



REEferralNet Referral Users Guide

By Mark T. Wehner

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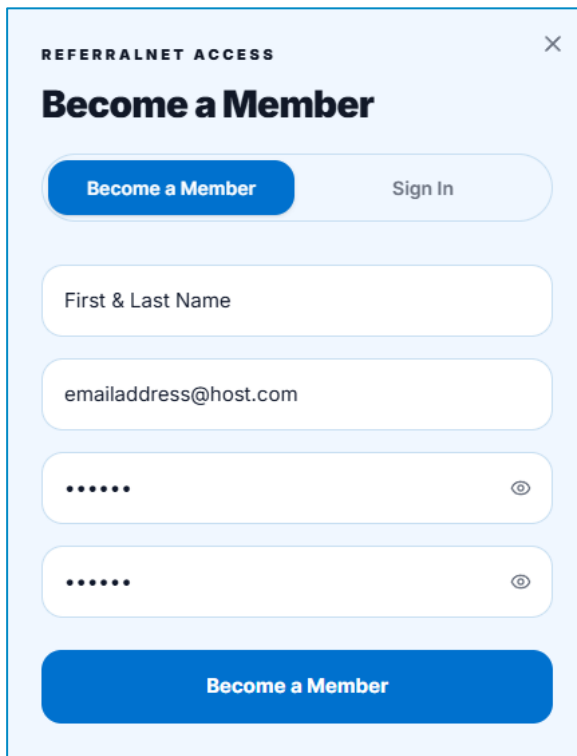
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REEferralNet: Overview

REEferralNet is a membership-based "APP-like" (Internet accessible) referral platform that enables members to create, manage, and share their trusted local service providers (referrals) via unique/branded member pages. Give a referral, get a referral is a win-win relationship-building strategy that provides valuable ongoing customer service to existing clients, partners, and influencers while generating new inbound leads for your business.

REEferralNet: Registration Process

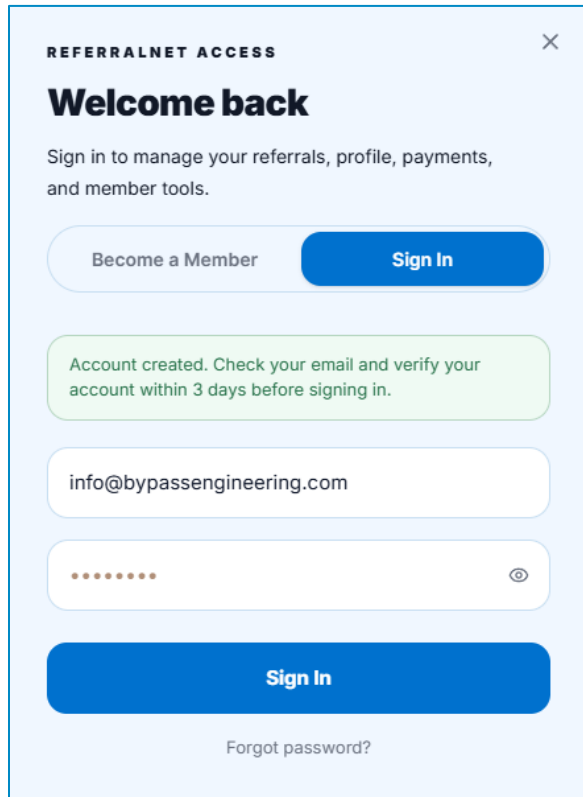
1. Open a browser and go to www.REEferralNet.com
2. Enter your FIRST and LAST NAME
3. Enter your EMAIL ADDRESS
4. Choose a password. The password MUST have 1 Capital Letter, 1 Lower Case Letter(s), Number(s), and a Special Character (!@#\$%...)
5. Press the **<Become a Member>** Button.



The screenshot shows a mobile-style registration form titled "REFERRALNET ACCESS" with a close button (X) in the top right corner. The main heading is "Become a Member". Below the heading are two buttons: "Become a Member" (highlighted in blue) and "Sign In". The form contains four input fields: "First & Last Name", "emailaddress@host.com", a password field with six dots and a visibility icon, and another password field with six dots and a visibility icon. At the bottom is a large blue button labeled "Become a Member".

- Next, a dialog box will appear displaying **WELCOME BACK**, with a message that reads: "Account Created. Check your email and verify your account within 3 days before signing in."

Note: Check your Spam folder if you do not see the confirmation email within ~10 minutes.




- Once received, click on the link in the email to verify your account.

Note: You will not be able to log in until your account has been verified by clicking on the link in the confirmation email to verify your account.

- Click the <**Confirmation Link**> OR <**Go To My Dashboard**> Button to be redirected to your Member Dashboard.

Verification Email

Sent to bypassengineering@gmail.com (a brand new member account)






You're one step away from your member account

Welcome to **REEferralNet**! We're excited to have you. Click the button below to verify your email and activate your account.

This link expires in 3 days. Button not working? [Copy this link](#)

WHAT HAPPENS NEXT

-  **Build your member page**
Your public directory page goes live — personalized and ready to share.
-  **Add your trusted vendors**
Build the referral list your clients will love — contractors, lenders, inspectors, and more.
-  **Share your QR & link**
One polished link and a print-ready QR code for flyers, signs, and follow-ups.

If you did not create a REEferralNet account, you can safely ignore this email.

© 2026 REEferralNet · Omaha, NE

Clicking the **<Copying this link>** hyperlink displays a JavaScript confirmation (*which should be hidden*). Also, clicking it a second time displays a JavaScript error: "Token expired."

```
{"success":true}
```

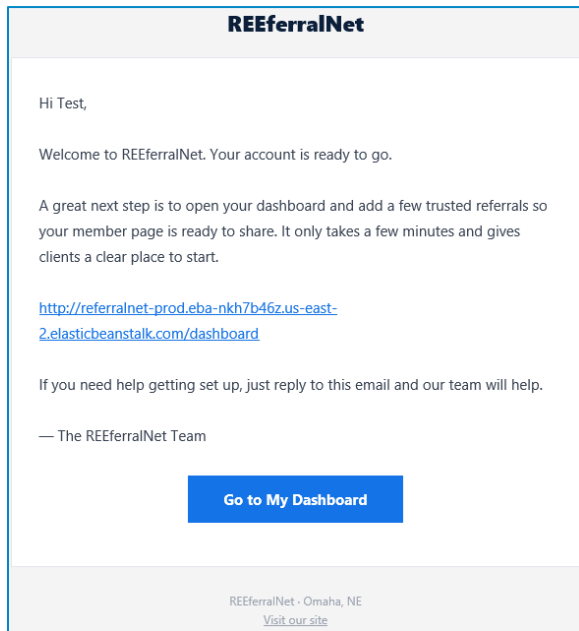
```
{"error":"Token expired"}
```



A secondary note would be that we need access to these emails to edit them. Otherwise, this is great content and a good starting point.

