# Referral Source - How to Guide

**Welcome to TerraTal – The Global Talent Exchange!!!** We would like to thank you for agreeing to become a registered Referral Source and look forward to working with you as you grow your Professional Network. The purpose of this document is to provide guidance on how to navigate getting setup and using the basic functionality within The Global Talent Exchange.

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i.  **How to Register as a Referral Source**
   a. You should have received a welcome email from TerraTal containing a link.  You will click on that link and it will immediately redirect you to the Referral Source registration page where it will require you to change your password and accept the website user policy agreement. Once this is completed you are now registered as a Referral Source and can begin referring Employers and Professionals into The Global Talent Exchange.

ii.  **How to Log into your Dashboard**
   a. To log back in as a Referral Source you can click on either the Professional Login or Employer Login buttons on the website's home page and enter your username and password.  The system will know where to direct you by these credentials.

iii.  **How to Refer a Professional**
   a. Once registered and logged in the site you can click on the Professionals Dashboard tab in the menu bar.  Here is where you can refer new professionals and track whether they register and create a professional profile.
   b. There are two ways to get credit for referring a professional:
      i. On your Professionals Dashboard in the Professional Invite section you will enter their first name, last name and email address in the applicable fields and click blue "Send Invitation" button.  This will send an automated email to the Professional indicating that you have referred them into the site as you believe it would benefit them.  In the email there is a link and if they click on the link and register they become part of your Professional Network by that email address.
      ii. On your Professionals Dashboard page you have been assigned a Dedicated URL that is outlined on this page under your name and email.  This is specific to your agency and allows us to tie anyone who uses it to register back to your

Professional Network. You can use that link to generate Professional Profiles and anyone who registers using it will become part of your Professional Network by the associated email address.

    c. You are able to track all of your Professional referrals through the system in the Referral Tracker section of the Professionals Dashboard just under the Professional Invite section. It will also tell you how many times there profile has been purchased. Please keep in mind that you will only see those that register through the Dedicated URL after they register.

iv. **How to refer an Employer**

    a. To refer an employer, click on the Employers Dashboard. Once the site has redirected you please enter the Employer Name (Company Name), First Name, Last Name, and email address of the person who you are referring in the applicable fields. You will then identify their role either as an Organizational Administrator or a Hiring Manager/Recruiter. You can only choose one.

        i. An Administrator will get access to a company dashboard whereby they can manage users under their company domain.

        ii. A Hiring Manager/Recruiter will have access to a personalized dashboard without the ability to add users under their company.

    b. Once you have identified which role you will click the blue button labeled "Send Invitation" which will generate an automated email based on their role containing a link that they will click on to complete their registration. Once registered as they drive Professional Profiles into The Global Talent Exchange these will become part of your Professional Network.

    c. You will be able to track whether the Employers, Hiring Managers, or Professionals have registered and the # of Referrals they have registered on The Global Talent Exchange.

This concludes our How to Guide for Referral Sources. If you should have any questions please email us at ReferralSource@terratal.com. Again, we are excited that you are part of The Global Talent Exchange!!!!

Sincerely,

The TerraTal Executive Team