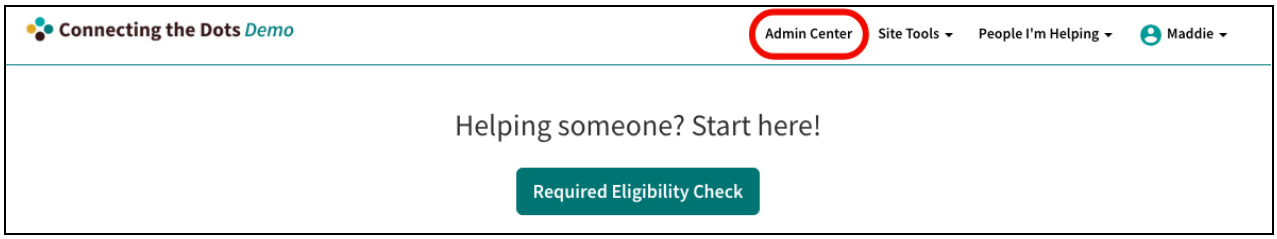
Managing Referral Notification Settings

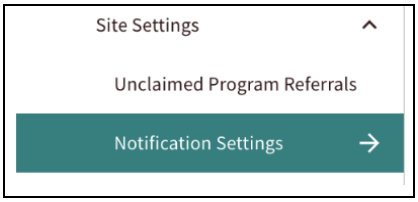
Both **Site Administrators** and **individual users** can manage their preferences for **referral notifications** when the referral status is updated or new notes are added to it. Click here to jump directly to the individual user notification settings section!

Site Administrators Notification Settings

Site Administrators can manage their referral notifications by accessing the **'Admin Center'** in the top toolbar. You will only see this option if you are logged in.

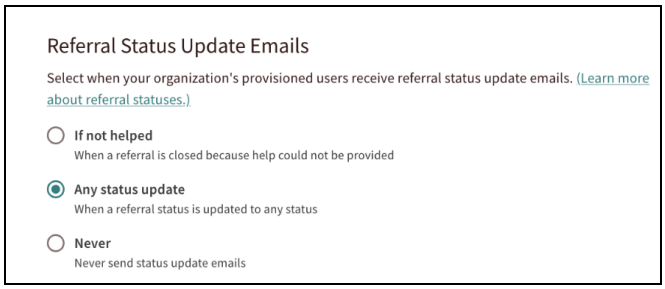


Within **'Site Settings**,' you can manage referral notifications within the **'Notification Settings'** section.



Referral Status Update Emails

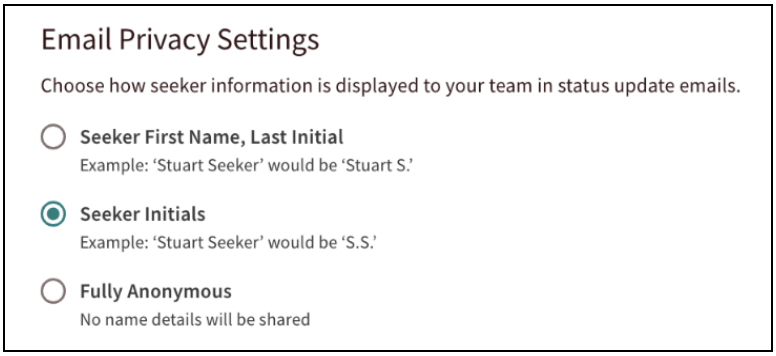
Choose when your organization's users receive email updates regarding **referral statuses**.



- **If not helped:** Emails are only sent when a referral is marked with a "closed loop" status, such as 'Referred elsewhere.'
- **Any status change:** An email is sent for every change in a referral's status.
- **Never:** No email updates will be sent.

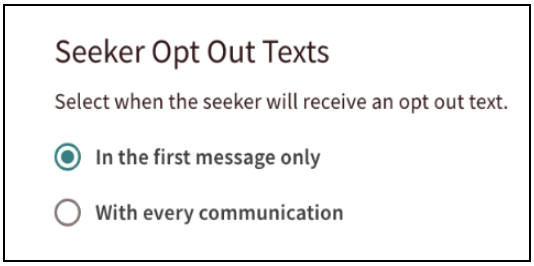
Email Privacy Settings

Site administrators can choose how **Seeker name details** are displayed in status update emails to protect their privacy. Options range from partial visibility to full anonymity.



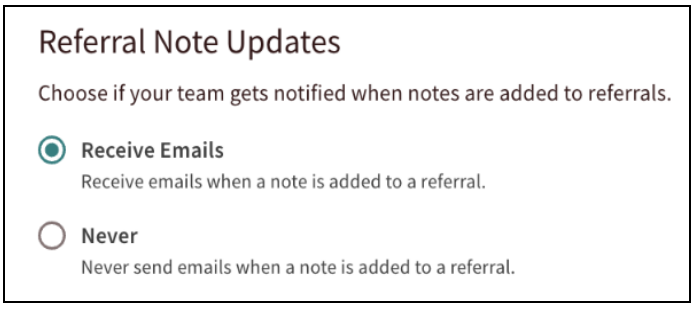
Seeker Opt Out Texts

If **two way texting** is enabled, Site Administrators can choose to provide an opt out text to Seekers in the first message only or with every text they receive.



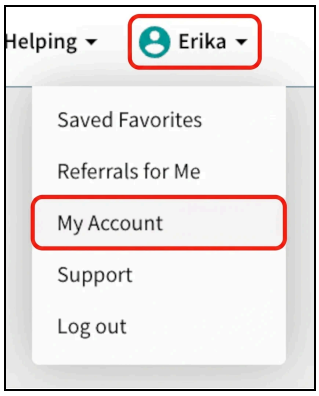
Referral Note Updates

You can choose to notify your team via email when **new notes** are added to a referral or to keep those email notifications turned off.



Individual User Notification Settings

By default, users' settings are set to their White Label global settings. When logged in, click on your **name** in the top right corner, and select **"My Account"**.



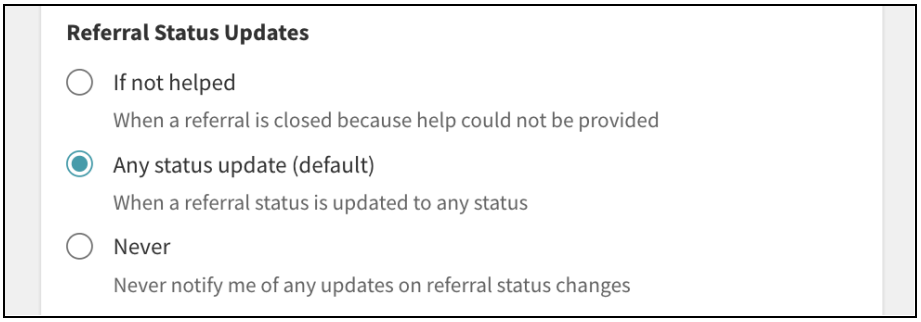
If '**Customize**' is toggled on, users can select their notification preferences. **Please note, these preferences only apply to referrals the user has initiated.*



Referral Status Updates

Choose to receive email notifications when the **referral status** is updated.

- **If not helped:** Emails are only sent when a referral is marked with a "closed loop" status, such as 'Referred elsewhere.'
- **Any status change:** An email is sent for every change in a referral's status.
- **Never:** No email updates will be sent.



Referral Note Updates

You can choose to receive email notifications when **new notes** are added to a referral or to never receive emails when a note is added to a referral.

