

Five Minute Set Up

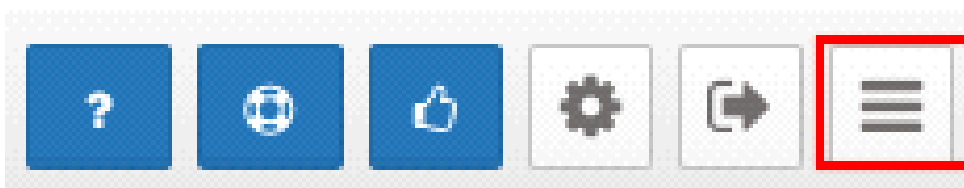
Follow these instructions to set up your first commission in five minutes and get you familiar with the platform.

We are going to add a user to the system. Set a revenue target of 5000 per month and a commission that pays 5% for up to 50% of target achieved and 10% for 50%+ of target achieved. We will then produce a report to check the correct commission has been calculated.

To create a commission report you will need to:

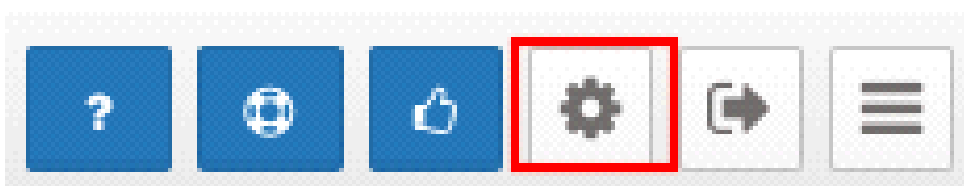
- Add a New User to the system
- Create a Target of 5000 per month
- Create a Commission paying 5% for up 50% of target achieved and 10% for 50%+
- Create an Opportunity for 10,000 with a Won status
- Process the commission
- Run the report

Step 1 – Open Left Hand Menu



Ensure left menu is showing by pressing the hamburger menu

Step 2 – Add a new user



Select the gear icon in the top right of the screen

User Management

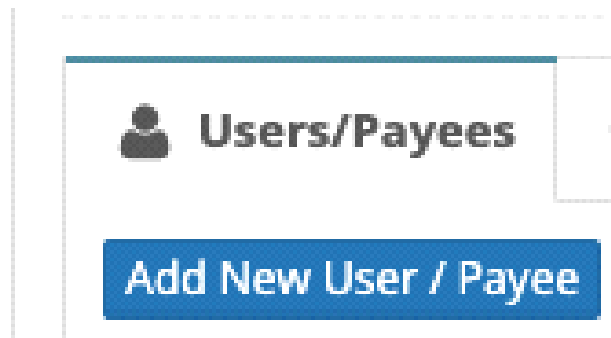
Users/Payees

Teams

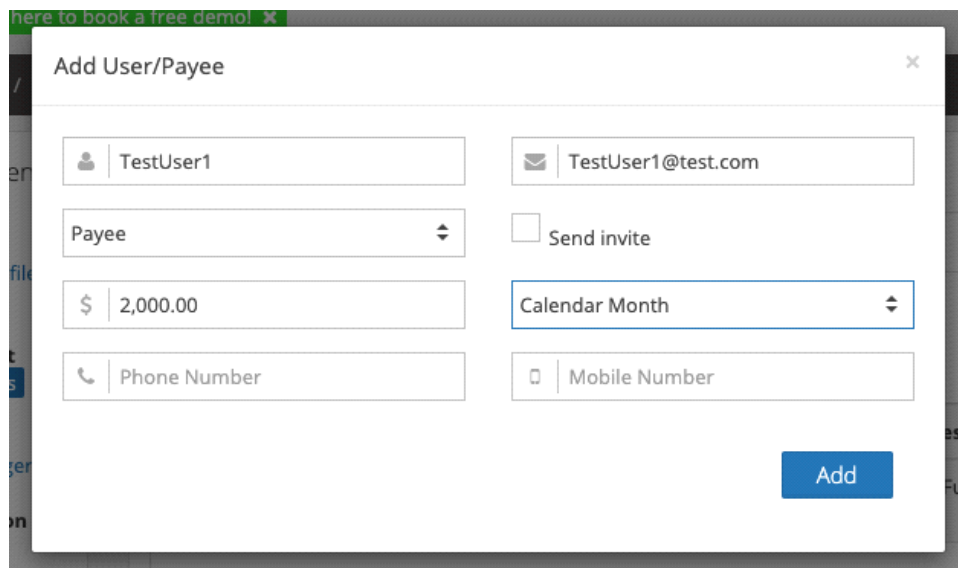
Territories

Access Manager

Select – Users / Payees in the settings menu



Select Add New User / Payee

A screenshot of a web form titled 'Add User/Payee'. The form contains several input fields: 'Name' with the value 'TestUser1', 'Email' with 'TestUser1@test.com', 'Payee' (a dropdown menu), 'Salary' with '\$ 2,000.00', 'Calendar Month' (a dropdown menu), 'Phone Number', and 'Mobile Number'. There is an unchecked checkbox for 'Send invite' and a blue 'Add' button at the bottom right.

