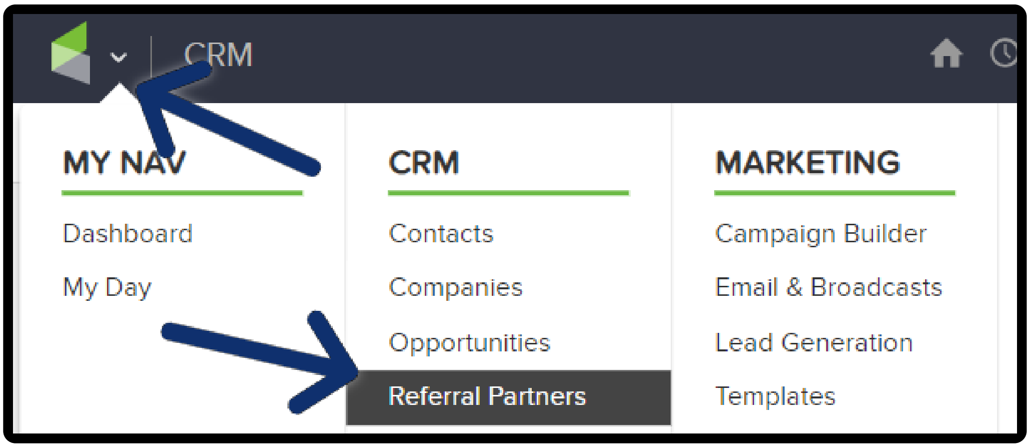
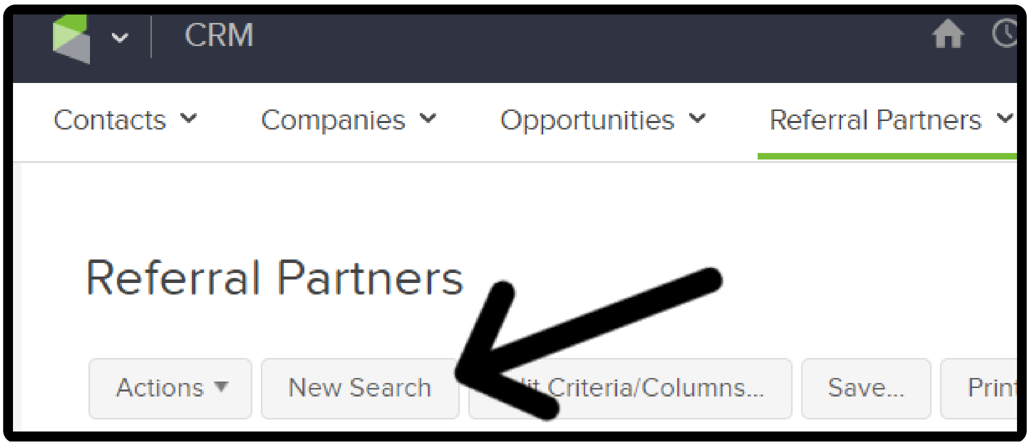
Search for Referral Partners

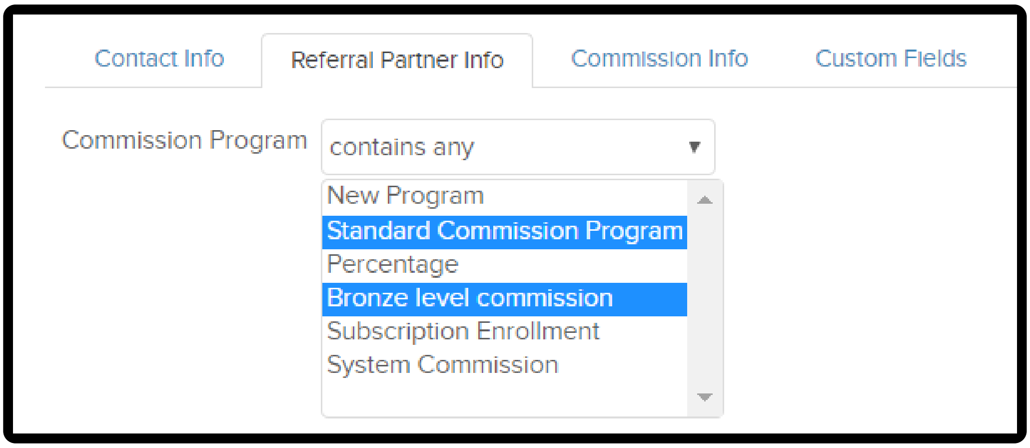
1. Go to **CRM** > **Referral Partners** in the main navigation menu



