OpenDataPolicies.org

REFERRAL SETUP

How to Share and Get Credit

Your link is the site address + # + your own email. Sharing takes 10 seconds. When a business owner clicks and requests a valuation, you get the credit, an account to track it, and a referral fee when the deal funds.

Compliance first: We never take HIPAA/PHI data or personal customer data. Everything is de-identified before it leaves your control.

STEP 1 · 10 SECONDS

Make your link

Take **https://opendatapolicies.org/**, add a **#**, then add **your own email**. Using Jeff as the example:

```
https://opendatapolicies.org/#jeff.cline@me.com
```

Use your own email at the end. You can also send people straight to the valuation form:

```
https://opendatapolicies.org/get-a-bid#you@email.com
```

Also works: opendatapolicies.org/you@email.com · any-page+you@email.com · ?ref=you@email.com. The first referrer is remembered for 90 days.

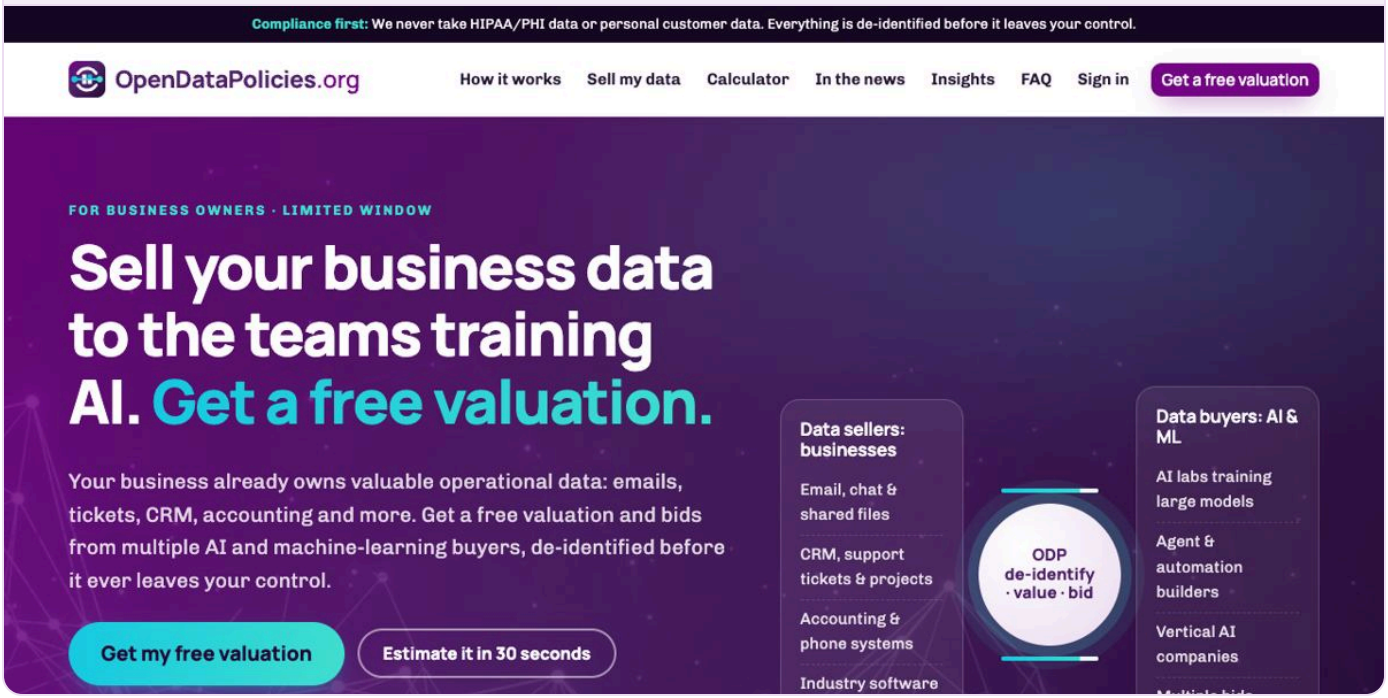
STEP 2

Share it

Text it, email it, post it with an image from the share kit. That's it: about 10 seconds.

STEP 3 · WHAT YOUR FRIEND SEES

https://opendatapolicies.org/



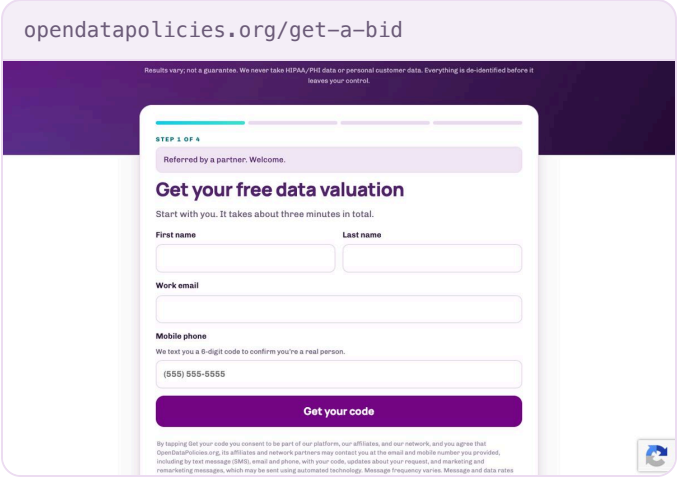
They land on the site. Your email is removed from the address bar instantly, and the credit is stored for 90 days.

