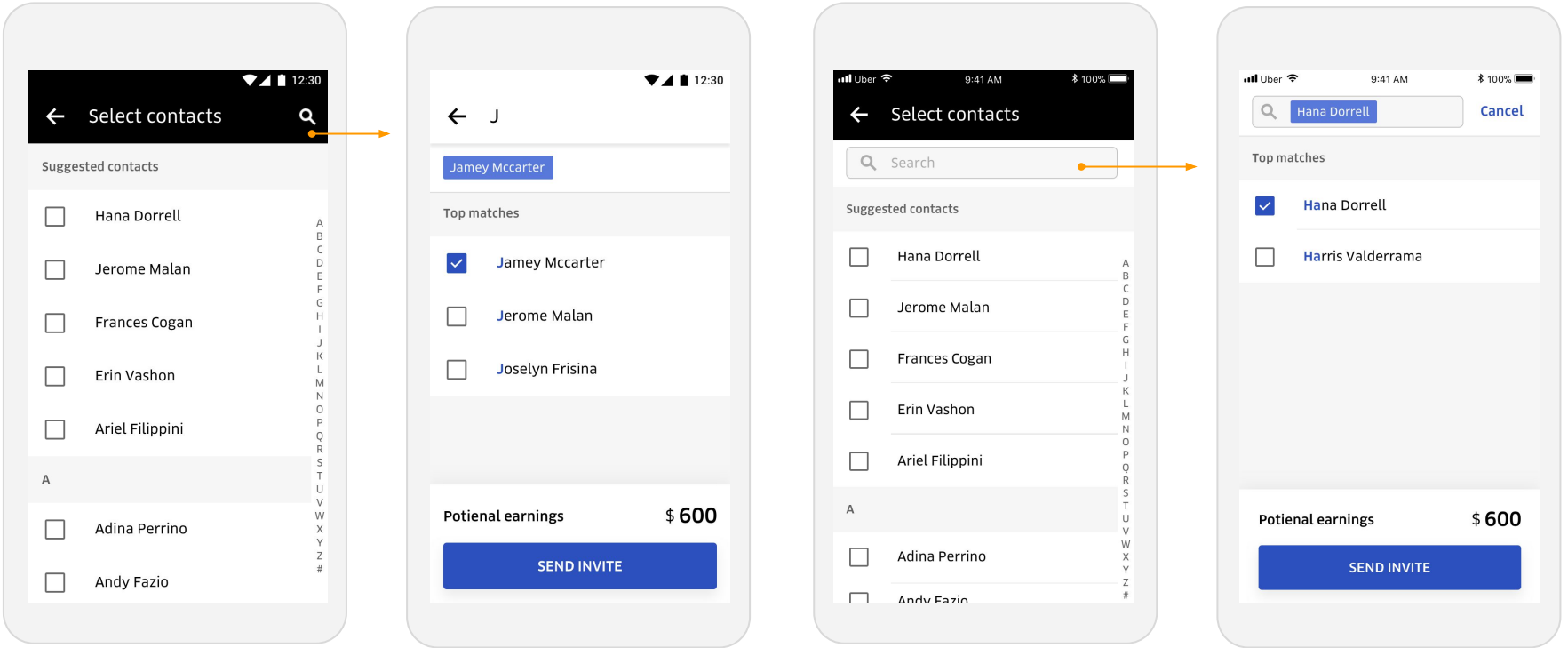



Multiple selection




No matches

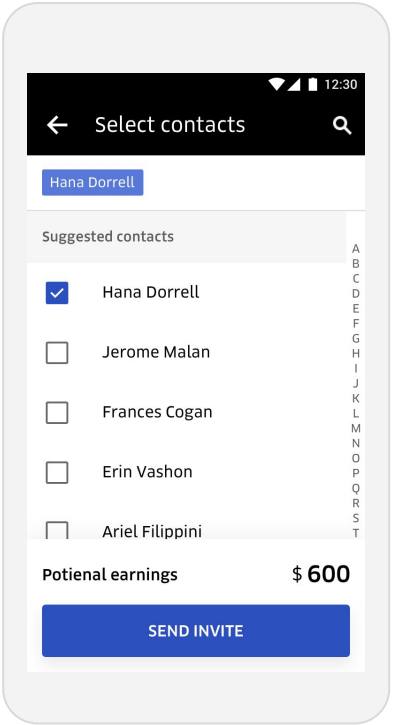
# Android and iOS



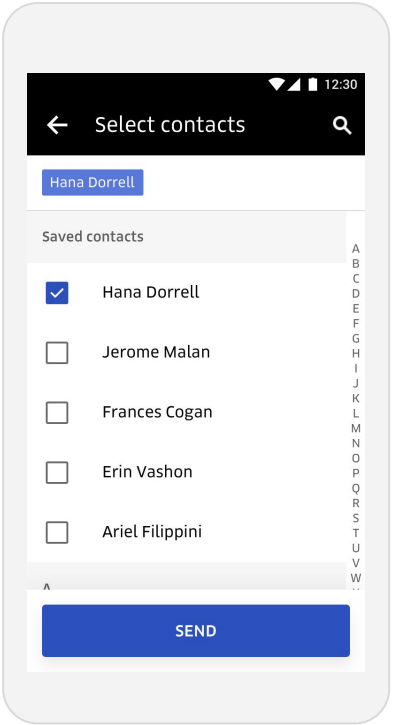

Android

iOS

# Cross-team adaptation



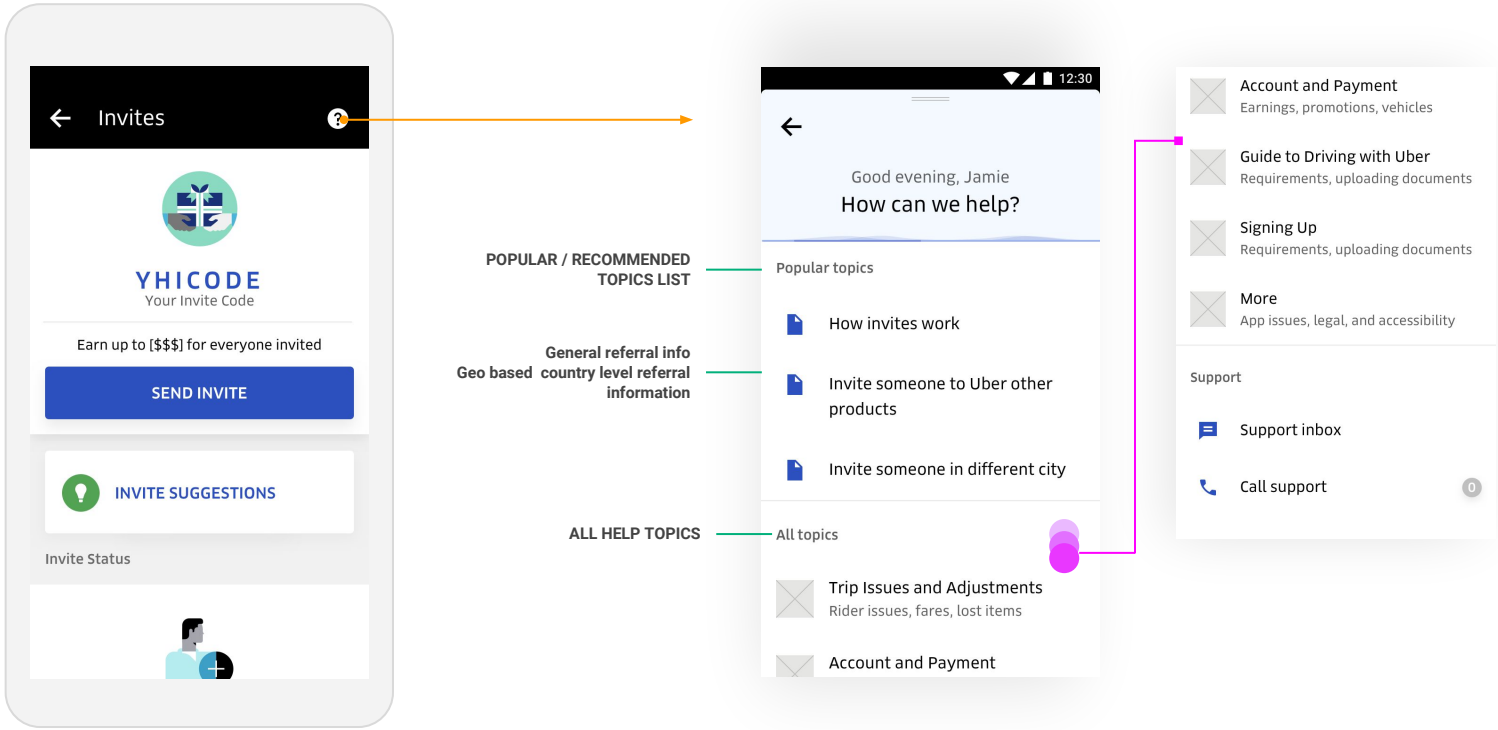

Referral contact picker




Cross-team

# Help

# Learn more


Invites
YHICODE
Your Invite Code
Earn up to [$$$] for everyone invited
SEND INVITE
INVITE SUGGESTIONS
Invite Status
12:30
Good evening, Jamie
How can we help?
POPULAR / RECOMMENDED TOPICS LIST
Popular topics
How invites work
General referral info
Geo based country level referral information
Invite someone to Uber other products
Invite someone in different city
ALL HELP TOPICS
All topics
Trip Issues and Adjustments
Rider issues, fares, lost items
Account and Payment
Account and Payment
Earnings, promotions, vehicles
Guide to Driving with Uber
Requirements, uploading documents
Signing Up
Requirements, uploading documents
More
App issues, legal, and accessibility
Support
Support inbox
Call support
0

# Manage invitations

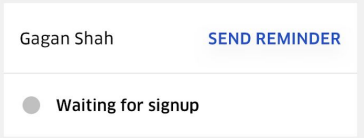
**Manage invitation**

## Status

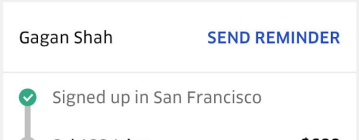
- Working towards goal
- Goal completed
- Ineligible Invitations

# Explorations

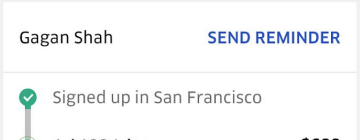
## Invitee status (Sign up via direct link)



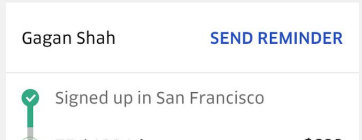

Inviter sent an invite from contact picker



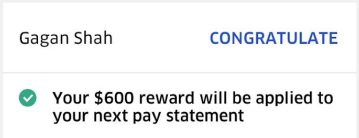

Invitee signed up from direct link



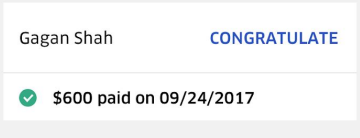

Invitee took 1st trip




Showing trip progress in status



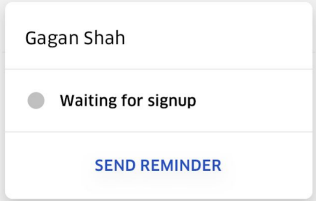

Invitee sees when will be paid



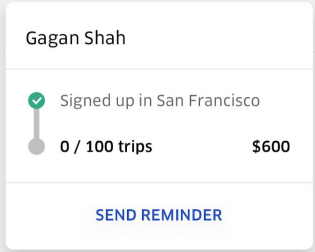

Shows paid date after paid

# Explorations

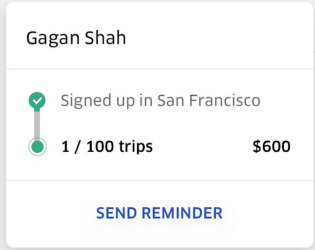
## Invitee status (Sign up via direct link)



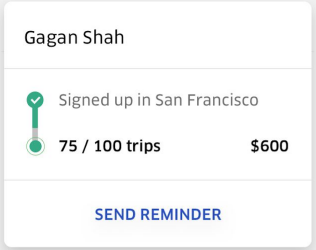

Inviter sent an invite from contact picker



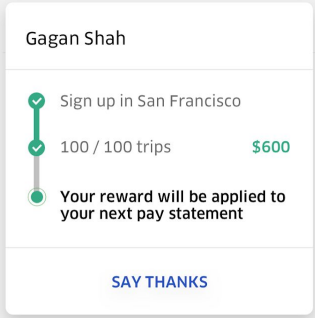

Invitee signed up from direct link



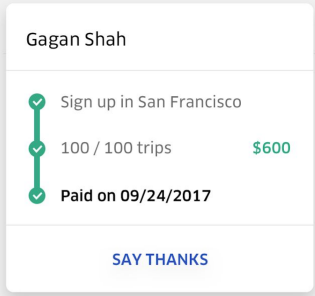

Invitee took 1st trip




Showing trip progress in status



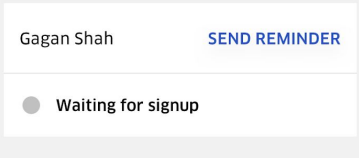

Invitee sees when will be paid



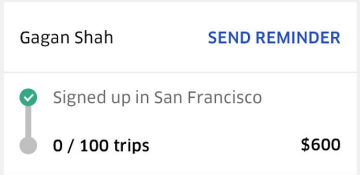

Shows paid date after paid

# Explorations

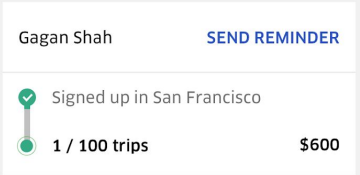
## Invitee status (Sign up via direct link)



