CloudFirst LABS

AgileComp

Accelerate. Access. Achieve

Quick Start Guide

Contents

Introduction

At CloudFirst Labs, we specialize in delivering intuitive, speedy, and robust applications built on and for Salesforce® and the Lightning Experience.

AgileComp, a Gross Profit based system, is no exception. Purpose-built for HR, Accounting, Payroll, Sales Ops, or any person/team involved in the administering and process of commissions, AgileComp removes the friction, frustration, and confusion that usually exists with commissions processing. Dump your spreadsheets or antiquated processes and put your commissions into the next generation platform your team will love!

The software is easy to configure and, in most cases, will be up and running in hours not days!

We provide a step-by-step process for setting up AgileComp in the most efficient order that we have tested. However, you are free to configure the system in any order that works for you but remember that there are dependencies between objects, and we recommend following our process.

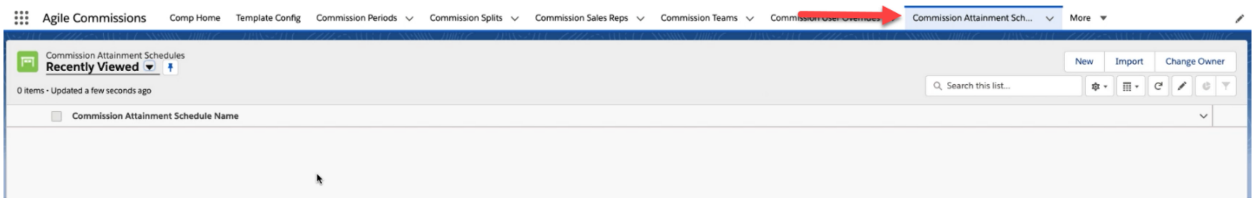
Once the application has been installed and licenses provisioned, follow this guide for a painless implementation.

If you require more detail regarding a certain section, need to know API names for objects or fields, want to edit the VisualFOrce for the PDF, or generally require more information on AgileComp please request a copy of the "Installation, Configuration, and Technical Guide" from your AgileComp administrator or head to cloudfirstlabs.com/agilecomp and use the Contact Us link to send us a message.

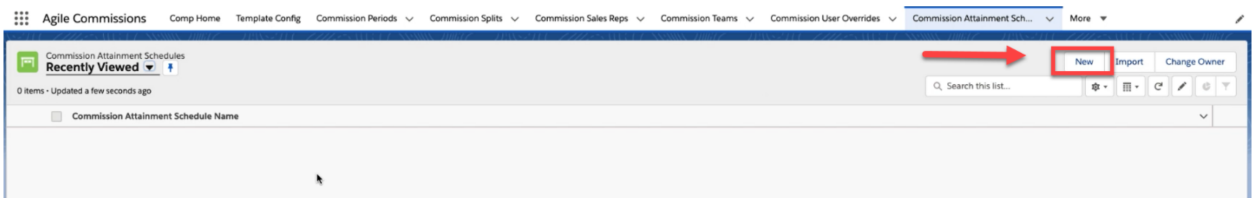
Attainment Schedules

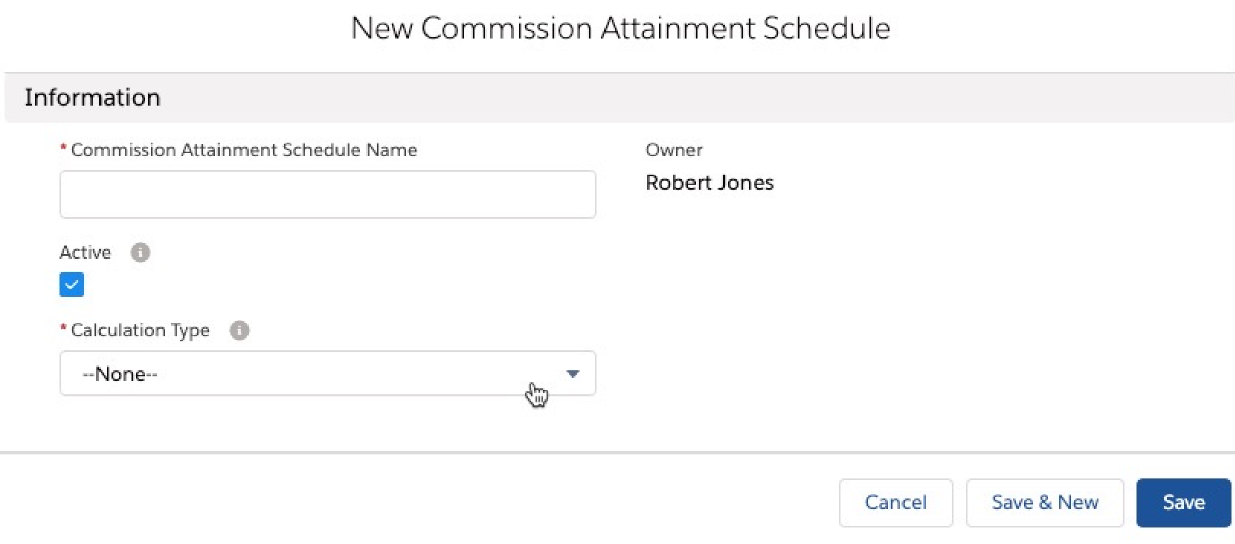
The Attainment Schedule is a method for creating payment tiers for a commissioned person's plan based on their performance. You can have one attainment schedule for all teams, or each team can have its own attainment schedule.