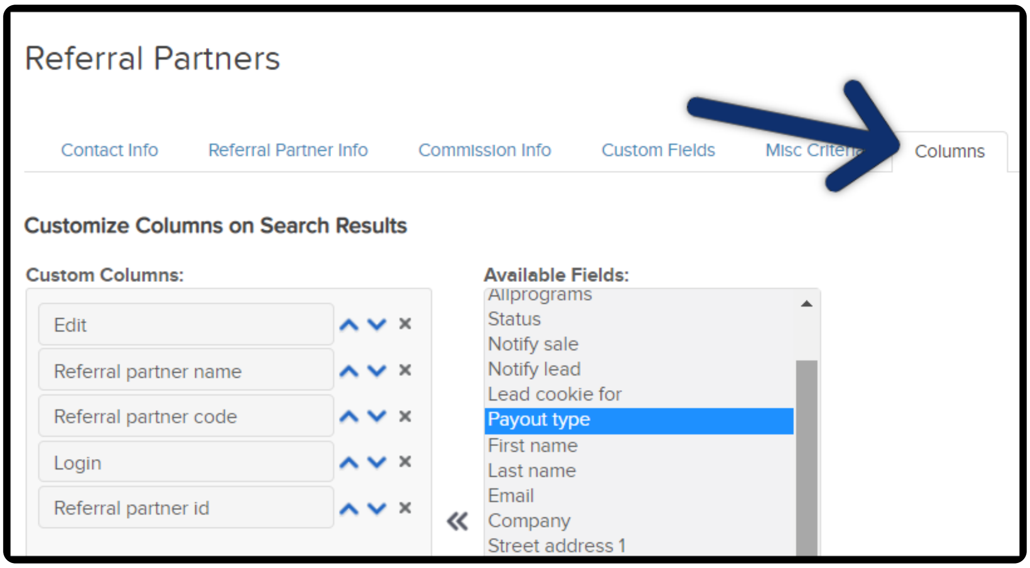
2. Click on the "**New search**"



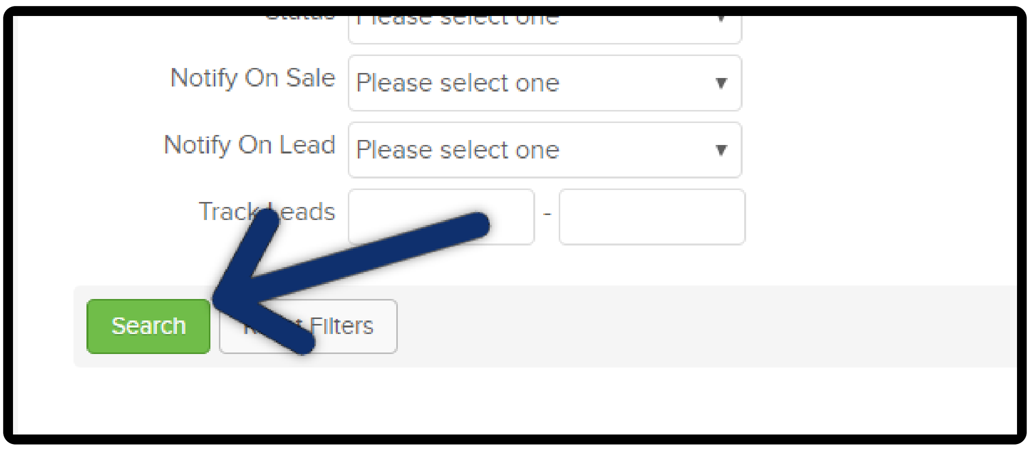
3. Enter the Search Criteria from one or more of the tabs to produce a specific referral partner list (e.g. referral partners that are in the *Bronze* and *Silver* commission programs.)



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.

