

Submit a Business Referral

How do I submit a referral in Biznomos?

To submit a referral in Biznomos, follow these steps:

1. Go to the Submit a Referral tab at the top.
2. Fill in all necessary fields—different referral types will require different required fields. For example, a Direct referral type requires a Contact Name but a Mutual referral type does not.
 - a. Send to either an Individual Member or All Members
 - b. Member Name
 - c. Send From—only available to Admin members
 - d. Referral Type
 - e. Contact Name
 - f. Company
 - g. Details

Submit a Referral

Send To *

☒ Individual Member ☐ All Members

Member Name *

Type or select member name ▾

Send From *

Type or select member name ▾

Referral Type *

☒ General ☐ Introduction Request ☐ Thank You ☐ Direct ☐ Mutual

Contact Name

Company

▾ HIDE ADDITIONAL CONTACT INFORMATION ▸

Details *

3. Expand the Additional Contact Information drop-down menu to add more contact information, including:
 - a. Email Address

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- b. Phone
- c. Address

^ HIDE ADDITIONAL CONTACT INFORMATION

Email Address

Phone

Address

- 4. Choose to include this referral in the public referral sheet with the checkbox at the bottom.



Yes, you can include this in the public referral sheet

- 5. Click on Submit Referral.

SUBMIT REFERRAL

Didn't find what you're looking for? [Contact Biznomos Support](#) online or call toll-free at [1-800-232-3989](tel:1-800-232-3989) for additional help.

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