External Referrers

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An external referrer is a brokerage, agent, or partner outside your company that earns a piece of the deal. Name them on the transaction, split the referral between them, and tell escrow who to pay.

Introduction

A relocation company sent you the buyer. A retired agent gets a piece of a deal she handed off. Someone outside the brokerage has earned on this closing, and they have to be named, paid, and accounted for like everyone else on the disbursement.

Pipeline needs two things from you for that: the amount, which goes in with the rest of the sale information, and the party being paid, which you enter further along in the referral section. That second half is what an external referrer is. What you record there prints on the CDA, name and address, down in the payables list, and one setting on your location decides whether escrow cuts them a check directly or sends the money to your brokerage to pass along.

That setting is worth deciding once rather than on every deal, because it's the difference between escrow handling somebody else's money and you handling it. The referrer's details belong to the transaction you entered them on, which is also where you go back to read them, so name the company the first time the way it needs to appear on a check.

How It Works

You enter external referrers per transaction rather than keeping a standing list, so each one is named on the deal it's owed against.

Who Counts as an External Referrer

Anyone outside your company that's owed part of the commission — a referring brokerage, an out-of-area agent, a relocation or lead partner. An agent inside your own company is an in-house referral instead, and gets named a different way.

Name the Referrer

Each referrer gets a name or company name and a mailing address. When the referrer is already a contact on the transaction, their address fills in from that contact record, so correcting an address means correcting the contact rather than retyping it here.

More Than One Referrer

A single side of a transaction can owe more than one outside party. You set how many referrers there are, then divide the total referral commission between them by percentage or by dollar amount. Each one gets their own name, address, and share.

Who Cuts the Check

Your location's Commission & CDA Settings include a payability setting for referral commissions. Turned on, the CDA tells escrow or title to send the referral money to your brokerage, and you disburse it. Turned off, the CDA gives each referrer their own payable line and escrow pays them directly. It's set per location, which is why two offices in the same account can produce CDAs that look different.

How They Appear on the CDA

When escrow pays referrers directly, each one appears in the payables section of the CDA with their address printed below their name — the address escrow mails the check to. Changing the setting only affects CDAs generated after the change, so re-enter commissions on an existing transaction to pick up the new format.

Tell Them Apart in Reports

The Commission & Closings report is where referral payments to outside parties show up. An in-house referral shows the referring agent's name beside the referral amount; an external referral shows the amount with no agent name. That difference is how you separate the two when reviewing a closing period.

Add an External Referrer to a Transaction

> Name the outside party in the *Referral Commissions* section so they appear on the CDA and in your reports.

> **Who Can Do This**: Admins with the **enter financial data** permission in the transaction's location.

To add an external referrer to a transaction:

1. Open the transaction, then click [Manage Commissions] or [Update Commissions] in the left menu.
2. In *Sale Info*, enter the referral amount in the **Referral Commission** field and leave [This is an in-house referral] unchecked.
3. Click [Calculate & Continue] until you reach the *Referral Commissions* section.
4. Enter the referrer's name or company name.
5. Enter their mailing address, or confirm the address that filled in from their contact record.
6. Click [Calculate & Continue], then [Save Commissions].

Pipeline adds the referrer to the transaction's commission record, and they appear on the regenerated CDA.

Split a Referral Between Multiple External Referrers

> When more than one outside party is owed on the same side, enter the total once and divide it between

them.

Who Can Do This: Admins with the **enter financial data** permission in the transaction's location.

To split a referral between multiple external referrers:

1. In *Sale Info*, enter the **total** referral commission for that side in the **Referral Commission** field.
2. Click [Calculate & Continue] until you reach the *Referral Commissions* section.
3. Set the number of referrers being paid.
4. For each referrer, enter their name or company name and mailing address.
5. Divide the total between them by entering each one's share as a percentage or a dollar amount.
6. Click [Calculate & Continue], then [Save Commissions].

Each referrer gets their own line in the commission breakdown, and on the CDA if your location pays referrers directly.

Update an External Referrer's Mailing Address

The address on the CDA comes from the referrer's contact record on the transaction — correct it there and re-enter commissions.

Who Can Do This: Admins with the **enter financial data** permission in the transaction's location.

To update an external referrer's mailing address:

1. Open the transaction and find the referrer in the contacts section.
2. Edit that contact and correct the mailing address.
3. Click [Update Commissions] in the left menu.
4. Continue to the *Referral Commissions* section and confirm the corrected address is showing.

5. Click [Calculate & Continue], then [Save Commissions].

The CDA regenerates with the corrected address under the referrer's name.

Decide Who Pays the Referrer

A referrer who never appears as their own line on the CDA is usually this setting rather than anything missed at entry. Changing it affects only the CDAs you generate afterward.

Set up Commission & CDA Settings for each of your offices to decide who gets paid directly, whose signature signs the CDA, and what instructions your title company reads.

See Commission & CDA Settings

External Referrers FAQ

External referrers are named on the transaction and paid out of the referral commission you entered in *Sale Info*. Answers to the common questions about adding referrers, their addresses, and who escrow pays. See External Referrers FAQ.

External Referrers Troubleshooting

Referrer not showing up where you expected? Start here.

- Why Isn't the Referrer Showing as a Payable on the CDA?