## How To Use Referral Program Reports &

1. Got to CRM > Reports > Referral Partners



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

Referral Partner Redirect Activity Summary	This shows all activity for R
Referral Partner Referral Report	This shows who the referri
Referral Partner Payment Search	This report will let you mar
Referral Partner Ledgers	View Referral Partner ledge
Referral Partner Structure	View the structure of your

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

Contacts 🗸	Companies 🗸	Opportunities 🗸	Referral Partners		
Actions	ferral Partne	er Ledgers	. Save	Prii	
1-2 of 2 50 ▼ per page					
🗹 Edit	Referral partner	name Parent	Clawbacks	Pa	
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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.

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https://martyc.infusions	oft.com/F	Reports/searchTemplate.jsp?r	eportClass=AffiliateLedger8	laction=none&vi
Edit Filters Search Conta	act Info	Referral Partner Info	Commission Info	Custom Fie
Commission Program	contain	s any	•	
	Bronze e	Affiliate Program		

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.)

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·ia/Columns	. Save	Save this report	
Code	Parent	Who would you like to share this report with?	a
aapex		Everyone Colton Leavitt	

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.

Actions <b>v</b>	Actions		it Criteria/Columns		Save	
Apply Action Set Apply/Remove Ta Assign to Compa Create Opportun Create Referral R Create a Task Create an Appoin Delete Contacts	ag any ities Partner Referral ntment Partners	awbacks	City	State	Zip	
Export	N					
Mass Update Co	ontacts					