Manage My Referrals

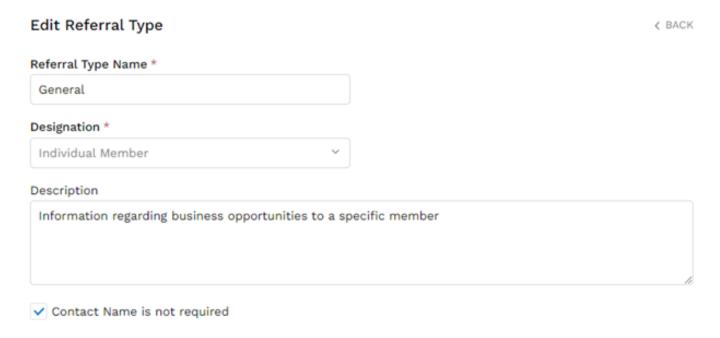
How do I edit a referral type?

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	
4	General	Individual Member	Information regarding business opportunities to a specific member	û <u></u>
4	Introduction Request	All Members		₩ 🖉
4	Introduction Request	Individual Member		ம் 🖉

- 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



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? <u>Contact Biznomos Support</u> online or call toll-free at <u>1-800-232-3989</u> for additional help.

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