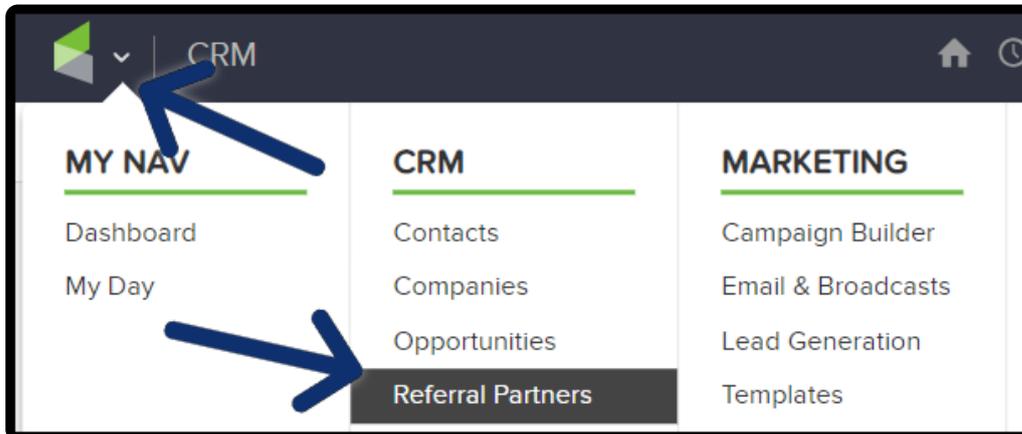
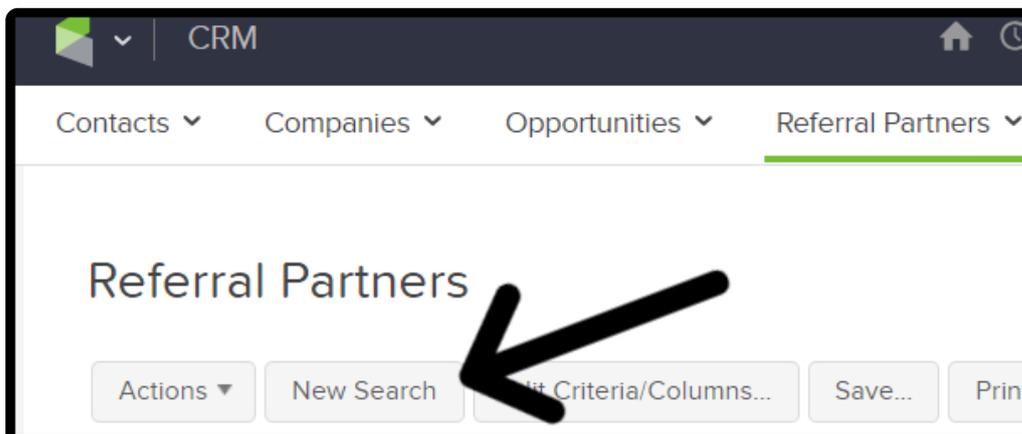


Search for Referral Partners

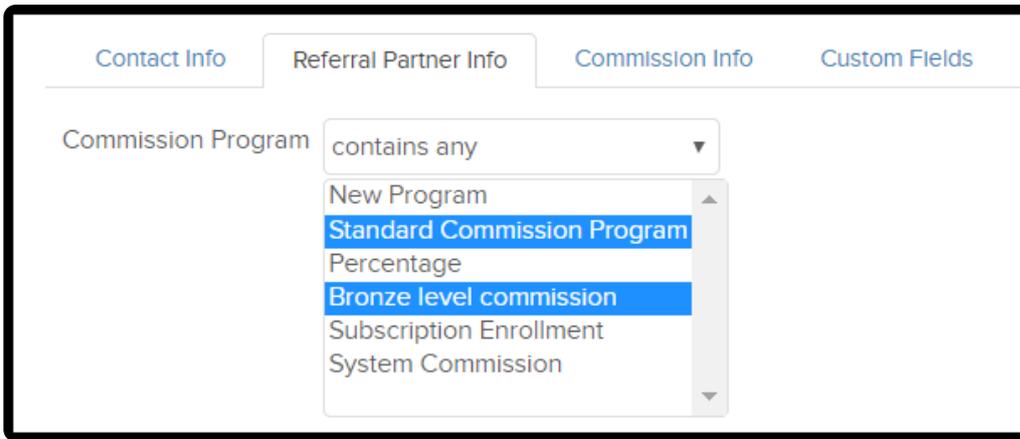
1. Go to CRM > Referral Partners in the main navigation menu