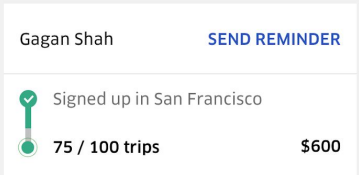

Inviter sent an invite from contact picker



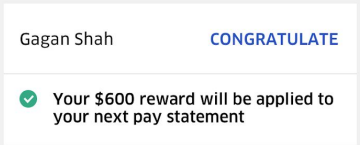

Invitee signed up from direct link



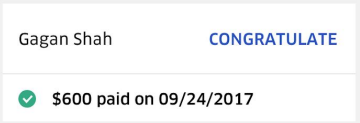

Invitee took 1st trip




Showing trip progress in status

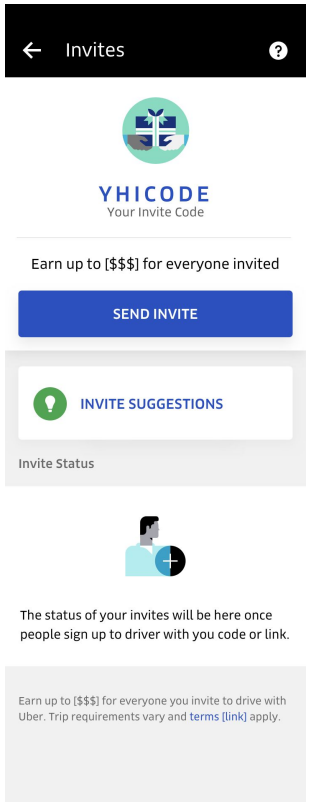



Invitee sees when will be paid

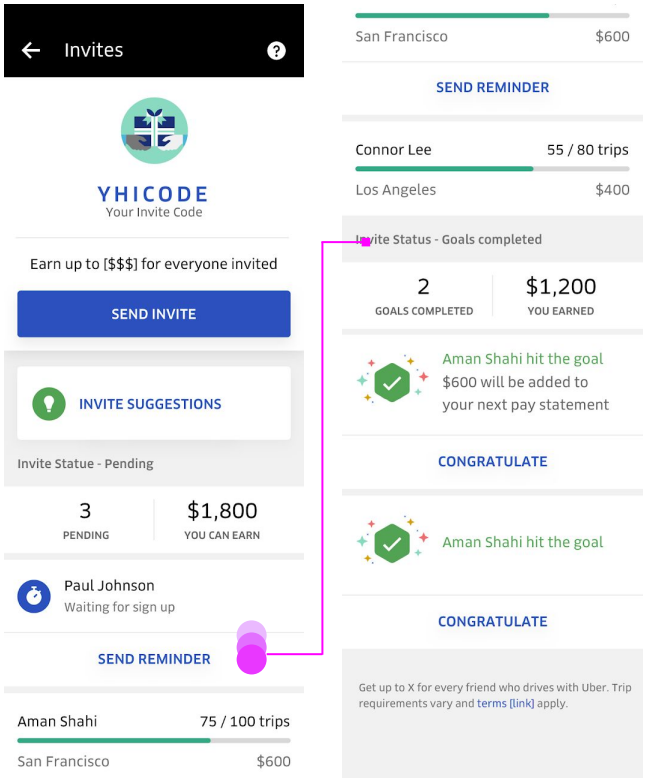



Shows paid date after paid

## Zero state



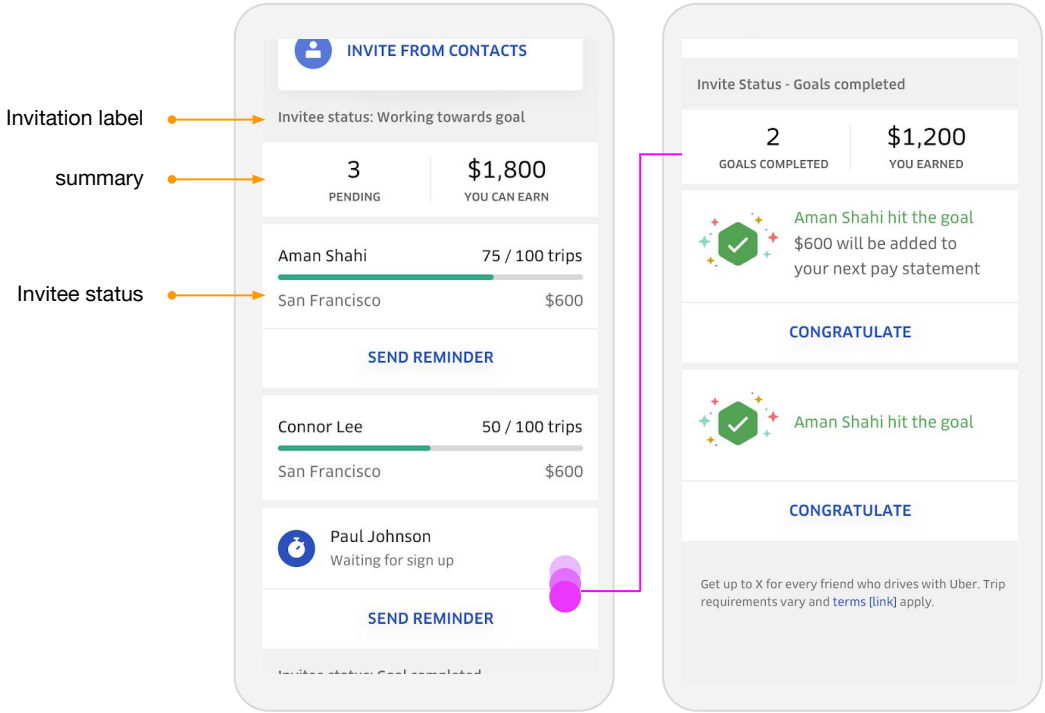

## Invitee exist state



# Manage invitations

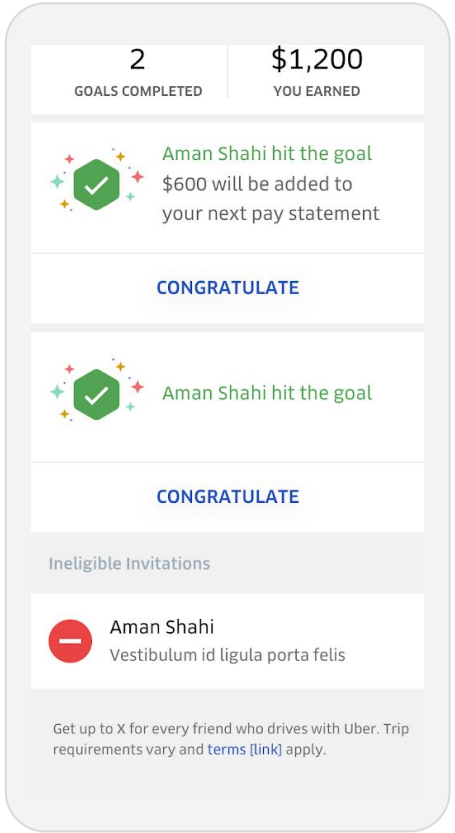
Manage invitation has 3 sections and ordered by pending, complete and Ineligible Invitations.

Pending and complete sections have a summary status that indicates number of pending/complete invitations and potential earnings and paid earnings.



# Manage invitations

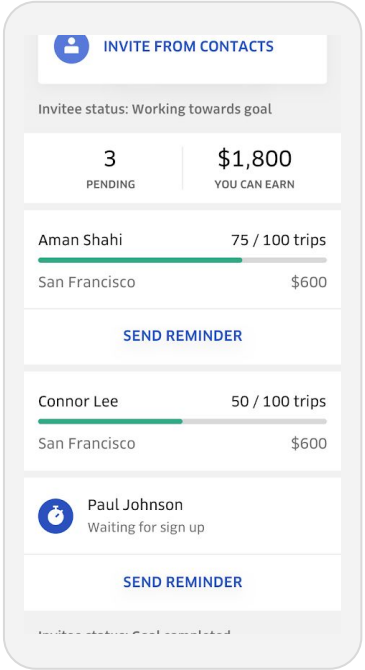
If there are ineligible Invitations, (disabled fraud referral, failed to pass background check, etc) we'll have an ineligible Invitation section after pending and complete section.



# Invite status

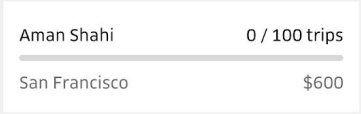
Invitee status are chronologically ordered.

**Chronologically ordered**



## Invitee status

Sign up via referral code or signup link



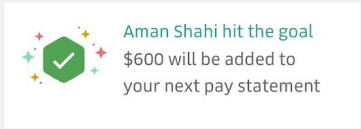

Invitee signed up with inviter reward

Invitee signed up with no inviter reward

Invitee got activated. Inform inviter that invitee is ready to drive

Invitee took 1st trip

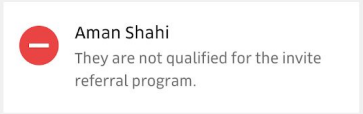
Showing trip progress in status




Inviter sees when invitee complete X trips before payment processed

Shows paid date after payment processed

No inviter award for when will be paid and after paid

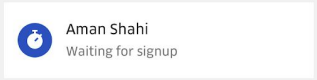



Disabled referral, BGC failed

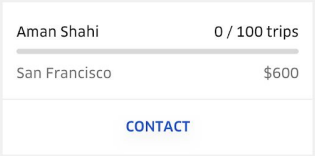
Warning expire within 30 days (not in P0)

## Invitee status

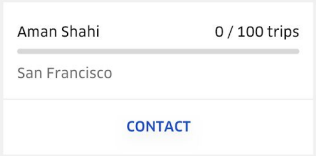
Sign up via contact picker



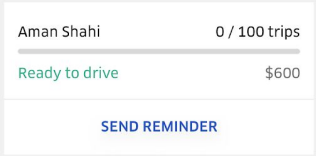

Inviter sent an invite from contact picker



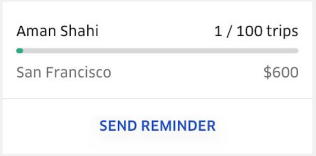

Invitee signed up from direct link



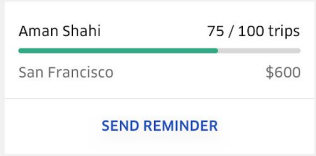

Invitee signed up with no inviter reward



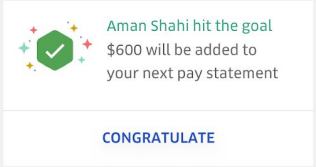

Invitee got activated. Inform inviter that invitee is ready to drive




Invitee took 1st trip

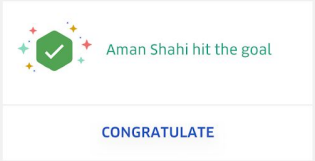



Showing trip progress in status

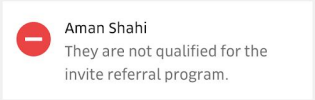



Inviter sees when invitee complete X trips before payment processed

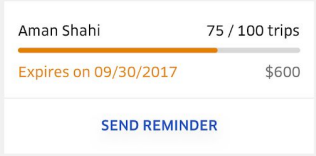
Shows paid date after payment processed




No inviter award for when will be paid and after paid

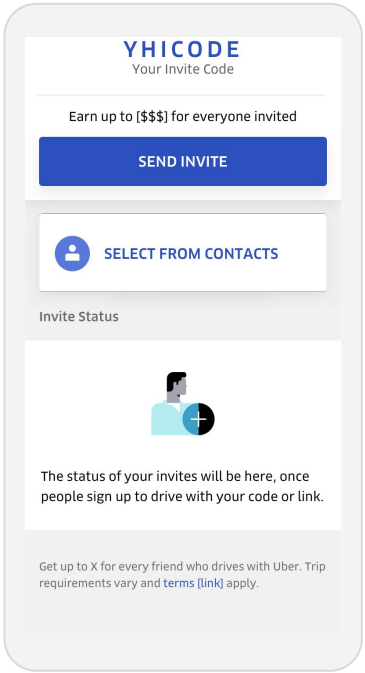



Disabled referral, BGC failed

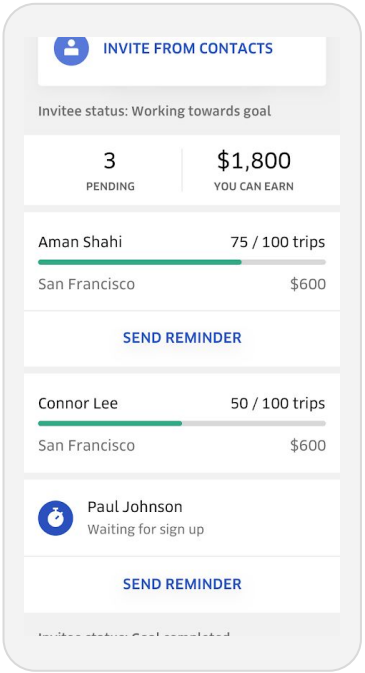



Warning expire within X days (Not in P0)

