



Refer & Earn™

PRODUCT REFERENCE

FEATURES & FUNCTIONALITY

Everything Refer & Earn does, area by area, for businesses that reward the people who send them clients.

EDITION · OCTOBER 17, 2026

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REFER & EARN™ FEATURES & FUNCTIONALITY

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Refer & Earn is a referral program you run for your own business. You add Earners, give each one a link, QR code, flyer and private page, track every referred client through each step, and thank Earners with a reward you choose and pay yourself.

01

At a glance

Every feature below is part of the app today. There are no feature differences between plans: your free trial and your membership include everything.

Feature area	Plan	Status
Account, free trial and membership	All plans	Live
Home: totals, checklist and Up next	All plans	Live
Program setup and rewards	All plans	Live
Earners	All plans	Live
Links, QR codes, flyers and welcome sheets	All plans	Live
Client sign-up page	All plans	Live
Referral tracking	All plans	Live
Rewards and payout details	All plans	Live
Earner page	All plans	Live
Automatic emails	All plans	Live
CSV import	All plans	Live
In-app instructions	All plans	Live
Help requests and My Business Hub	All plans	Live
Your data and privacy tools	All plans	Live

02

Account, free trial and membership

- Open Refer & Earn in your web browser, on your phone or computer. Sign in with your email and a password of at least 8 characters.

- Anyone can start a **14-day free trial** with no credit card. You confirm you are 18 or older and agree to the Terms and Privacy Policy.
- A bar at the top counts down the days left in your trial, with a **Subscribe** button.
- After the trial, access needs an active membership bought on the Across the Table store, using the same email you sign in with.
- If the trial or membership ends, everything stays saved. Earner links show a "paused" message, client sign-ups stop, and emails stop until you subscribe again.
- **I just subscribed — check again** rechecks your membership right away. The app also rechecks when you come back to it.
- Password reset by email.
- When the Terms or Privacy Policy change, you are asked once to agree again before you continue.

03 Home

- Four totals: **Earners** (active), **Referrals**, **New clients** (marked Paid) and **Rewards owed**.
- A reminder box when rewards are owed, with their dollar total if you set a reward value.
- A **Get started** checklist until setup is done: set up your program, add your first Earner, send an invitation, get your first referral.
- **Up next:** the clients that need you today, in order. Rewards to send come first, then new sign-ups to book, no-shows to rebook, appointments that have passed, and clients who showed up and need to be marked Paid.
- Quick buttons: **Add an Earner** and **Add a referral**.

04 Program setup and rewards

- Business name, email for replies and alerts, phone, website and booking link.
- Your reward in your own words (a gift card, a free service, cash), plus an optional dollar value for totals.
- An optional offer for new clients, shown on the flyer and the client page.
- The ways you pay rewards: Venmo, Cash App, Zelle, PayPal, cash or gift card. Earners can only choose from the ways you check.
- When you pay (optional), shown to Earners in their rules.
- A personal note added to every invitation.
- A switch for owner alerts: an email when a new referral signs up and when a reward is earned.
- A reminder that some fields limit or ban paying for referrals.

05 Earners

- Add a person, a business, or both. Email and phone are optional.
- Private notes only you can see.
- Record how each Earner wants to be paid, or let them choose on their page.
- Each Earner shows **Referred**, **Paid**, **Owed** and **Rewarded** counts and a list of their referrals.
- The Earners list shows each person's referrals, rewards owed, and whether they have been invited yet. Search appears once you have more than 5.
- **Pause their link** to stop new sign-ups while keeping history, and switch it back on anytime.
- **Remove Earner** turns off their link, flyer and page. Their referrals stay in your list.
- See whether each Earner has email updates on or off.

06 Links, QR codes, flyers and welcome sheets

- Every Earner gets a personal referral link. **Copy link**, or **Share** on phones that support it.
- A QR code for the link, which you can download as an image file.
- A printable flyer with your business name, the Earner's name, your new-client offer, the QR code, and your phone and website. Every client who scans it is credited to that Earner.
- A printable welcome sheet to hand over in person. It explains how it works, the reward and the rules, with one QR code for the Earner's private page and one for their referral link.
- Both print on regular letter paper.
- An invitation email that includes the link, flyer and Earner page. Up to 3 per Earner and 40 in total per day.

