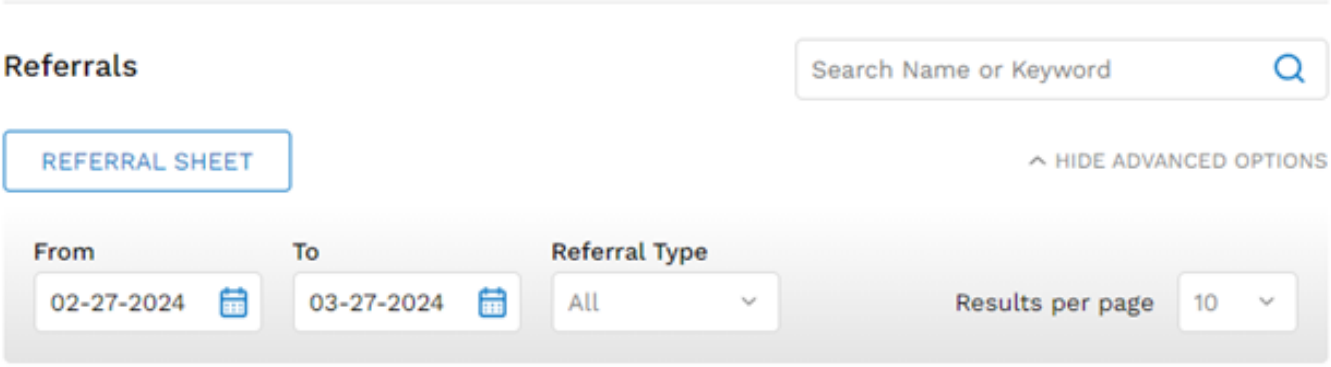
Referral Sheet Management

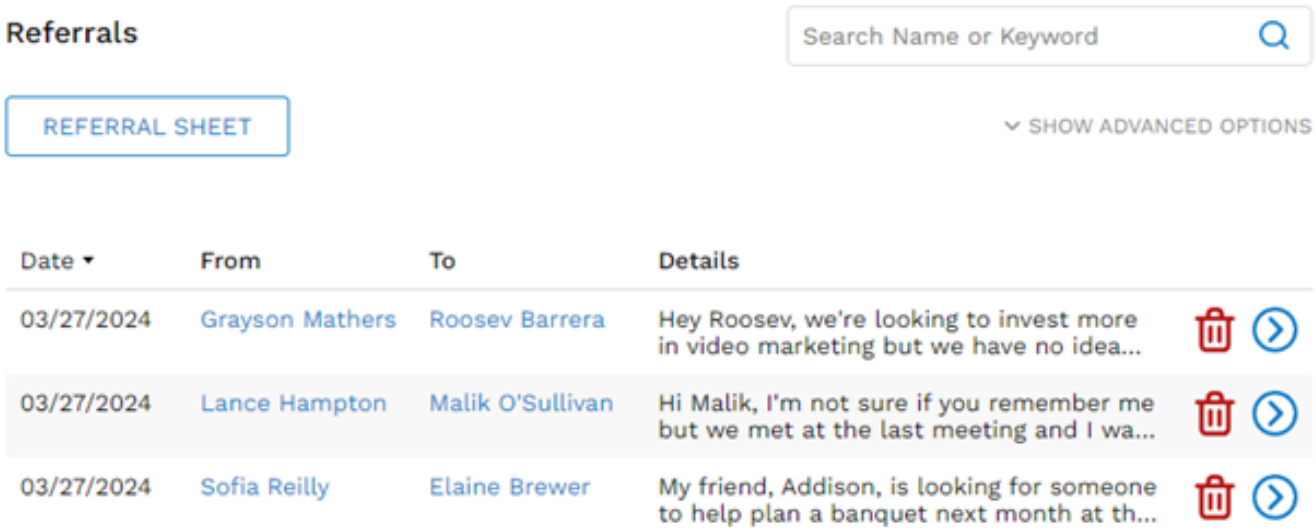
How do I manage my organization's referral sheet?

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.



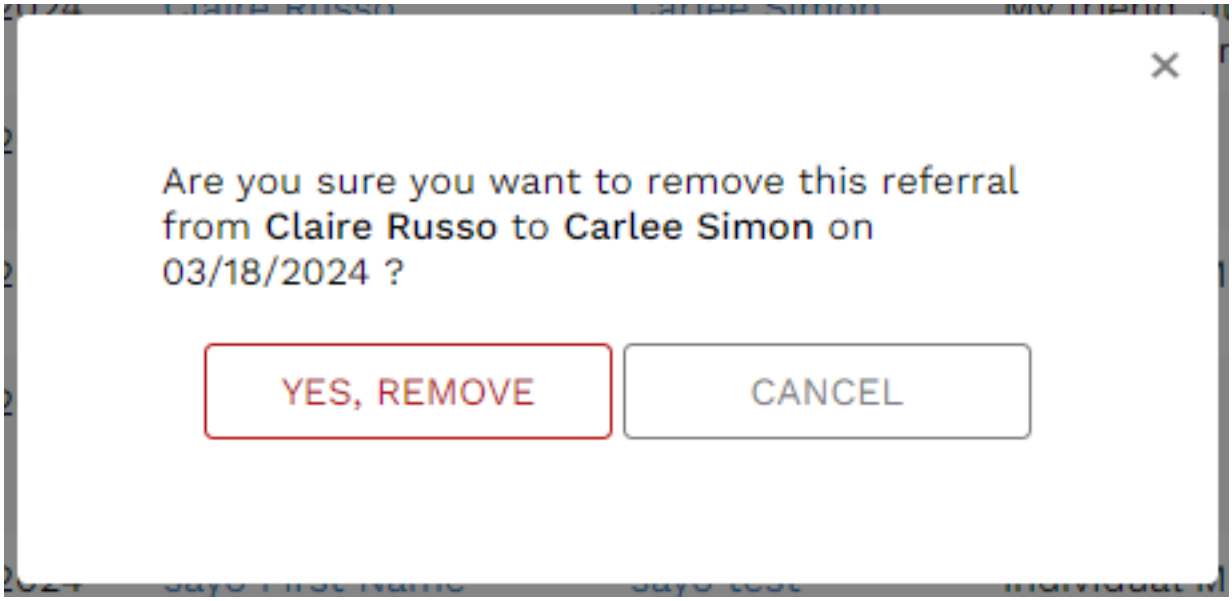
7. View a referral by clicking on the blue arrow icon on the referral you’d like to view.
8. Delete a referral by clicking on the red trash bin icon.



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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Referral Sheet Management



Didn't find what you're looking for? Contact Biznomos Support online or call toll-free at 1-800-232-3989 for additional help.

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Author: n/a
Last update: 2024-05-29 19:25

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