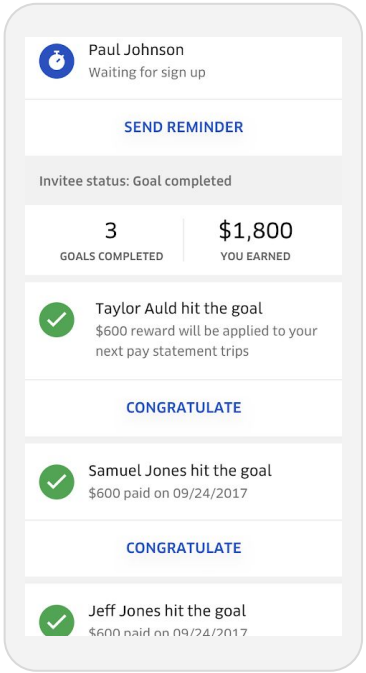
# Manage invitations states



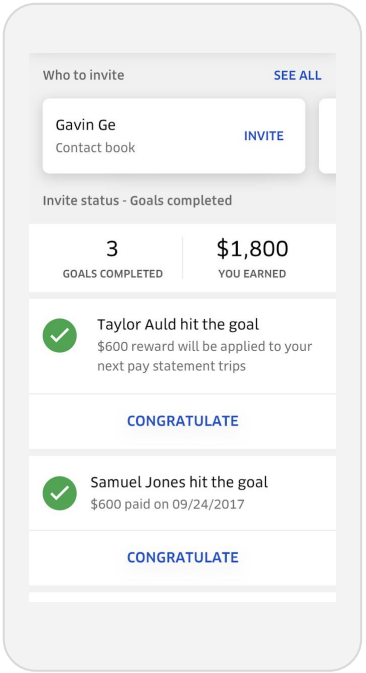

Zero state




Pending state

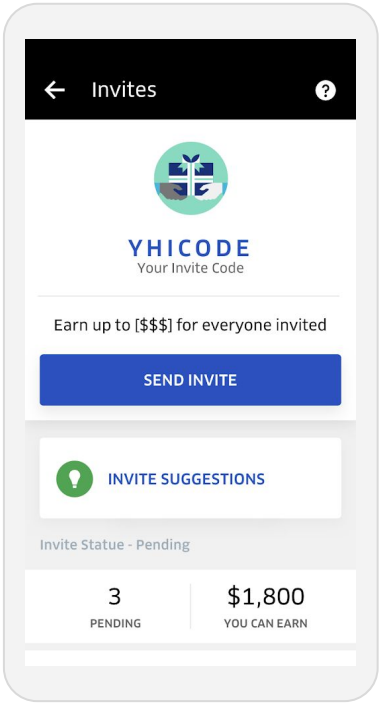


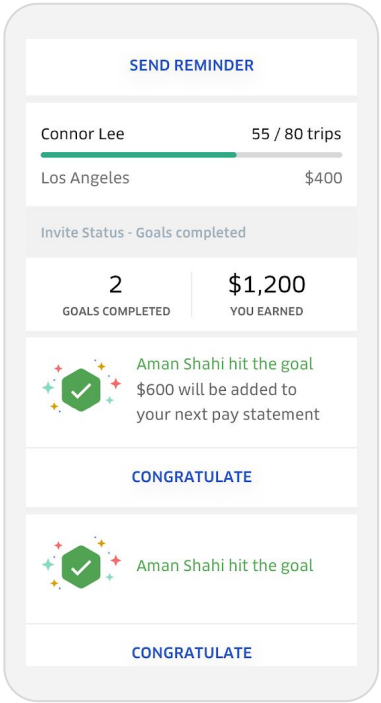

Completed state

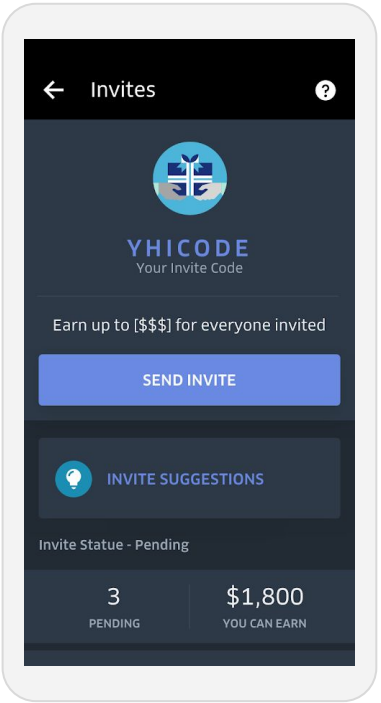


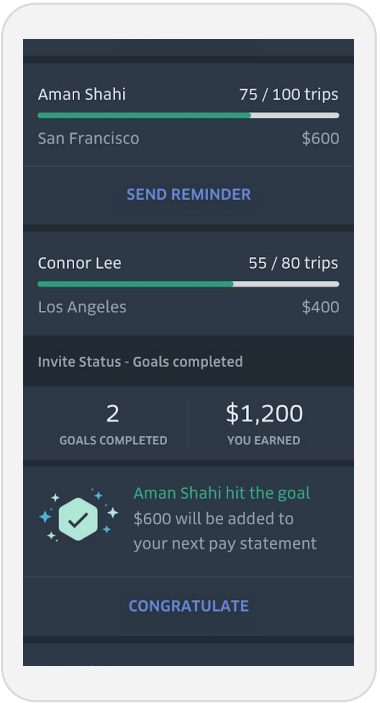

No pending but has completed state

# Day mode and night mode

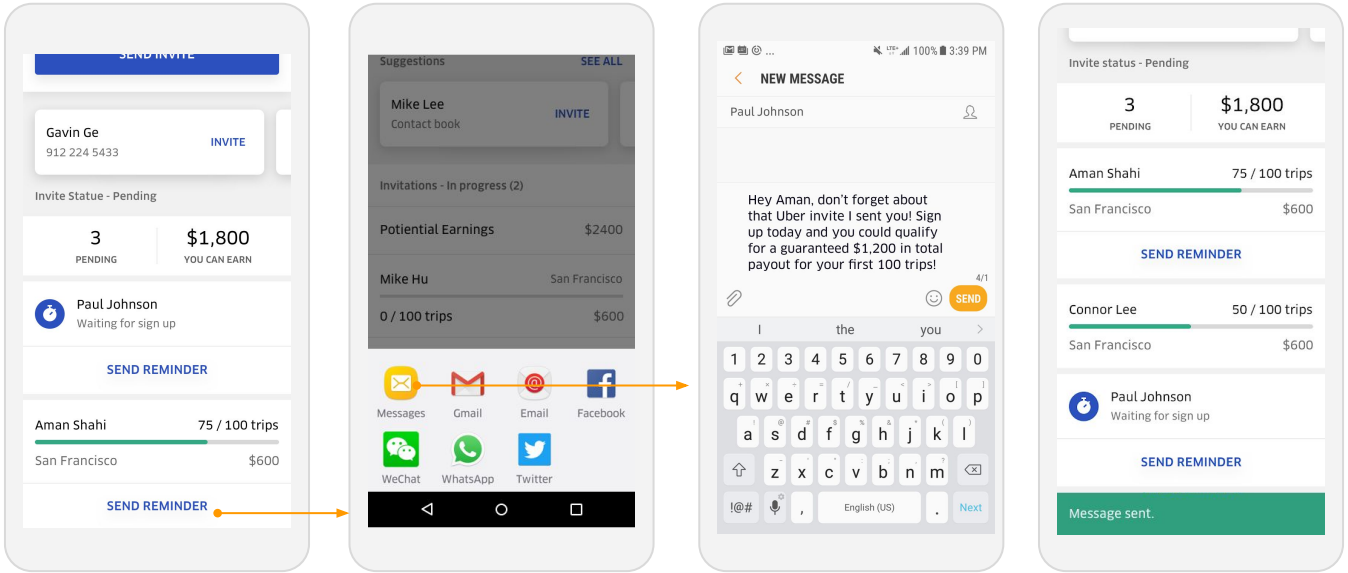


# Send reminder




Invitee progress card

Pull up sheet

SMS

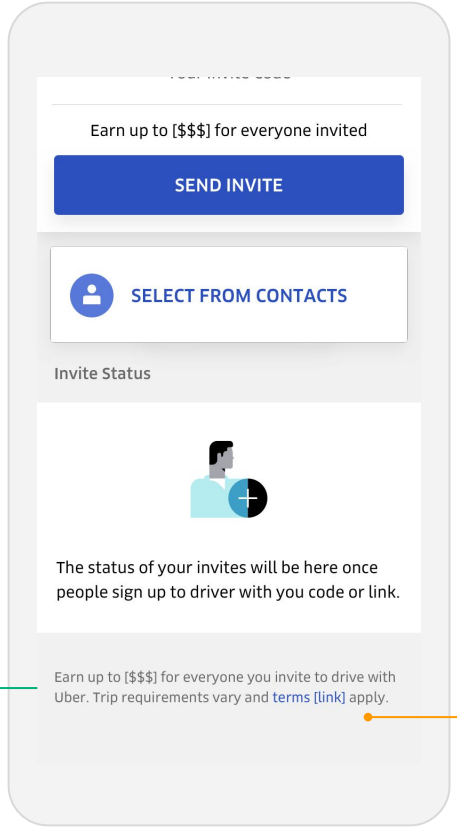
Toast

# Reminder and Congrats copy

| Traditional referral | | | | | | |
|---|---|---|---|---|---|---|
| | **Before 1st trip** | | **Trip in progress** | | **Hit the goal** | |
| | **SMS** | **Email** | **SMS** | **Email** | **SMS** | **Email** |
| Has invitee reward | Don't forget to start driving and earn a reward of $1,200 in [CITY]after completing your first 100 trips. | **Title:** Don't forget to start driving with Uber **Content:** Hey Mark, complete your first 100 trips and earn $1,200 ~~in [CITY~~]. | Great progress! Complete your first 100 trips to earn that reward of $1,200 ~~in [CITY]~~ | **Title:** Great driving progress! **Content:** Hey Mark, you're on your way to completing your first 100 trips and earning $1,200~~ in [CITY]~~. Keep it up! | Congrats on completing your first 100 trips and earning your driving reward! Well done. | **Title:** Driving goal achieved! **Content:** Hey Mark, congrats on completing your first 100 trips and earning your driving reward! Well done. |
| No invitee reward | Don't forget to start driving and start earning. | **Title:** Don't forget to start driving with Uber **Content:** Hey Mark, decide on your own schedule, then get on the road to start earning. | Great progress! Keep driving to get your first 100 trips completed. | **Title:** Great driving progress! **Content:** Hey Mark, you're on your way to completing your first 100 trips. Keep it up! | Congrats on completing your first 100 trips. Well done. | **Title:** Driving goal achieved! **Content:** Hey Mark, congrats on completing your first 100 trips. Well done. |

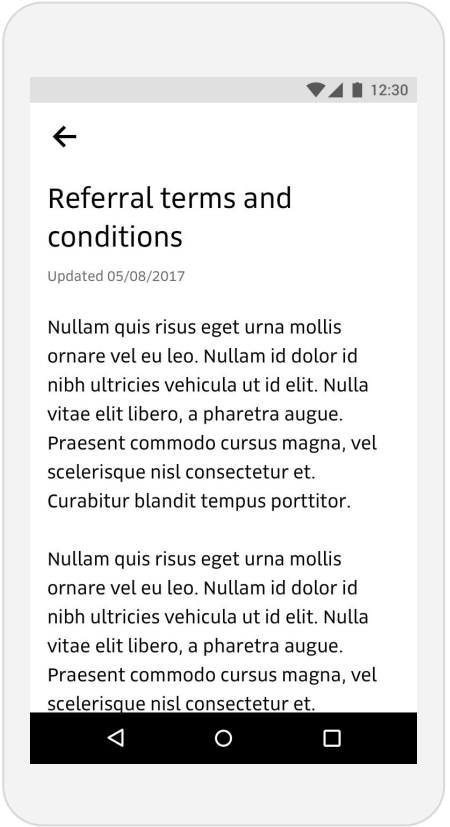
# Legal

Legal open a secondary page view




**TERMS AND CONDITIONS COPY CHANGE BASED ON THE VALUE PROP**

**Dashboard**

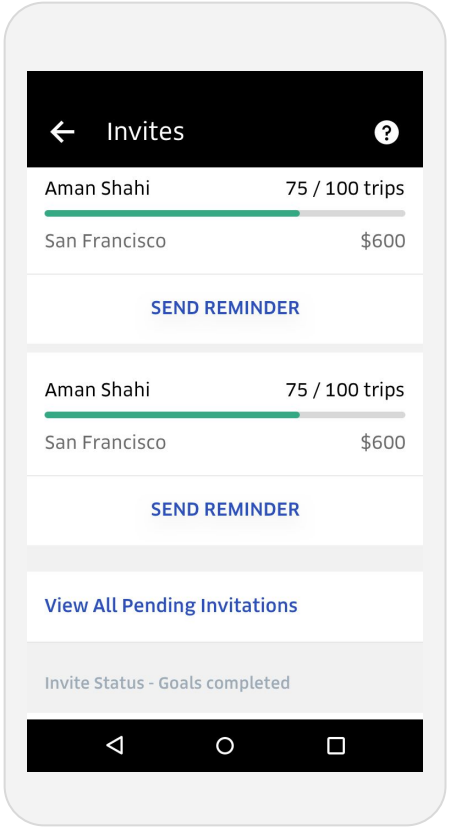


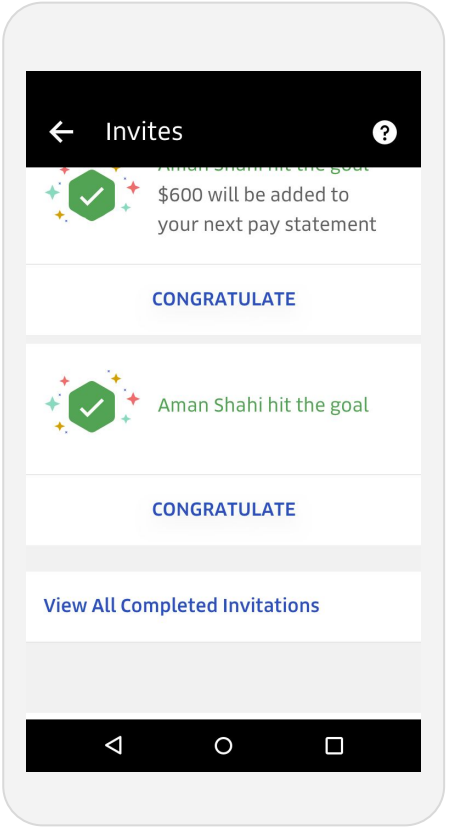

**Terms and conditions detail page**

## When driver is power inviter

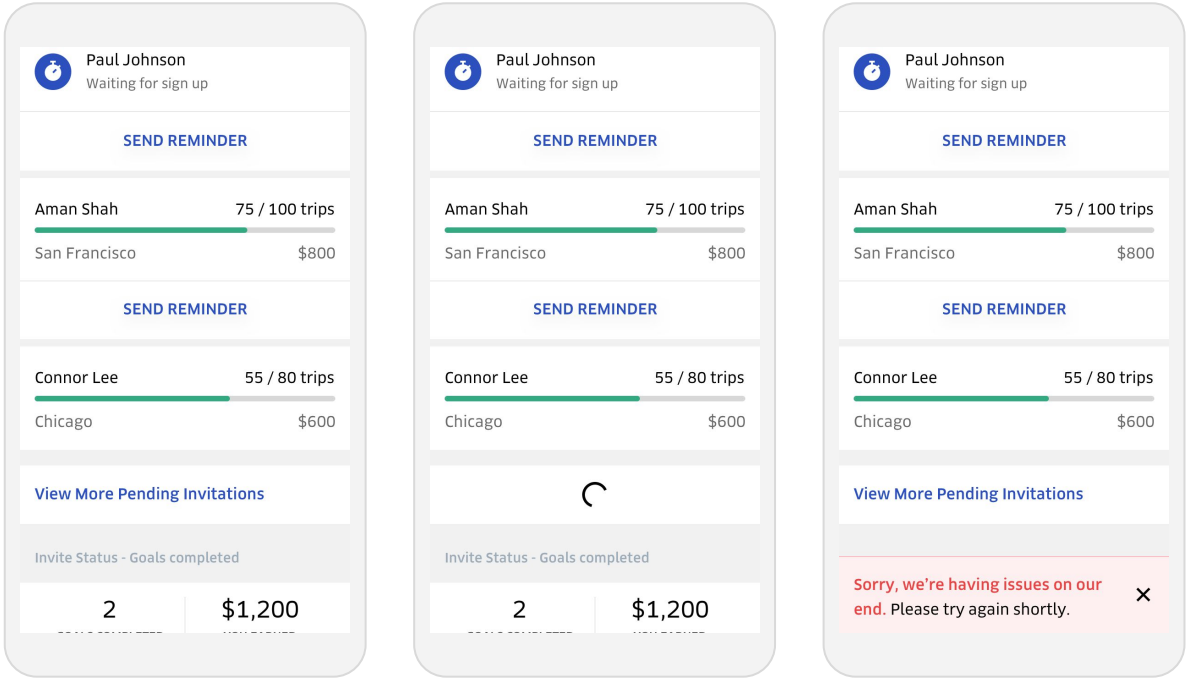
The CTA links to partner dashboard in webview next to “Pending” and “Completed” sections.

There is no CTA to link to partner dashboard for disabled section.



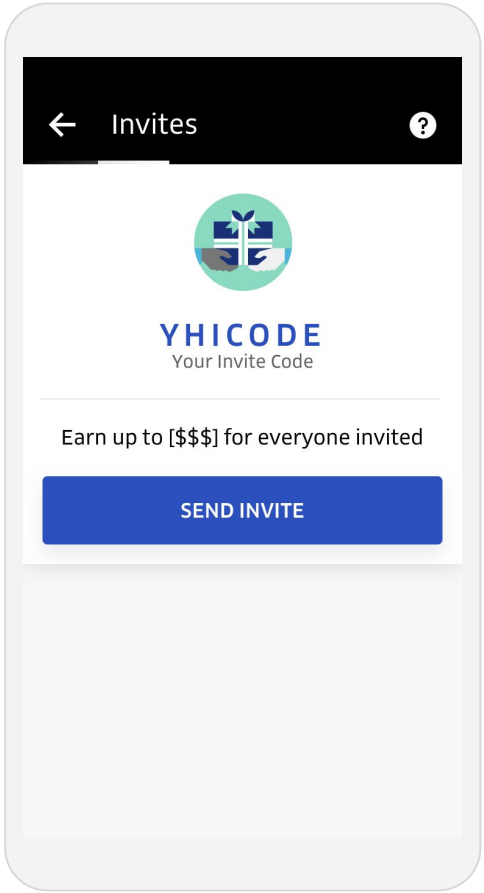



# Pagination


Paul Johnson
Waiting for sign up
SEND REMINDER
Aman Shah
75 / 100 trips
San Francisco
$800
SEND REMINDER
Connor Lee
55 / 80 trips
Chicago
$600
View More Pending Invitations
Invite Status - Goals completed
2
$1,200
Paul Johnson
Waiting for sign up
SEND REMINDER
Aman Shah
75 / 100 trips
San Francisco
$800
SEND REMINDER
Connor Lee
55 / 80 trips
Chicago
$600
Invite Status - Goals completed
2
$1,200
Paul Johnson
Waiting for sign up
SEND REMINDER
Aman Shah
75 / 100 trips
San Francisco
$800
SEND REMINDER
Connor Lee
55 / 80 trips
Chicago
$600
View More Pending Invitations
Sorry, we're having issues on our end. Please try again shortly.

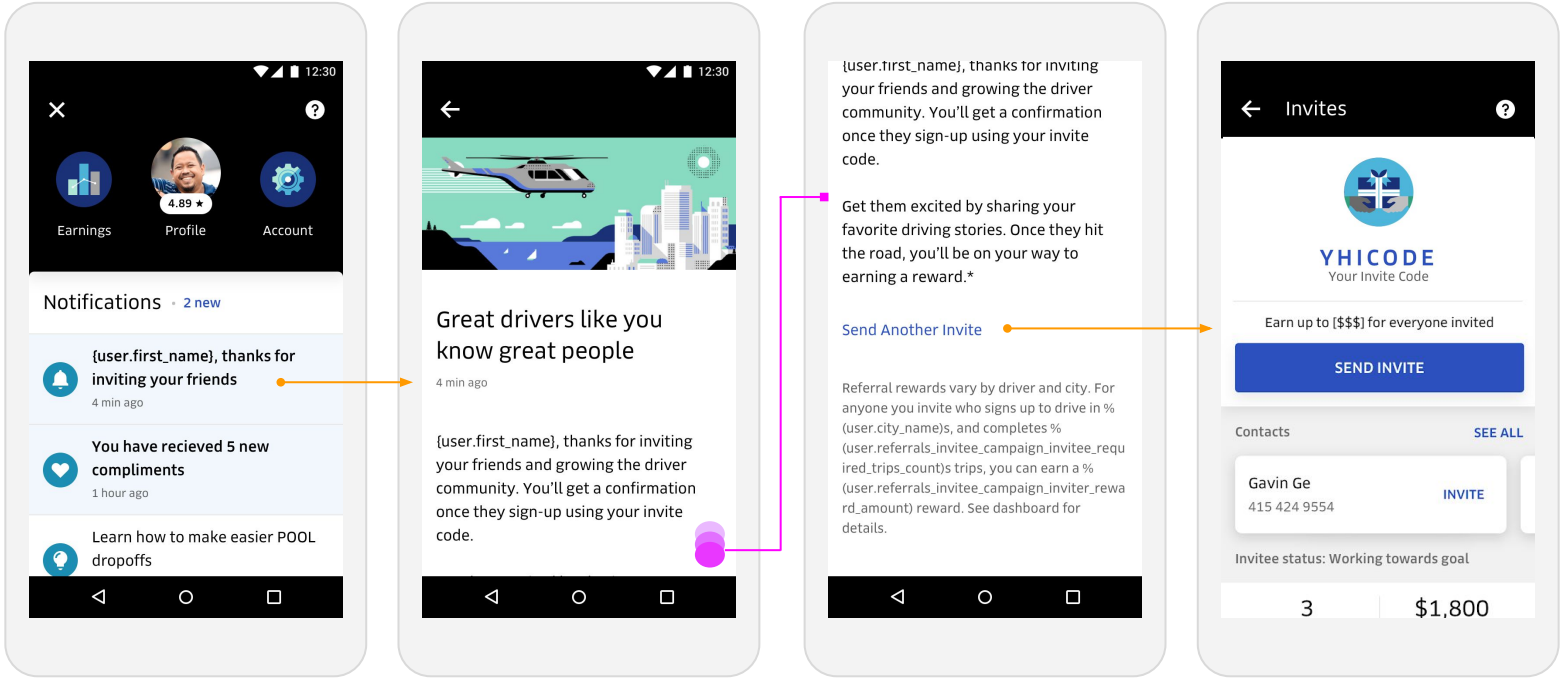
# Loading

Loading UI



# Comms

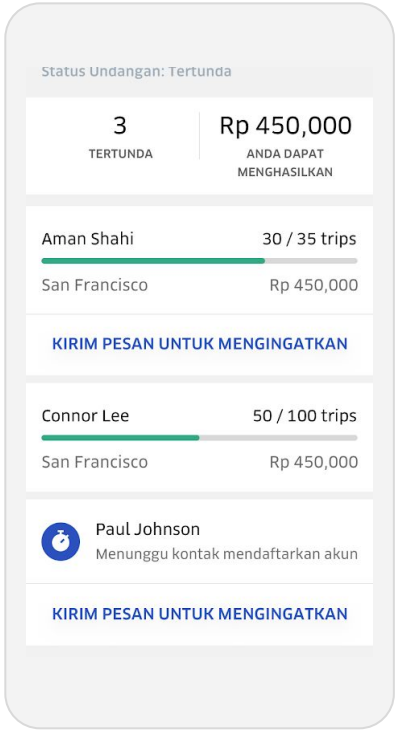
# [Referral Comms doc]



