Generate Referral Partner commission and Payment Reports

This article applies to:

Use the following reports to view the financial activity of your referral partners. Go to **CRM > Reports > Referral Partner** to view the reports that provide insight into commissions due, clawbacks issued, and payments issued.

Referral Partner Ledgers

The referral partner ledger report shows all financial activity for referral partners within a specific date range, including beginning balance (prior to date range), commissions earned (with the date range), clawbacks (due to refunds or canceled orders), payments issued (within the date range), and an ending balance (beginning balance plus commissions earned minus payments issued and clawbacks).

You can filter this report by commission program, code, parent partner, referral partner status, custom fields, tags, and more.

In addition to using this report to issue payments, you can use it to:

- Identify top performing referral partners that you may want to 'graduate' to the next commission level through a mass update.
- Monitor claw-back amounts and find which referral partners are generating customers who are a poor fit for your business.
- Use a partner's login to access your Referral Partner Center through this report and view an individual partner's ledger.

Referral Partner Payment Search

The referral partner payment search shows you payments issued to one or more affiliate within a specific date range.

- You can use this report to view statistics on past payments and research inquiries from specific referral partners.
- You can filter this report by batch id, date range, amount, referral partner, tags, and custom fields.
- This report differentiates between manual, one-off payments and batch payments.