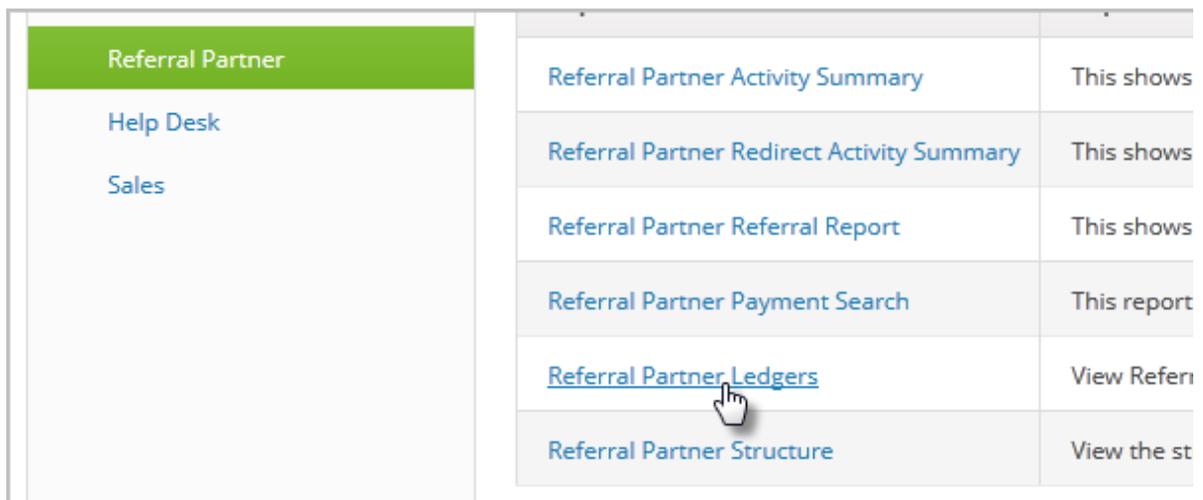


Pay A Group Of Referral Partners At Once

Infusionsoft 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 Infusionsoft simply "zeros-out" the partner's balance, actual payments are made outside of Infusionsoft (i.e. check, PayPal, etc.)

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

1. Go to **CRM > Reports** in the main navigation menu
2. Click on the **Referral Partner Ledgers** link to open the report

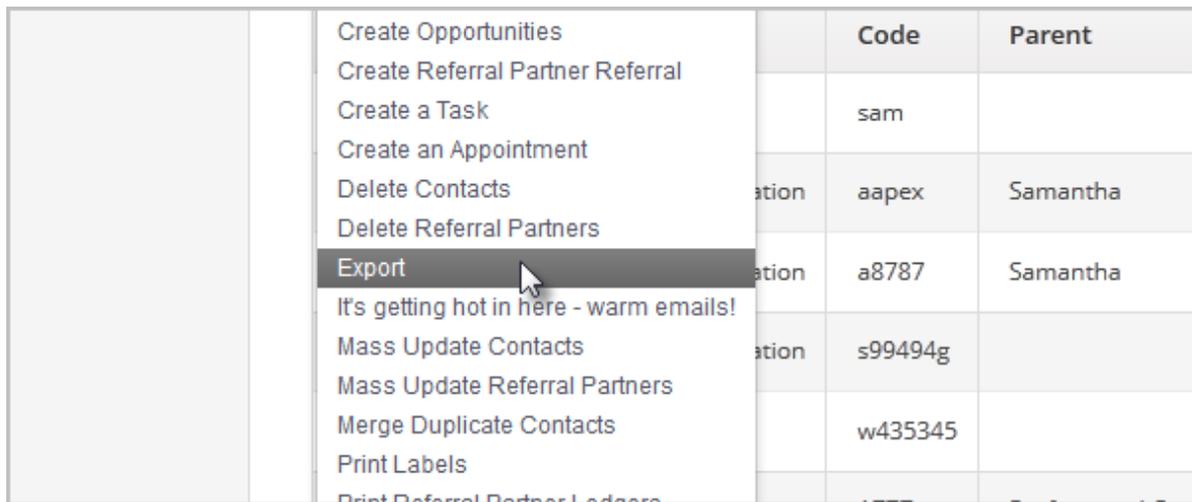


The screenshot shows a navigation menu on the left with 'Referral Partner' selected. The main content area displays a list of reports. A mouse cursor is hovering over the 'Referral Partner Ledgers' link.

