

Pay a group of referral partners at once

This article applies to:

[Max Classic](#)

Max Classic tracks partner referrals and calculates commissions due when a referral makes a purchase. You will need to issue payments to referral partners on whatever schedule you've defined in your partner contract. Issuing payments in Max Classic simply "zeros-out" the partner's balance, actual payments are made with programs outside of Max Classic; e.g., pay by check, PayPal. To auto-pay affiliates you can use the "Make a Mass Payment" option in PayPal or you can check with your preferred merchant account for instructions on how to make mass payments.

If you issue commission payments to large groups of referral partners at the same time, you can run a referral partner ledger report to find out how much to pay each referral partner.

1. Navigate to **CRM > Reports**.
2. Click on the **Referral Partner Ledgers** link to open the report.
3. Enter the search criteria for the report and click **Search** to see your results.
4. (Optional) Click on **Ledger** to view individual affiliate ledgers.
5. Click on the **Actions** drop-down and select **Export** to create a .csv file of this report.

You can upload this file to another system or use it to issue checks. Note: There is also an option to **Print Referral Partner Ledgers** if you want to include a copy of the ledger with your payment.

6. Once you have paid your affiliates, you need to record the payments in Max Classic.
7. Find the same report you used to export the affiliate balances and Click on the **Actions** drop-down and select **Create Referral Partner Payments**.
8. Choose the method you used to calculate the payment amount.

Note: The same recording method will be used for ALL of the affiliates on the ledger report.

- **Commission earned for the date range**: This method applies a payment amount equal to the commission earned within the date range on the report. This is displayed in the commissions column on the ledger report.
 - **Beginning balance plus commission earned for date range**: This method adds the beginning balance amount and the commission earned together within the date range on the report. The beginning balance may be a positive or negative value. A negative value is the result of customer returns that involve commission clawbacks.
 - **Ending balance**: This method records a payment amount equal to the affiliate's ending balance at the time the payment is processed. The ending balance is calculated by adding the beginning balance and commissions together, then subtracting any payments issued within the date range.
9. Review the payment type, batch ID, and date.
This information is generated by the system, but you can change it. The batch ID is a date code (e.g. Batch-20150624 = June 24, 2015).
 10. Click **Process Action** to apply the payments.

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