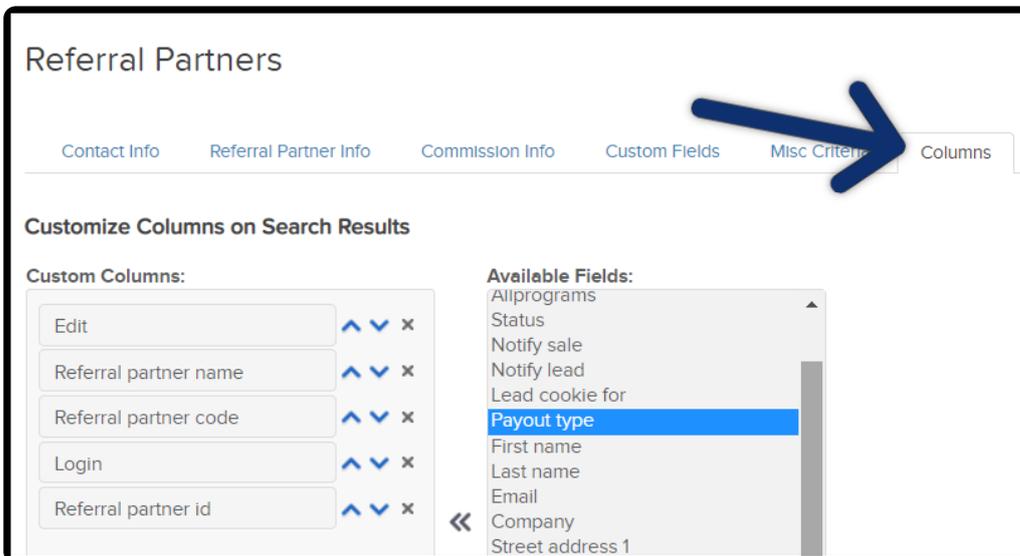
2. Click on the "New search"



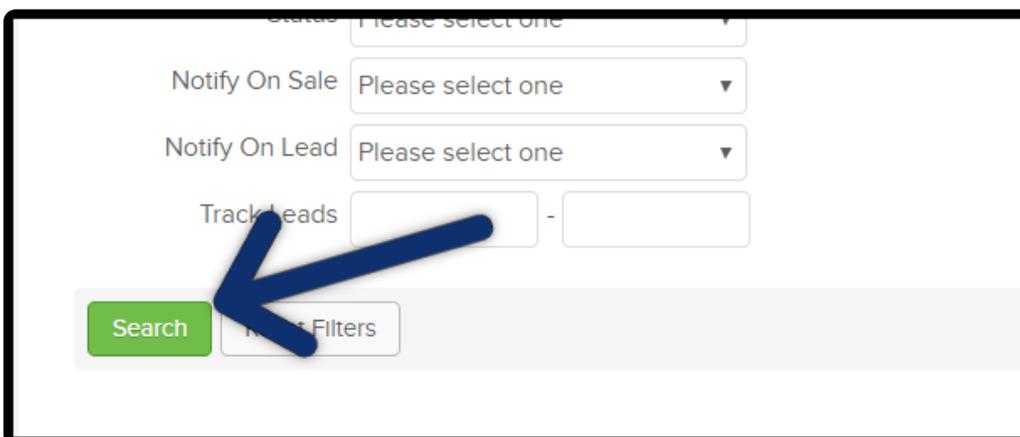
3. Enter the Search Criteria from one or more of the tabs to produce a specific referral partner list (e.g. referral partners that are in the *Bronze* and *Silver* commission programs.)



4. Click on the **Columns** to adjust the search criteria or add/remove columns from the search results. In the example image below, the column, "Payout type" has been added to the search results.