Name :TestUser1

Email : Create TEST Email Address or Use Your Personal As a Test
Untick Send Invite

Choose Template: Payee - This sets the access the user will have on the system.

Basic Salary :2000

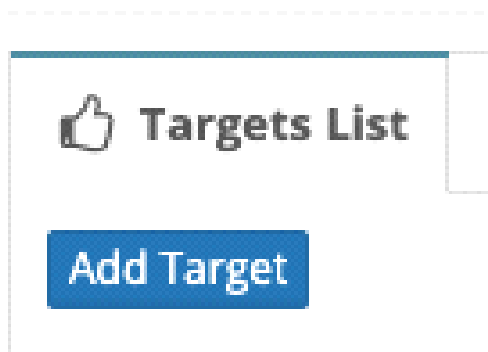
Salary Cycle to Monthly – This sets the salary to $12 \times 2000 = 24000$

Step 3 - Add A Target



Select Targets on the Main Left-Hand Menu

Targets



Select Add Target

Targets - TestUserTarget 1 Add new

Targets List + Edit Target

1 Target Type 2 Target Group 3 Period 4 Create Commission

Step 1 - Choose Target Type

Target Name	TestUserTarget 1	Target Type	Total Sales Revenue
Revenue	10,000.00		

Previous Next

Select the Target Type – Select Total Sales Revenue
Target Name: Set to TestUserTarget 1
Revenue – Set to 10000
Press Next

Targets List **Add Target**

Target Type Target Group Period Create Commission

Step 2 - Target Group

Target Group Individual

Target value applies to each individual selection. E.g Target amount is 50K - selecting 2 team means overall target is 100K

TestUser1

Set the target group
 Select – Individual and then choose TestUser 1

Targets List **Add Target**

Target Type Target Group Period Create Commission

Step 3 - Period

Recurring Target Fixed Target Date

Recur Every Calendar Month Commencement Date 05/01/20

Expiration Date Enter Expiration Date

Previous Save Target

Select recurring target
 Recur Every – Select Month
 Commencement Date: Enter the 1st of the current month.
 The end date is optional
 The target will be recurring every month.

Save Target

Targets - Individual Target **Edit Target** Add new

Targets List

Target Type Target Group Period Create Commission

Step 3 - Period

Recurring Target Fixed Target Date

Target Start Date 03/01/20 Target End Date 02/28/21

Previous Save Target

Alternative – For a fixed target
 Set the start date
 Set the end date
 The target will be fixed for the period set.

Select Save Target

Step 4 - Setting Up A Commission



Select Commissions on the left hand menu

Commission Name: TestUserComm1

Commission Status: Won - This will be the status that will trigger the payment of the commission.

(The status list can be changed under Settings -> Opportunities-> Status)

Select the Target that you created in Step 1

Select Next

Commission Type - Revenue or Profit

Is Override - leave off (This is used to pay a manager a % of other user's commissions)

Paid Against - Leave as Total Sales Revenue (Total Profit can be used if you supply costs in the product information)

Tier Set As
 As % As Amount

Commission Paid As
 As % As Amount As Multiplier

Target Required Off

Pay Recurring Commissions – Leave blank – if set the commission will recur for the period set)

Accumulate Parent Revenue – Leave Blank – Combines the sales per parent and then applies the tier calculation to each parent total separately and not to the total sales in the period.

Commission Paid As – Set As % – Commission will be a % of the total sales

As amount – Leave Blank – You can set the amount to be paid out on each tier.

As Multiplier – Leave Blank – Multiplies the Sales by the amount set on each tier.

Target Required – Leave Blank – full target to be met before commission is paid out. Once the target is achieved commission from all sales will be calculated.

+ Add Commission Tier *			
Tier Start	Tier End	Commission Values	Remove
0.00 %	50.00 %	5.00 %	✕
50.00 %	∞ % <input checked="" type="checkbox"/> No upper tier limit	10.00 % <input type="checkbox"/> Applies to all tiers	✕

