

Referral Partner Portal

User Guide

A complete walkthrough of your Referral Portal: logging in, submitting leads, tracking points and gift cards, and redeeming for prizes.



1. Welcome

The Referral Partner Portal is where you track everything related to your referral activity in one place: the leads you've submitted, the points and gift cards you've earned, and the prizes you can redeem them for.

This guide walks through every part of your dashboard — what each section shows, what actions you can take, and what to do if something doesn't look right.

2. Logging In

Your portal is a private page — you'll need to log in with the email address your Account Manager has on file. Once logged in, you'll land on your personal dashboard showing your points, gift cards, and referral activity.

Tip: If you can't log in, double-check you're using the exact email address your Account Manager has on file for you — a different or personal email won't be recognized.

3. Your Dashboard

3.1 Points & Gift Cards Summary

At the top of the page, two cards summarize your account:

- Points card: Total Earned, Redeemed, and your current Balance (available to spend on prizes).
- Gift Cards card: total dollars Earned and how many \$25 gift cards have been Delivered.

Tip: Your Balance already accounts for any redemption you've submitted but that hasn't finished processing yet — so it won't let you accidentally spend the same points twice.

3.2 Sidebar

On the left, you'll find:

- Update Profile — opens a form to update your name, branch/office, and shipping address.
- Update Password — takes you to the password reset page.
- Logout
- Submit Leads — jumps down to the lead submission form.

4. Lead Submissions & Unqualified Leads

These two tables track every lead you've referred to us:

Table	What it shows
Lead Submissions	Leads that have an active or completed deal in progress are qualified leads. Shows status (Open / Approved / Not Approved / Abandoned), last updated date, and any points or gift cards earned so far.
Unqualified Leads	Leads you've submitted that our Sales team hasn't yet quoted or contacted.

- Use the date-range tabs above Lead Submissions (Last 30 Days / 6 Months / This Year / Last Year) to filter by when the deal was last updated.
- Click any column header with an arrow icon to sort by that column.
- Tables longer than 10 rows will show Prev / Next controls at the bottom.

Tip: There may be a short delay before a newly submitted lead shows up here — refresh the page after a minute if you don't see it right away. If it still hasn't appeared after several minutes, see Section 12 (Troubleshooting).

5. Points History & Gift Card History

Below the lead tables, two more tables give you a full transaction log:

Table	What it shows
Points History	Every points transaction, with date, associated deal, point amount, whether it was a bonus, and status.
Gift Card History	Every gift card transaction, with date earned, type, associated deal, dollar value, bonus flag, status, and date delivered.

Points Status meanings

- Active — you've earned it and it's available to redeem.
- Pending — you've submitted a redemption for it, but it hasn't finished processing yet.
- Redeemed — Redemption for prizes and points no longer available.

Gift Card Status meanings

- Earned — you've earned it! The deal has qualified.
- Delivered — sales rep has delivered the gift card.

Good to know: Redemption processing time can vary — most redemptions move from Pending to Redeemed as the order ships, but occasionally a redemption may show as Redeemed right away. Either way, once points are used toward a redemption they've been deducted from your Balance and can't be spent again.

6. Submitting a New Lead

Scroll to the Submit New Leads form (or click "Submit Leads" in the sidebar). Your own name, email, phone, and branch are pre-filled automatically. Simply fill in your referred lead's information and submit.

Tip: Each submission is tracked individually — feel free to submit leads one at a time as you get them, rather than batching multiple submissions in quick succession.

Note: Wait 1-2 minutes after submission for your lead to show up in "unqualified leads". Refresh your page for the latest status.

7. Redeeming Points for Prizes

Scroll down (or click "Redeem Now" under point balance at the top) the Big Book of Prizes section to browse available prizes, then fill out the Prize Redemption Form below it. Your email is pre-filled automatically.

1. Browse the Big Book of Prizes catalog.
2. Select the prize(s) you'd like to redeem in the redemption form.
3. Submit the form.
4. Your points balance updates immediately to reflect the redemption. Your Points History will show the redeemed points as Pending or Redeemed (see Section 5).

Tip: If you're selecting more than one prize in a single submission, each prize is tracked and processed as its own individual order.

8. Updating Your Profile

Click "Update Profile" in the sidebar to open a form where you can update your first name, last name, branch/office, and shipping address (used for prize delivery). Your current information will be pre-filled where available — just update what needs changed and submit.

9. Updating Your Password

Click "Update Password" in the sidebar to be taken to the password reset page.

10. Your Account Manager & Sales Rep

Near the bottom of the page, you'll find a card with your dedicated Account Manager's name, photo, and contact information, along with a button to reach out directly for any leads/sales related issues. For portal support, contact referralportal@retailers.com

11. Getting Help / Troubleshooting

If something on your dashboard looks incorrect, here's what to check before reaching out:

What you're seeing	What to check first
A lead I just submitted isn't showing up	Wait a minute or two and refresh — new leads take a short time to appear. Contact referralportal@retailers.com if it's still missing after 10+ minutes. New leads first show up under the "Unqualified Leads" table.
My points balance looks lower than expected	Check Points History — any redemption you've submitted is deducted right away, even before the prize ships (shown as Pending). If you suspect an error, please contact your Account Manager for a lead status update or email referralportal@retailers.com .
A gift card or prize hasn't arrived	Gift card delivery dates are displayed in the Gift Card History section in your portal. Contact your Account Manager if it has been more than a couple of weeks. Point redemption status is displayed in the Points History section. Please allow 7-15 days after redemption for prize delivery.
A deal status seems stuck or wrong	Deal status reflects our Sales team's current stage for that lead — reach out to your Account Manager, who can provide you with the latest update.

For anything not covered above — a missing lead, an incorrect points balance, or a redemption that doesn't seem to be progressing — reach out to your Account Manager using the contact card at the bottom of the page.