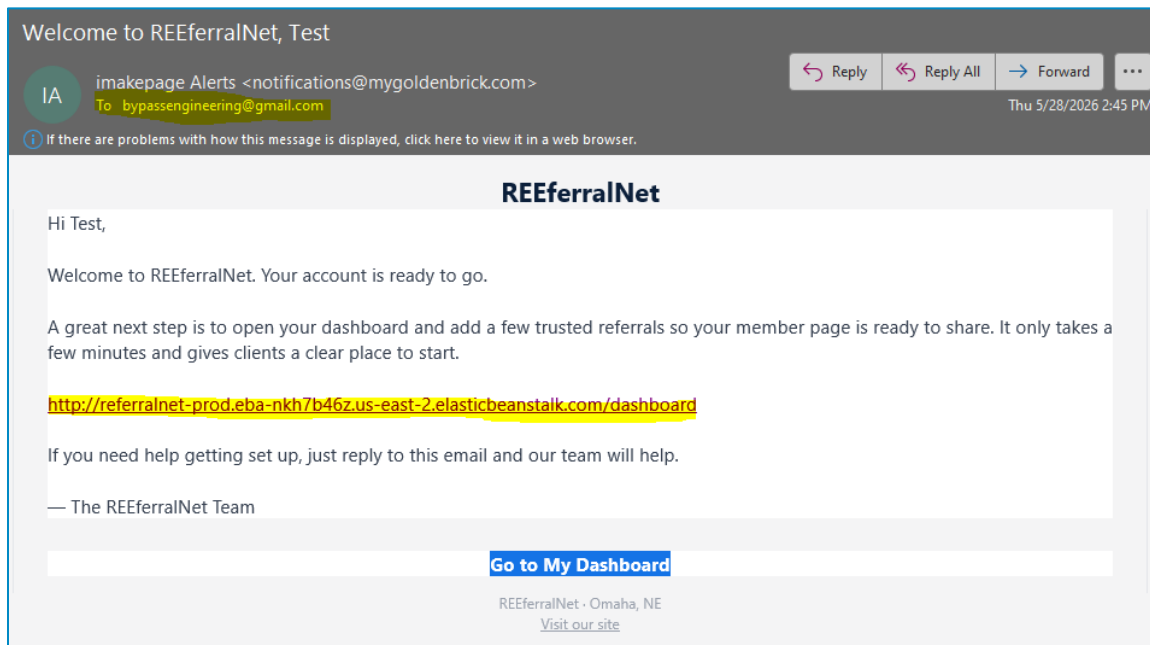
Welcome Aboard Email (After Verification Access)

As Displayed in Chrome Browser



Welcome Aboard Email (After Verification Access)

Displayed Outlook (formatting issues) Sent to bypassengineering@gmail.com



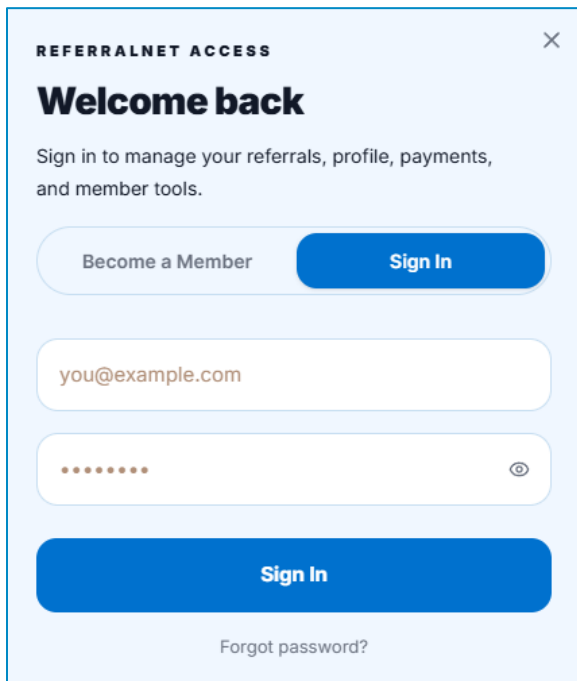
Clicking on the link takes me directly to my bypass@cox.net ADMIN account. However, this email was generated from an entirely new account with unique credentials.



- User Name: Test Account
- Password: Referral123\$

Logging In to Your Account Directly

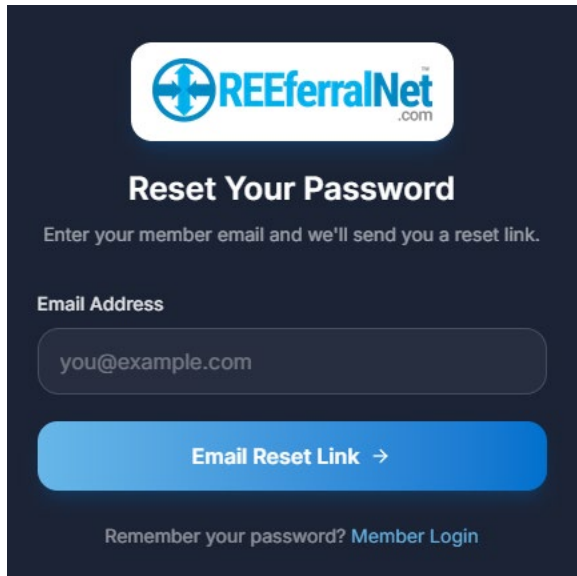
1. Return to www.REEferralNet.com Press **<Become a Member>**, then click **<Sign In>**
2. Enter your email address and password.
3. And press the large **<Sign In>** button at the bottom of the login dialog box.



The screenshot shows a login dialog box titled "REFERRALNET ACCESS" with a close button (X) in the top right corner. Below the title is the heading "Welcome back" and a sub-heading "Sign in to manage your referrals, profile, payments, and member tools." There are two buttons: "Become a Member" and "Sign In". Below these are two input fields: the first contains the email address "you@example.com" and the second contains a masked password "....." with an eye icon to its right. At the bottom, there is a large blue "Sign In" button and a link "Forgot password?".

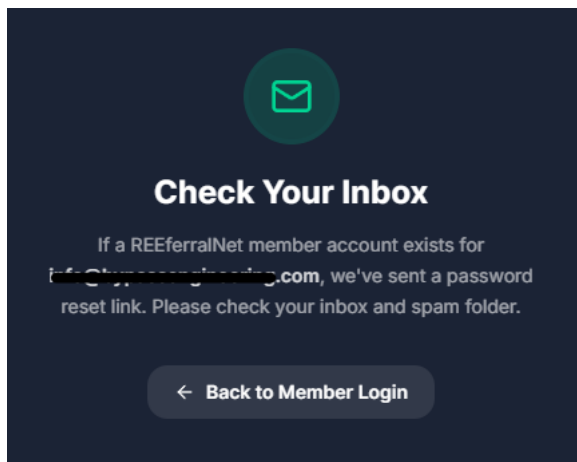
4. Go to the next section of this document, "REEferralNet: Getting Started." If you forget your password, you can request a password reset by clicking **<Forgot password?>**. Doing so will open a password reset dialog box.
 - A) Enter the email address that you used during registration.
 - B) Next, click the **<Email Reset Link>** Button.

