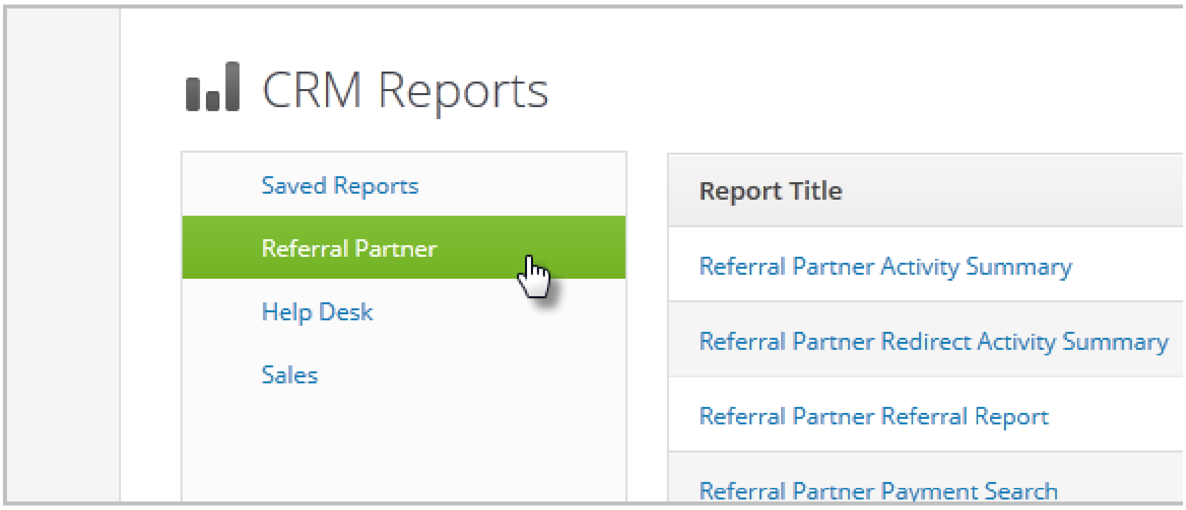
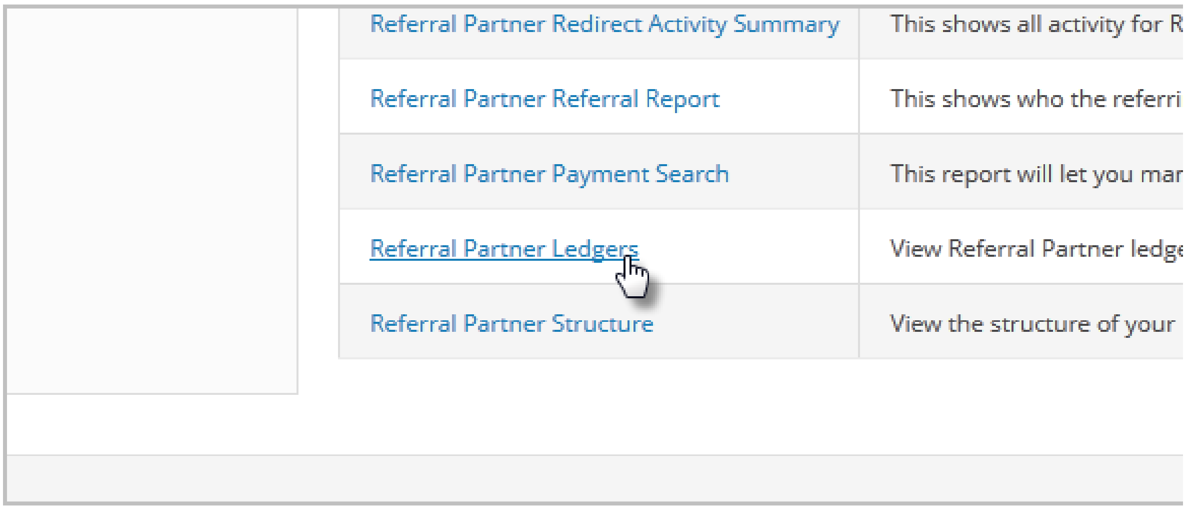
How To Use Referral Program Reports

