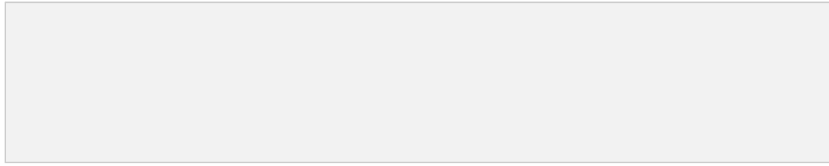


# How to Enter a Referral (you are the Referring Agent)

**Did you refer someone to an outside brokerage? Follow these easy steps to get paid.**

## **Create a Referral:**

1. When you are in the Real App, make sure you are in "My Transactions" (left hand side) and click "Create Referral" on the top right.



2. The system will walk you through a series of questions.

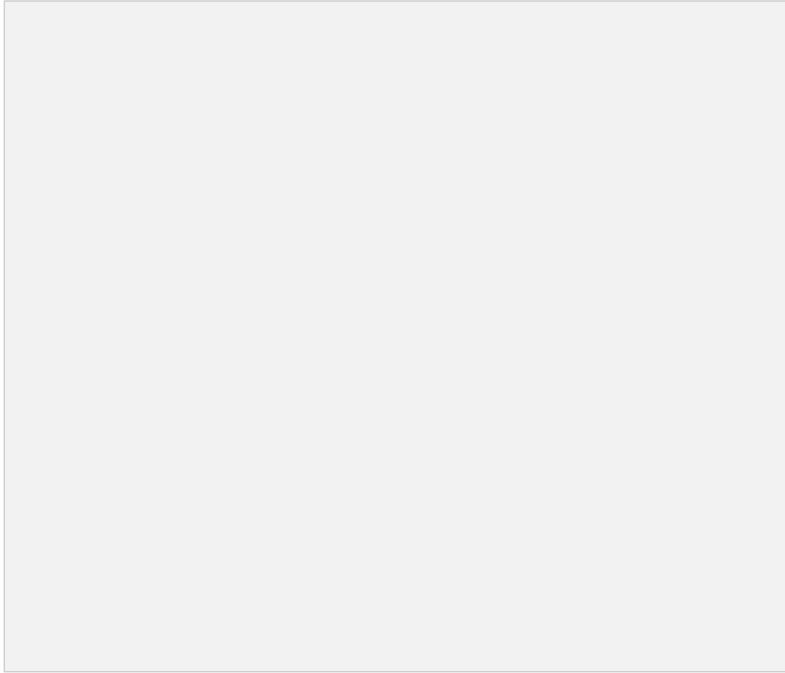
Notes:

- If you aren't sure of the referral amount, that's ok. Under "Expected Referral Amount," just enter your best estimate. Same thing for Approximate Closing Date -- you can always change these later.
- If you don't know the address yet, you can enter the "Referral" and the client name for Street and come back to edit this later.
- If you don't have payment information at this time, you can enter this later.

3. Once you've completed all the steps, review and click "Create Referral." The system will create a transaction, just like any other transaction.

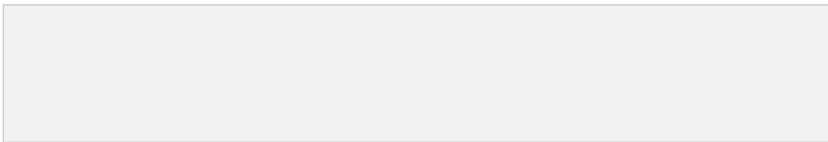
**If you need to edit the referral:**

- Click "Manage Participants" if you want to add someone else on the referral
- Click "Edit Transaction" if you need to edit information on the referral. A module will pop up on the right.



**Manage your referral:**

- Click on Checklist to upload referral documentation



- If you want to track the progress of your referral, click Road to Success. This is tailored to a referral and will show you the specific steps to help you understand where your referral is in the process.