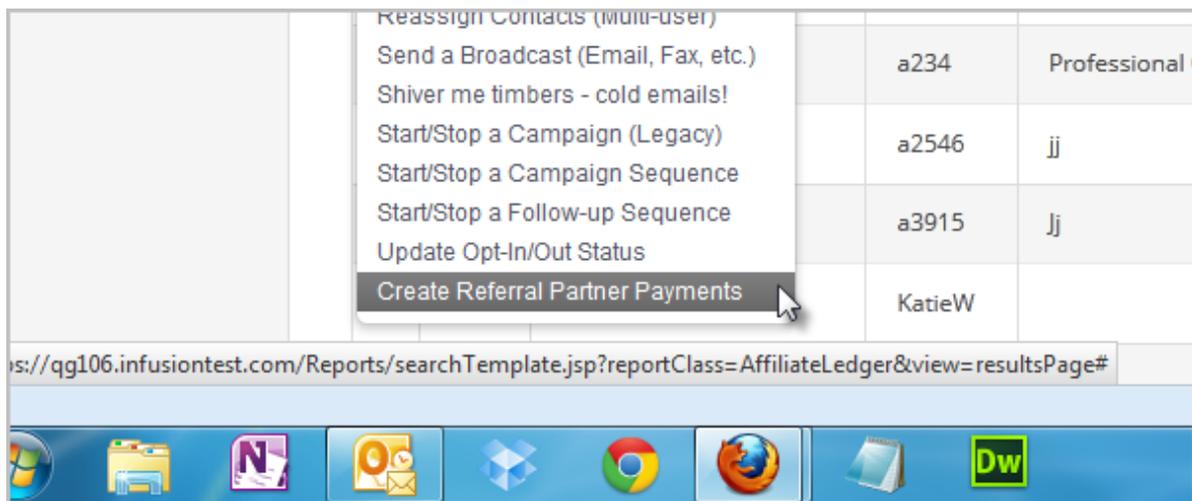
Referral Partner	Referral Partner Activity Summary	This shows
Help Desk	Referral Partner Redirect Activity Summary	This shows
Sales	Referral Partner Referral Report	This shows
	Referral Partner Payment Search	This report
	Referral Partner Ledgers	View Referr
	Referral Partner Structure	View the st

3. Enter the search criteria for the report (e.g. date range) and click the search button 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 Infusionsoft.
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.

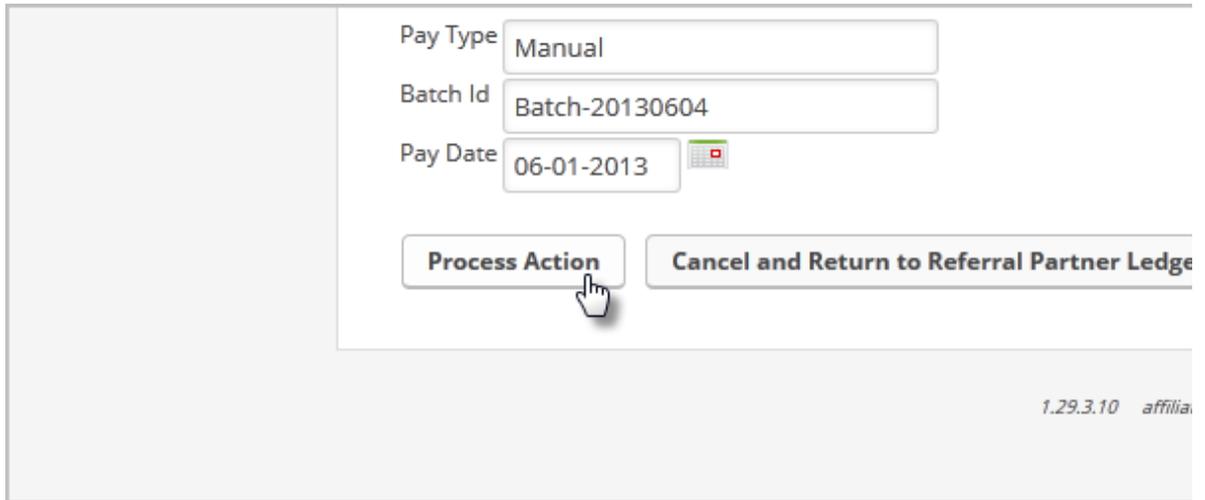
 - o **Commission earned for the date range:** This method applies a payment amount equal to the commission earned within the date range on the report. This is displayed in the commissions column on the ledger report.
 - o **Beginning balance plus commission earned for date range:** This method adds the 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.
 - o **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 on the **Process Action** button to apply the payments.



The screenshot displays a web-based payment processing interface. On the left, there is a large, empty grey rectangular area. To its right, a form contains three input fields: 'Pay Type' with the value 'Manual', 'Batch Id' with the value 'Batch-20130604', and 'Pay Date' with the value '06-01-2013' and a calendar icon. Below these fields are two buttons: 'Process Action' and 'Cancel and Return to Referral Partner Ledger'. A mouse cursor is positioned over the 'Process Action' button. In the bottom right corner of the interface, the text '1.29.3.10 affilia' is visible.