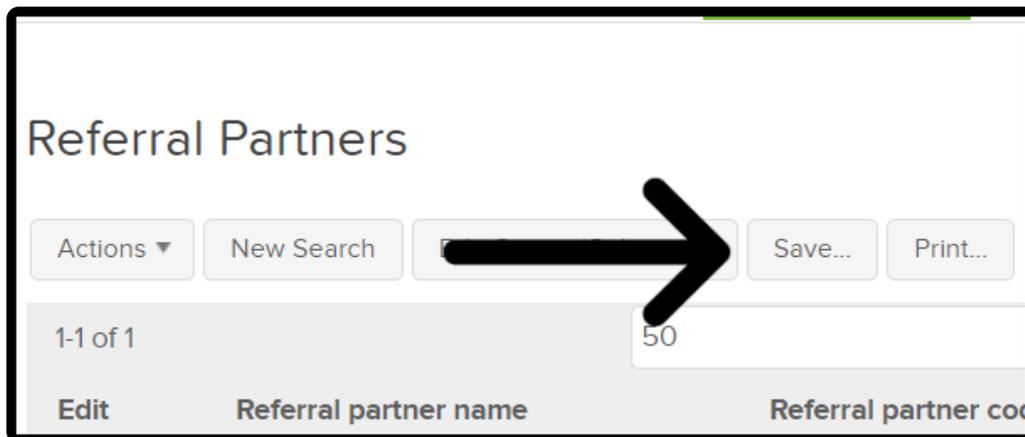


5. Click on the **Search** to continue

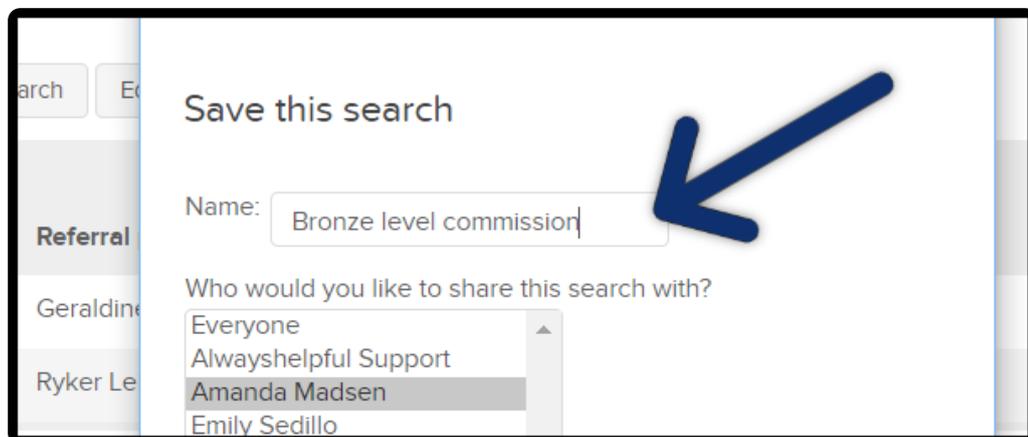


Save search

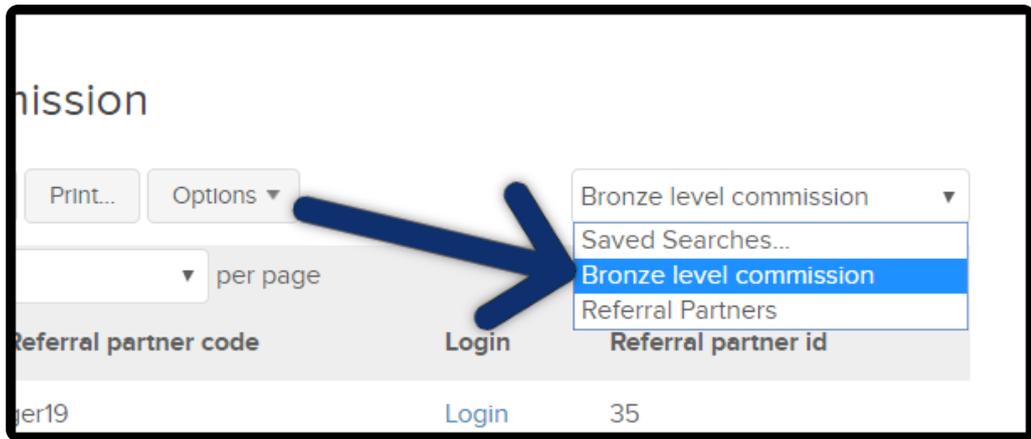
1. Click "Save" to name and save the dynamic list for quick access in the future. You are saving the search criteria, not a specific list, which means the save search will update automatically.



