

# Referral Management

## REALedger™ Add-on

**Good Idea!**  
Track Inbound  
and Outbound  
Referrals

It has become increasingly important to be on top of Referrals – both inbound and outbound. With Referral Management you can track, report, and budget your referral dollars. Robust reporting makes staying on top of referrals a snap. A single data entry screen allows you to enter, find, and report on referrals. As with all REALedger forms, you can find information by searching on any field.

Inbound referrals can be assigned to an office, agent, Listing, and Sale as it processes through the sales cycle. When the sale is closed, the referral can be paid through AP or via table funding, and the Referral Record is updated automatically.

Outbound referrals can be linked to a Broker and/or their agent and you can send emails directly from the entry screen to check status.

Three robust reports provide all the variations you need to manage your referrals cycles. The **Detailed Referral Report** includes all information on a single referral, including all notes. The **Referral Report** allows you to filter and select the data you want to see. **Time To Close Metrics Report** includes days to close and total paid out and in.

Sample Outbound Referrals Data Entry Screen

ID	Ref #	Address Seller / Buyer	Direction Orig. Office	Status	Type	Source	Date Ent'd	Referral Percent	Date Referral Closed	Paid Amount	Referral By or To Assigned Agent (Off)
Agents Show: ALL Office Show: ALL Additional Filter: Direction = Outbound											
For Dates: 1/1/2009 through 7/31/2009 Date Applied To: Date Received or Given Group By: Office											
Originating Office: AS - Astoria											
313	AS-090817	- / Finney, Tula	Outbound AS	Closed Sale	Client Move		06/02/2009	2.25%	07/19/2009	6,750.00	RE/Max Preferred (Not assigned)
			Count: 1			Total Inbound:			\$0.00		
					Total Outbound:			\$6,750.00			
Originating Office: CA - Canas WA											
2	123	1230 Meadow Dr Conroy, Dale / Abbey, Omar	Outbound CA	Closed Sale	Listing	Drive By	05/20/2009	5.00%	05/20/2009	1,000.00	Prudential NW Properties Adams, David (C.A)
			Count: 1			Total Inbound:			\$0.00		
					Total Outbound:			\$1,000.00			
FIRM TOTAL											
			Count: 2			Total Inbound:			\$0.00		
					Total Outbound:			\$7,750.00			

Sample Outbound Referrals report grouped by Office

## Referral Management features:

- ◆ Single form for inbound and outbound entry
- ◆ User defined Directions, Status, Type, and Source of Business
- ◆ Link inbound referrals to Office, Listing, Sale, and Agent
- ◆ Link outbound referrals to outside Agent, Broker, and Company
- ◆ Unlimited notes that print on the Referral report
- ◆ Closed Sales trigger Referral payment
- ◆ Payment can be via Accounts Payable, and can be initiated by the sale close
- ◆ As with all REALedger data entry forms, **Find** data easily with case sensitive lookups on all fields.

## Reporting Options

Filter on:

- ◆ Direction (i.e. inbound or outbound)
- ◆ Status (i.e. Open or closed)
- ◆ Type
- ◆ Source of Business

Sort and Group on:

- ◆ Agent
- ◆ Office
- ◆ Firm
- ◆ Referring Company



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