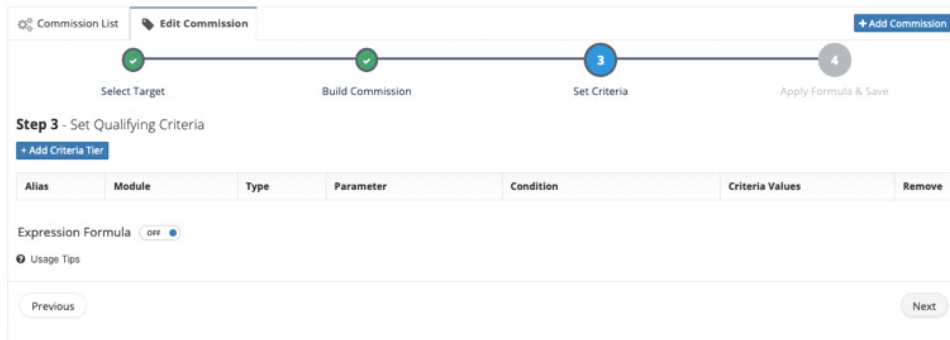
Add a Commission Tier

Tier1 – Set Tier Start 0.00% Tier End 50.00%

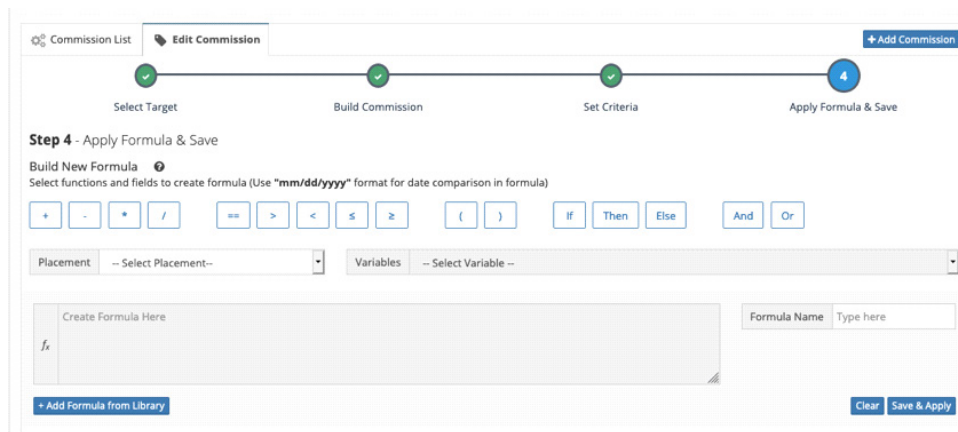
Tier2 – Set Tier Start 50.00% Select No upper limit – any sales above 100% of target will get paid at 10%

Select – Applies to all tiers

If sales are above 50% of target, then all sales in the period will be paid at the higher tier value ie 10%



Criteria Allows you to select groups of opportunities by setting criteria – See Knowledgebase for instructions



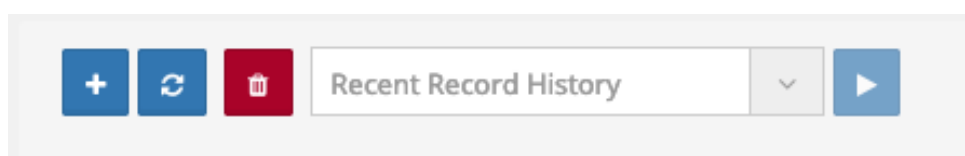
Optional – (Not enabled by default)

If Formula Builder is enabled under Settings → Commissions. You can build formulas to affect the opportunity value that is used when calculating a commission or the total commission amount paid to a Payee.

Step 5 – Create an Opportunity



Select Opportunities on the left-hand menu



Select the + button at the top of the page

Opportunity Name: The unique identifier linking this opportunity to your existing CRM or ERP system

Company Name : **Opportunity Value:**

Order Type:

Owner: Owner **Status:**

Description:

Add a New Opportunity

Opportunity Name – Enter TestUserOpp1

Parent – Type COMPANY 1 and Add – This is the name of the company who the opportunity is for – You can type in a new Parent and add the details.

Order Type – Select New

Owner – Type TestUser1

This is the User who will be paid commission on the opportunity

Opportunity Value – Enter a value of 10000

Status – Set to Won

Select Save

Won
TestUser1 on 05/12/20

COMPANY1 Opportunity Description
Add Opportunity description

Email:

Opportunity Name: TestUserOpp1

Order Type: New

Opportunity Value: 10,000.00

Opportunity Status: Won 05/12/20

TestUser1

Add tag above

Commission Data: Commission Data value

Products 0 Splits 1 Commission 0 Notes 0 File Manager 0

Add Product Create Product

Product Name	Quantity	Total Price	Action
No information available			

Showing 1 to 1 of 1 entries Previous Next

Make a note of the WON date in the status bar at the top of the Opportunity

REVIEW

If you have followed the steps so far you will have completed the following

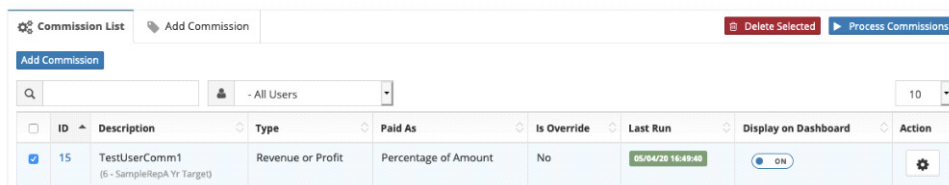
- Added a User
- Created a Target for the user
 - Created a Commission
 - Added an Opportunity