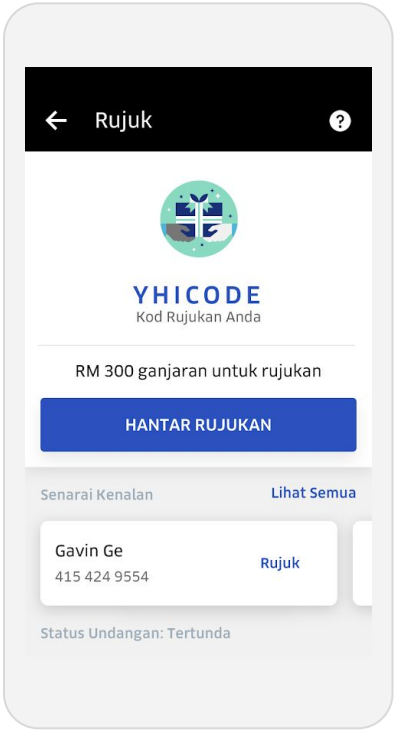

**Header image is placeholder**

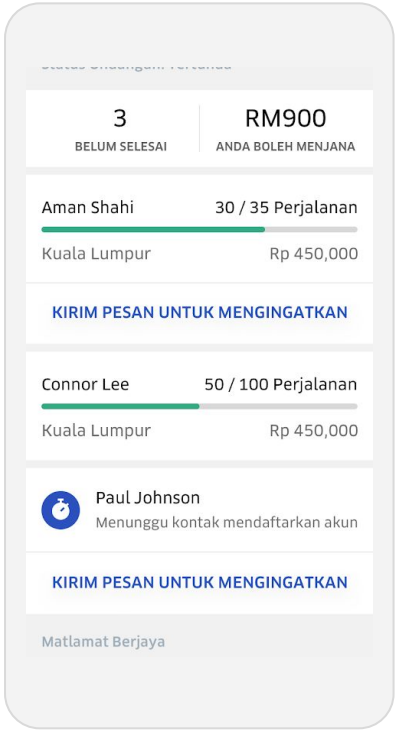
# Localization

# Localization




**Bahasa Indonesia**




**Bahasa Malaysia**

# P1

**Problem**

## Retroactive Referral Request

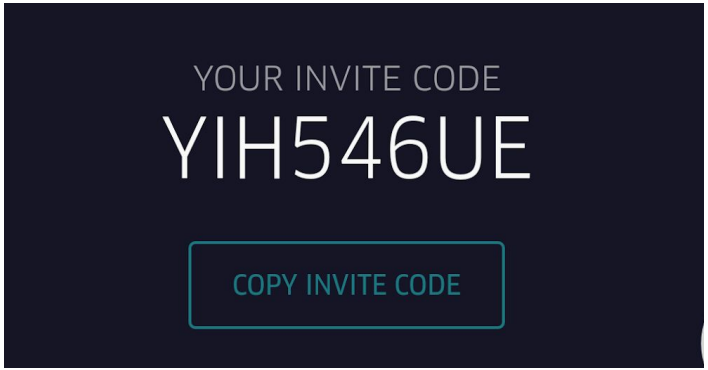
Users contact support to add referral after invite signs up.

Reasons:
-Invitee forgets to enter code
-Invitee enters wrong code
-Invitee does not know where to enter invite code
-Fraud

## Invite code

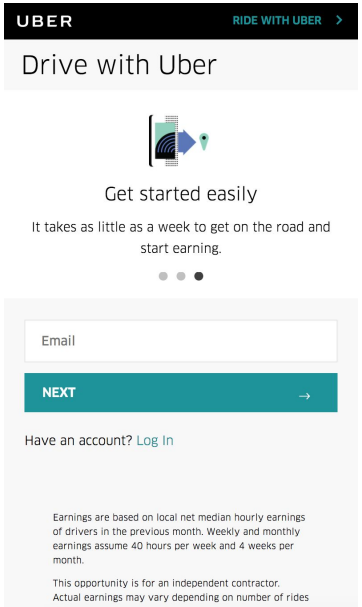
**Inviter:**
Hard to remember and not relevant with driver (Code randomly generated from backend). To avoid confusion, “0””o” are excluded.

**Invitee:**
High possible to entered the wrong invite code especially non English speaking countries.

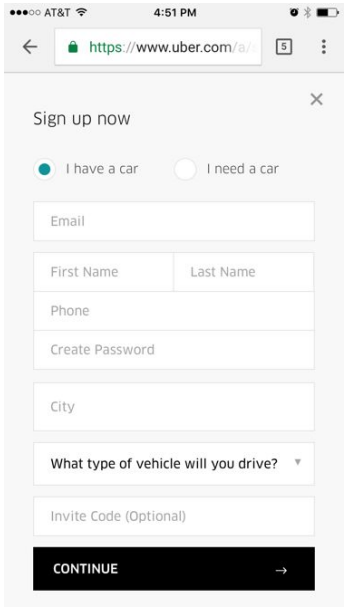



Referral code example

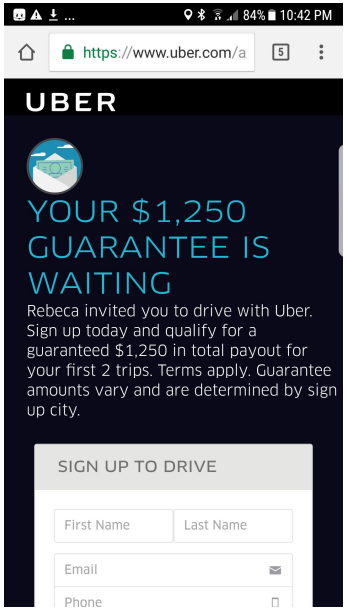
# Sign up landing pages



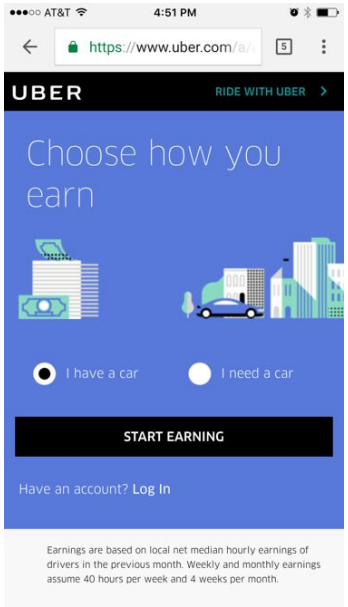

Paid marketing landing pages




Organic landing pages




Referral landing page

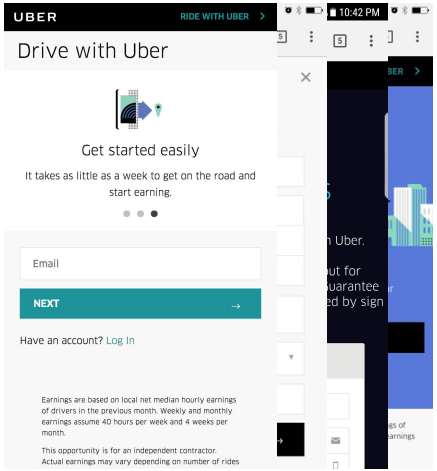



Local marketing landing pages

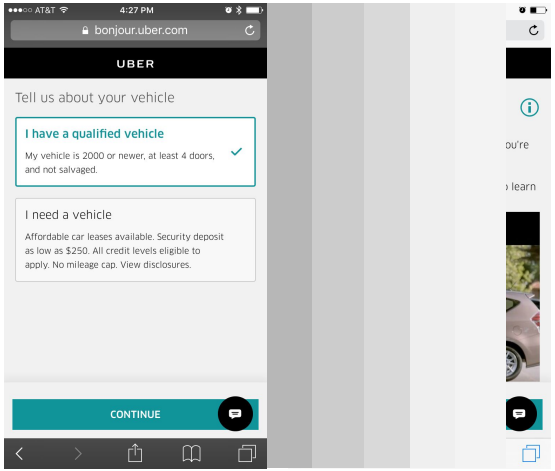
# Onboarding

It’s hard to tell where and when to input referral code during the signup process with multiple different landing pages as different channels maintained by different stakeholders.

Forgot to enter invite code by the massive requirements during the process.




Sign up




Onboarding

**Potential solutions**

## Optimizing invite code

Make it more relevant to driver.

- Phone number
- Name + Number
- Customizable code
- QR code
- etc

This would improve the experience on inviter side, but invitee still need to remember the code and enter on the landing pages which is still a fraction. QR code decrease the input fraction, but required invitee has the app already which is applicable for all the use cases.

## Optimizing landing pages

Make referral code input more noticeable

It might increase fraud as people who do not have invite code would search the code online. This is not supposed to be the use case for referral program.

# Motivation

## Inviter’s motivation is higher than invitee

All the insights from research and behaviors demonstrate inviter would like to do a bit extra work to make sure invite is successfully applied to invitee.

# Who inviter invite?

**Relatives**
**Friends**
**Coworkers**
**Strangers/Unfamiliar persons***

*From insights, only power inviters actively refer strangers who they do not know/unfamiliar before.

# What information inviter knows

**Invitee’s phone number**
**Invitee’s name**
**Invitee’s gender**
**Invitee’s city**
**Invitee’s estimate age**
**If invitee has a car or not**

## Invitee uses code flow

| Inviter | Invitee | | | |
|---|---|---|---|---|
| Sends code | Get code | After X days | Signup | Support |
| SMS | SMS | Averagely takes 3 days | Ask code again | Retroactive Referral Request |
| Whatsapp and other messaging apps | Whatsapp and other messaging apps | | Forgot to enter code | Referral status check |
| Screenshots | Screenshots | | Enter wrong code | No rewards for inviter and invitee |
| Handwriting | Handwriting | | | Churn |
| Print materials etc | Print materials etc | | | |

## Optimized code could optimize the experience, but using code is actually a fraction

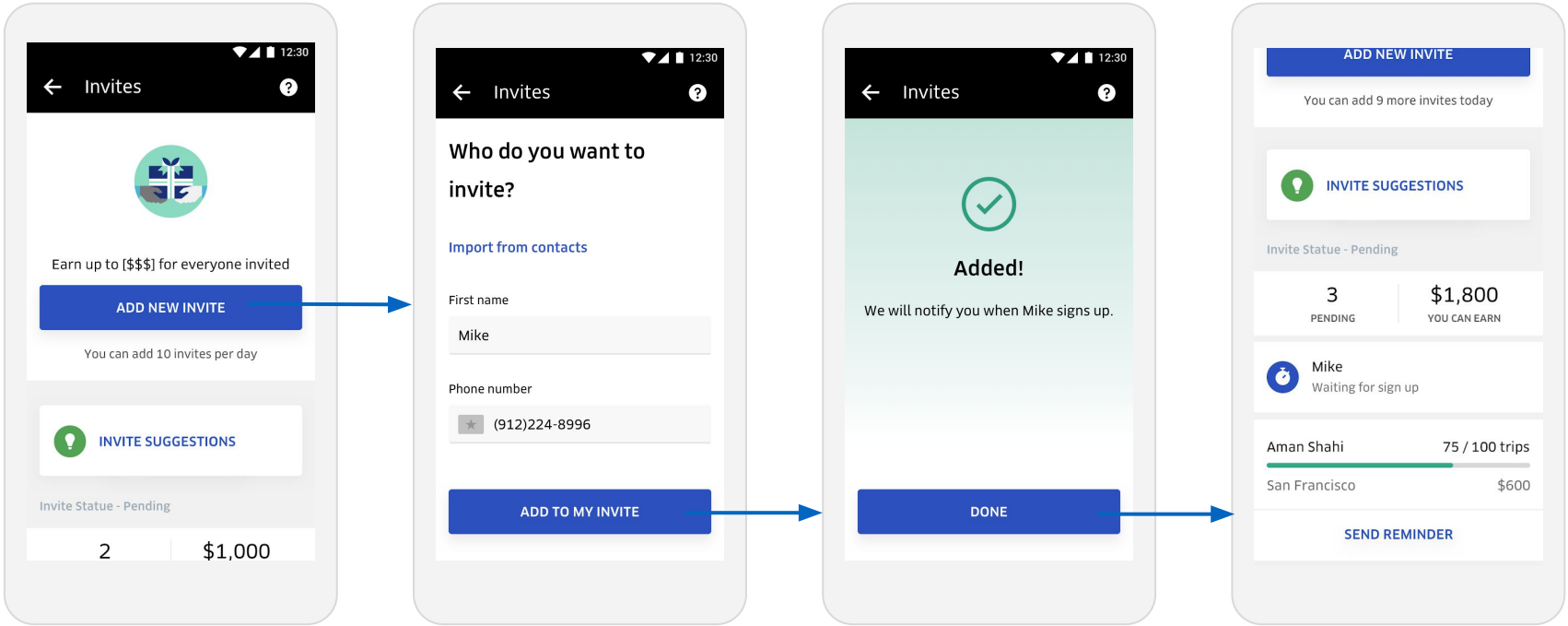
| Inviter | Invitee | | | |
|---|---|---|---|---|
| Sends code | Get code | After X days | Signup | Support |
| **SMS** | **SMS** | Averagely takes 3 days | **Ask code again** | Retroactive Referral Request |
| **Whatsapp and other messaging apps** | **Whatsapp and other messaging apps** | | **Forgot to enter code** | Referral status check |
| **Screenshots** | **Screenshots** | | **Enter wrong code** | No rewards for inviter and invitee |
| **Handwriting** | **Handwriting** | | | Churn |
| **Print materials etc** | **Print materials etc** | | | |

# Out of inviter’s control

**Invitee forgets to enter code**
**Invitee enters wrong code**

# Removing the fraction of using code

# Invites flow - no need to send message



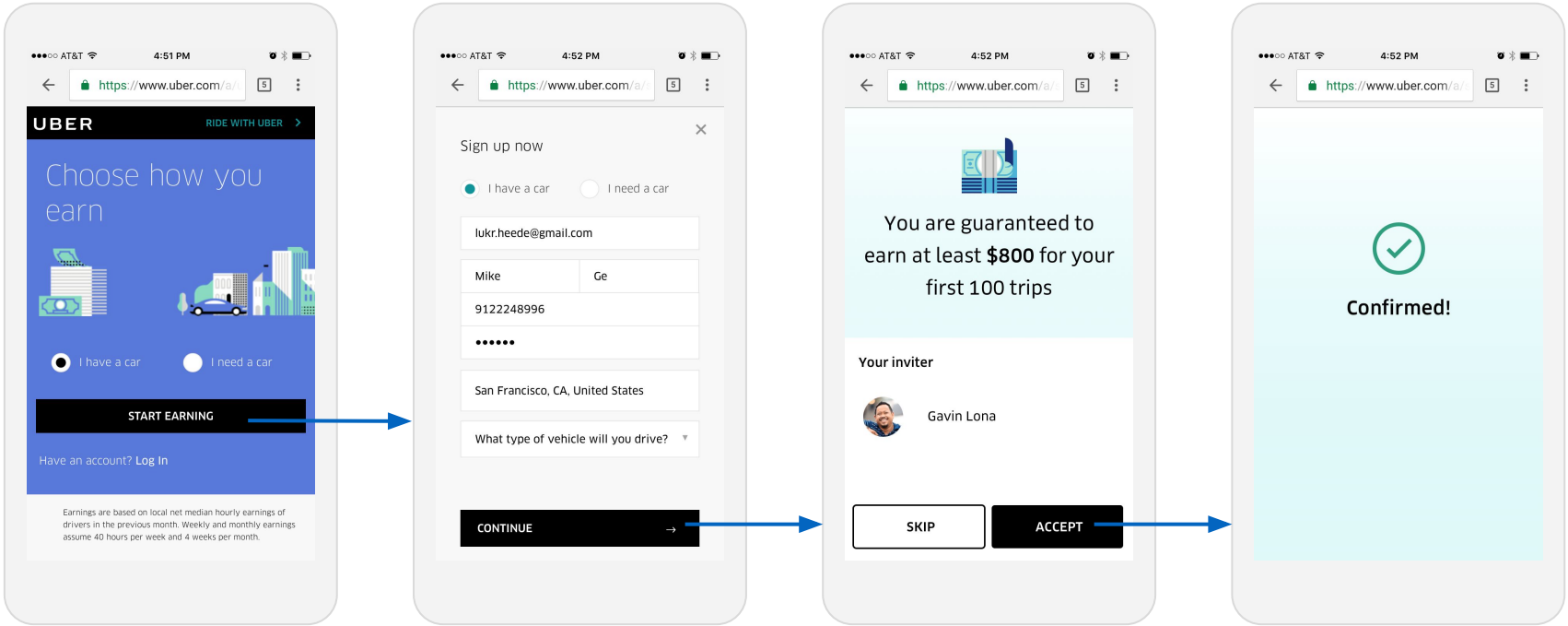

Referral home

Add invite

Added invite

Referral home

# Invitee flow- no need to enter code




Sign up landing page

Create account

Invite info

confirme

## Existing and new flow comparison

The new flow still takes the same steps as existing invite flow. However, it extremely reduced the fraction on the invitee side.

