



Quick Commission Calculator

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1. Introduction

1.1 Document Purpose

The purpose of this User Guide is to explain how to install and use the 'Quick Commission Calculator'. The document contains a table of contents, detailed information and images for better understanding.

1.2 Application Overview

The Quick Commission Calculator is an efficient solution for sales teams to instantly compute their earnings. It simplifies the process of calculating commissions with precision, allowing for real-time tracking of sales performance and potential payouts.

2. Administration

This section will help you set up your organization to be able to start using Quick Commission Calculator.

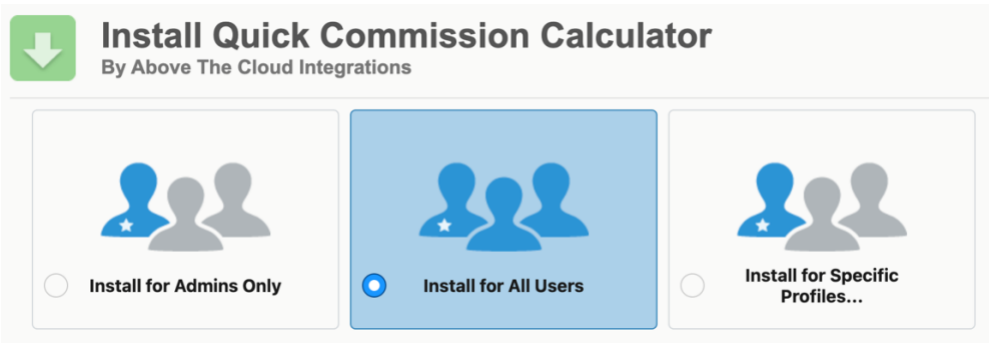
To setup the application you need to do steps in 2.1

2.1 Install Quick Commission Calculator

To install the Quick Commission Calculator:

1. Go to the AppExchange <http://www.salesforce.com/appexchange>
2. Search for Quick Commission Calculator
3. Click the  button.

4. Click the option **Log in to the AppExchange**.
5. You can then select to install Quick Commission Calculator in either Production or Sandbox.
6. Select check box to agree the terms and conditions.
7. Click the **Confirm and Install!** button.
8. Enter your organization credentials.
9. Select installation details (either for Admin Only, All Users, or Specific Profiles)
10. Then click **Install**.



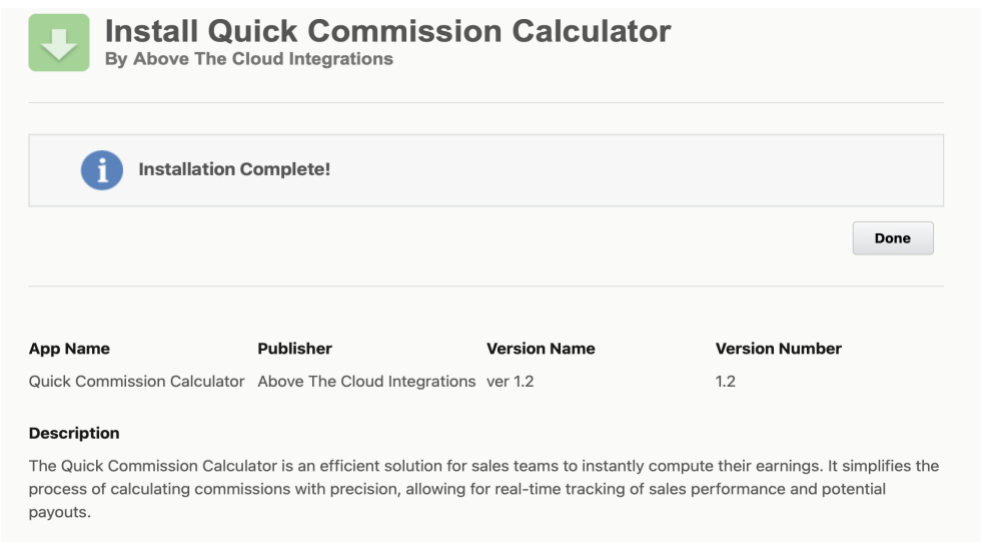
Install Quick Commission Calculator
By Above The Cloud Integrations

☐ Install for Admins Only

☒ Install for All Users

☐ Install for Specific Profiles...