Note: Check your Spam folder if you do not see the Password Reset email within ~10 minutes.



The screenshot shows a dark blue background with the REEferralNet logo at the top. Below the logo is the heading "Reset Your Password" and a sub-heading "Enter your member email and we'll send you a reset link." There is a text input field labeled "Email Address" containing "you@example.com". Below the input field is a blue button labeled "Email Reset Link →". At the bottom, there is a link that says "Remember your password? Member Login".

5. After clicking the <**Email Reset Link**> Button, an on-screen dialog box will appear, confirming your request and displaying the email address to which the system will send your reset email and reset link.



The screenshot shows a dark blue background with a green envelope icon at the top. Below the icon is the heading "Check Your Inbox" and a sub-heading "If a REEferralNet member account exists for [redacted]@example.com, we've sent a password reset link. Please check your inbox and spam folder." At the bottom, there is a button labeled "← Back to Member Login".

6. Click the <**Reset Password**> link in the email to reset your Member account password.

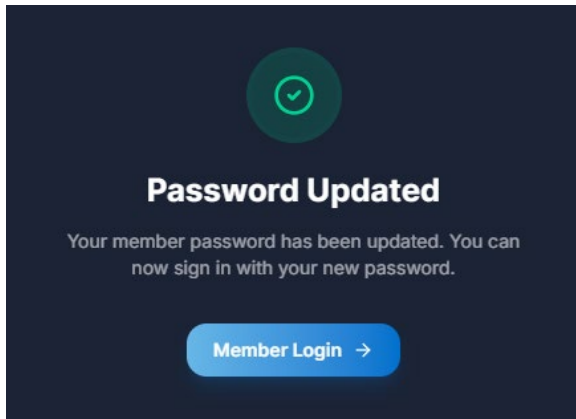
Reset your password

Click the link below to reset your password.

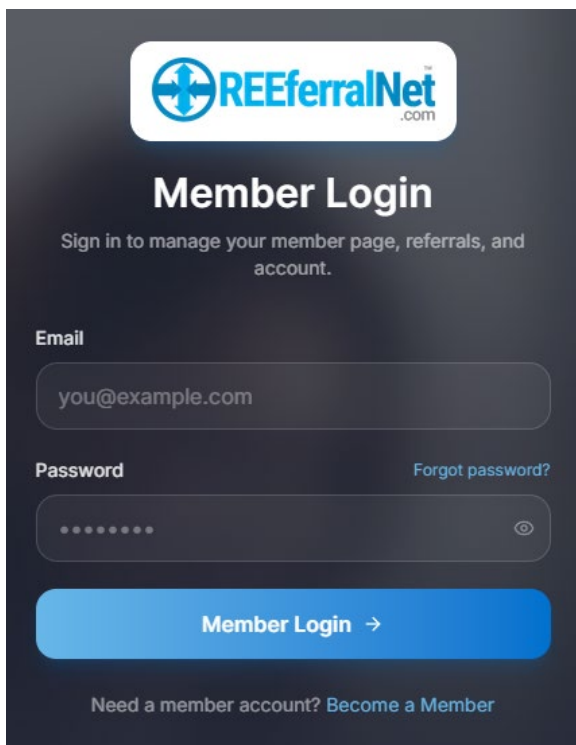
[Reset Password](#)

If you did not request this, you can ignore this email.

7. Enter your new password. The system will confirm that your password has been successfully changed. Click on the <Member Login> Button to proceed to your Member Dashboard.



8. Enter your new password. The system will confirm that your password has been successfully changed with a pop-up dialog. Enter your login credentials and click on the <Member Login> Button to proceed to your Member Dashboard.



REEferralNet: Getting Started

Account Profile Settings

1. Once you have successfully logged in to your account, the system should automatically redirect you to your **Account Profile Settings**. Here you can enter and/or edit the following account information.
 - a. **Profile Photo**: Upload any photo. Doing so will automatically optimize it to fit the profile image.
 - b. **Member Logo**: Upload the business logo; this will appear on your public Member page.
 - c. **Full Name**:
 - d. **Email Address**:
 - e. **Company Name**:
 - f. **Phone**:
 - g. **Profession / Title**:
 - h. **Custom Slug (aka URL)**: referralnet.com/r/**your-Name**
Note: Leave this as is for now. This feature is described in detail later in this document.
 - i. **Website**:
 - j. **Payout Stripe Account ID**: Used for a member to refer a new member under their account to receive referral incentive payouts. (\$25 per new member registered by clicking on the **<Become a Member>** link on your Member Page.
Note: This feature is described in detail later in this document.
 - k. **BIO**: Company description

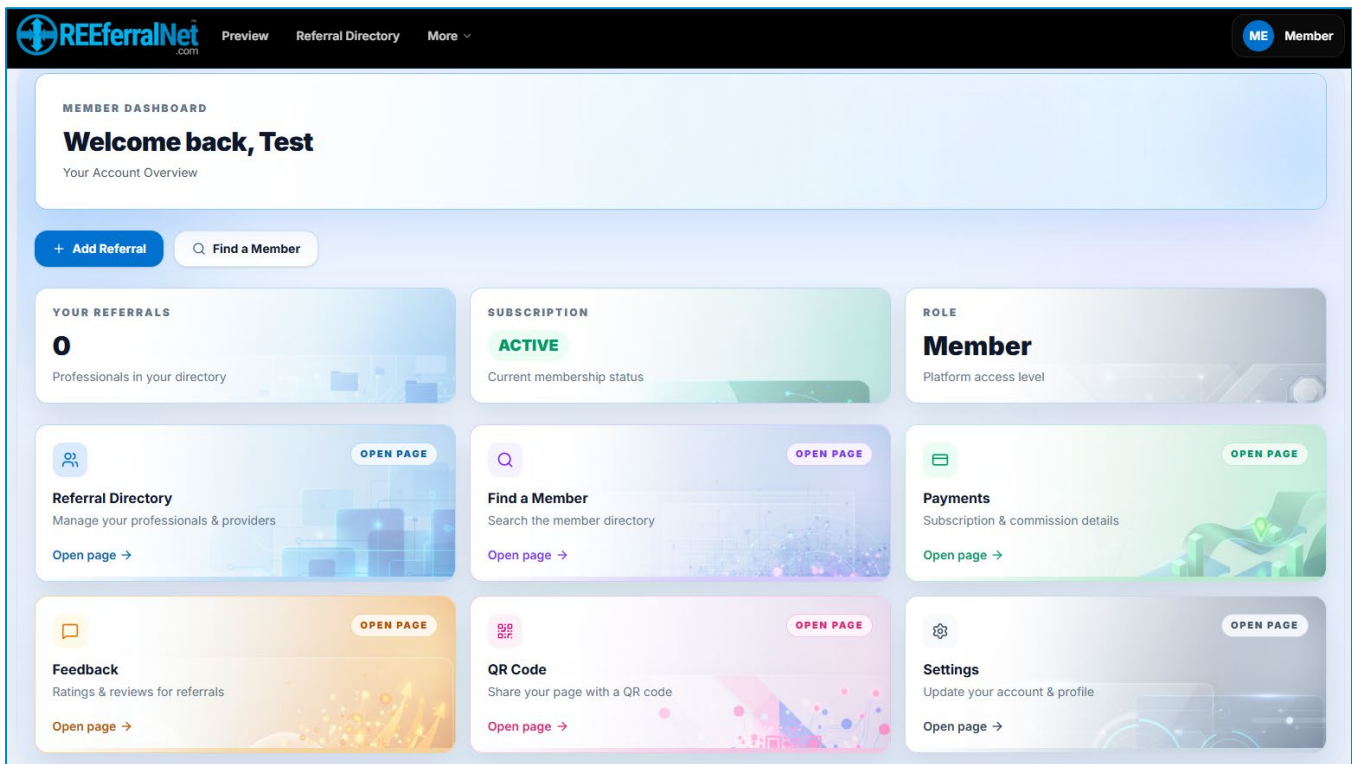
Returning to Log in After Setting Up Your Profile