**Improvements:**

No need to remember invite code

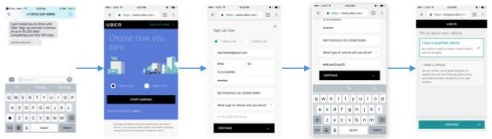
No need to look for where to add invite code

No worry about enter wrong code

## Existing

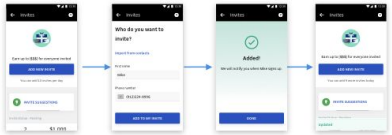
Inviter

Invitee

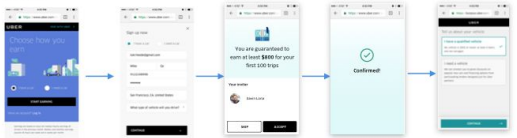


## New

Inviter



Invitee

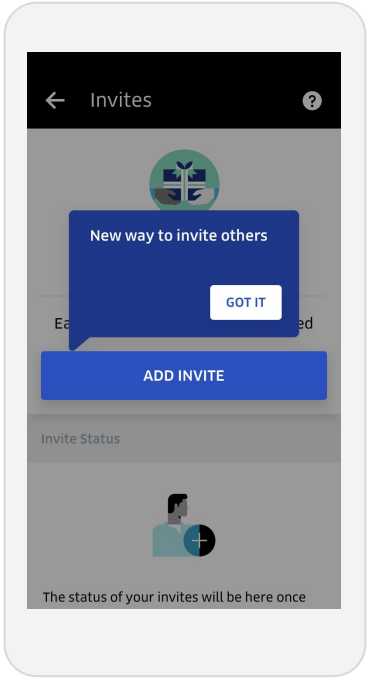


## Minimized fraction

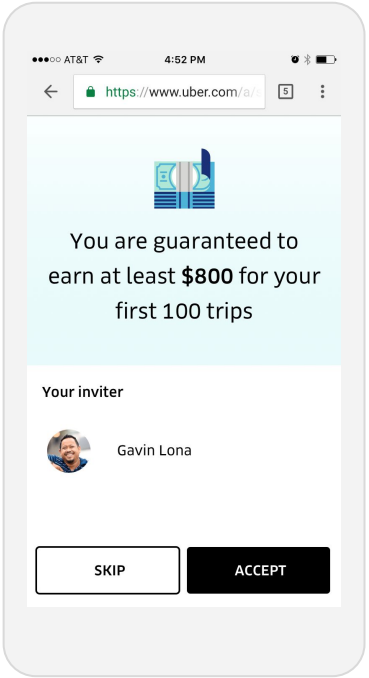
No worry about failed invite due to invitee's fault

No need to remember invite code
No need to look for where to add invite code
No worry about enter wrong code

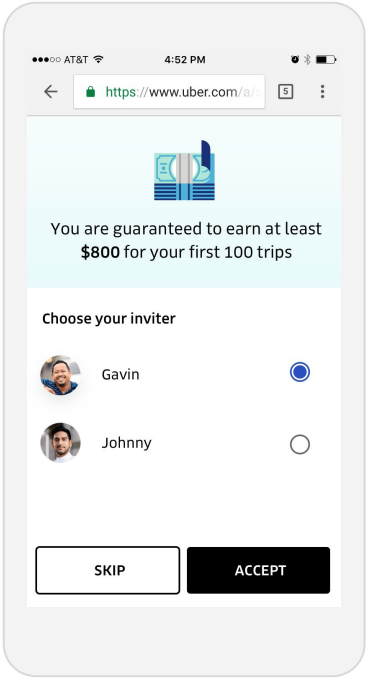
# Others




FTUX




Single inviter




Multi inviters

# Inviter

Use cases review

Do not need to send code or link to invitee via SMS, Whatsapp and etc

Help to signup in person

Do not need to print referral code

Do not need to write down invite code

Do not need to take invitee to GLH

Ask invitee go to GLH

Hire people to refer others

Pay to advertise own referral landing pages

Post on social media

# Invitee

Use cases review

Do not need to use referral link sign up via referral landing page

Do not need to use referral code on paid marketing landing pages

Do not need to use referral code on organic landing pages

Do not need to use referral code on region created landing pages

Sign up via GLH

Search referral code/link online

Sign up by inviter

# SPECS

# SPECS

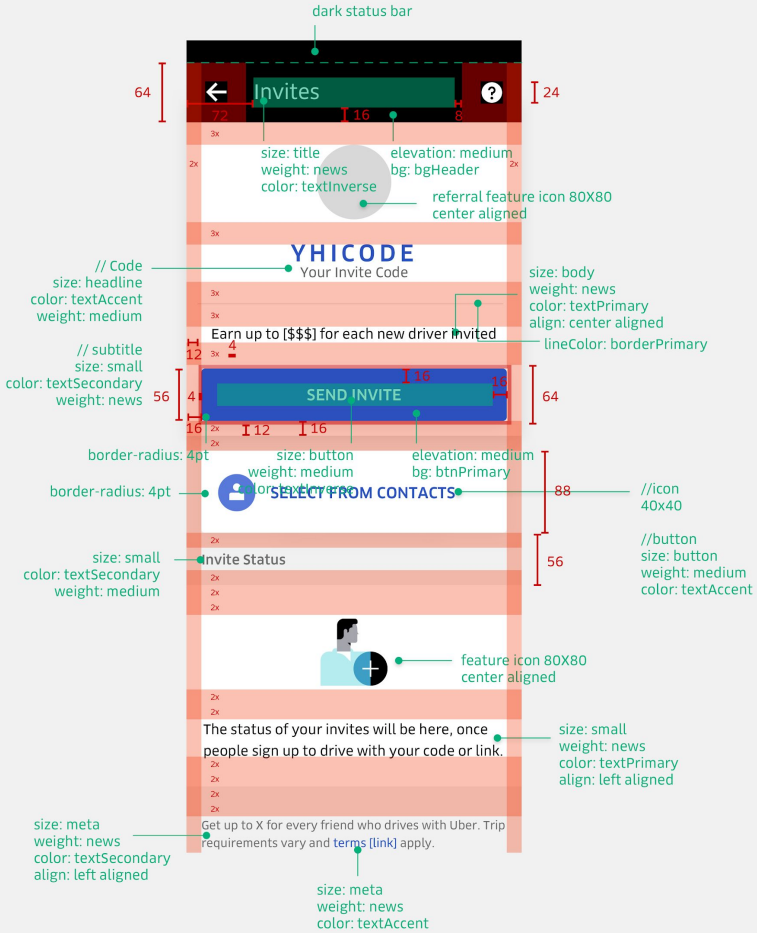
Spacing, font type, font sizes, colors are noted on the following slides.

[Carbon] Platform UI Tracker indicates specific Android style for engineers.

Assets include header referral icon, empty state icon, completion icon, waiting icon etc.

# Home

Zero state



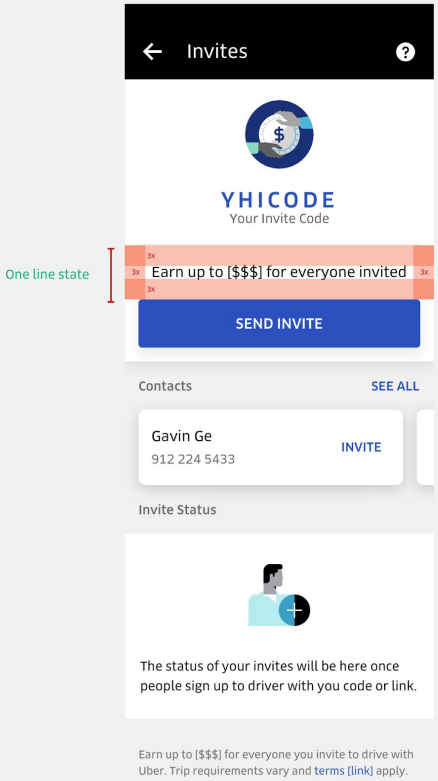
// Code
size: headline
color: textAccent
weight: medium
UPPERCASE
Character Spacing: 4

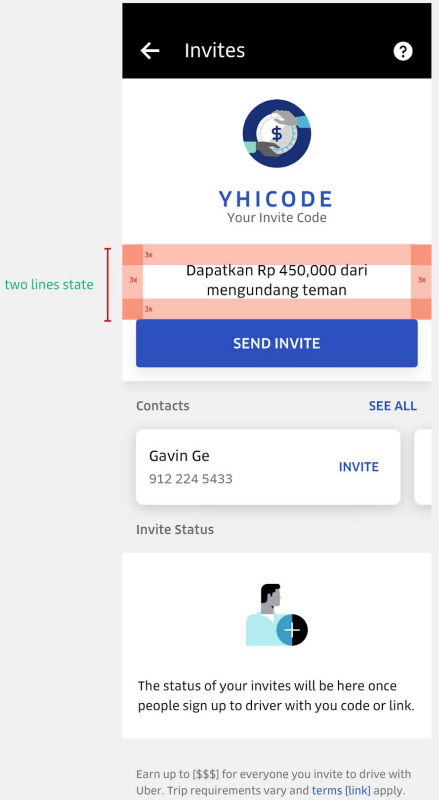
// subtitle
size: small
color: textSecondary
weight: news

YHICODE
Your Invite Code

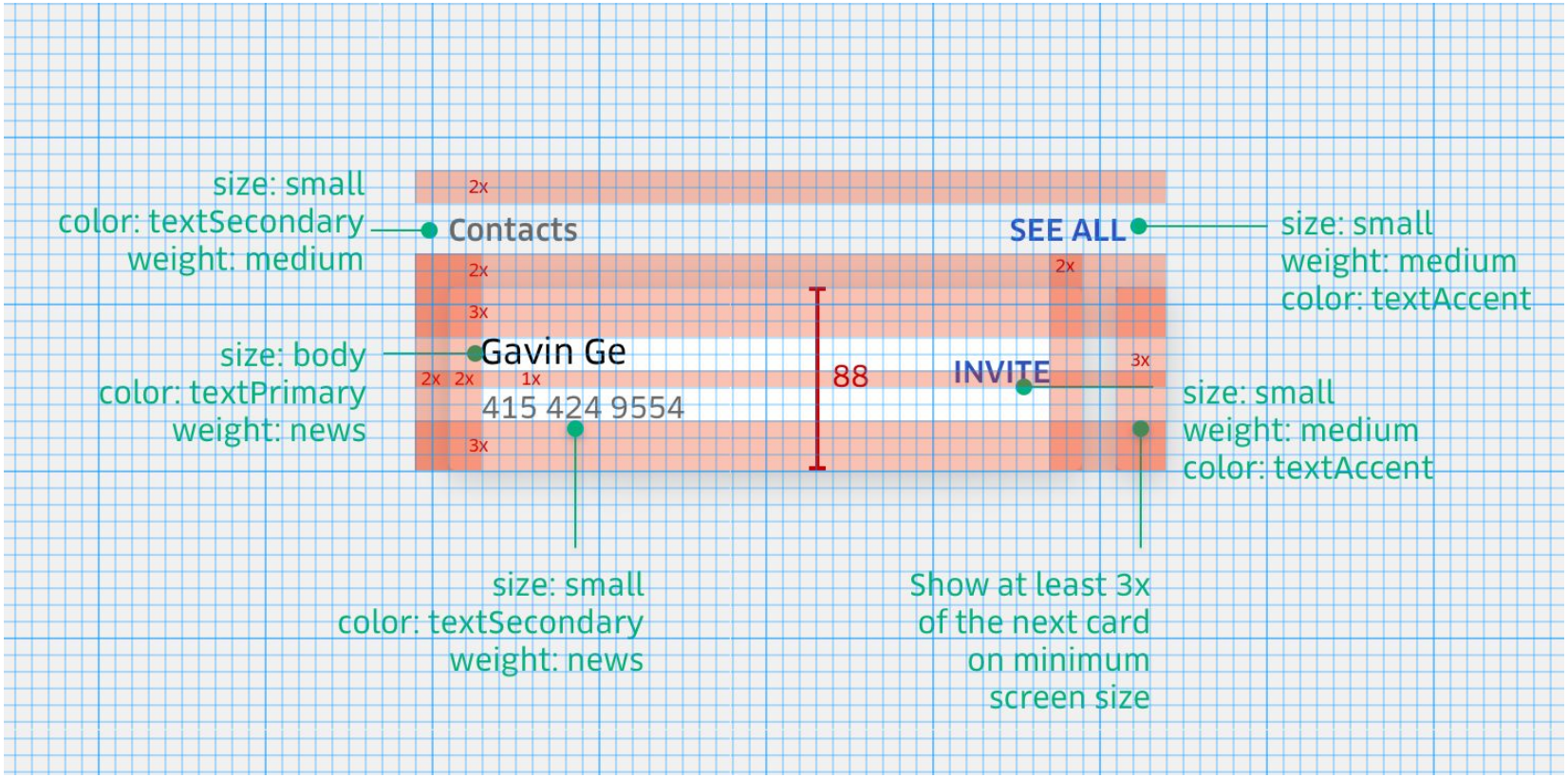
## Description title

The description section can be expended to fit two lines copy.

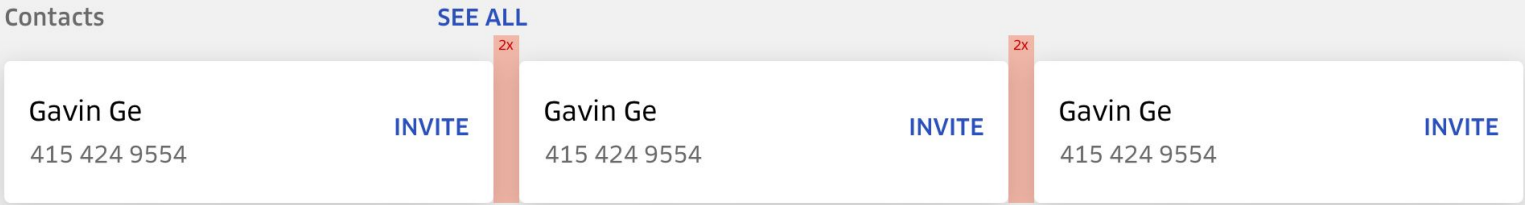


## Contacts

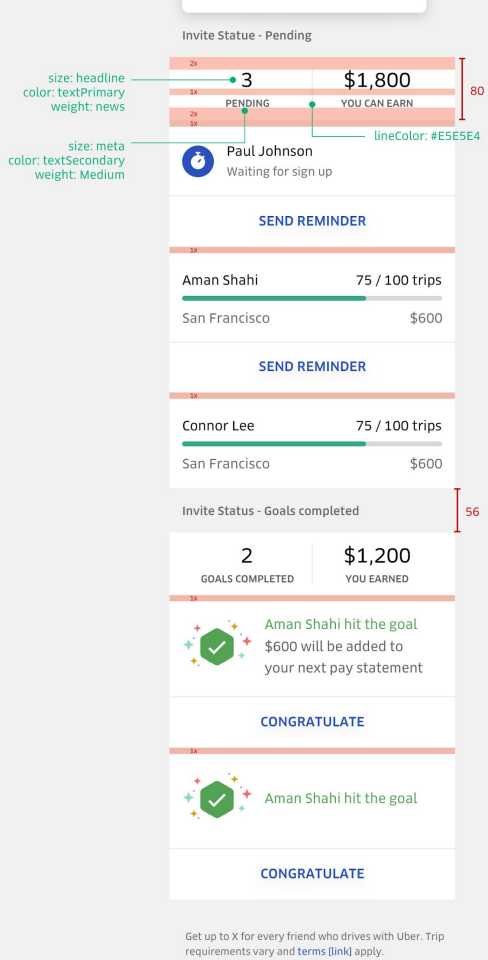

size: small
color: textSecondary
weight: medium
Contacts
SEE ALL
size: small
weight: medium
color: textAccent
size: body
color: textPrimary
weight: news
Gavin Ge
415 424 9554
88
INVITE
size: small
weight: medium
color: textAccent
size: small
color: textSecondary
weight: news
Show at least 3x
of the next card
on minimum
screen size
2x
3x
1x