If the installation is successfully completed, you will see the following confirmation message.



Install Quick Commission Calculator
By Above The Cloud Integrations

i Installation Complete!

Done

App Name	Publisher	Version Name	Version Number
Quick Commission Calculator	Above The Cloud Integrations	ver 1.2	1.2

Description

The Quick Commission Calculator is an efficient solution for sales teams to instantly compute their earnings. It simplifies the process of calculating commissions with precision, allowing for real-time tracking of sales performance and potential payouts.

2.2 Adding the Quick Action

To enable users to create commission plans and check their commissions, add the ‘Calculate Commission’ quick action to the Opportunity Page layout

SETUP > OBJECT MANAGER

Opportunity

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Buttons, Links, and Actions

16 Items, Sorted by Label

Quick Find

New Action

New Button or Link

LABEL	NAME	DESCRIPTION	TYPE	CONTENT SOURCE	OVERRIDDEN
Add to Campaign	AddInfluence			Standard page	
Calculate Commission	Calculate_Commission	Button utilized to compute the commission for an Opportunity in accordance with the configured commission plans.	Lightning Web Component	Lightning Web Component	
Calculate Price	headlessPricingAction			Standard page	

Opportunity

Burlington Textiles Weaving Plant Generator

+ Follow

Calculate Commission

New Case

New Note

Account Name

Burlington Textiles Corp of America

Close Date

5/29/2024

Amount

\$235,000.00

Opportunity Owner

Buzz Lightyear

2.3 Granting User Permissions

Users need to be assigned to the permission set ‘Commission Calculator’ to use the application.

Permission Set

Commission Calculator

Video Tutorial | Help for this Page

Find Settings...

Clone

Manage Assignments

View Summary

Permission Set Overview

Description

Permission Set created to provide user the necessary permissions to access the Quick Commission Calculator by ATCI.

API Name

Commission_Calculator

License

Namespace Prefix

ATCI_qcc

Session Activation Required

Created By

Buzz Lightyear, 8/13/2024, 2:07 PM

Permission Set Groups Added To

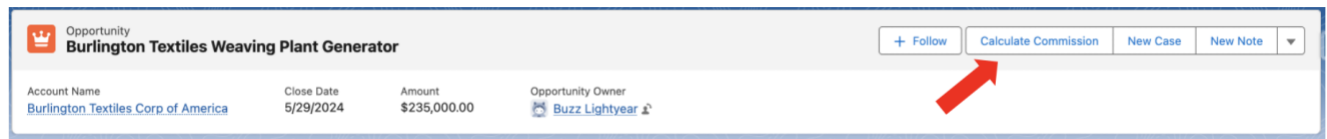
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Last Modified By

Buzz Lightyear, 8/13/2024, 2:07 PM

3. Application

Quick Commission Calculator can be accessed by clicking on the 'Calculate Commission' button on the Opportunity Page Layout.



3.1 Get to know your calculator

Upon accessing the Calculator for the first time, users will see a screen like the one below. This screen provides options for setting up and managing the user's commission plans.

The main components of this screen are listed and described below.

- **Currency Field:** This is the field from which the Opportunity Amount is fetched and displayed; it can be any currency field on the Opportunity.
- **Total Opportunity Amount:** This is the currency value that is retrieved from the currency field.

Quick Commission Calculator ⓘ

Select Currency Field	Amount
Total Opportunity Amount	\$235,000.00
Base Commission Rates ⓘ	
Base Commission Rate I	7.00%
Adjustment Thresholds ⓘ	
Adjustment Threshold I	\$155,000
Adjusted Rates ⓘ	
Adjusted Commission Rate I	12.50%
Calculated Commissions	
Calculated Commission I	\$20,850
Total Commission	\$20,850

[Clear](#)
[Add as Configuration](#)

- Base Commission Rates: These are the initial commission rates before any adjustments.
- Adjustment Thresholds: Value thresholds that could change the commission rates.
- Adjusted Rates: Commission Rates after applying the thresholds.
- Calculated Commissions: The final calculated value based on the details entered.
- Clear: Let's the users clear the configuration, allowing the user to enter from scratch.
- Add as Configuration: Up to 5 Configurations can be added by each user.