07 Client sign-up page

- Opens from an Earner's link or flyer, with no sign-in.
- Shows who recommended the business, and your new-client offer if you set one.
- A short form: name, email, phone, and what they are looking for. A name and an email or phone are required.
- An optional box where the client chooses to let the Earner see their first name and progress.
- After sending, the client sees **Book now** with your booking link, or a note that you will contact them, plus a button to call you.
- A paused or removed link shows a clear message instead of the form.
- Sign-ups through links are limited per hour, to block floods of fake sign-ups.

08 Referral tracking

- Six steps: **Signed up, Booked, Showed up, No-show, Paid and Cancelled**. Each referral shows only the buttons that make sense next.
- An optional appointment date when you mark **Booked**.
- A dated history of every step.
- Shows where each referral came from: signed up through the link, added by hand, or imported.
- Filters: **In progress, Reward owed, Paid, No-shows, Cancelled, All**. Search appears once you have more than 8 referrals.
- Add a referral by hand for clients who call or walk in, and choose the Earner.
- Edit details or fix a step entered by mistake. Delete a referral if you need to.
- Private notes on each referral.

09 Rewards and payout details

- One reward per new client, earned automatically the moment you mark the referral **Paid**.
- Repeat clients are caught: if the same email or phone already earned a reward, the referral shows **No reward**. You can still choose **Give the reward anyway**.
- Moving a referral back from **Paid** removes a reward that was not yet sent.
- Each owed reward shows how the Earner wants to be paid, with a button to open Cash App, Venmo or PayPal when they gave a username.
- Add a note on how you sent it, then tap **Mark reward paid**.
- Refer & Earn only records usernames, \$Cashtags, or the email or phone used for a payment app. It never asks for bank or card numbers.
- Rewards are offered and paid by your business. Across the Table does not pay, hold or guarantee any reward.

10 Earner page

- A private page for each Earner, with no sign-in. It opens with the long private link in their emails or the QR code on their welcome sheet.
- Shows clients sent, rewards owed and rewards paid, with dollar totals when you set a reward value.
- Their link, QR code, share button and printable flyer.
- Lets them choose how they get paid from the ways you accept.
- Lists their clients with progress and rewards. A client who did not agree to share shows only as "A client you referred" and whether a reward was earned.

- How it works, the rules, your contact details, and an email updates switch.
- If your program is paused, it says so, and their rewards are still shown.
- Preview it from the app: More, then **Earner instructions**.

11 Automatic emails

Email	Who gets it	When
Invitation	Earner	When you tap Send invitation
New referral	You	When a client signs up through a link (if alerts are on)
A client signed up	Earner	When a client signs up through their link
Booked, Showed up, No-show, Cancelled	Earner	At each step, only when the client agreed to share
You earned your reward	Earner	When you mark the client Paid
Reward earned: thank your Earner	You	When a reward is earned (if alerts are on)
Your reward is on its way	Earner	When you tap Mark reward paid

- Each email is sent only once, even if you change a referral more than once.
- Every Earner email has a link to stop updates.
- Emails pause while your trial or membership is not active.

12 CSV import and in-app instructions

- **Import referrals (CSV):** choose a file or paste it. Works with the SOS Permit Assistant download for Refer & Earn or any spreadsheet with the listed columns.
- Earners are matched by email and added when new. Importing the same file again updates steps instead of adding duplicates.
- **How-to tab:** seven steps from setup to your first thank-you, plus tips.
- **Earner instructions:** exactly what your Earners see and which emails they get.

13 Help and My Business Hub

- **Get help:** send a question, problem, billing question or idea, with how urgent it is. You get a request number and can see your past requests.
- **My Business Hub** on acrossthetable.biz: all your Across the Table apps, purchases and help requests in one place. Sign in with the same email, using a link sent to your inbox.

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14 Privacy, security and your data

- Each business can see only its own program, Earners and referrals.
- Each Earner sees only their own page, and a client's name and steps only when that client agreed to share them. Names are shortened, for example "John S."
- Earner pages open only with a long private link. Earners are told to keep it to themselves and share their referral link instead.
- Payments for your membership happen on the Across the Table store. The app never sees your card.
- The app stores only payment app usernames for Earners, never bank or card numbers.
- Sign-ups through links and invitation emails have limits to prevent abuse.
- **Download my data** gives you a file of everything in your account.
- **Delete my account** erases your account, program, Earners and referrals right away. The Privacy Policy says backup copies expire within 30 days.
- Your email, plan, purchases, help requests and a few named moments (like inviting an Earner) are shared with My Business Hub. Your Earners' and clients' details are not.
- The Privacy Policy says personal information is never sold or rented and no advertising trackers are used. Privacy questions: info@acrossthetable.biz.
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