You will need to have completed these steps to continue

Step 6 – Process the Commission Plan



Select Commissions in the right hand



The screenshot shows a web interface for managing commissions. At the top, there is a "Commission List" header with a search icon, an "Add Commission" button, and two action buttons: "Delete Selected" (red) and "Process Commissions" (blue). Below the header is a search bar, a user selection dropdown set to "- All Users", and a page size selector set to "10". The main content is a table with the following columns: ID, Description, Type, Paid As, Is Override, Last Run, Display on Dashboard, and Action. One row is visible with ID 15, Description "TestUserComm1 (5 - SampleRepA Yr Target)", Type "Revenue or Profit", Paid As "Percentage of Amount", Is Override "No", Last Run "05/04/20 16:49:46", Display on Dashboard "ON", and an Action button with a gear icon.

ID	Description	Type	Paid As	Is Override	Last Run	Display on Dashboard	Action
15	TestUserComm1 (5 - SampleRepA Yr Target)	Revenue or Profit	Percentage of Amount	No	05/04/20 16:49:46	ON	

Select the TestUserComm1 commission



Select the Process Commissions Button

Step 7 – Run Commission Report



Select Reports from the left-hand menu

Commission Reports

- Commission Payee Summary
- Commission by Plan
- Commission Payee with Opportunities
- Summary of Unpaid Commissions
- Paid vs. Unpaid Commissions

Select Commission Payee Summary in Commission Reports

13749

TestUser1

testuser1@test.com

From the list that appears select the commission plan that you have set up

Payee: TestUser1
Payment Cycle: Calendar Month (01 May 2020— 31 May 2020)
Select Date: 2020, May

[Update Date](#) [Choose Pay Cycle](#)

[Export to Excel](#)

Commission ID	Commission Name	Target ID	Target Name	Incentive Type	Total Sales	Total Commission
15	TestUserComm1	15	TestUserTarget 1	Percent of Value	10,000.00 GBP	750.00GBP

[Adjustments](#) [Add Adjustment](#)

Total Commission: **750.00GBP**

Review Commission Payee Report

If ADJUSTMENTS have been enabled in Settings -> Commissions you can enter an adjustment to the commission amount and note.

Commission Reports

- Commission Payee Summary
- Commission by Plan

Review Commission Plan Report

This will show all Commission Plans and the payees
Select Commission by Plan

Select Target

Search: 10

Commission ID	Commission Name	Override	Target ID	Target Name	Target Type
3	TestUserComm1	No	3	Test User Target 1	Total Sales Revenue

Select the TestUserComm1

Full Name: TestUser1 [Order Details](#) ~ Back to Top

Description:
Target Type: **Revenue or Profit**
Incentive Type: **Percent of Value**
Paid Against: **Gross Revenue**

Opportunity ID	Opportunity Name	Owner	Parent	Status	Won Date	Deal Value	Commissionable Amount	Commission Value	Commission Due
315	TestUserOpp1	TestUser1	Company 1	Won	05/05/20	10,000.00 GBP	10,000.00 GBP		GBP
							5,000.00GBP	5.00%	250.00GBP
							5,000.00GBP	10.00%	500.00GBP
						GBP	10,000.00		750.00 GBP
								Total Commission	750.00

The opportunity view displays each opportunity by tier

Full Name: TestUser1 [Order Details](#) ~ Back to Top

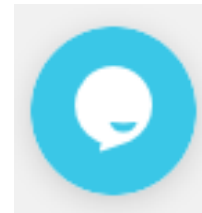
Description:
Target Type: **Revenue or Profit**
Incentive Type: **Percent of Value**
Paid Against: **Gross Revenue**

Tier	Sales Achieved (Per Tier)	Incentive (Amount or % of Revenue)	Commission Payable
(>) 0.00 to 50.00%	5,000.00 GBP	5.00%	250.00 GBP
(>) 50.00% +	5,000.00 GBP	10.00%	500.00 GBP
			750.00 GBP
		Total	750.00

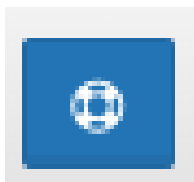
The Tier View displays the amount paid out in each tier in the plan



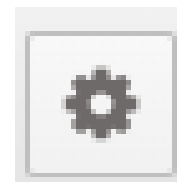
For additional resources



To access the Knowledge Base for Articles and Videos – Select



Quick Start Tour – Select



For additional settings – Select