The screenshot shows the 'Quick Commission Calculator' interface. A modal dialog titled 'Add as Configuration' is open, prompting the user to enter a 'Configuration Name'. The name 'Renewal Config' has been entered. The background interface shows the following details:

Quick Commission Calculator	
Select Currency Field	Amount
Total Opportunity Amount	\$235,000.00
Base Commission Rates	
Base Commission Rate I	
Adjustment Thresholds	
Adjustment Threshold I	
Adjusted Rates	
Adjusted Commission Rate I	
Calculated Commissions	
Calculated Commission I	\$20,850
Total Commission	\$20,850

Buttons at the bottom: Clear, Add as Configuration.

- Once a configuration is saved, more options are unlocked like the one's in the image below.

The screenshot shows the 'Quick Commission Calculator' interface with a saved configuration selected. Red arrows and numbers highlight key features:

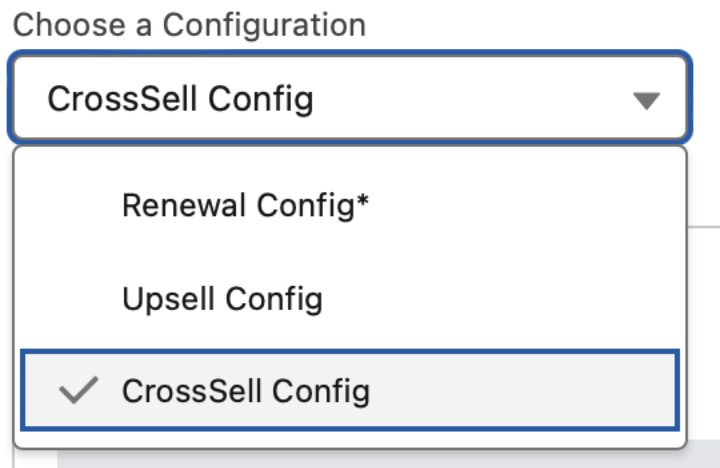
- 1**: Points to the 'Choose a Configuration' dropdown menu, which now shows 'CrossSell Config'.
- 2**: Points to the settings gear icon next to the dropdown.
- 3**: Points to the refresh/clear icon in the top right corner.

The configuration details are as follows:

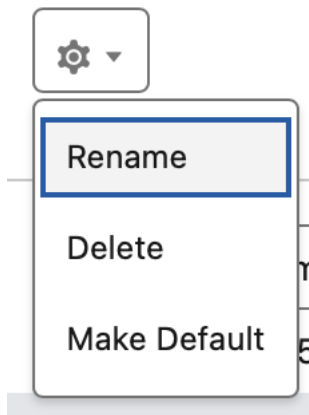
Quick Commission Calculator	
Choose a Configuration	CrossSell Config
Select Currency Field	Amount
Total Opportunity Amount	\$235,000.00
Base Commission Rates	
Base Commission Rate I	5.90%
Adjustment Thresholds	
Adjustment Threshold I	\$220,000
Adjusted Rates	
Adjusted Commission Rate I	9.70%
Calculated Commissions	
Calculated Commission I	\$14,435
Total Commission	\$14,435

Buttons at the bottom: Clear, Save, Add as Configuration.

1. Choose a Configuration: Allows the users to select among various configurations saved. The configuration with Asterix (*) is the default configuration.



2. Settings: Allows users to Rename, Delete or make an existing configuration as default.



3. Undo: This button allows the user to undo the changes up to the last save point.

- The '+' and '-' buttons are used to add up to 3 base commission rates, adjustment thresholds and adjustment rates, based on split amounts if the commission plans need to have split amounts., split amounts can be used to split the commission rates between various amounts or products within an opportunity.

Quick Commission Calculator

Choose a Configuration

Upsell Config



Select Currency Field	Amount
Total Opportunity Amount	\$250,000.00
Base Commission Rates 	
+ -	
Base Commission Rate I	5.00%
Base Commission Rate II	7.00%
Adjustment Thresholds 	
Adjustment Threshold I	\$34,543
Adjustment Threshold II	\$688
Adjusted Rates 	
Adjusted Commission Rate I	6.00%
Adjusted Commission Rate II	8.00%
Split Amounts 	
Split Amount I	\$6,868
Split Amount II	\$6,868
Calculated Commissions	
Calculated Commission I	\$343
Calculated Commission II	\$543
Total Commission	\$886

[Clear](#) [Save](#) [Add as Configuration](#)



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