# Contacts


Contacts
SEE ALL
2x
2x
Gavin Ge
415 424 9554
INVITE
Gavin Ge
415 424 9554
INVITE
Gavin Ge
415 424 9554
INVITE

# Home

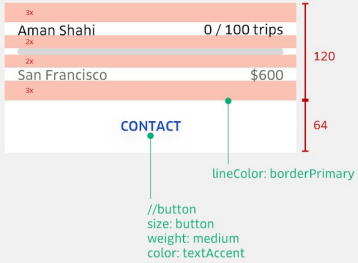
Manage invitation

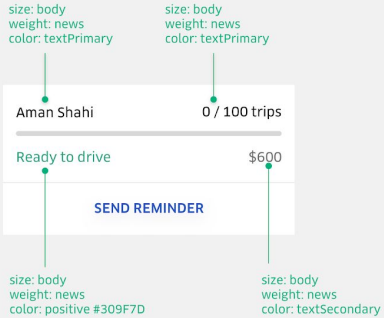


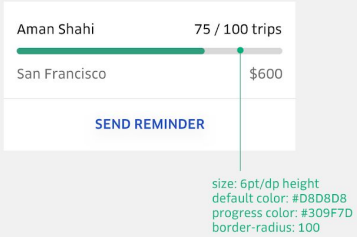
# Status card

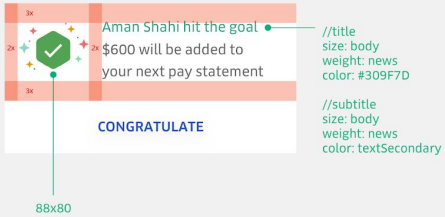
## Invitee status

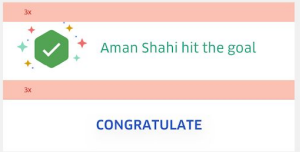
No bottom CTA if signs up via referral code or sign up link

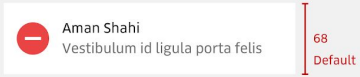


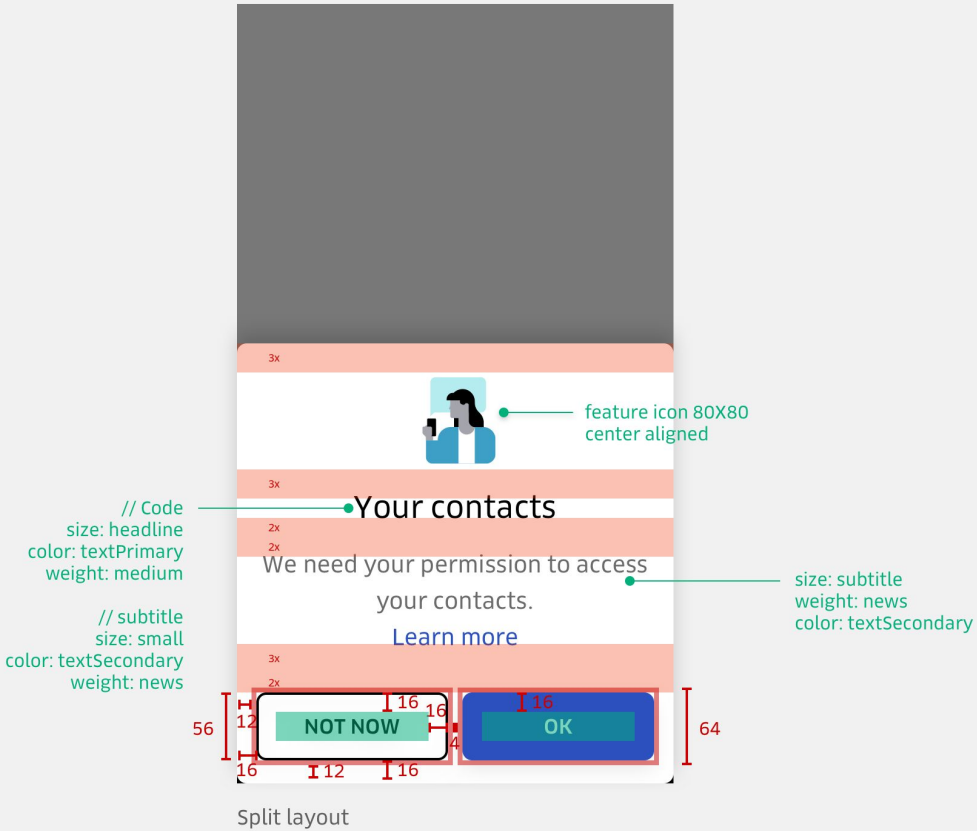



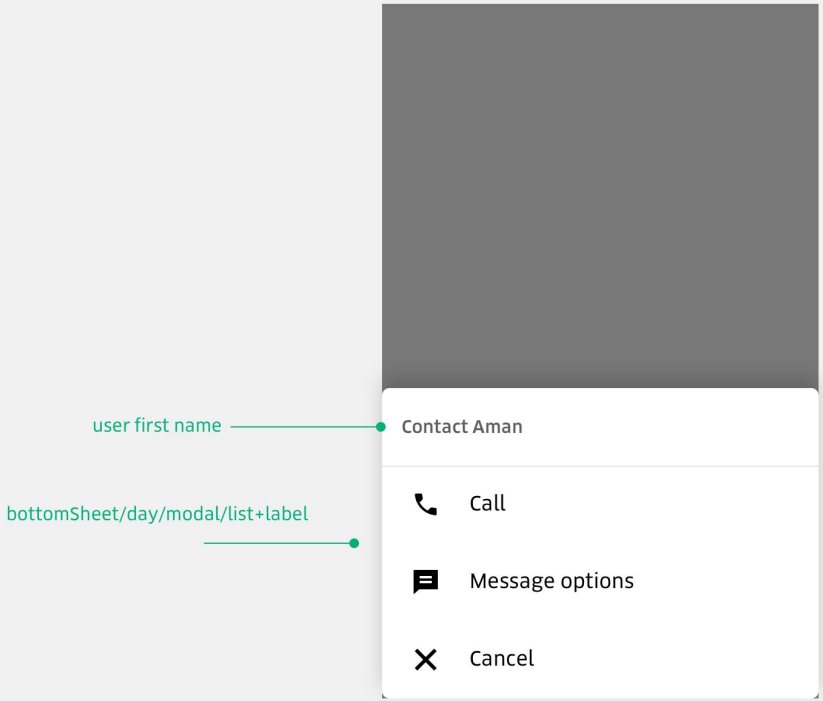



# Permission

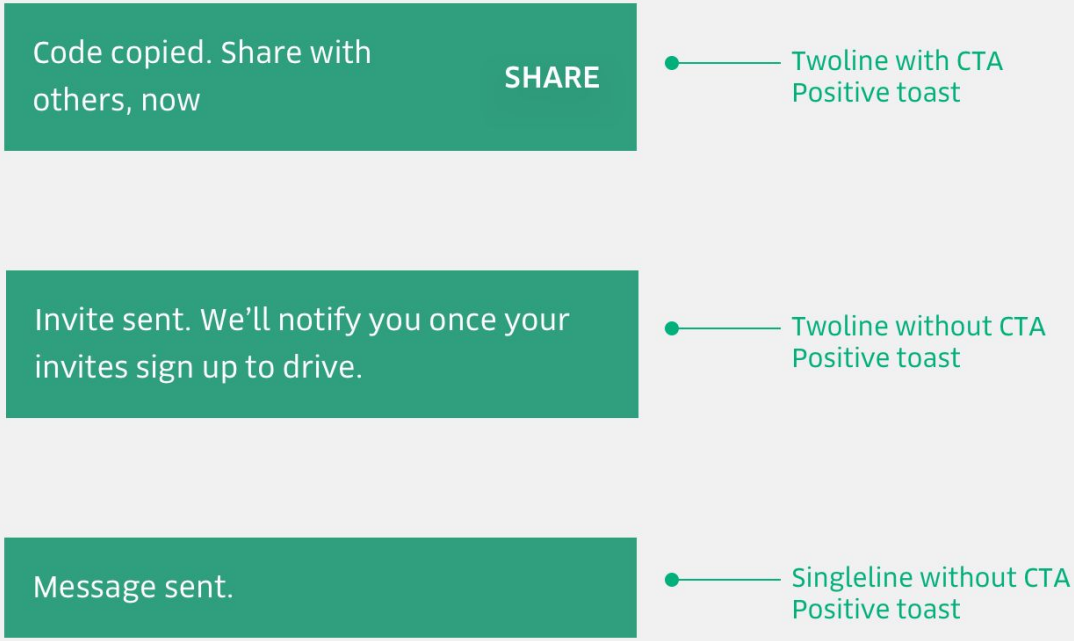



Split layout

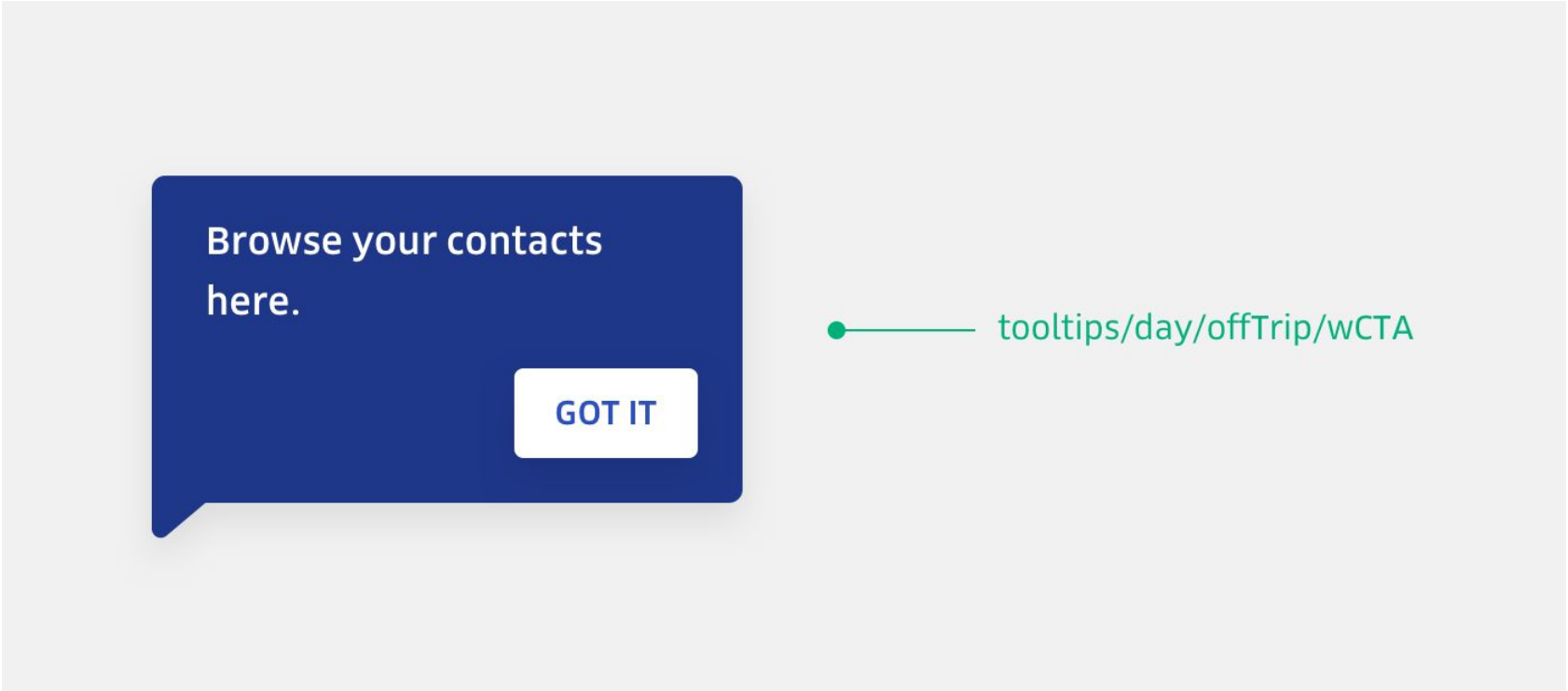
# Carbon bottom sheet



# Toast


Code copied. Share with others, now
SHARE
Twoline with CTA
Positive toast
Invite sent. We'll notify you once your invites sign up to drive.
Twoline without CTA
Positive toast
Message sent.
Singleline without CTA
Positive toast

**Tooltips**



# Congratulation icon

turquoise10
#309F7D

turquoise4
#B1E7D6

navy8
#2C51BE

red6
#EA4444

amber6
#FFBE33

# Contact picker permission icon

teal9
#1C8EB4

black
#000000

grey6
#A6A5A5

white
#FFFFFF

blue3
#CDE1F4

# Referral icon

teal6
#4DB5D9

turquoise10
#309F7D

grey5
#C0C0C0

white
#FFFFFF

navy13
#1A3177

# Empty state icon

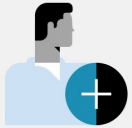
teal9
#1C8EB4

black
#000000

grey6
#A6A5A5

white
#FFFFFF

blue3
#CDE1F4



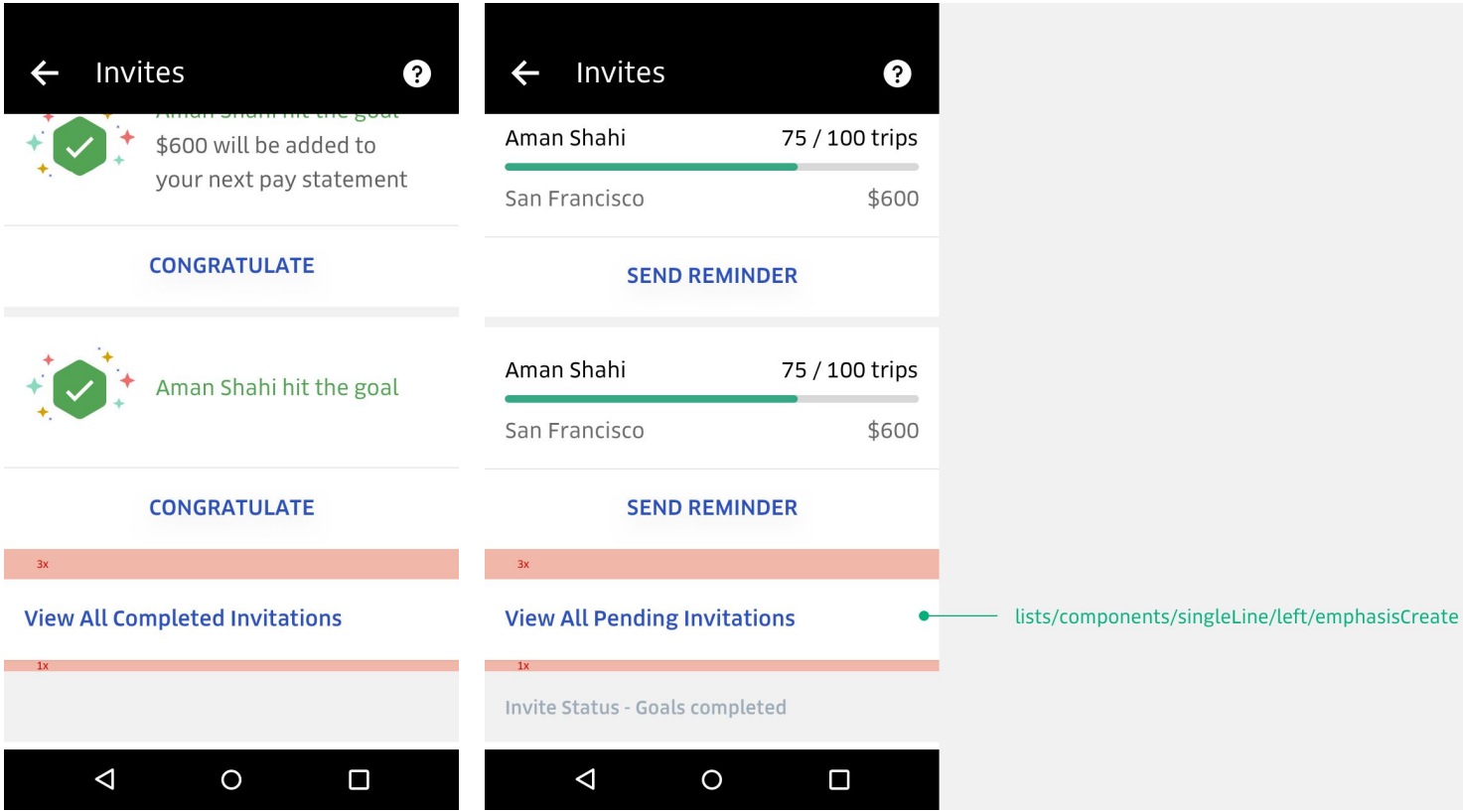
**Contacts icon**

teal9
#1C8EB4

**icon font**

icons/day/feature/notification-category/account

## Webview CTA


Invites
$600 will be added to your next pay statement
CONGRATULATE
Aman Shahi hit the goal
CONGRATULATE
3x
View All Completed Invitations
1x
Invites
Aman Shahi
75 / 100 trips
San Francisco
$600
SEND REMINDER
Aman Shahi
75 / 100 trips
San Francisco
$600
SEND REMINDER
3x
View All Pending Invitations
1x
Invite Status - Goals completed
lists/components/singleLine/left/emphasisCreate

# Legal

Final header design with legal link.

