Track Referrers

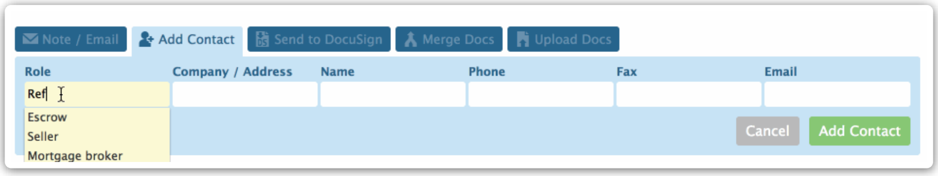
SUMMARY

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.



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