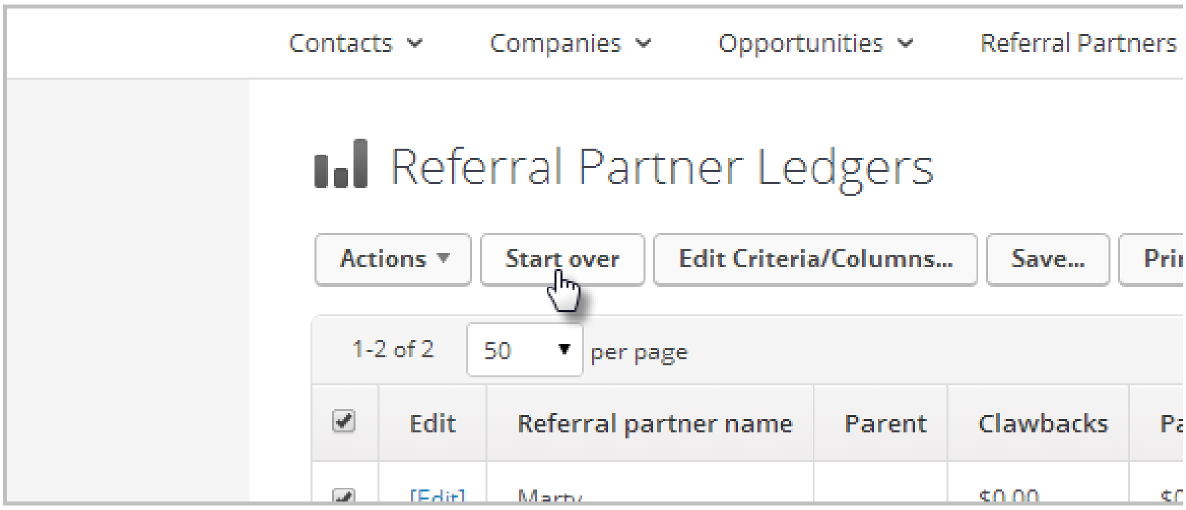
1. Got to **CRM** > **Reports** > **Referral Partners**



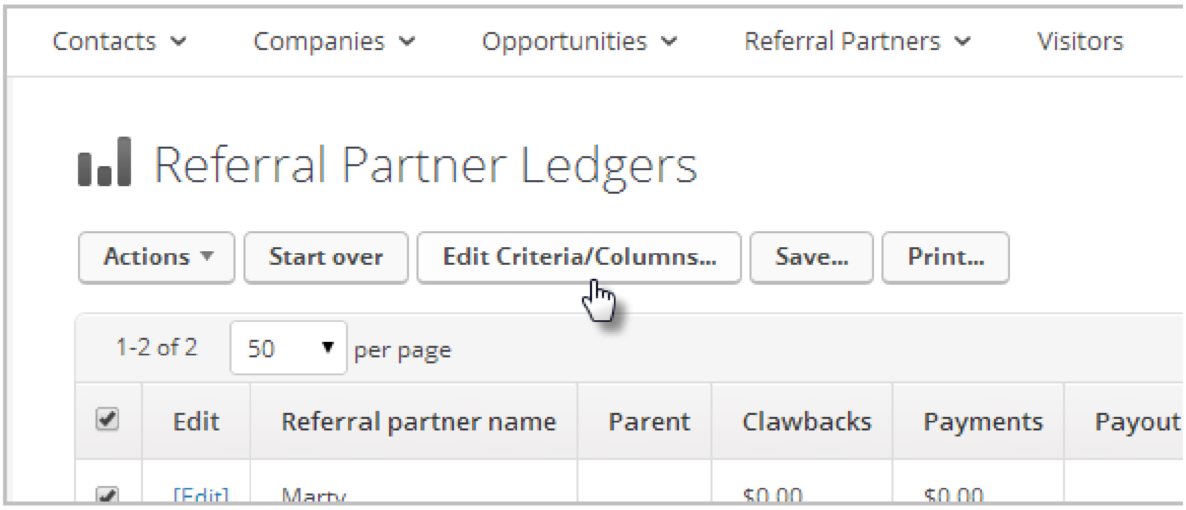
2. To view a report, just click the report title.



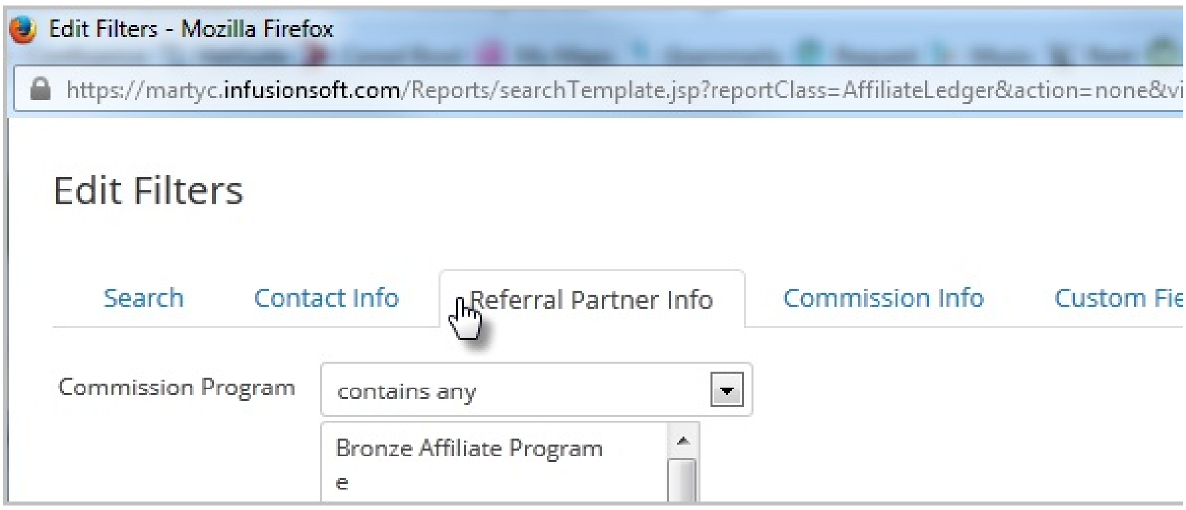
3. To clear the search results, click on the **Start Over** button.