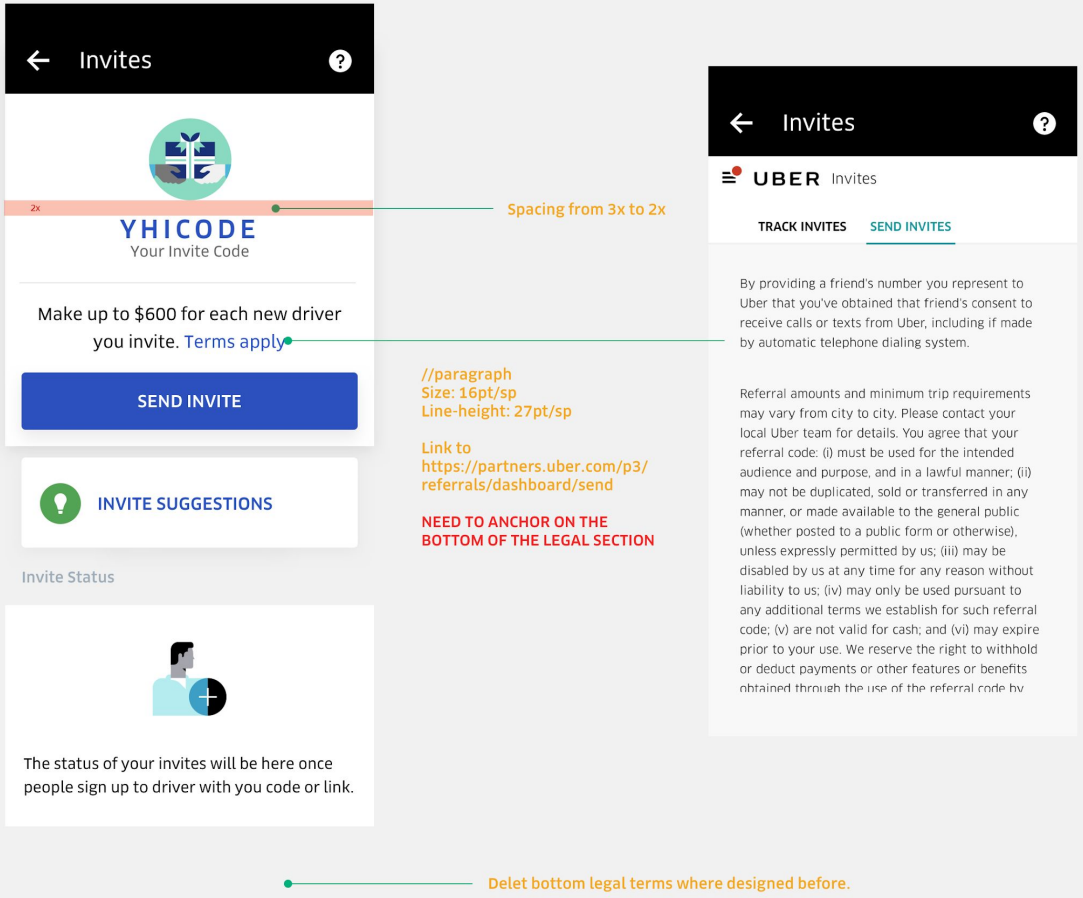
Changes:

1. Spacing as noted on the image from 3x to 2x.

2. Adding “terms apply” above the CTA

3. Delete bottom legal paragraph.

“Terms apply” links to partner web dashboard and **need to anchor on the bottom of the legal section.**



# iOS QA

02.14.2018

**DESIGNED**

YHICODE
Your Invite Code

Character Spacing: 4

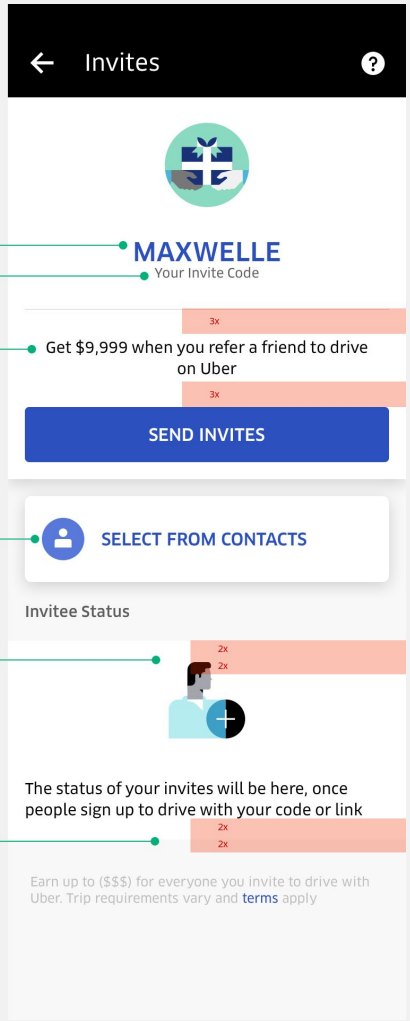
// subtitle
size: small
color: textSecondary
weight: news
Size: 14

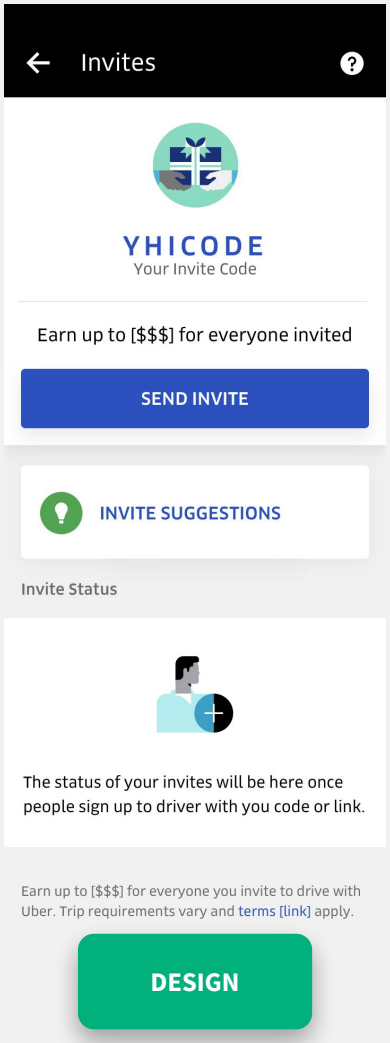
size: body
weight: news
color: textPrimary
Size: 16

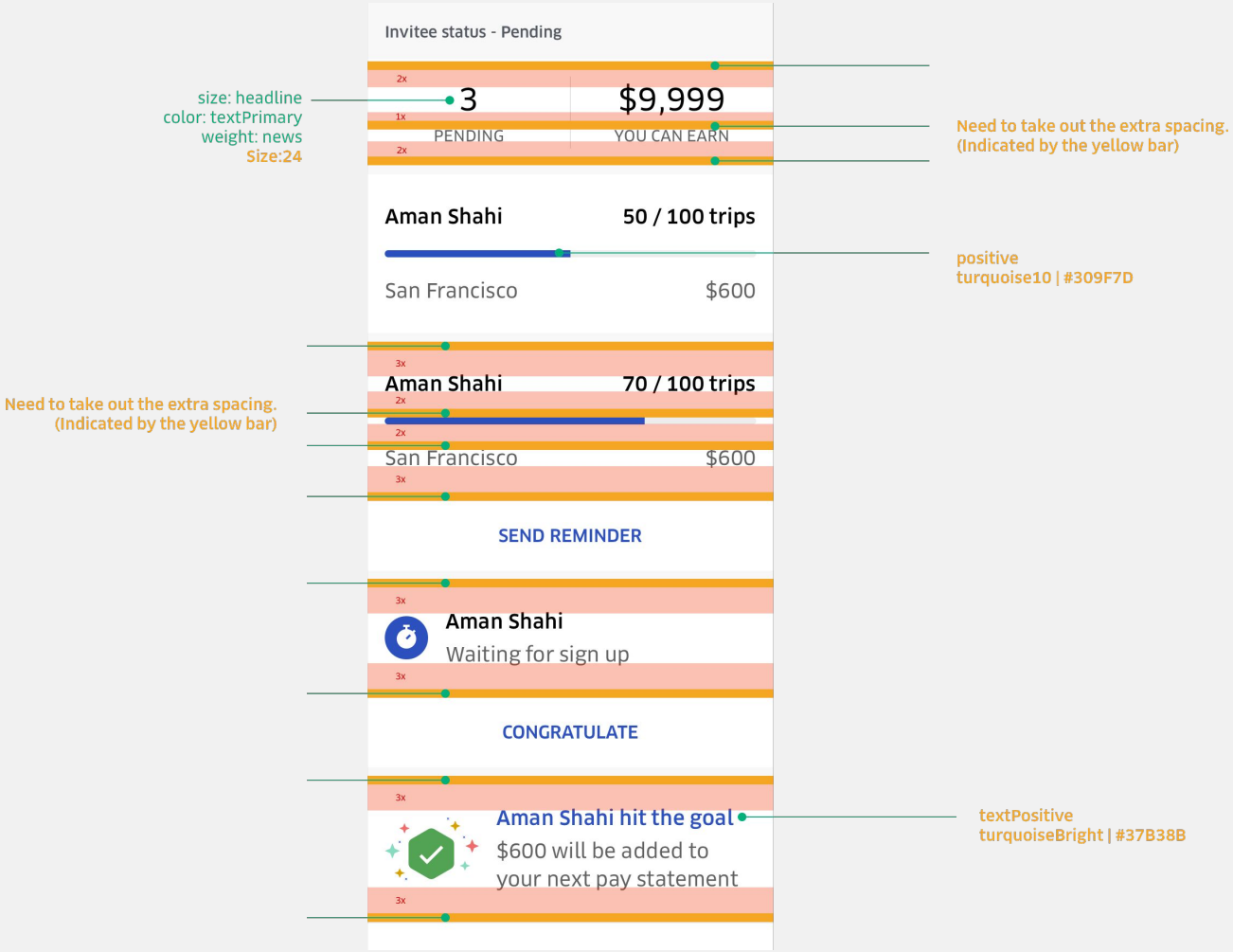
Copy and icon use “INVITE SUGGESTIONS”

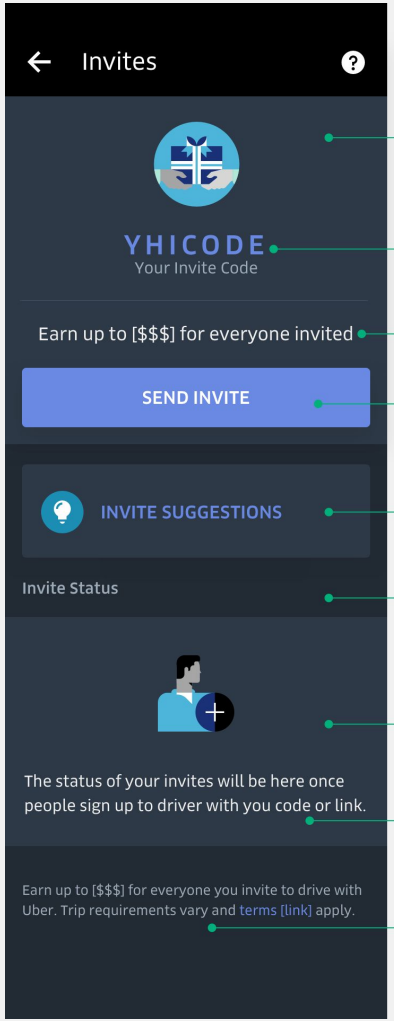
Spacing needs to increase to 4X

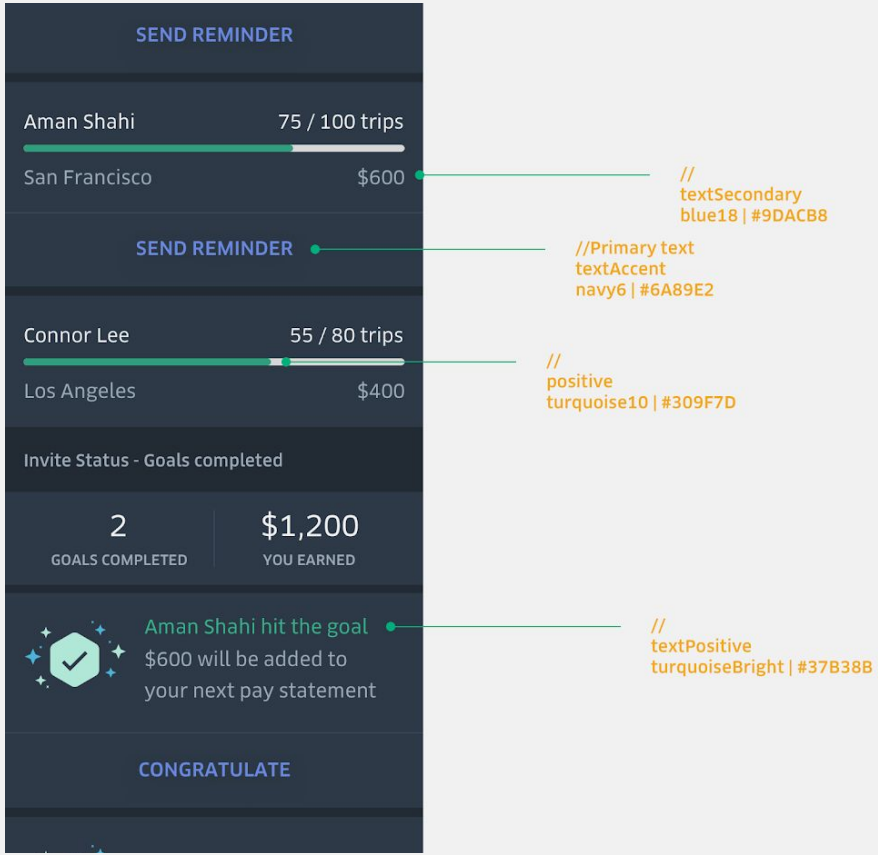
Spacing needs to increase to 4X




Invitee status - Pending
2x
3
$9,999
1x
PENDING
YOU CAN EARN
2x
Aman Shahi
50 / 100 trips
San Francisco
$600
3x
Aman Shahi
70 / 100 trips
2x
2x
San Francisco
$600
3x
SEND REMINDER
3x
Aman Shahi
Waiting for sign up
3x
CONGRATULATE
3x
Aman Shahi hit the goal
$600 will be added to
your next pay statement
3x
size: headline
color: textPrimary
weight: news
Size:24
Need to take out the extra spacing.
(Indicated by the yellow bar)
positive
turquoise10 | #309F7D
Need to take out the extra spacing.
(Indicated by the yellow bar)
textPositive
turquoiseBright | #37B38B

