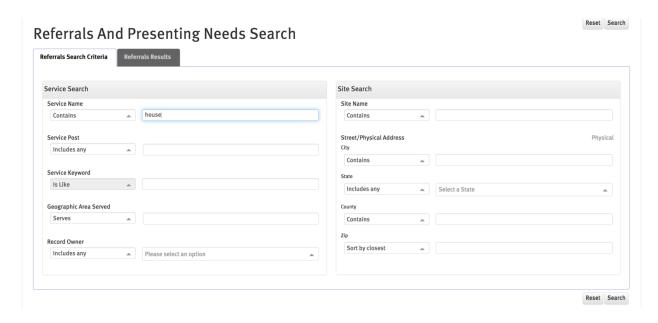
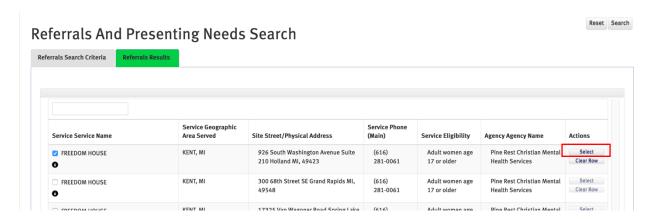


## How to Select a Referral

From within a Contact or Client Form, move to the Resource Search, and enter criteria in one or more fields.



Your search results will appear on the next tab of the module. Locate the resource you wish to select from the list (and save for this client) and check the appropriate box and click on the word "Select" to capture the resource. Click on "Clear Row" to unselect the resource.



Your selected referrals will now appear at either the top of the module or the bottom depending on configuration, so that you can see the referrals saved for this client or contact. Once your form is completed, click the "Submit" button to save the record.

Submit

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