Manage My Referrals

How do I edit a referral type?

To edit 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 yellow pencil icon.

	Name	Designation	Description		
✛	General	Individual Member	Information regarding business opportunities to a specific member	🗑	✏
✛	Introduction Request	All Members		🗑	✏
✛	Introduction Request	Individual Member		🗑	✏

5. Edit referral type by changing:

a. The Referral Type Name

b. Designation - either an Individual Member or All Members

c. Description

d. Choose to require or not require a Contact Name with the checkbox at the bottom

Edit Referral Type   ‹ BACK

Referral Type Name *

> General

Designation *

> Individual Member   ⌄

Description

> Information regarding business opportunities to a specific member

✔ Contact Name is not required

6. Once finished, click on the green Update Referral Type.

> UPDATE REFERRAL TYPE

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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](#) for additional help.

Unique solution ID: #1016
Author: n/a
Last update: 2024-05-29 18:25