To set up these items click on the Commission Attainment Schedule tab:



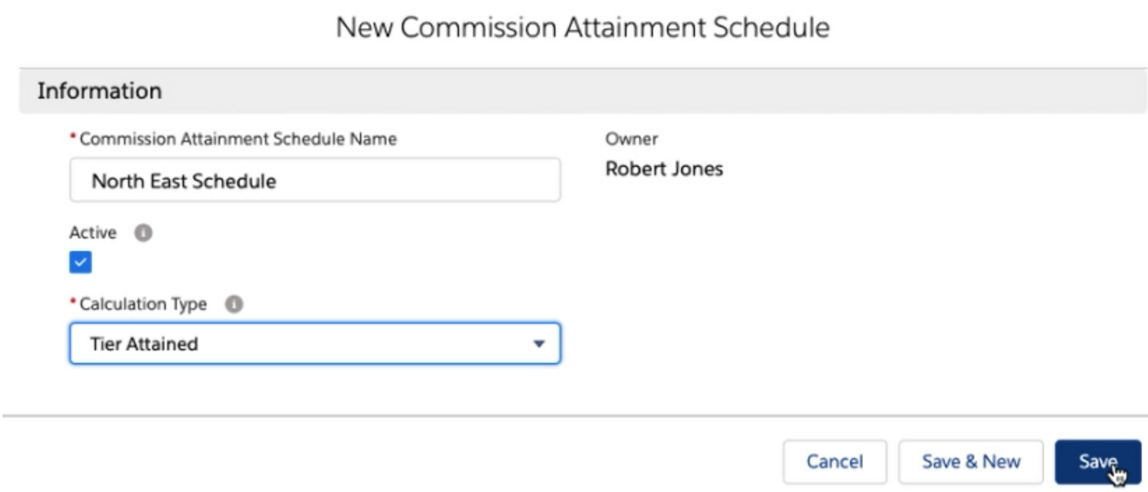
To create an Attainment Schedule, select the click "New":



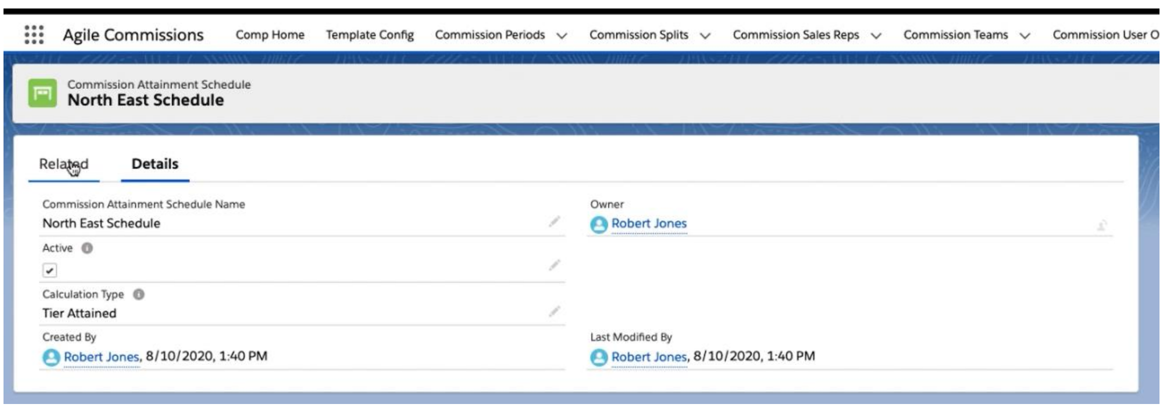


The following fields are required to create an attainment schedule:

