

Referral Sheet Management

How do I manage my organization's referral sheet?

To manage your organization's referral sheet, follow these steps:

1. Go to the Admin Tools tab at the top.
2. Go to Referrals under the Organization Management heading.
3. Click on the blue Referral Sheet button.
4. If you'd like to search for a referral, use the search bar.
5. To filter results by date and/or referral type, expand the Show Advanced Options arrow.
6. If you'd like to print the referral sheet, click on the blue Printable Sheet button.

The screenshot shows the 'Referrals' management interface. At the top left is the title 'Referrals'. To its right is a search bar labeled 'Search Name or Keyword' with a magnifying glass icon. Below the search bar is a blue button labeled 'REFERRAL SHEET'. To the right of this button is a link that says '^ HIDE ADVANCED OPTIONS'. Below these elements are several filter controls: 'From' with a date picker set to '02-27-2024', 'To' with a date picker set to '03-27-2024', 'Referral Type' with a dropdown menu set to 'All', and 'Results per page' with a dropdown menu set to '10'.

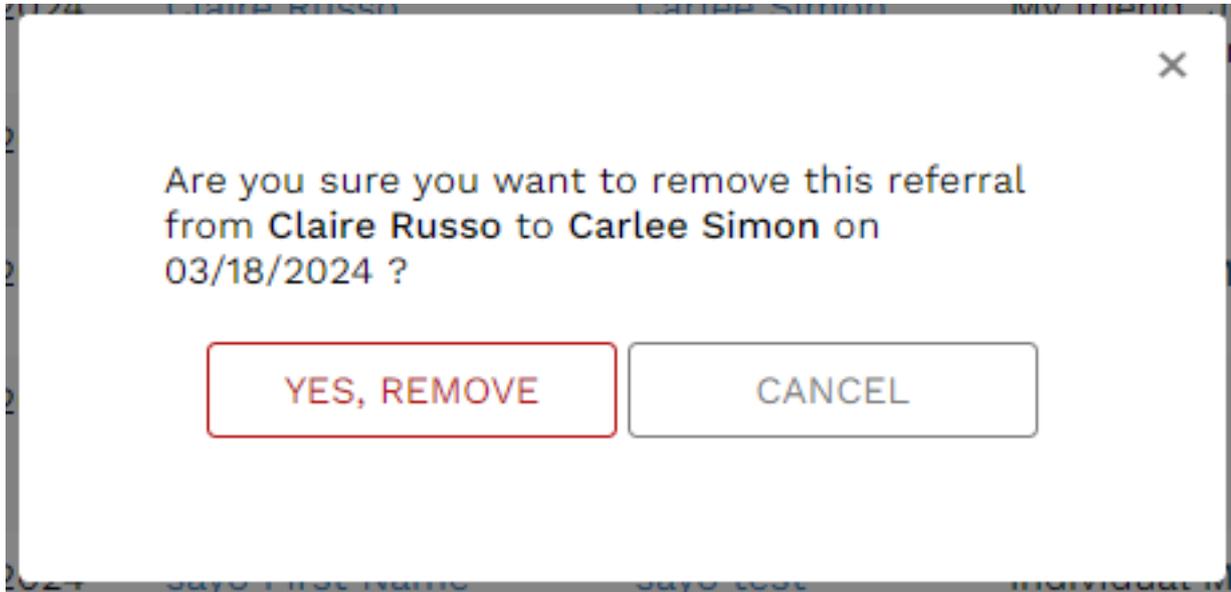
7. View a referral by clicking on the blue arrow icon on the referral you'd like to view.
8. Delete a referral by clicking on the red trash bin icon.

The screenshot shows the 'Referrals' management interface with a list of referrals. At the top left is the title 'Referrals'. To its right is a search bar labeled 'Search Name or Keyword' with a magnifying glass icon. Below the search bar is a blue button labeled 'REFERRAL SHEET'. To the right of this button is a link that says 'v SHOW ADVANCED OPTIONS'. Below these elements is a table with the following columns: 'Date', 'From', 'To', and 'Details'. The table contains three rows of referral data, each with a red trash bin icon and a blue arrow icon to its right.

Date	From	To	Details		
03/27/2024	Grayson Mathers	Roosev Barrera	Hey Roosev, we're looking to invest more in video marketing but we have no idea...		
03/27/2024	Lance Hampton	Malik O'Sullivan	Hi Malik, I'm not sure if you remember me but we met at the last meeting and I wa...		
03/27/2024	Sofia Reilly	Elaine Brewer	My friend, Addison, is looking for someone to help plan a banquet next month at th...		

- a. Click on the red Yes, Remove button. If you've selected the wrong referral or you no longer want to delete a referral, click on the gray Cancel button.

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