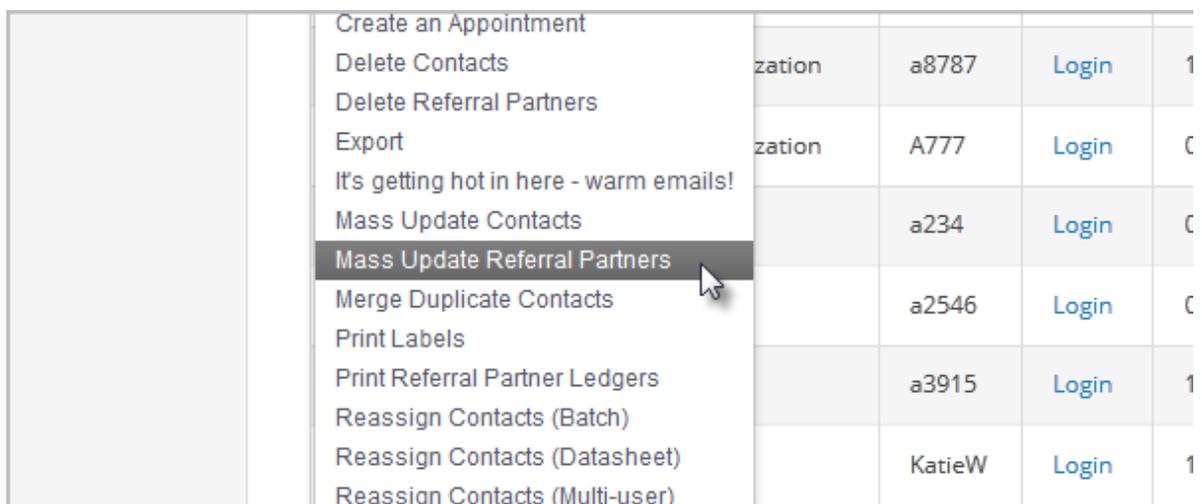


Mass Update A List Of Referral Partners

You can mass update the following information for a list of referral partner records:

- Status
- Notify Lead
- Notify Sale
- Lead Cookie for
- Default Skin
- Remove from Programs
- Add to Programs
- Referral Partner Record Custom Fields

1. Go to **CRM > Referral Partners** in the main navigation menu or the referral partner ledger report (**CRM > Reports > Referral Partner > Referral Partner Ledgers.**)
2. Navigate to **CRM>Referral Partners** and search for the Referral Partners that need an update.
3. Click on the **Actions** drop-down and select **Mass Update Referral Partners** option.



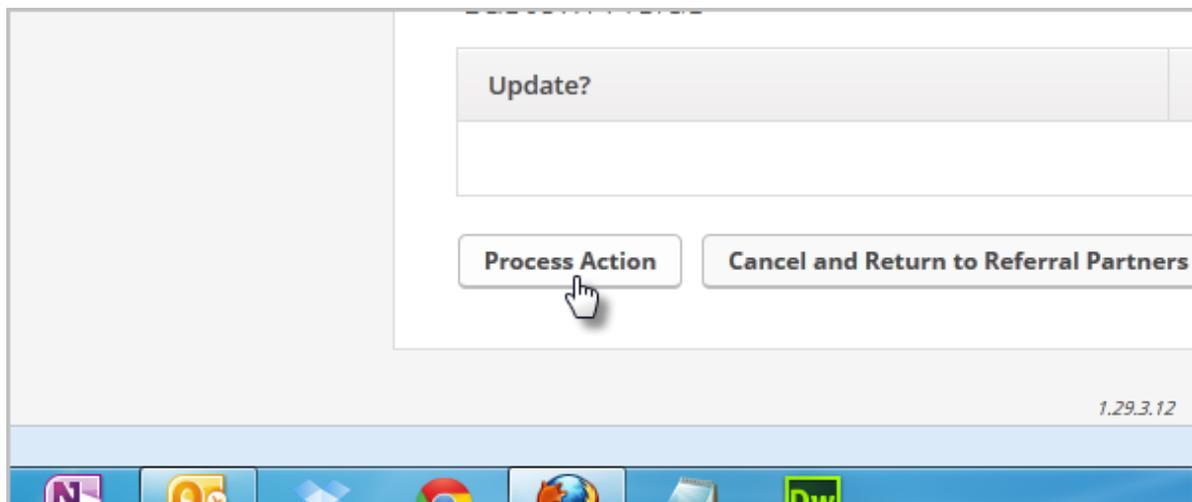
| | | | | | |
|--|---|--------|--------|-------|---|
| | Create an Appointment | | | | |
| | Delete Contacts | zation | a8787 | Login | 1 |
| | Delete Referral Partners | | | | |
| | Export | zation | A777 | Login | 0 |
| | It's getting hot in here - warm emails! | | | | |
| | Mass Update Contacts | | a234 | Login | 0 |
| | Mass Update Referral Partners | | | | |
| | Merge Duplicate Contacts | | a2546 | Login | 0 |
| | Print Labels | | | | |
| | Print Referral Partner Ledgers | | a3915 | Login | 1 |
| | Reassign Contacts (Batch) | | | | |
| | Reassign Contacts (Datasheet) | | KatieW | Login | 1 |
| | Reassign Contacts (Multi-user) | | | | |

4. Mark the checkbox beside the field(s) you need to update, and enter the new value for that field. The new value will override any existing values for these referral partners.

Standard Fields

| Update? | Field | Value |
|-------------------------------------|-----------------|---|
| <input checked="" type="checkbox"/> | Status | Please select one  |
| <input type="checkbox"/> | Notify Lead | Please select one Active Inactive |
| <input type="checkbox"/> | Notify Sale | |
| <input type="checkbox"/> | Lead Cookie For | |

5. Click on the **Process Action** button to permanently update the referral partner records.



Update?

Process Action **Cancel and Return to Referral Partners**

1.29.3.12