

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.

Referrals

Search Name or Keyword

REFERRAL SHEET

HIDE ADVANCED OPTIONS

From

To

Referral Type

Results per page

02-27-2024

03-27-2024

All

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.

Referrals

Search Name or Keyword

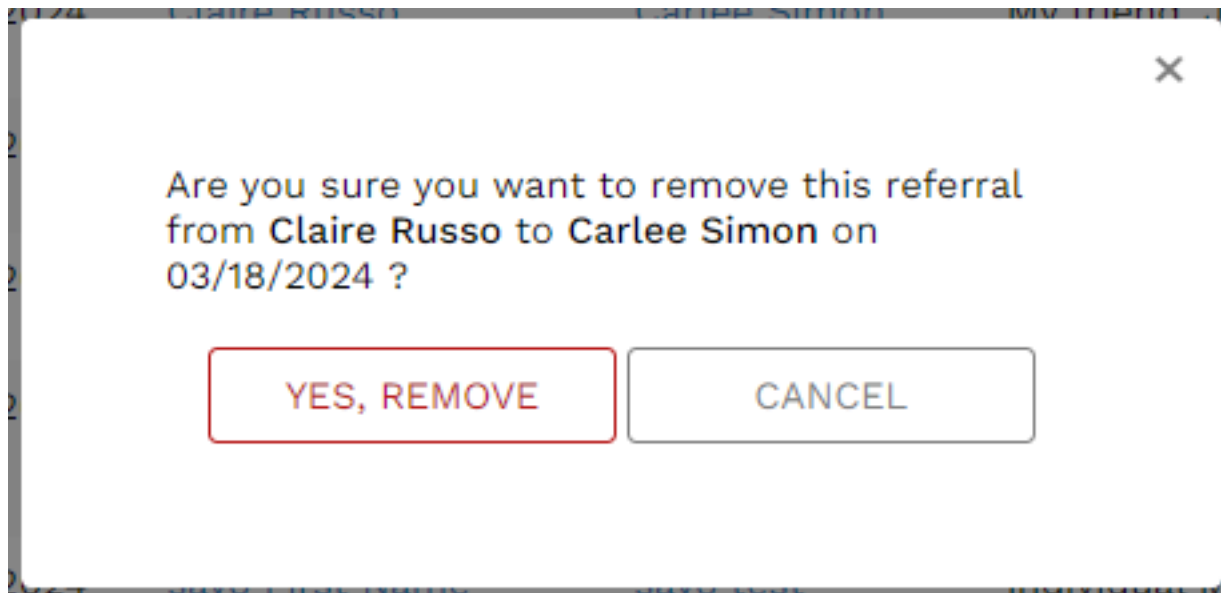
REFERRAL SHEET

SHOW ADVANCED OPTIONS

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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Didn't find what you're looking for? [Contact Biznomos Support](#) online or call toll-free at [1-800-232-3989](tel:1-800-232-3989) for additional help.

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Author: n/a

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