

Manage My Referrals

How do I review my organization's overall referrals?

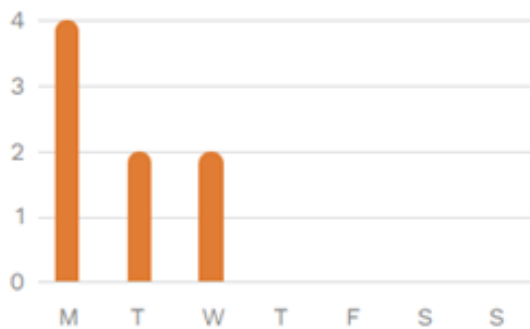
To review your organization's overall referrals, follow these steps:

1. Go to the Admin Tools tab at the top.
2. Go to Statistics under the Organization Management heading.
3. View statistical data from a different time frame by using the drop-down menu for the Active Members Online and Referrals By Type statistics.

Statistics

Active Members Online

This Week ▾



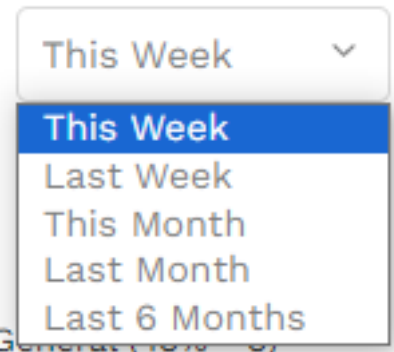
Referrals By Type

This Week ▾

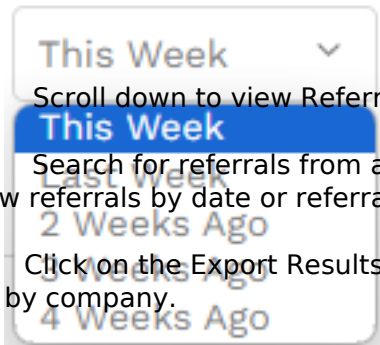


4. Choose to view data from:
 - a. This Week
 - b. Last Week
 - c. 2 Weeks Ago-only for Active Members Online
 - d. 3 Weeks Ago-only for Active Members Online
 - e. 4 Weeks Ago-only for Active Members Online
 - f. This Month-only for Referrals By Type
 - g. Last Month-only for Referrals By Type
 - h. Last 6 Months-only for Referrals By Type

Manage My Referrals



5. Scroll down to view Referrals by Company.
 - a. Search for referrals from a specific company by using the search bar.
View referrals by date or referral type by expanding the Show Advanced Options arrow.
 - b. Click on the Export Results button to download a .csv file of your organization's statistical referrals by company.



Referrals By Company

[EXPORT RESULTS](#)[^ HIDE ADVANCED OPTIONS](#)

From

03-25-2024



To

03-31-2024



Referral Type

All



Name ▲	General Sent	General Received	Introduction Request Sent	Introduction Request Received	Direct Sent	Direct Received
1Lacey Sykes Real Estate	1	0	0	8	0	0
abc	1	2	1	3	0	0
Beam Tech Construction	0	0	0	8	0	0

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