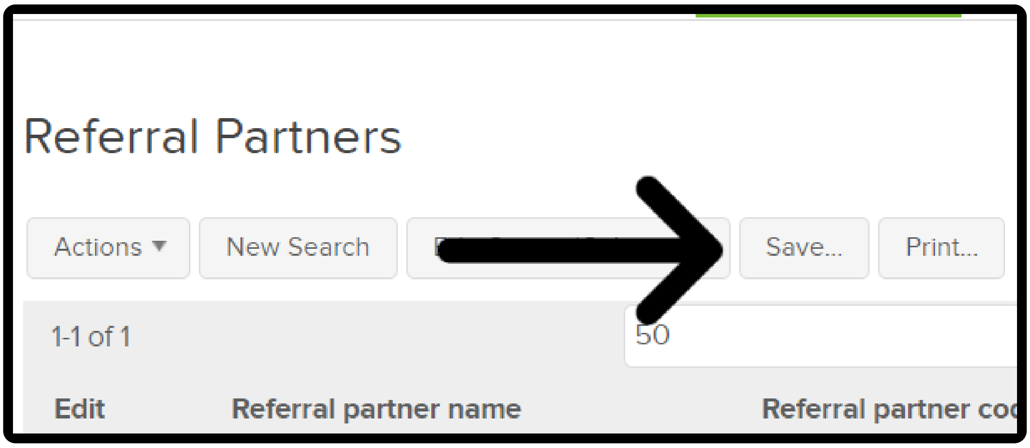


5. Click on the **Search** to continue

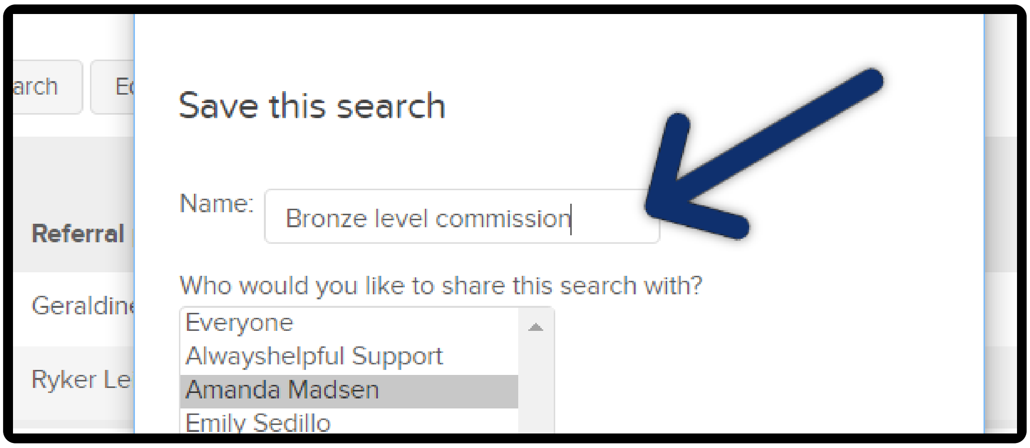


Save search

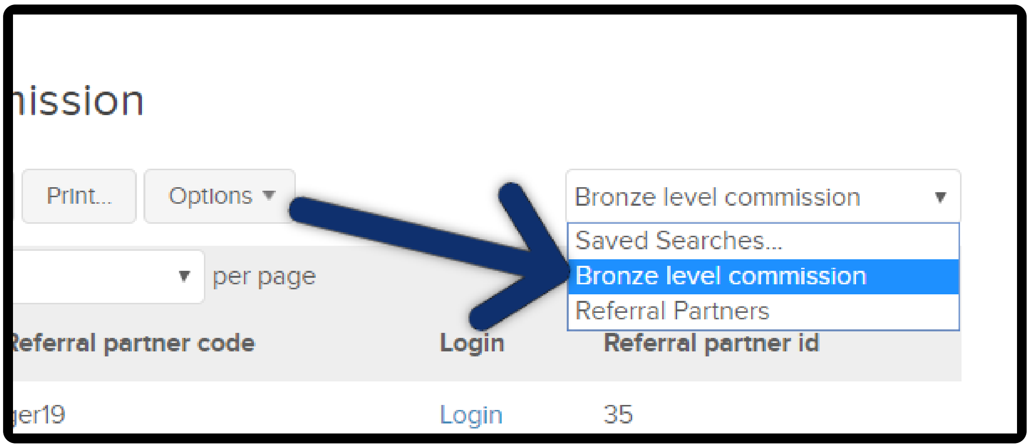
1. Click "**Save**" to name and save the dynamic list for quick access in the future. You are saving the search criteria, not a specific list, which means the save search will update automatically.