2. Return to www.REEferralNet.com
 - a. Press **<Become a Member>**, then click **<Sign In>**
 - b. Enter your email address and password.
 - c. And press the large **<Sign In>** button at the bottom of the login dialog box.
3. Doing so will take you directly to Your Member Dashboard. **Explained in the next section.**

REEferralNet: Entering Your First Referral

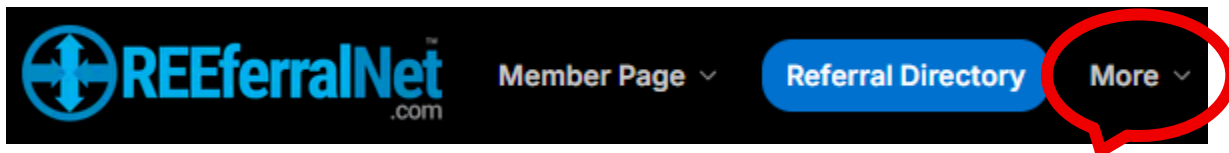
Member Dashboard

Your Member Dashboard is the control center for managing your account and Referrals, and for viewing status/statistics.

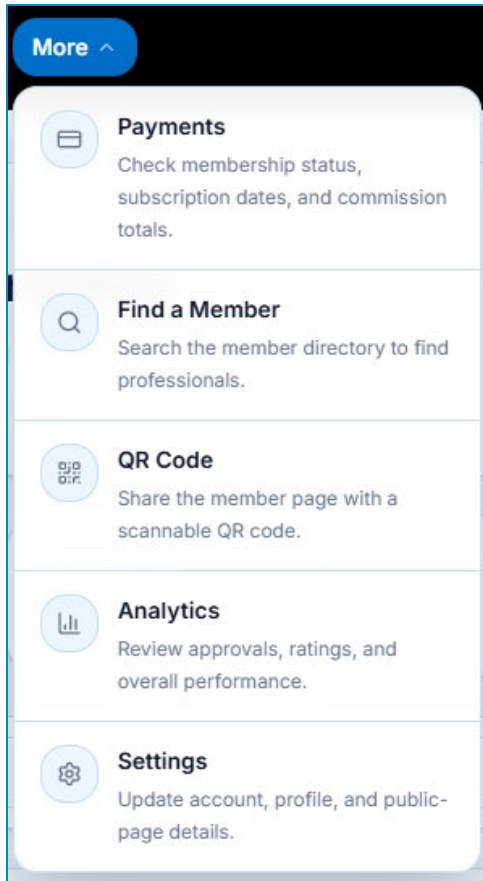


Member Dashboard Header Area

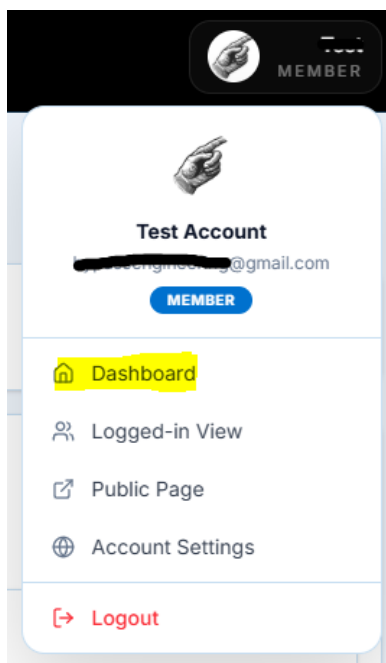
Navigate between your Member Page, Referral Directory (current display), and More (quick view of action options).



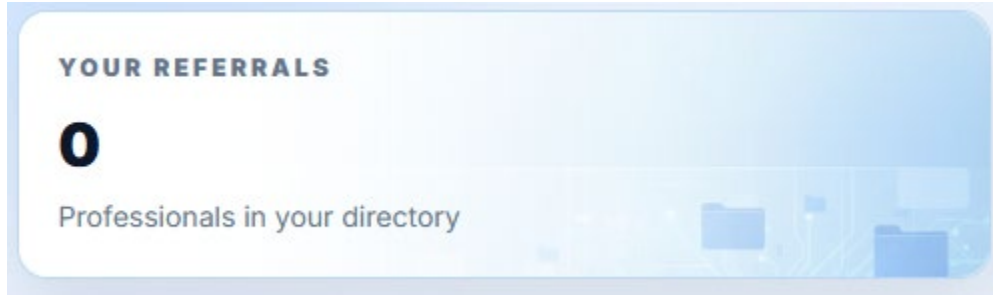
1. The **<More>** button displays a quick view of your Referral Directory options. These are covered in detail in the following section.



2. Account Profile Access Area (Top-Right) of the page. You can use this option to **RETURN** to your **Member Dashboard** or execute other listed options, such as **Logout**.



3. **Your Referrals:** Total number of referrals that you've added and approved so far.

