

# CB REFER FAQs





# CB REFER FAQs

- **What is CB Refer?**

CB Refer is a platform that has been created for agents, by agents.

We have compiled feedback and created a responsive web solution that empowers users to easily and effectively find an agent for their clients who can provide unparalleled service. This domestic product aims to improve the agent experience of referring a consumer. While increasing the overall number of outgoing referrals captured within Coldwell Banker and Realogy.

- **What is it for?**

CB Refer easily allows agents to send agent to agent (broker to broker) referrals to Coldwell Banker or Realogy Brands when there is no Coldwell Banker in the market.

- **Who is it available for?**

It is currently available for the Coldwell Banker Realty real estate agent population.

## CB REFER FAQs

- **If help is needed where should agents go?**

If agents have questions about CB Refer they should contact the Helpdesk.

 877-678-4357

 [cbhelp@realogy.com](mailto:cbhelp@realogy.com)

If agents have questions about a specific referral submitted, they should contact:

 [questions@CBRefer.com](mailto:questions@CBRefer.com)

- **What is the value of using CB Refer instead of finding an agent on my own?**

CB Refer delivers a consistent experience by keeping business in the Coldwell Banker brand and delivering an expected level of service, while guaranteeing the referring agents referral fee is paid in a timely manner after closing.

## CB REFER FAQs

- **Is CB Refer available as a mobile app?**  
CB Refer is a web platform that is also responsive for tablet and mobile devices.
- **Who has access to CB Refer and where can it be found?**  
Currently, CB Refer is only available to Coldwell Banker Realty agents via Okta credentials. It is accessed on CB Desk or directly at CB Refer.com.
- **How different is this from the e-Relo form?**  
CB Refer puts the power in the agent's hands by streamlining the process, allowing the agent to select a referral fee, and providing the ability to select their own agent.
- **Does CB Refer support international referrals?**  
No, not at this time. This is a Domestic US application only.
- **What is displayed within the agent profiles?**  
The profile includes information such as years of experience, number of transactions, and average sales prices. In addition, the referring agent can view their agent's bio and connect directly with the receiving agent to conduct an interview prior to sending the referral.

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- **If a referring agent already has a specific agent in mind, can they search by the agent's name to request them?**  
Yes, CB Refer allows you to search agents in a market area. If, for any reason you cannot find your specific CBR agent, just click "Select for Me" on the agent selection screen and one of our CB Operations Specialists will reach out to assist.
- **What if I try to submit a referral where there is no coverage?**  
Simply click "Have a Specialist Assigned" and a CB Operations Specialist will help you find an agent where we do not have coverage.
- **Who will manage my referral once I place it through CB Refer?**  
Our CB Operations Specialists will ensure all documentation along with milestone updates are provided to you on an ongoing basis.
- **Can you search for an assigned agent by language or certification?**  
Not at this time but it is being considered for future releases.

## CB REFER FAQs

- **Will any additional fees be charged to the referring agent?**  
No. CB Refer will not assess additional fees to the referring agent.
- **Will any additional fees be charged to the receiving agent?**  
Yes. Standard market add-on fees and split caps will apply to the receiving agents.
- **Will there be any additional fees or split caps added to local office-to-office referrals?**  
No unless business rules dictate otherwise.





**CB REFER**  
**Agent Search and  
Selection**



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## CB REFER

# Agent Search and Selection

- **How are agents presented for selection on CB Refer ?**

Search results will populate all agent's that service the chosen area regardless of the office they are affiliated with.

The search results will initially show Leads Agents first, followed by all other agents that service the area.

All columns have a sort feature to show agents by Name, Years of Experience, Total Transactions and Average Sales Price.

- **Why are Agents from my office not presented first?**

Agent selection is focused on determining the best match from agents who have a track record in the designated referral area. Managing agent display by office location is not available at this time.

- **Why do Leads Agent populate first?**

Leads Agents have a demonstrated track record of lead acceptance, proven lead conversion and accept the associated total referrals fees. All agents can be found by scrolling down or sorting by specific criteria. You can also use the Search Agents box to find any CB Agent by name

- **Can agents use this to send local office-to-office referrals?**

Yes. This tool can be used for outgoing or local office-to-office referrals.





# CB REFER Agent Search and Selection

- **I checked an agent's transactions, and it doesn't seem accurate. How can I get this fixed?**

CB Refer pulls all its data from Realogy financial systems of record and cannot adjust them in the CB Refer platform

- **Where do the data points for the agent's profile come from?**

Agent Profile Fields	System of Record
Agent Full Name	CBHomes
Years of Experience	LeadRouter
# Transactions	Trident
Avg. Sales Price	Trident
Agent picture	CBHomes
Brokerage name	CBHomes
Agent Phone Number	CBHomes
Agent Email Address	CBHomes
"About" section	CBHomes
Brokerage Information	CBHomes
Property Specializations	LeadRouter
Languages Spoken	CBHomes
Licenses	CBHomes

- **How do team member transactions show in CB Refer?**  
The team's total transactions appear under the team lead.