

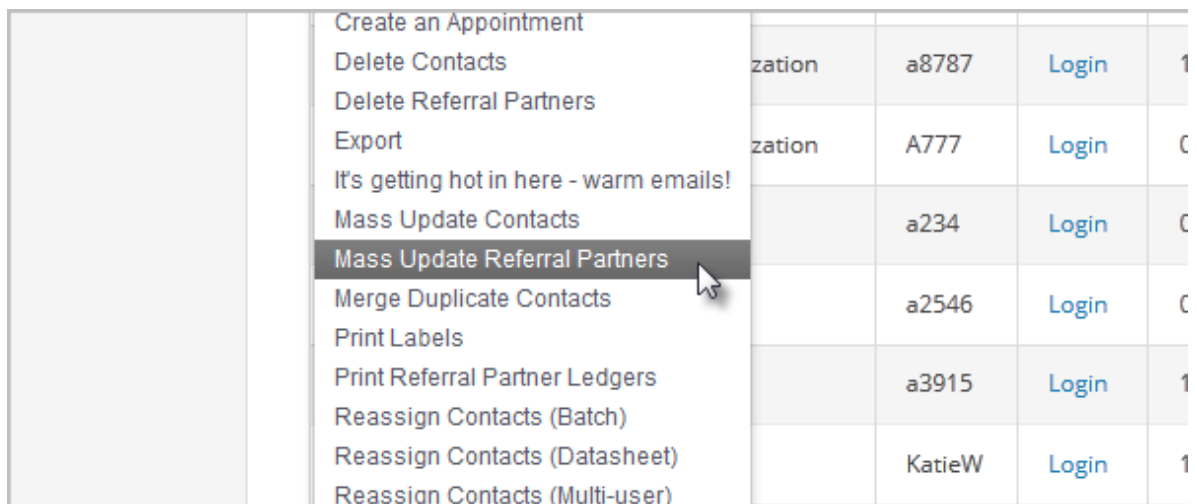
# Mass update a list of referral partners

You can mass update the following types of data 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

## Mass update a list of referral partners

1. Navigate to **CRM** and click **Referral Partners** or the referral partner ledger report (**CRM > Reports > Referral Partner > Referral Partner Ledgers.**)
2. Select the Referral Partners that you want to update.
3. Click the **Actions** drop-down and select **Mass Update Referral Partners**.



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

4. Add a check to the fields that you want to update and select a new value for that field.

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

Update?	Field
No results to display.	

**Option**

Allow empty values to clear data