Referral Program reporting

This article applies to:

Max
Max Classic

Run a custom referral partner report.

1. Navigate to **CRM > Reports > Referral Partners.**
2. To view a report, click the report title, select search criteria and click **Search.**
3. To create a filter for this report, click on the **Edit Criteria/Columns** button.
4. Use the tabs to navigate through the available filters.
5. Click on the **Columns** tab to customize which fields appear on the report.
6. Once you have completed setting up your report, click **Ok.**
7. To export the report, click the **Actions** drop-down and click **Export.**