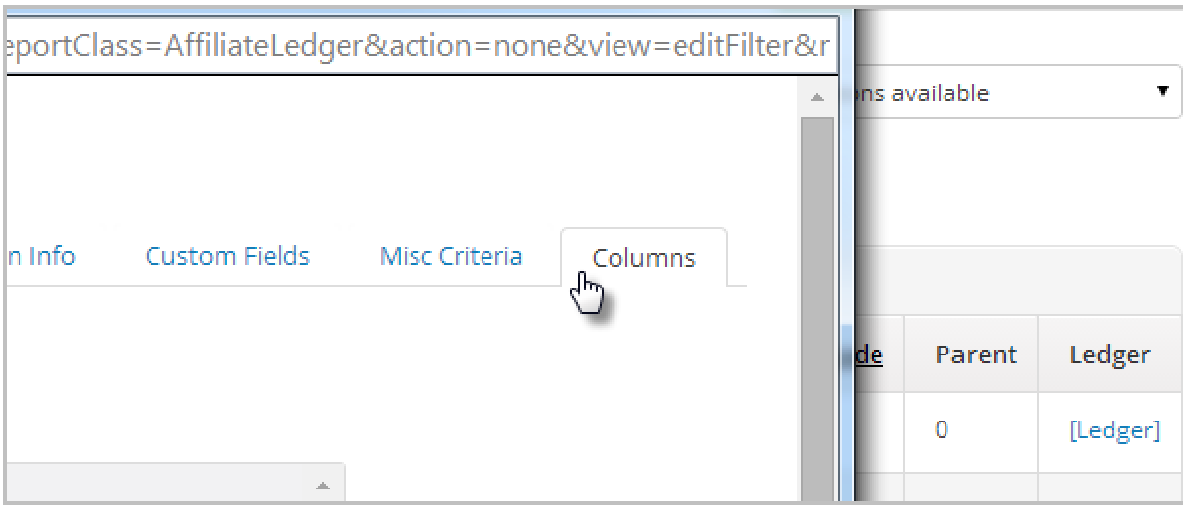
4. To create a filter for this report, click on the **Edit Criteria/Columns** button.



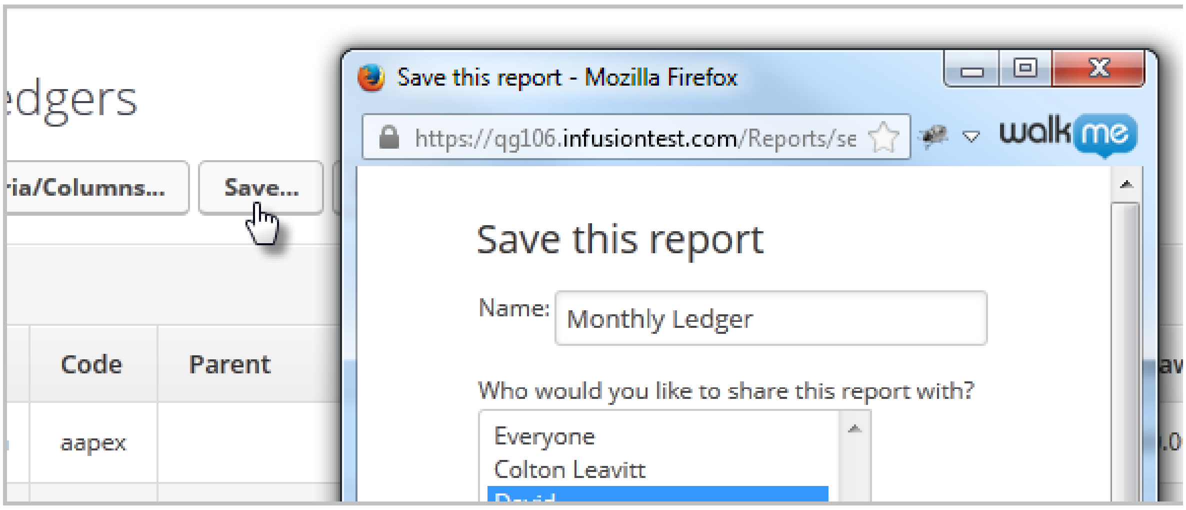
5. Use the tabs at the top to navigate through all of the available filters.



6. Click on the **Columns** tab to customize which fields appear on the report.



7. Once you have completed setting up your report, click the **Save** button (and check the box to add the report to your dashboard.)



8. Click the **Actions** button to see all of the available options. For example, you can export the report into a .csv file from here.