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

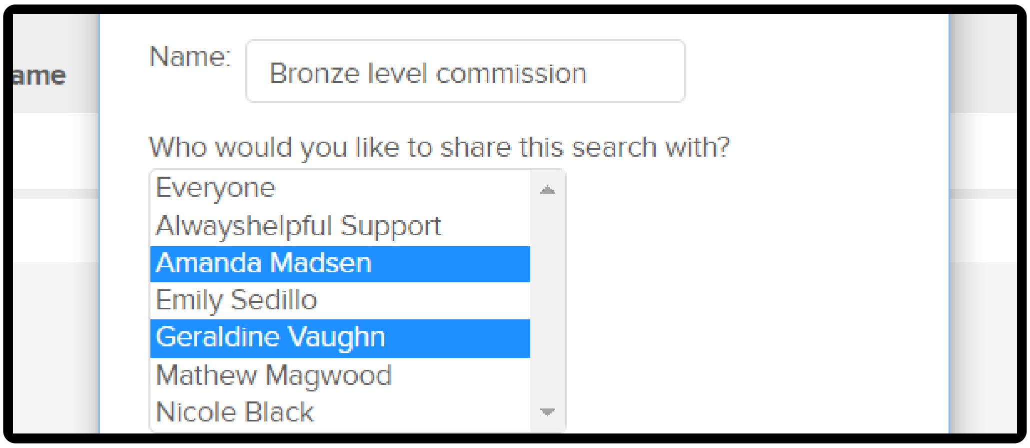


   This name will display in custom drop-down menus

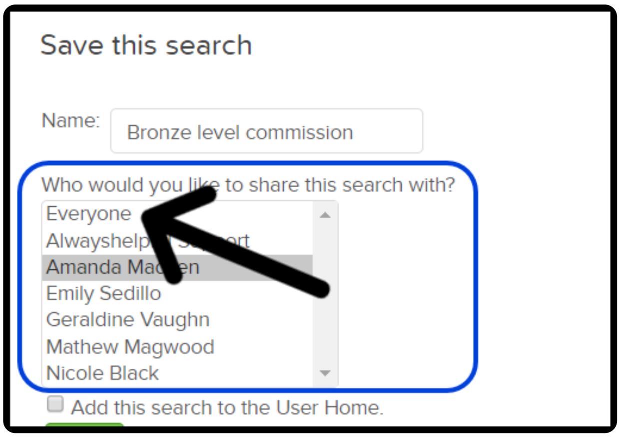


Share the search

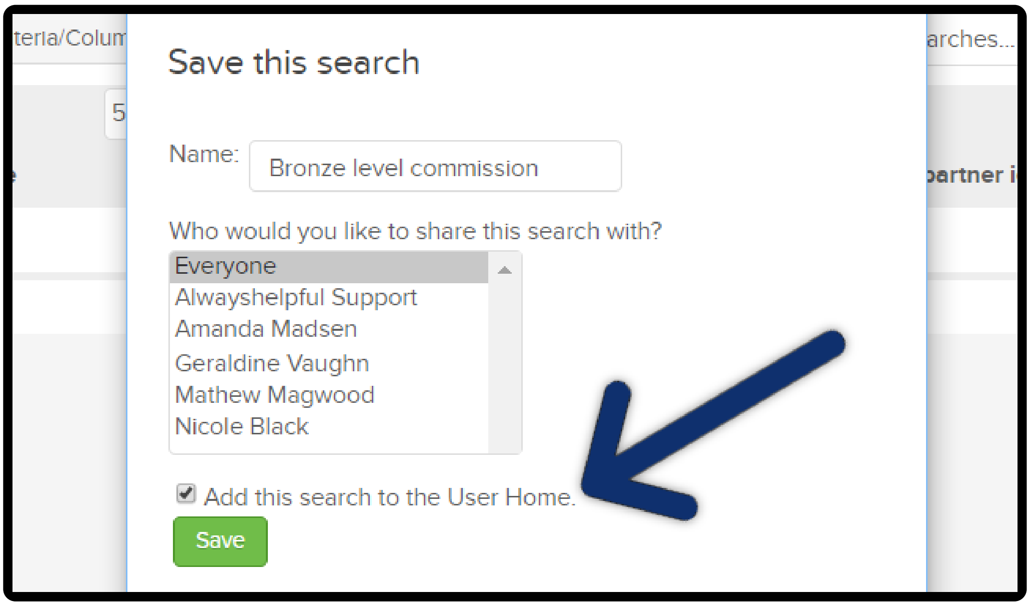
- Click on the name(s) of the users who need to see this search