STEP 4

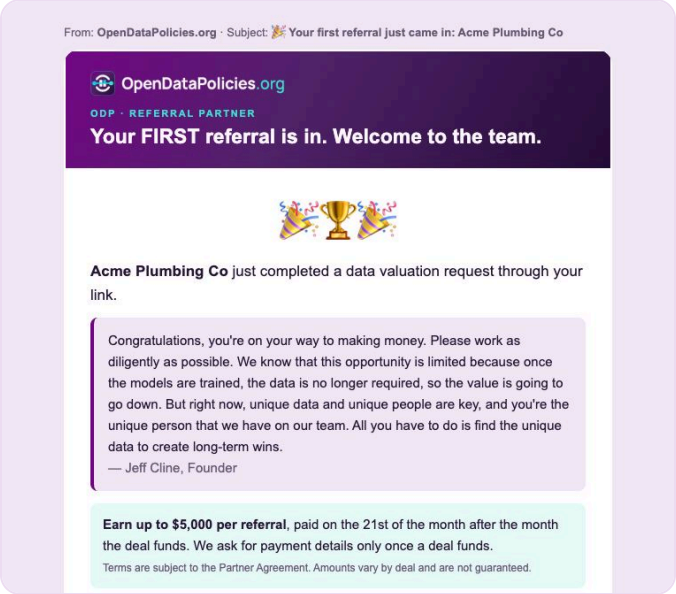
Two things happen when they click and sign up

1. **The system records that your friend or their business is interested**, and the request lands in our CRM, credited to you.

2. **Because your email is attached, you're automatically emailed an account setup** to create your Referral Partner account and track progress.



Your friend completes the free valuation (about 3 minutes).

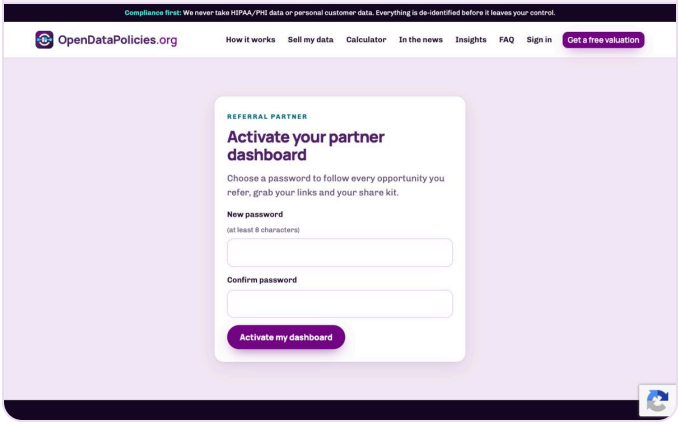


You get this email: business name only, never their details.

STEP 5

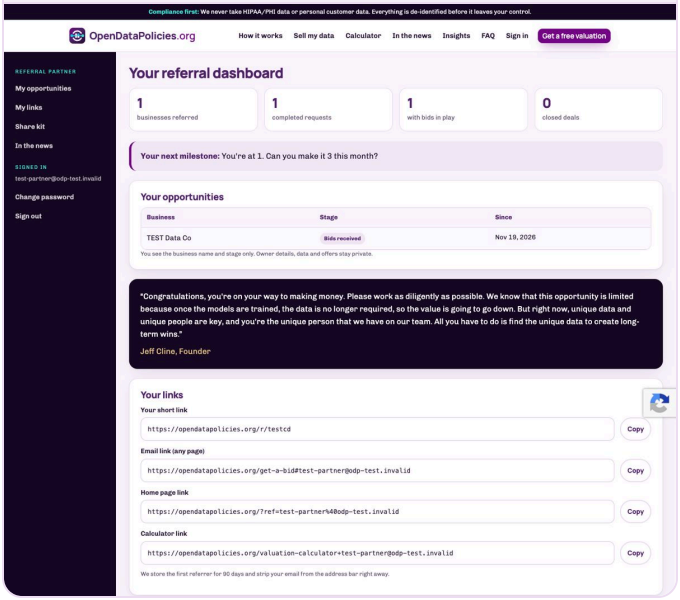
Activate and track

opendatapolicies.org/reset-password?p=activate



Tap the button in the email and choose a password.

opendatapolicies.org/partner



Your partner dashboard: every business you referred (name + stage), your links, the share kit and the latest news.

Get paid

Up to $5,000

per referral. We pay a referral fee depending on the size of the deal, on the **21st of the month after the month we are funded** for the deal. We ask for payment details only once the deal funds.

Terms are subject to the Partner Agreement. Amounts vary by deal and are not guaranteed.

PLEASE DO THIS NOW

Test it in 2 minutes

1. Write your link: **https://opendatapolicies.org/#** + your email.
2. Send it to a friend, or open it yourself in a private window and use a test email address on the form (one you can read).
3. Walk through the free valuation: name, email and mobile (tap **Get your code**), the business, the tools, a header row, the code, submit.
4. Check your inbox: the referral email arrives with your **Activate my partner dashboard** button.
5. Activate, open your dashboard, and tell us anything that felt slow or unclear.

> **Tip:** start every share with the link. The window is open now: once the AI models are trained, this data is no longer required and its value drops.

> **Always:** We never take HIPAA/PHI data or personal customer data. Everything is de-identified before it leaves your control.

Full program: **opendatapolicies.org/preferred-partners** · This guide online: **opendatapolicies.org/referral-setup**