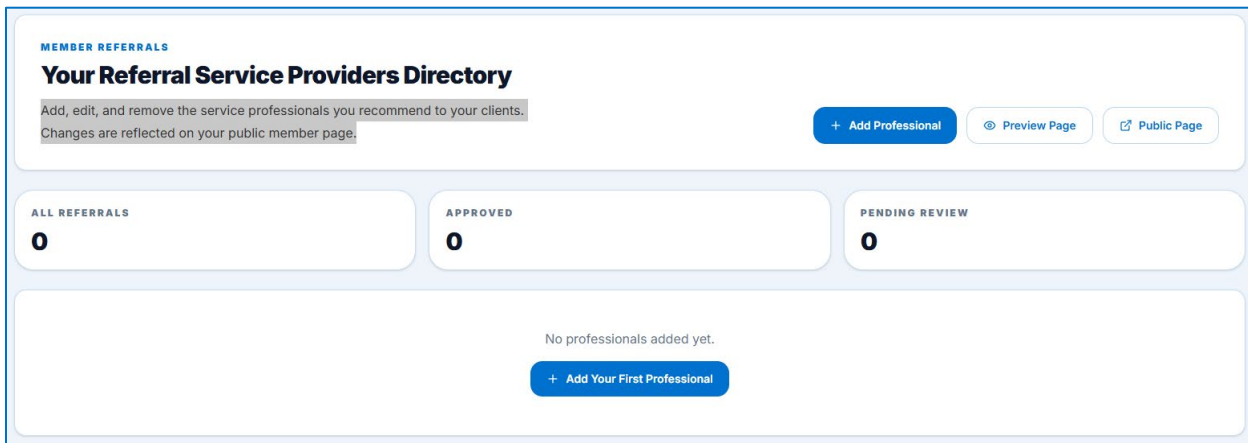


Referral Directory:

Provides direct access to add, edit, or remove referral service providers you recommend to your clients. Changes are reflected on your public member page.



Click <Open Page> to add or edit referrals.




Click on the <Add Professional> or <Add Your First Professional> button, and enter your service provider's information.




Add New Professional ×

<input type="text" value="First name *"/>	<input type="text" value="Last name *"/>
<input type="text" value="Company"/>	<input type="text" value="Professional Title / Role"/>
<input type="text" value="Hourly Charge (\$)"/>	<input type="text" value="Occupation(s)"/>
<input type="text" value="Email"/>	<input type="text" value="Phone"/>
<input type="text" value="Website"/>	<input type="text" value="Location"/>



JPG, PNG, GIF — max 5 MB

- a) First Name and Last Name
- b) Company Name
- c) Your Professional Title/Role
- d) **Hourly Charges (\$):** I believe this field should be deleted.
- e) Occupation(s): 
- f) Email:
- g) Phone:
- h) Website:
- i) Location: The company's physical address.
- j) **Upload a photo:** Service Provider's portrait or Company Logo. JPG, PNG, GIF (max 5 MB)
- k) Profile & Summary:

4. When finished, click the <Add **Professional Referral**> button.




- You can continue adding referrals or click on the <Preview Page> or <Public Page> buttons to review a live view of the referrals you have added.



Your Public Page Preview



Displays your account information, referrals, and a search-and-sort option.

YOUR PUBLIC PAGE PREVIEW This is how your page appears to the public.
← Back to Dashboard



Test Account
Test Company · Tester
Review and documentation.

8885551212 bypassengineering@gmail.com Anywhere USA speedtest.net



SHARE PAGE

Become a Member

Trusted Service Providers 1 visible

All categories ▾

↑↓ A-Z ▾






CATEGORY	REFERRAL	SPECIALIZATION	ABOUT	ACCESS
 Consultant	 Doug McClure	By Pass Engineering, Inc. CEO	By Pass Engineering, Inc. is a full-service Internet Business Development consulting company specializing in...	bypass@cox.net 6193003017



Member Referrals > Referral Directory List > Category Badge






REFERRAL DIRECTORY 1 visible

Profiles, summaries, and approval status in one focused workspace.

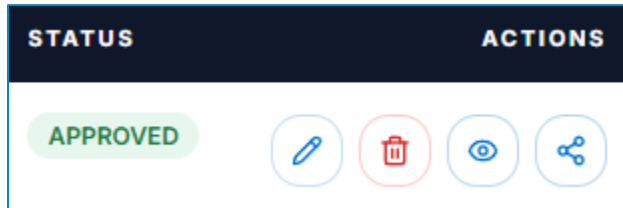
CONTACT NAME	CATEGORY	COMPANY	PHONE	EMAIL	WEBSITE	STATUS	ACTIONS
 Doug McClure	Consultant	By Pass Engineering, Inc.	6193003017	bypass@cox.net	bypassengineering.com	APPROVED	   

Click on the Category badge to display a quick view (w/ edit options) of this service provider's details.

Member Referrals > Referral Directory List > Status/Options

REFERRAL DIRECTORY							
Profiles, summaries, and approval status in one focused workspace. 1 visible							
CONTACT NAME	CATEGORY	COMPANY	PHONE	EMAIL	WEBSITE	STATUS	ACTIONS
 Doug McClure	Consultant	By Pass Engineering, Inc.	6193003017	bypass@cox.net	bypassengineering.com	APPROVED	   

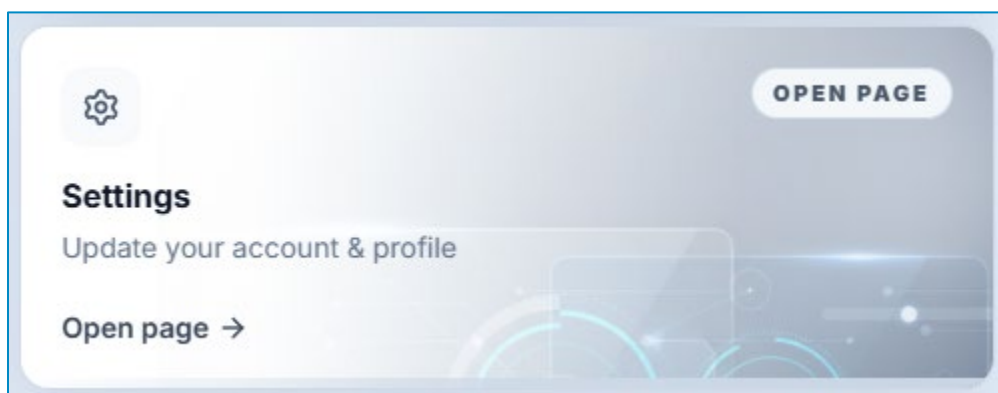
Referral Status and Edit Buttons



- Approved:** This status badge identifies that a referred service provider has reviewed and approved their listing.
- Pencil Icon:** Click to edit this referral listing
- Trash Can Icon:** Click to delete this referral listing
- Eye Icon:** Click to display a quick view of this referral listing & Work Done by This Referral.
- Share Icon:** Click to share this referral with nearby devices (e.g., smartphone). Make sure the device has **"Nearby sharing"** turned **ON** in Action Center.

Member Settings

Click to view and configure your Membership Account Profile settings.



Membership Status Bar:

MEMBER ACCOUNT SETTINGS

Profile, membership, and payout settings

Manage your account profile, billing status, renewal timeline, and payout account details from one page.