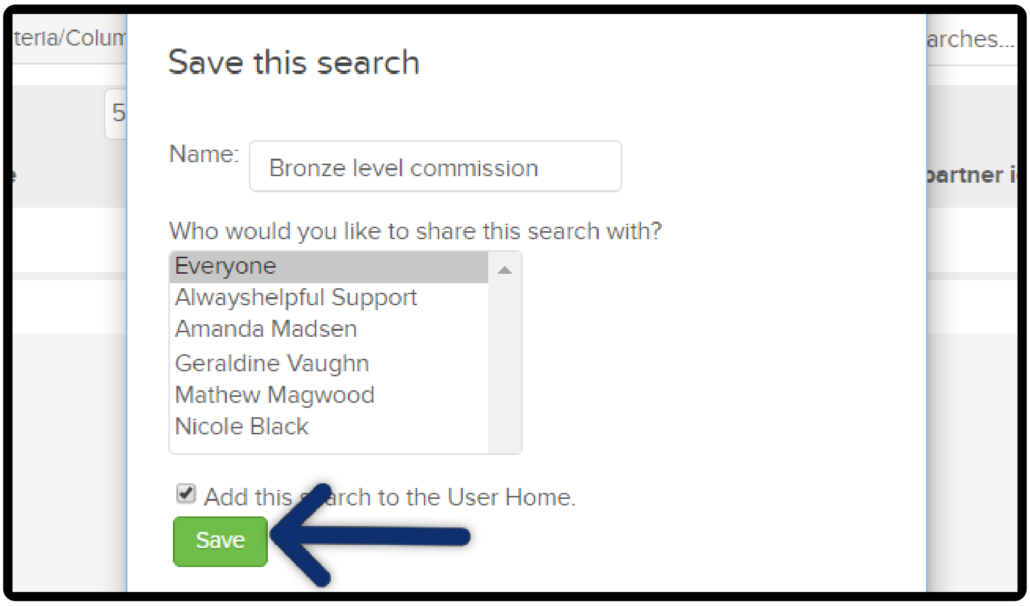
- Click "**Everyone**" to share the search with all users



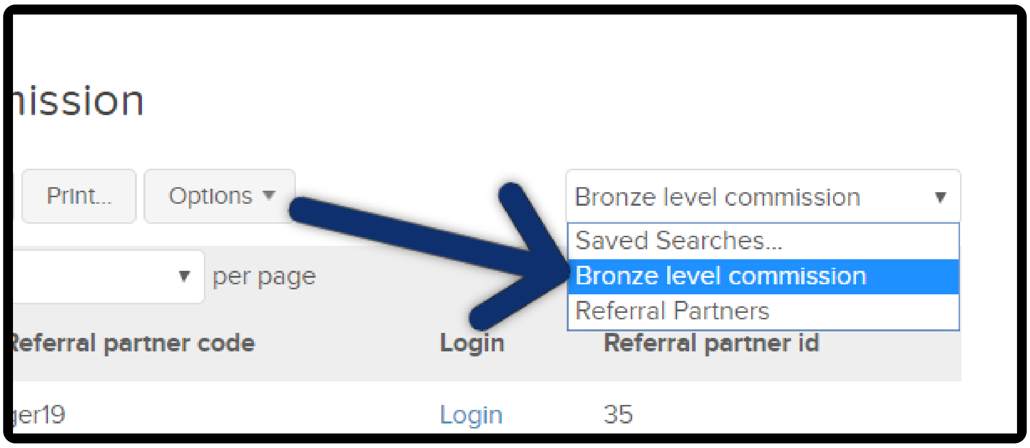
- **"Mark the Add this search to the User Home"** checkbox if you want to add a saved search widget to your dashboard. For more information regarding the saved search widget, click here



- Click **Save**



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