Manage My Referrals

How do I add a referral type?

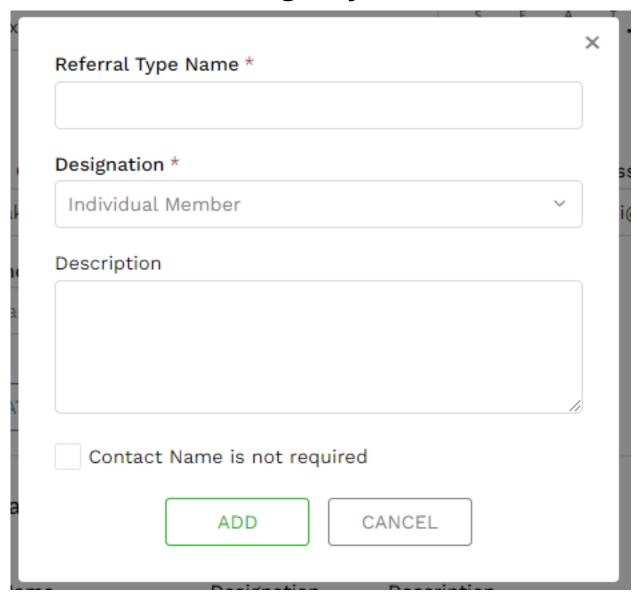
To add a referral type, follow these steps:

- 1. Go to the Admin Tools tab at the top.
- 2. Go to Organization Settings under the Organization Management heading.
- 3. Scroll down to the Referral Types heading.
- 4. Click on the green Add Referral Type button.

ADD REFERRAL TYPE

- 5. Add a Referral Type name.
- 6. Choose a Designation-either for All Members or only for an Individual Member.
- 7. Add a Description.
- 8. Choose to require or not require a contact name by checking or not checking the box titled, Contact Name is not required.
- 9. Once finished, click on the green Add button.

Manage My Referrals



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

Unique solution ID: #1015

Author: n/a

Last update: 2024-05-29 18:21