MEMBERSHIP ACTIVE	JOINED DATE 5/28/2026	RENEWAL DATE Not renewed	EXPIRATION DATE Not set
-----------------------------	---------------------------------	------------------------------------	-----------------------------------

- a) Membership Status: Active
- b) Joined Date:
- c) Renewal Date:
- d) Expiration Date:

Membership Billing: I BELIEVE THIS SECTION CAN BE DELETED (TBD)

MEMBERSHIP BILLING

Change or renew your plan

Membership checkout belongs to the Payments page. Choose where you want to continue.

[Go to Monthly Plan](#) [Go to Yearly Plan](#)



- a) Go to Monthly Plan
- b) Go to Yearly Plan (This is the primary option) Including: Renewal and Group

Change Your Password

PASSWORD

Change your password

For your security, enter your current password before choosing a new one.

CURRENT PASSWORD
Your current password

NEW PASSWORD
At least 5 characters

CONFIRM NEW PASSWORD
Re-enter new password

[Update Password](#)

- a) Current Password
- b) New Password
- c) Confirm New Password
- d) Click the <Update Password> Button

Edit Your Profile

PROFILE PHOTO
Upload any photo and we will automatically optimize it to fit the profile image.

[Change](#) [Remove](#)

MEMBER LOGO
Upload the business logo that should appear above the QR code on your public page.

[Change](#) [Remove](#)

FULL NAME

Test Account

EMAIL

bypassengineering@gmail.com

COMPANY

Test Company

PHONE

8885551212

LOCATION

Anywhere USA

TRADE / SPECIALTY

Tester

PROFESSION / TITLE

IT

CUSTOM SLUG

localhost:3000/r/ test-account

WEBSITE

https://www.speedtest.net/

PAYOUT METHOD

Stripe transfer

Use Stripe when this account should receive payouts through a connected Stripe account.

STRIPE CONNECT
Connect your Stripe account to receive automatic payouts

[Connect Stripe](#) [Refresh Status](#)

ReferralNet uses Stripe Connect OAuth so members can connect their own Stripe accounts directly. No manual Stripe account ID entry is required in the app.

ACCOUNT ID Not connected	DETAILS Needs action	TRANSFERS Not enabled	ONBOARDED Not yet
------------------------------------	--------------------------------	---------------------------------	-----------------------------

BIO

Review and documentation.

[Save Changes](#)

STRIPE Connection:

Connect your Stripe account to receive automatic payouts. (\$25 for referring new members from your Member Page <Become a Member> link.

PAYOUT METHOD

Stripe transfer

Use Stripe when this account should receive payouts through a connected Stripe account.

STRIPE CONNECT
Connect your Stripe account to receive automatic payouts

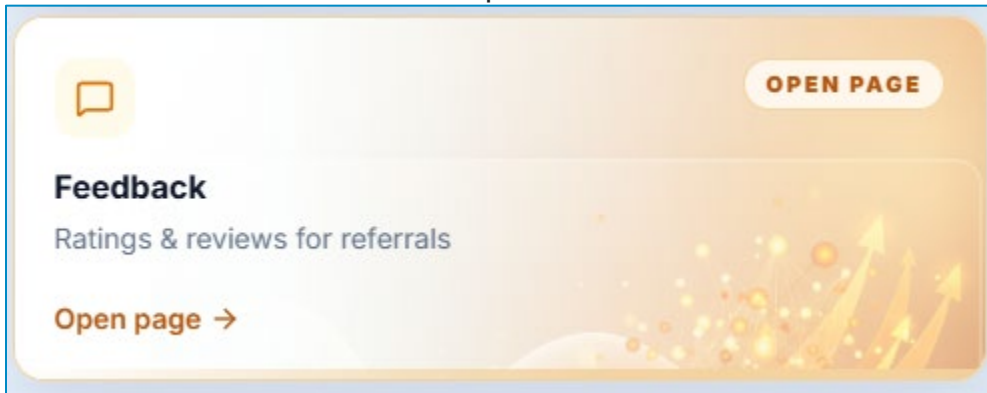
[Connect Stripe](#) [Refresh Status](#)

ReferralNet uses Stripe Connect OAuth so members can connect their own Stripe accounts directly. No manual Stripe account ID entry is required in the app.

ACCOUNT ID Not connected	DETAILS Needs action	TRANSFERS Not enabled	ONBOARDED Not yet
------------------------------------	--------------------------------	---------------------------------	-----------------------------

Feedback:

Measure client satisfaction and improve outcomes.



Feedback
Ratings & reviews for referrals

[Open page →](#)

MEMBER FEEDBACK

Referral Ratings and Reviews

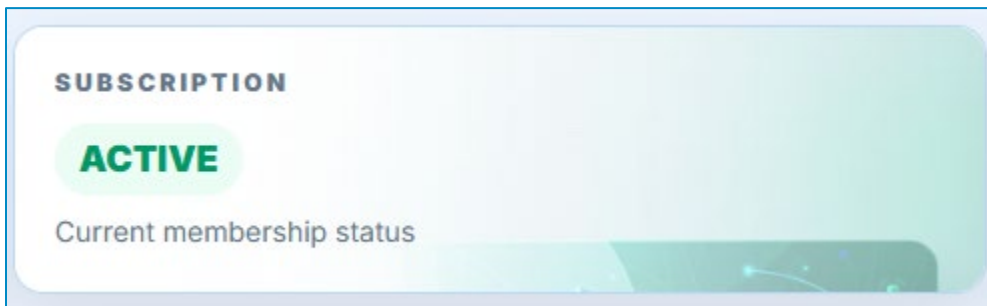
Feedback is grouped under your referrals. Measure client satisfaction and improve outcomes.

FEEDBACK COUNT	AVERAGE RATING
0	0.0

No feedback has been submitted for this member yet.

Subscription:

Active



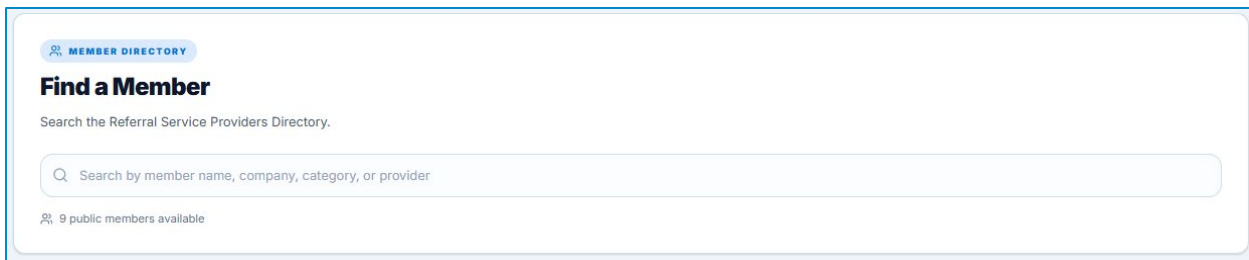
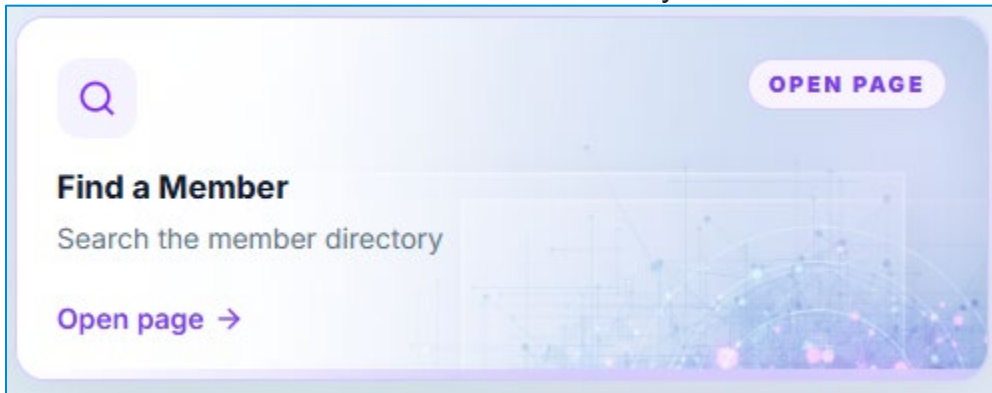
SUBSCRIPTION

ACTIVE

Current membership status

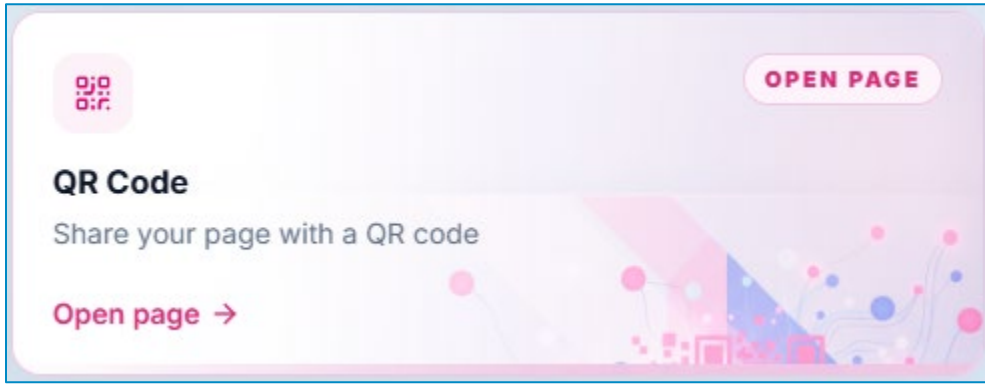
Find A Member:

Search the Referral Service Providers Directory.

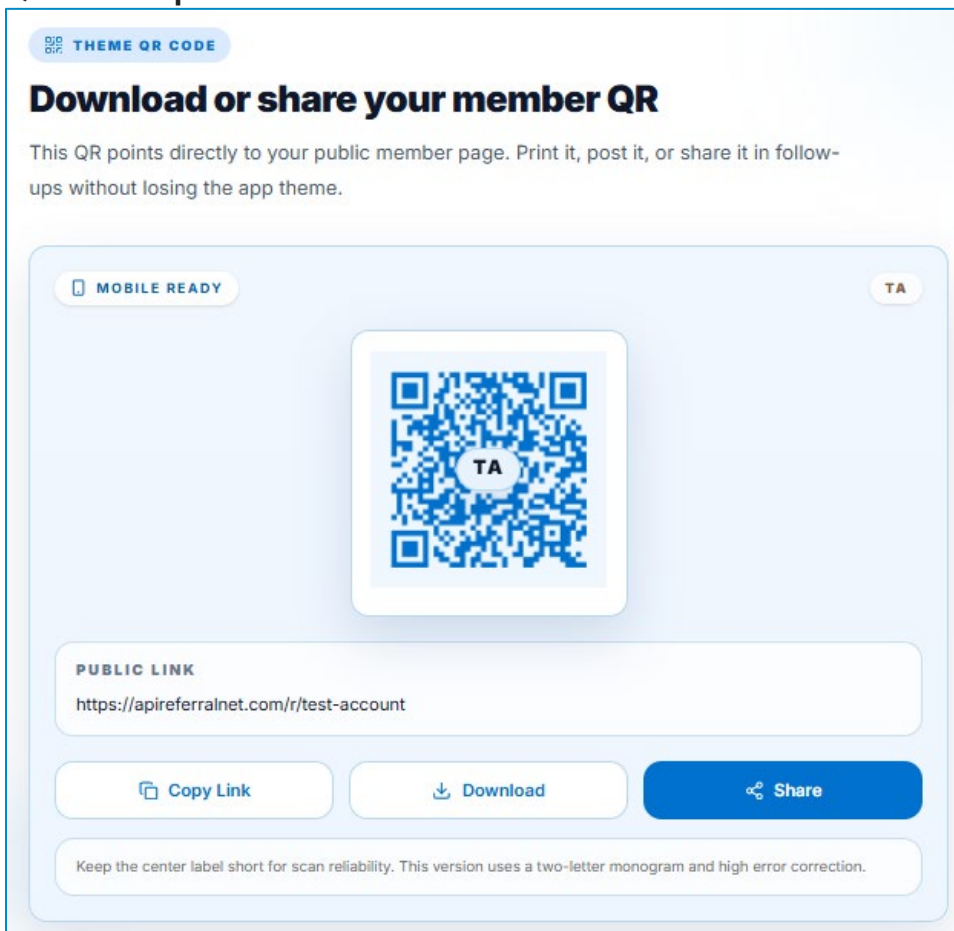


QR Code:

Used to navigate to your public member page directly. Print it, post it, or share it in follow-ups without losing the app theme.