- a. **Name:** Enter a short, descriptive name for the search

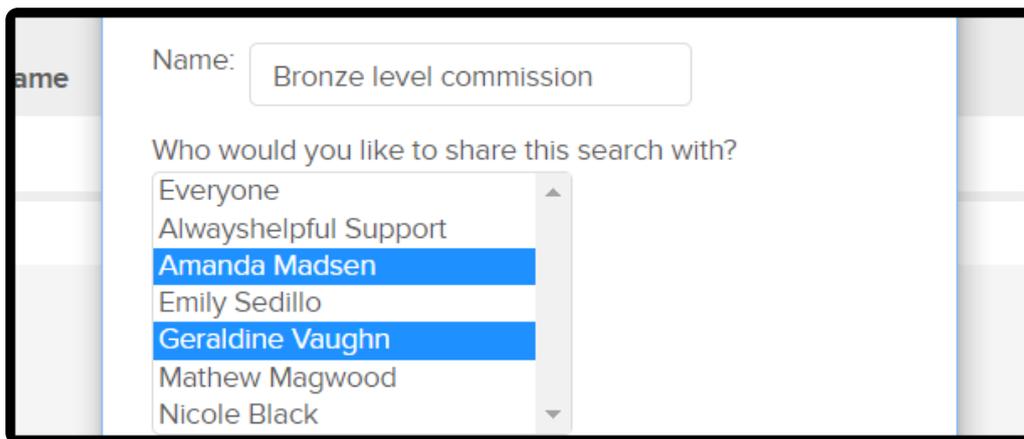


This name will display in custom drop-down menus

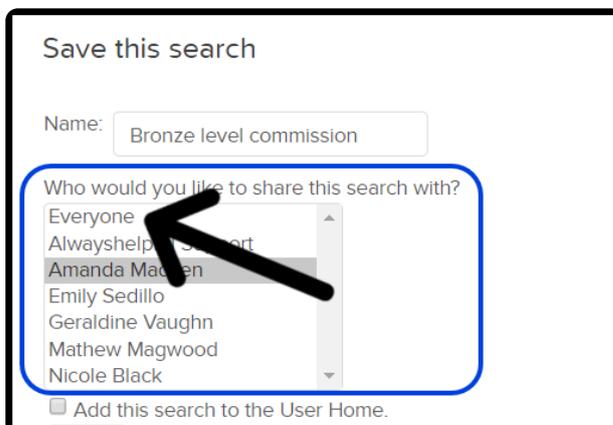


Share the search

- Click on the name(s) of the users who need to see this search

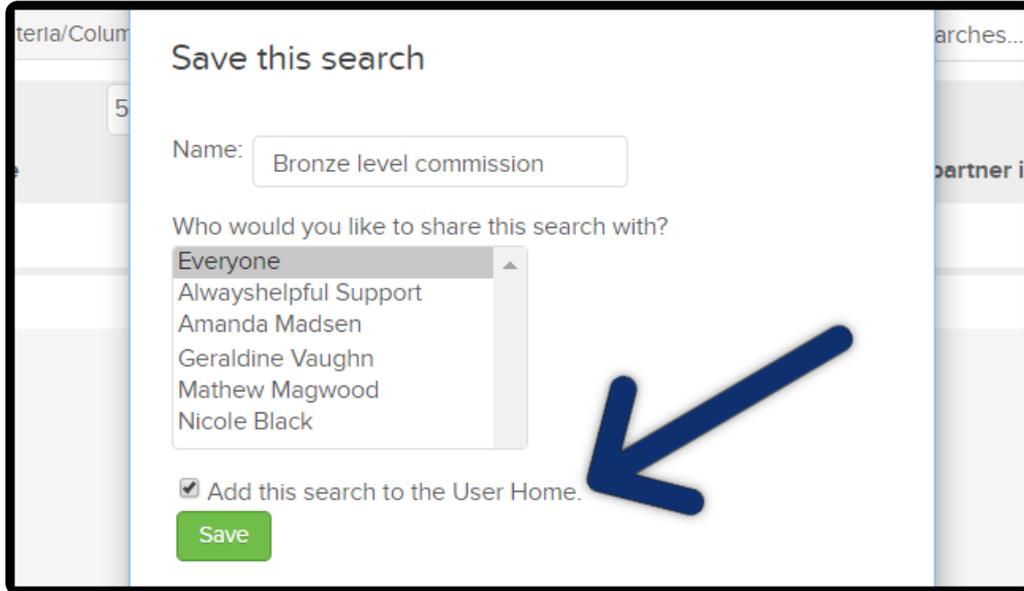


- Click "Everyone" to share the search with all users



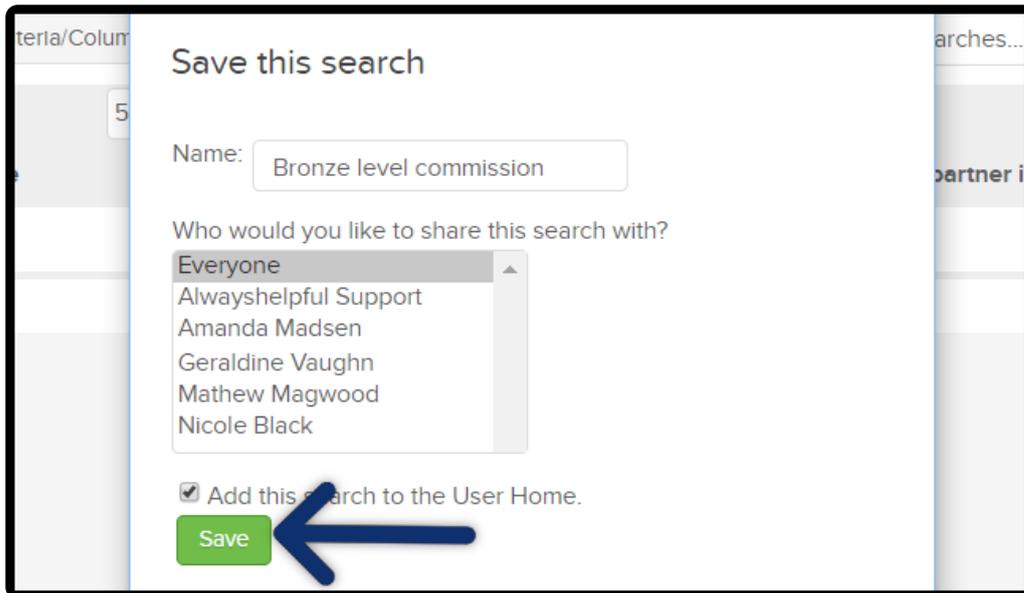
- "Mark the Add this search to the User Home" checkbox if you want to add a saved search widget to your dashboard. For more information regarding the saved

search widget, [click here](#)



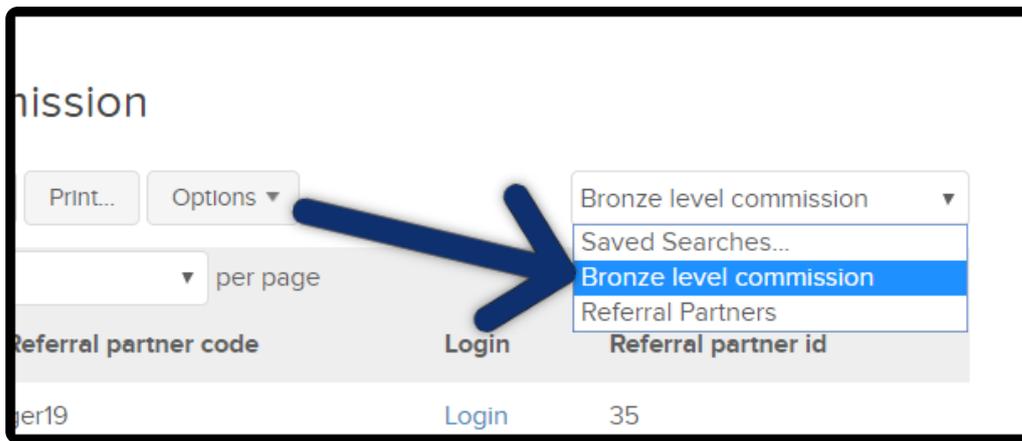
The screenshot shows a 'Save this search' dialog box. At the top, the title is 'Save this search'. Below the title is a 'Name:' label followed by a text input field containing 'Bronze level commission'. Underneath is the question 'Who would you like to share this search with?' followed by a dropdown menu. The dropdown menu is open, showing 'Everyone' as the selected option, with other options listed below: 'Alwayshelpful Support', 'Amanda Madsen', 'Geraldine Vaughn', 'Mathew Magwood', and 'Nicole Black'. At the bottom of the dialog, there is a checked checkbox labeled 'Add this search to the User Home.' and a green 'Save' button. A large blue arrow points from the right side of the dialog towards the 'Save' button.

- Click Save



This screenshot is identical to the one above, showing the 'Save this search' dialog box. The 'Name' field contains 'Bronze level commission', the sharing dropdown is set to 'Everyone', and the 'Add this search to the User Home.' checkbox is checked. A large blue arrow points from the right side of the dialog towards the green 'Save' button.

The saved search is now available as a drop-down whenever you go to CRM > Referral Partners



Pro Tip! Click "Options" after you save a search to modify.

- **Save As** - create a new search when criteria has been changed
- **Rename** - Change the search name
- **Delete** - Remove save search
- **Add to favorites** - add to black tool bar, under the star
- **Add User home** - add to another Users dashboard
- **Share/Unshare** - Share or unshare search with Users
- **Email save search** - Create an automated email report

