

Track Referrers

SUMMARY

Pipeline will automatically detect referrers on transactions and apply them to CDAs.

Identify a Referrer

To identify a referrer, add the person as a contact on the transaction. here's how:

- 1 From any transaction, scroll down to the “Add Contact” section.
- 2 Enter or select “Referrer” from the “Role” dropdown list.
- 3 Fill in the rest of the contact’s information or select a previously used referrer from the suggestions presented. Optionally add a note to the contact.
- 4 Click [Add Contact] to save the referrer.

Role	Company / Address	Name	Phone	Fax	Email
Ref					
Escrow					
Seller					
Mortgage broker					

Contacts with the referrer role and any notes associated with them will be displayed in the referrer section of the Update Commissions page.