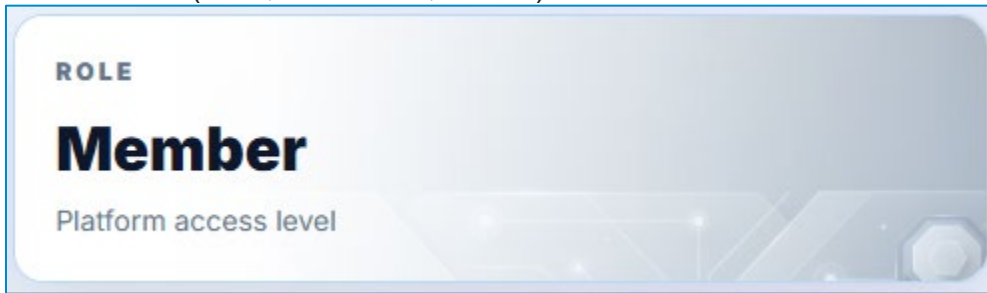


QR Code Options



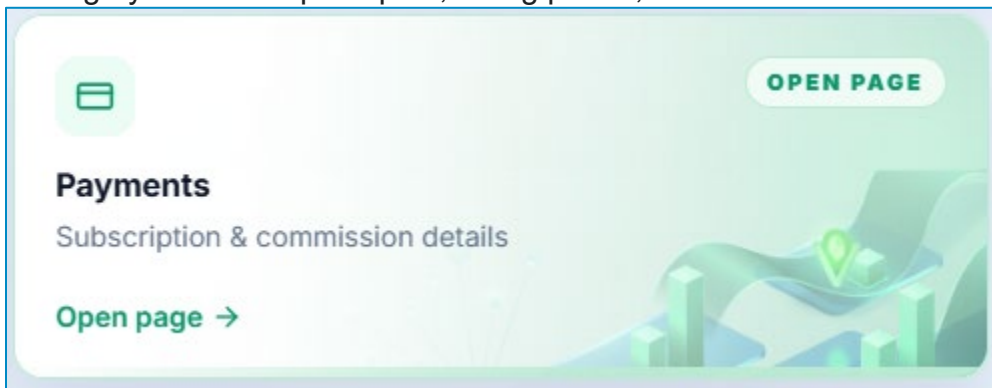
Member Role:

Access level (User, Moderator, Admin)



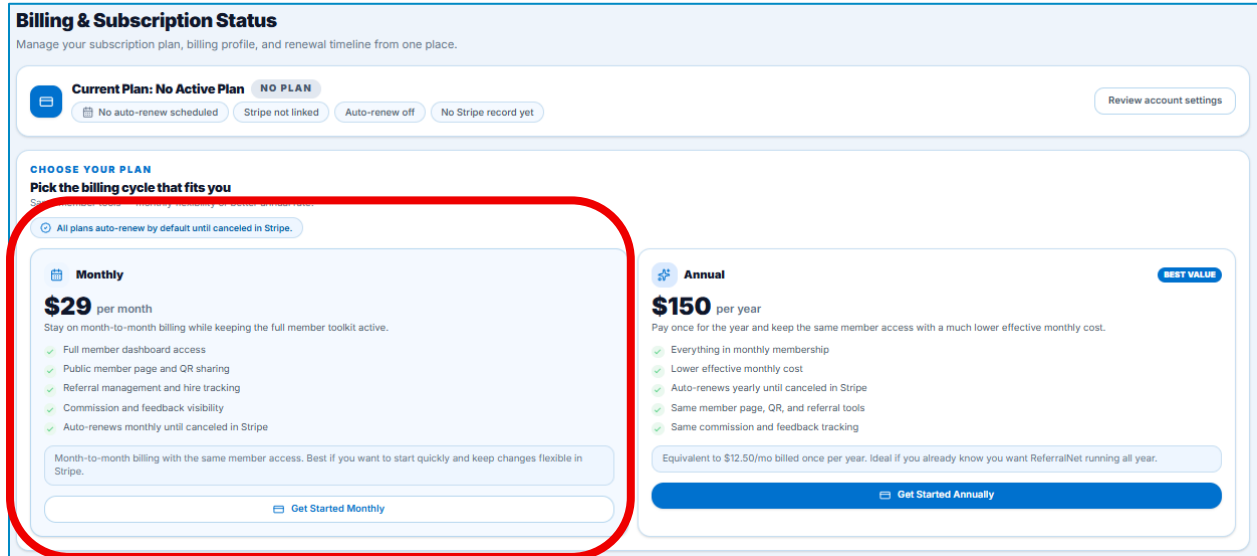
Payments:

Manage your subscription plan, billing profile, and renewal timeline.



REEferralNet: Billing Cycle

Billing Cycle: I BELIEVE THE MONTHLY PLAN CAN BE DELETED



Billing & Subscription Status
Manage your subscription plan, billing profile, and renewal timeline from one place.

Current Plan: No Active Plan **NO PLAN**
No auto-renew scheduled | Stripe not linked | Auto-renew off | No Stripe record yet | [Review account settings](#)

CHOOSE YOUR PLAN
Pick the billing cycle that fits you

All plans auto-renew by default until canceled in Stripe.

Monthly

\$29 per month

Stay on month-to-month billing while keeping the full member toolkit active.

- ✓ Full member dashboard access
- ✓ Public member page and QR sharing
- ✓ Referral management and hire tracking
- ✓ Commission and feedback visibility
- ✓ Auto-renews monthly until canceled in Stripe

Month-to-month billing with the same member access. Best if you want to start quickly and keep changes flexible in Stripe.

[Get Started Monthly](#)

Annual **BEST VALUE**

\$150 per year

Pay once for the year and keep the same member access with a much lower effective monthly cost.

- ✓ Everything in monthly membership
- ✓ Lower effective monthly cost
- ✓ Auto-renews yearly until canceled in Stripe
- ✓ Same member page, QR, and referral tools
- ✓ Same commission and feedback tracking

Equivalent to \$12.50/mo billed once per year. Ideal if you already know you want ReferralNet running all year.

[Get Started Annually](#)

No Monthly option. Yearly option is \$197

- Full member dashboard access
- Public member page and QR sharing
- Referral management and hire **referral program** tracking
- Commission and feedback visibility
- Auto-renews monthly until canceled in Stripe
- ~~Everything in monthly membership~~
- ~~Lower effective monthly cost~~
- Auto-renews yearly until canceled in Stripe
- Same member page, QR, and referral tools
- ~~Same commission and feedback tracking~~

REEferralNet: Referral Directory Stats/Analytics

Referral Directory Stats/Analytics

We need to understand the PROCESS and email communications that occur during each step.



MEMBER ANALYTICS

Referral Directory Stats

These metrics pull directly from your referrals, feedback, and commission records so the member dashboard reflects live data instead of static placeholders.

<p><small>TOTAL REFERRALS</small></p> <p style="font-size: 24px; font-weight: bold;">1</p>	<p><small>APPROVED</small></p> <p style="font-size: 24px; font-weight: bold;">1</p>	<p><small>PENDING</small></p> <p style="font-size: 24px; font-weight: bold;">0</p>
<p><small>REJECTED</small></p> <p style="font-size: 24px; font-weight: bold;">0</p>	<p><small>FEEDBACK COUNT</small></p> <p style="font-size: 24px; font-weight: bold;">0</p>	<p><small>AVERAGE RATING</small></p> <p style="font-size: 24px; font-weight: bold;">0.0</p>
<p><small>COMMISSION ENTRIES</small></p> <p style="font-size: 24px; font-weight: bold;">0</p>	<p><small>TOTAL COMMISSIONS</small></p> <p style="font-size: 24px; font-weight: bold;">\$0.00</p>	

Top categories

CATEGORY

Consultant

1 referral

- a) Total Referrals
- b) Approved (Process?)
- c) Pending (Process?)
- d) Rejected (Process?)
- e) Feedback Count (Process?)
- f) Average Rating
- g) Commission Entries
- h) Total Commissions
- i) Top Categories