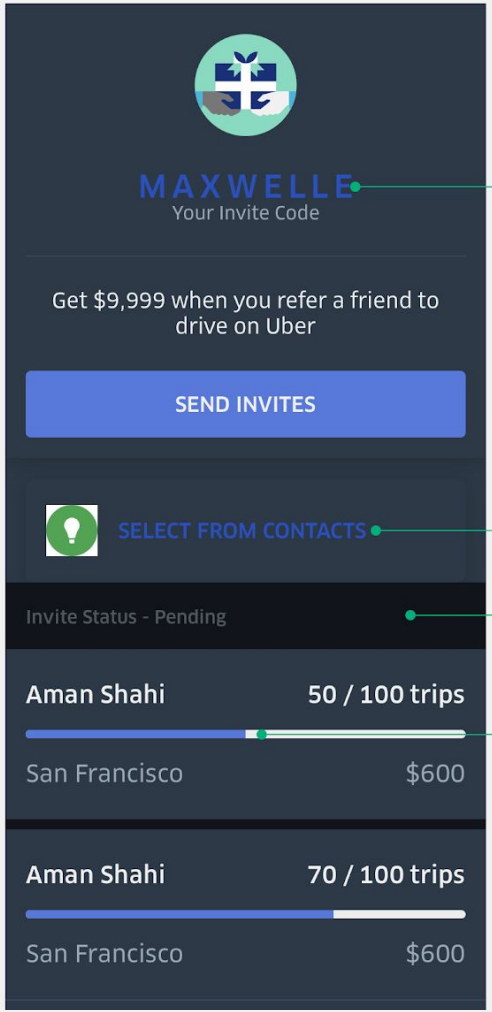

Invites
YHICODE
Your Invite Code
Earn up to [$$$] for everyone invited
SEND INVITE
INVITE SUGGESTIONS
Invite Status
The status of your invites will be here once people sign up to driver with you code or link.
Earn up to [$$$] for everyone you invite to drive with Uber. Trip requirements vary and terms [link] apply.
//
bgContainer
blue21 | #2D3946
//Primary text
textAccent
navy6 | #6A89E2
//Sub text
textSecondary
blue18 | #9DACB8
//
textPrimary
grey2 | #F1F1F1
//
buttonPrimary
navy6 | #6A89E2
//
bgContainer
blue21 | #2D3946
//Primary text
textAccent
navy6 | #6A89E2
//
bgView
blue22 | #222A34
//
bgContainer
blue21 | #2D3946
//
textPrimary
grey2 | #F1F1F1
//
textSecondary
blue18 | #9DACB8
//link text
textSecondary
blue18 | #9DACB8


SEND REMINDER
Aman Shahi
75 / 100 trips
San Francisco
$600
SEND REMINDER
Connor Lee
55 / 80 trips
Los Angeles
$400
Invite Status - Goals completed
2
GOALS COMPLETED
$1,200
YOU EARNED
Aman Shahi hit the goal
$600 will be added to
your next pay statement
CONGRATULATE
//
textSecondary
blue18 | #9DACB8
//Primary text
textAccent
navy6 | #6A89E2
//
positive
turquoise10 | #309F7D
//
textPositive
turquoiseBright | #37B38B

# iOS QA

**02.28.2018**

All blue CTA should use
accentPrimary
navy6 | #6A89E2

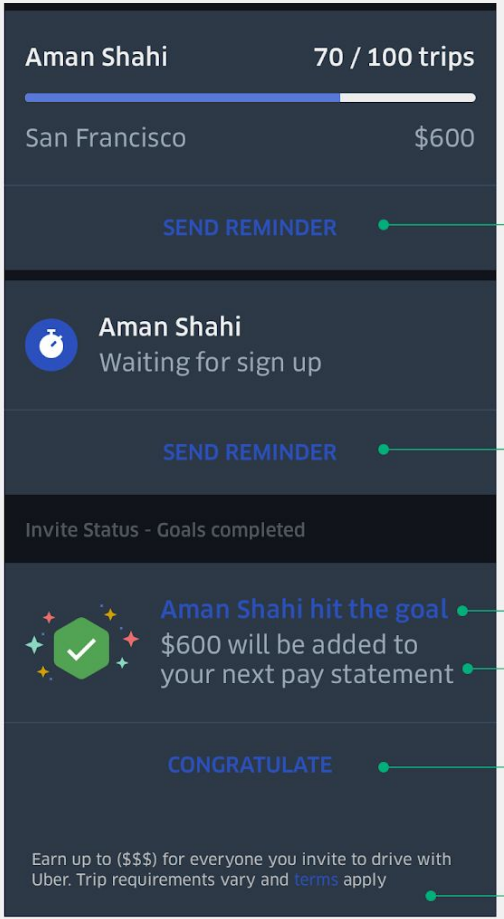



accentPrimary
navy6 | #6A89E2

accentPrimary
navy6 | #6A89E2

bgView
blue22 | #222A34

//Progress bar is green.
positive
turquoise10 | #309F7D




accentPrimary
navy6 | #6A89E2

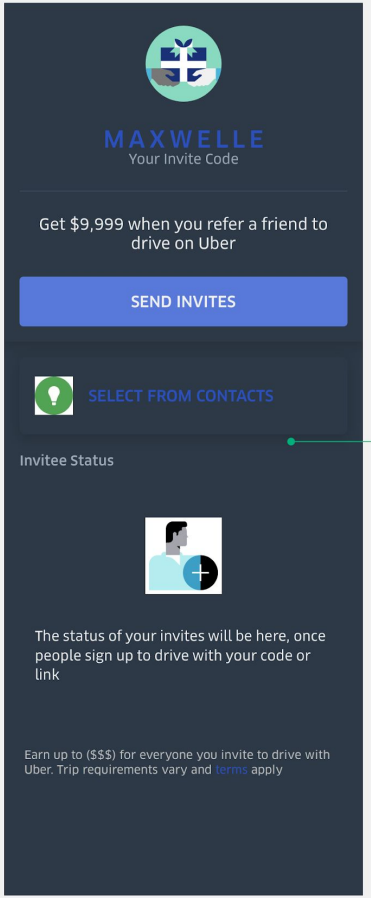
accentPrimary
navy6 | #6A89E2

//The congrats title should be green
textPositive
turquoiseBright | #37B38B

//Line spacing is 27

accentPrimary
navy6 | #6A89E2

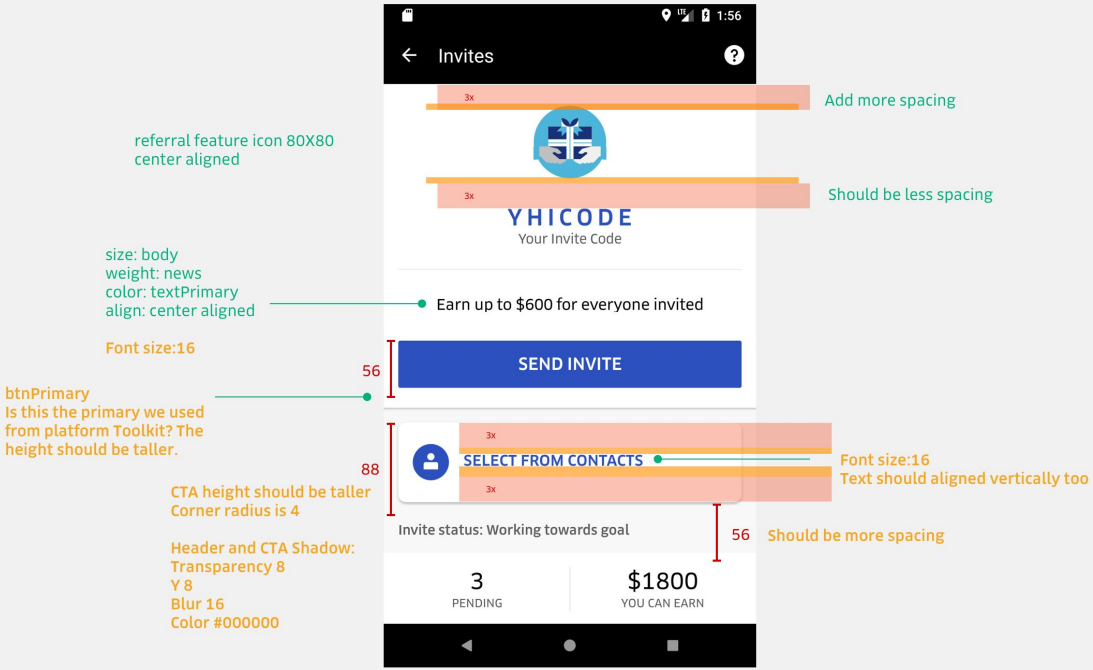
//This should use bgView color
bgView
blue22 | #222A34

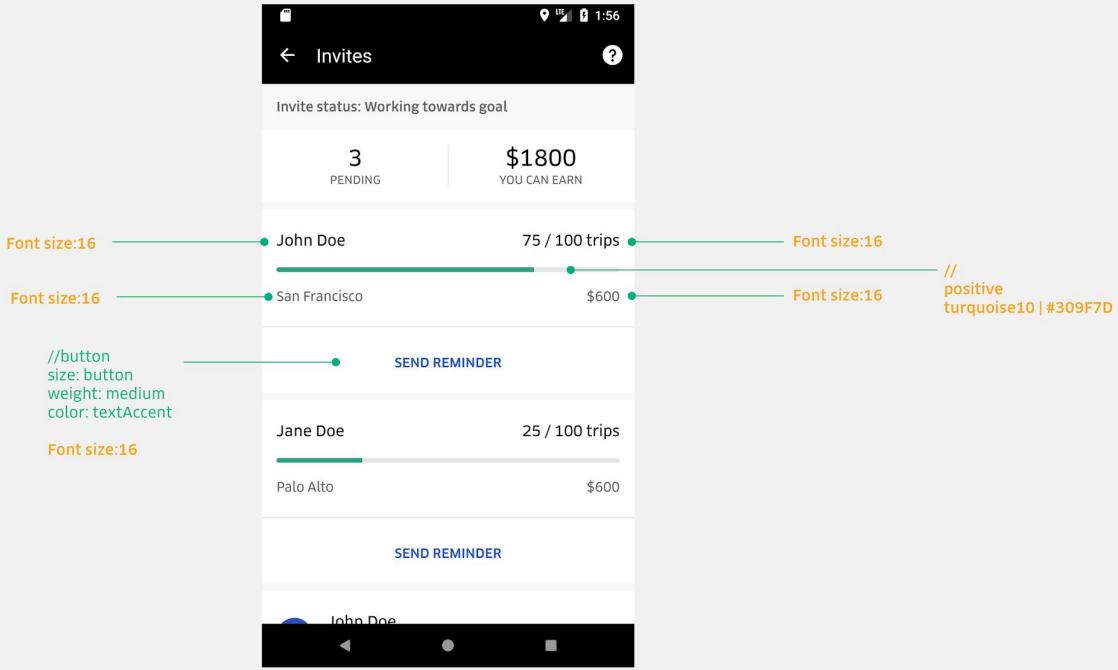


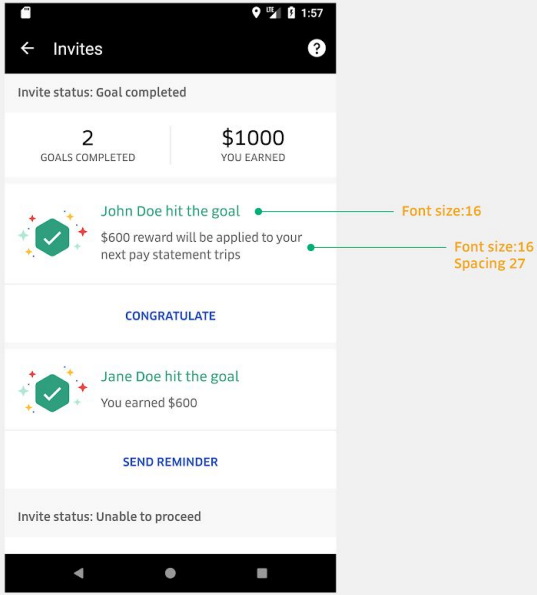

bgView
blue22 | #222A34

# Android QA

02.27.2018

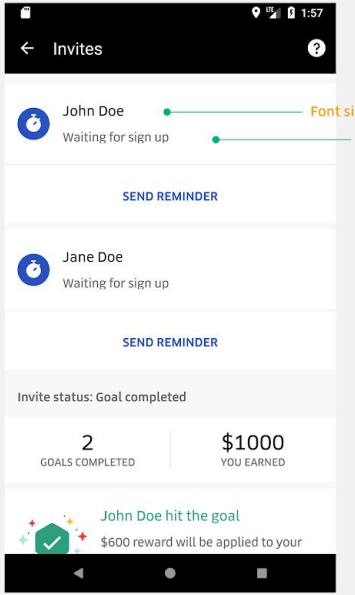

referral feature icon 80X80
center aligned
size: body
weight: news
color: textPrimary
align: center aligned
Font size:16
btnPrimary
Is this the primary we used from platform Toolkit? The height should be taller.
CTA height should be taller
Corner radius is 4
Header and CTA Shadow:
Transparency 8
Y 8
Blur 16
Color #000000
1:56
Invites
3x
Add more spacing
3x
Should be less spacing
YHICODE
Your Invite Code
Earn up to $600 for everyone invited
56
SEND INVITE
88
3x
SELECT FROM CONTACTS
3x
Font size:16
Text should aligned vertically too
Invite status: Working towards goal
56
Should be more spacing
3
PENDING
$1800
YOU CAN EARN


1:56
Invites
Invite status: Working towards goal
3
PENDING
$1800
YOU CAN EARN
John Doe
75 / 100 trips
San Francisco
$600
SEND REMINDER
Jane Doe
25 / 100 trips
Palo Alto
$600
SEND REMINDER
Font size:16
Font size:16
Font size:16
Font size:16
//
positive
turquoise10 | #309F7D
//button
size: button
weight: medium
color: textAccent
Font size:16



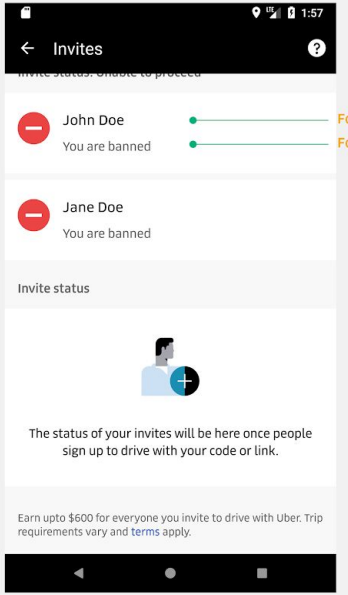

Font size:16

Font size:16
Spacing 27




Font size:16

Font size:16



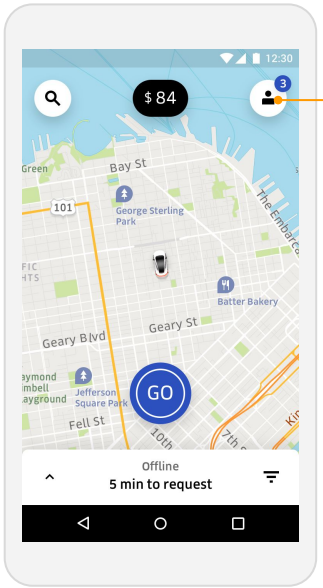

Font size:16

Font size:16

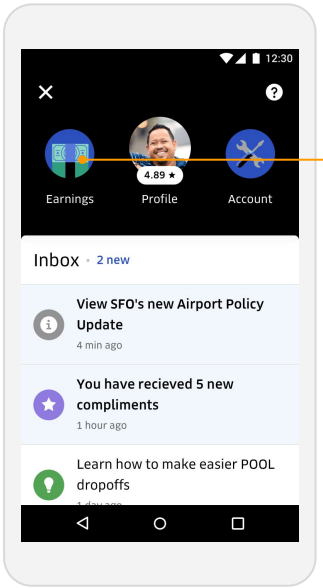
# Appendix

# Driver Referrals in Carbon

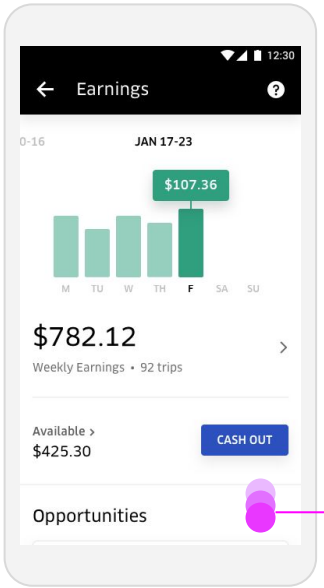
## Entry point



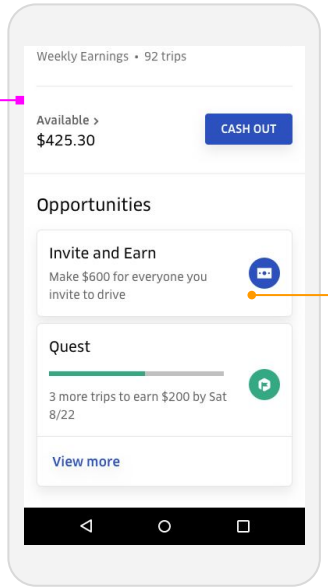

Carbon Home

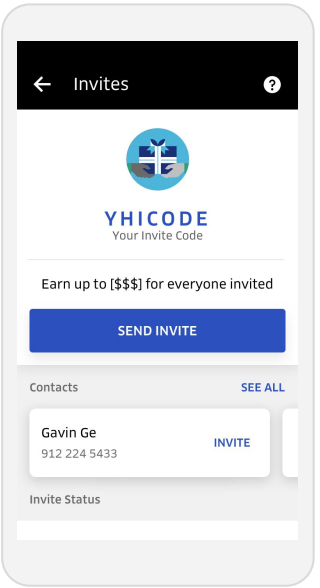



My hub




Earnings




Referral home