Record a Referral Fee on a Deal You Weren't Part Of

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Your office sent a client to another brokerage and a check is coming back. Pipeline has no referral transaction type — here is the shape support builds instead, so the income lands in your reports instead of a drawer.

Introduction

An outside referral is money your brokerage earned without representing anyone. There's no side, no sale price, and no closing to run: just an agreement, a check, and a number that belongs in your year-end totals.

Pipeline doesn't ship a transaction type for it. What it does have is everything a referral actually needs: a transaction to hang the paperwork on, a label to classify it, an agent to credit, and a commission entry with only the referral figure filled in. Assembled in that order, the referral behaves like any other closed deal in your reports.

When to Use This

- You referred a client to an agent at another brokerage and the referral fee is coming to your office.
- You went looking for a referral transaction type and only saw Buyer and Listing.
- A referral check arrived and there's nowhere obvious to file the agreement.
- Your year-end totals are missing referral income you know the office earned.
- Your accountant wants referral revenue broken out from commission revenue.

Why This Keeps the Income in Your Reports

The instinct is to treat a referral as paperwork rather than a deal — scan the agreement, drop it somewhere shared, deposit the check, and move on. It's a reasonable instinct, because a referral doesn't look like a transaction. Nobody toured a house.

The cost shows up in January. Every financial report in Pipeline reads transactions, so referral income that never became one isn't there — not in Commission & Closings, not in your brokerage totals, not in anything you hand your accountant. Building the referral as a transaction takes a few minutes once and puts the money where the rest of your money already lives.

1. Create a Transaction for the Referral

Name it so it reads as a referral at a glance — most offices use the referrer's or the client's name with the word *Referral* in it.

Add a new transaction to start tracking a listing or sale in your company's Pipeline account.

See Adding a Transaction

> A transaction created to hold a referral counts against your monthly transaction quota, exactly like any other. If your office takes a lot of small referrals, that's worth knowing before you build one per check.

> If you only need somewhere to keep referral *paperwork* and aren't running commissions on it, some offices keep a single ongoing transaction per agent — *Jane Smith - Referrals* — and file every agreement and check there. One transaction instead of a dozen. It won't carry per-referral commission figures, so it's a filing answer, not a reporting one.

2. Label It as a Referral

Apply a **Referral** label when you create the transaction. A label is permanent classification: it survives every status change the transaction goes through, which is why support reaches for a label here rather than a custom status. Later, one search on the label returns every referral your office has ever taken.

Labels classify your transactions by property type, and they drive the checklists Pipeline auto-assigns.

See Transaction Labels

3. Add the Referring Agent

Put the agent who made the referral on the transaction. That's what gives them access to the file and what lets the referral show up against their name when commissions are entered.

Put the right agents on each side of a transaction so Pipeline credits the deal correctly and everyone can open the file and work it.

See Assign Agents

4. Enter Only the Referral Commission

Open [Manage Commissions] and fill in the referral figure and nothing else. Leave Sale Price, Sales Volume, and Units empty — your office didn't sell anything, and filling those in would inflate your production numbers with a deal you never worked.

Manage Commissions is the one screen where you record a transaction's money, and it's what your CDA and every financial report are built from.

See Manage Commissions Workspace

> Saving produces a CDA, and on a referral you usually won't send it anywhere — there's no escrow officer waiting on it. It exists so the transaction has commission figures attached, which is the thing that makes your reports see it.

5. Pull the Referral Income at Year-End

Referral revenue reports at the transaction level rather than per agent, so this is the report to run when you want it broken out.

The closed-business record — every closed transaction in your period, with the commission and fees your company collected and what it paid back out.

See Commission & Closings