Pay an Individual Referral Partner

This article applies to:

Max Classic

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If you have a large number of referral partners, use the referral partner ledger report to view commission balances and issue payment. But, you can also view commissions and issue payment to individuals through the referral partner record.

1. Go to **CRM > Referral Partners** to find the partner you want to pay.
2. Select the referral partner record.
3. Go to the Commissions section. Note the Current Balance and Total Balance.
   - **Current Balance**: The current balance is the sum of the commission earned to date. It only includes commissions for paid in full sales. Claw-backs and past commission payments are already subtracted from this balance.
   - **Total Balance**: The total balance includes all commissions to date, including commissions for future payment plan billing. Claw-backs and past commission payments are already subtracted from this balance as well.
4. Note: These two balances will be different if the payout type for one or more of the referral partner's commission program is *Credit on Customer Payment*. The balances will be the same when the payout type for all of the partner's commission program is *Up-Front Credit in Full*.

   For Example: You receive an order for a $100 product. You pay the referral partner who sent you the customer a 10% commission on this product. The total commission for this order is $10.
   - If there is no payment plan associated with the product OR if the payout type is "Up-Front Credit in Full" then the Current Balance and the Total Balance are both $10. The referral partner receives credit for the full commission.
   - If there is a 5 installment payment plan associated with the order AND the payout type is "Credit on Customer Payment" then the Current Balance is $2 (the amount of commission earned from the first payment). However, the Total Balance is still $10. Each time the customer makes a payment, $2 is added to the Current Balance until the entire order is paid. Once the balance is paid in full, the referral partner will have received $10 in commission.
5. Click the **View Ledger** button.
6. Enter a commission date range and click on **Refresh Ledger** to view a payment balance for that date range.
7. Click on the **Create Payment** button and enter the Payout Information.
   - **Pay Type**: Select a pay type from the drop-down (e.g. check). This should represent the method you used to pay the referral partner.
   - **Pay Date**: Enter the date the payment was issued.
   - **Pay Amount**: Enter the payment amount. This may or may not match the commission earned for the date range you selected.
   - **Pay Note**: Enter a note about the payment. This note will show up on the referral partner's ledger. Partners are able to view their ledger through the Referral Partner Center.
8. Click **Save**. The payment will show up on the referral partner's ledger.