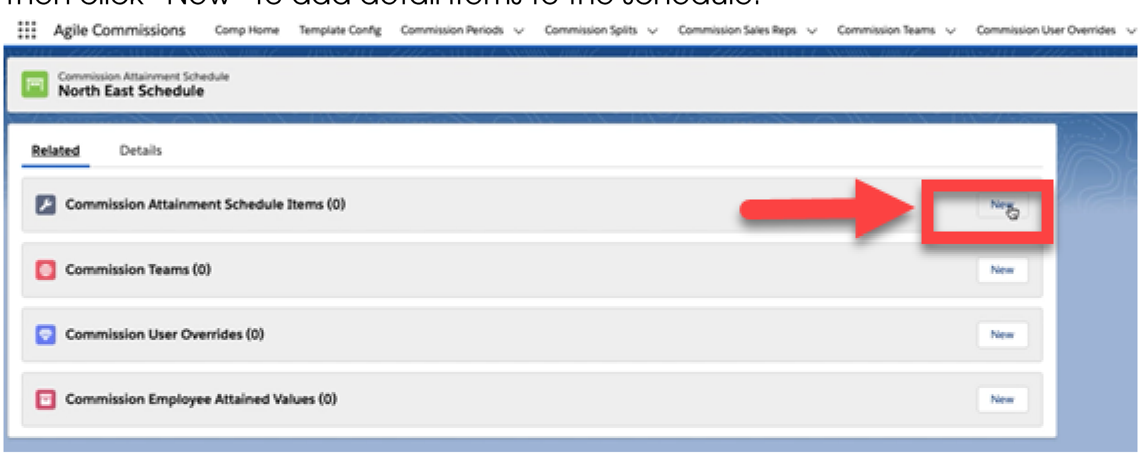
Commission Attainment Schedule Name	Select a name that is descriptive and easily identifiable when you are attaching teams and overrides. This field is required.
Active	Is the attainment schedule active?
Calculation Type	The values for this are • Step • Tier Attained



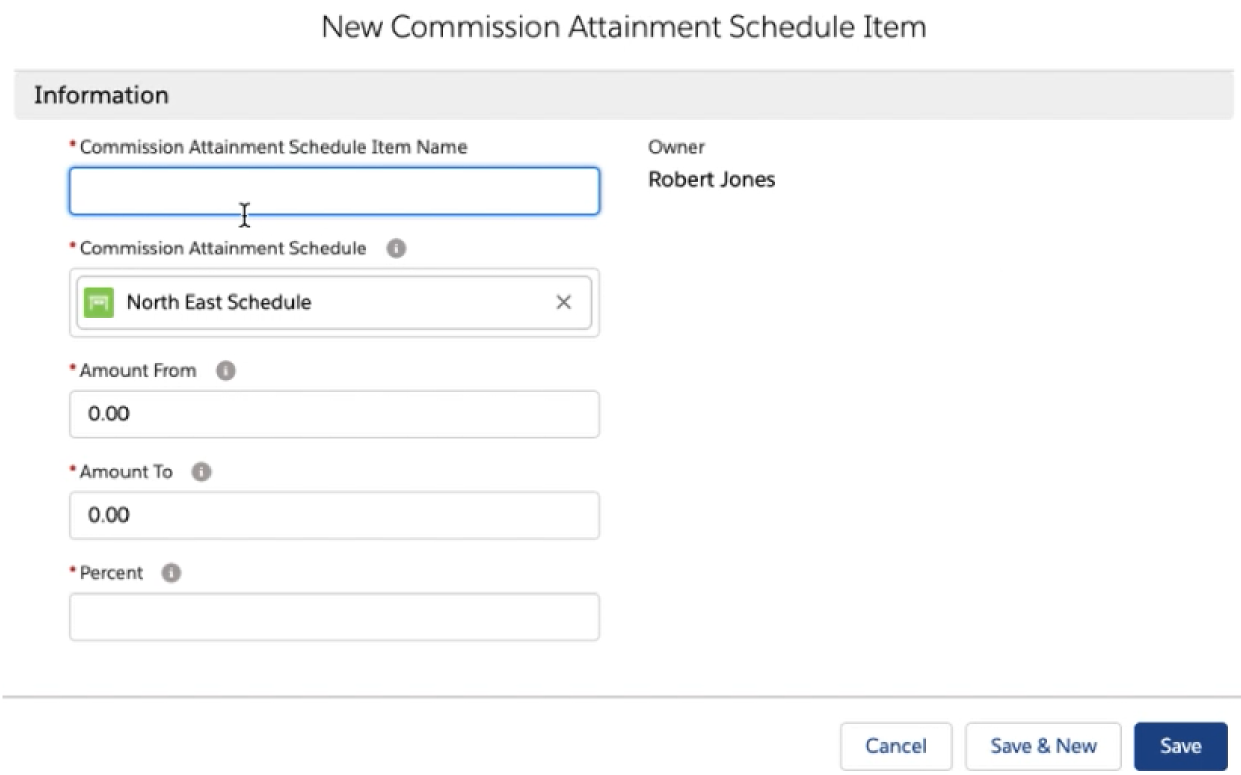
Click "Save" and then go to the Related Items tab:



Then click "New" to add detail items to the schedule:



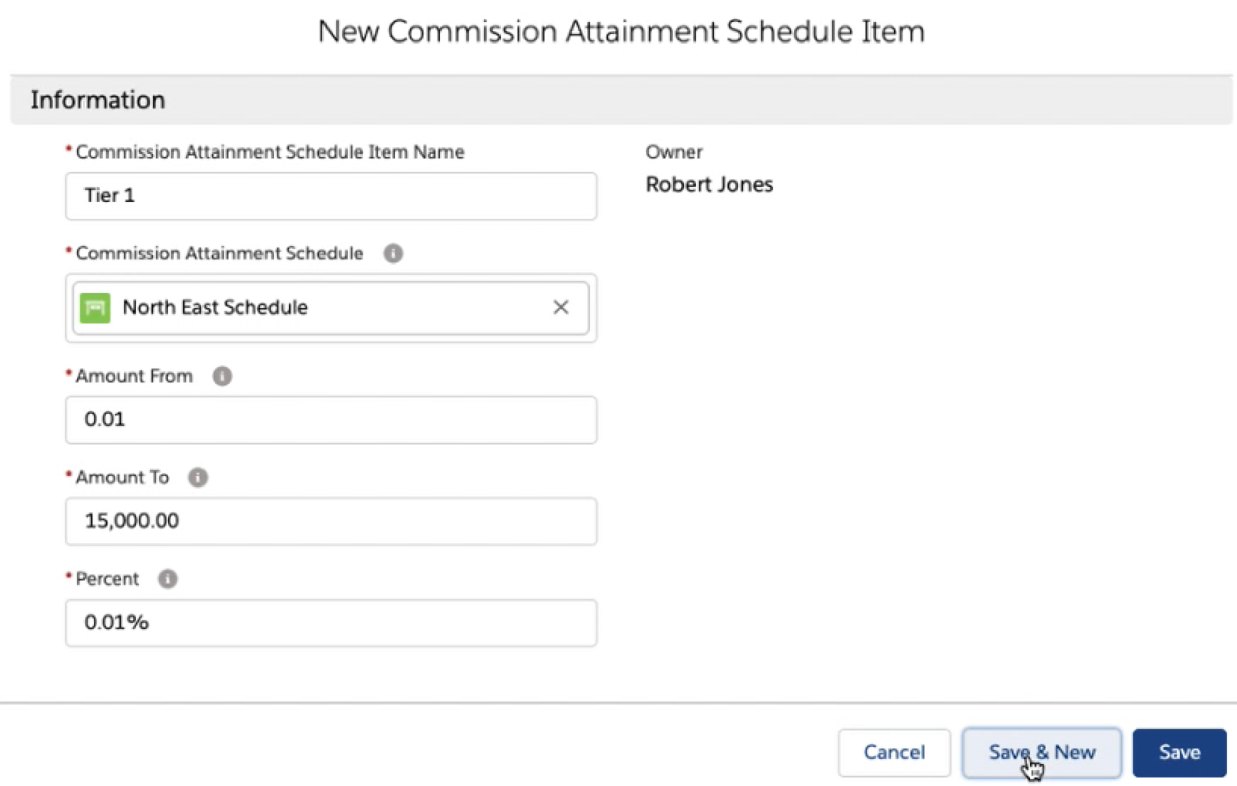
This will launch the Commission Attainment Schedule Item screen:



Input the following information to create an Attainment Schedule Items (all fields are required):

Schedule Item Name	Use a descriptive name for the item.
Attainment Schedule	LookUp field to an attainment schedule
Amount From	Dollar amount for the start of the range
Amount To	Dollar amount for the end of the range
Percent	Percent to apply to the tier

For example:



New Commission Attainment Schedule Item

Information

*Commission Attainment Schedule Item Name

Tier 1

Owner

Robert Jones

*Commission Attainment Schedule

North East Schedule

*Amount From

0.01

*Amount To

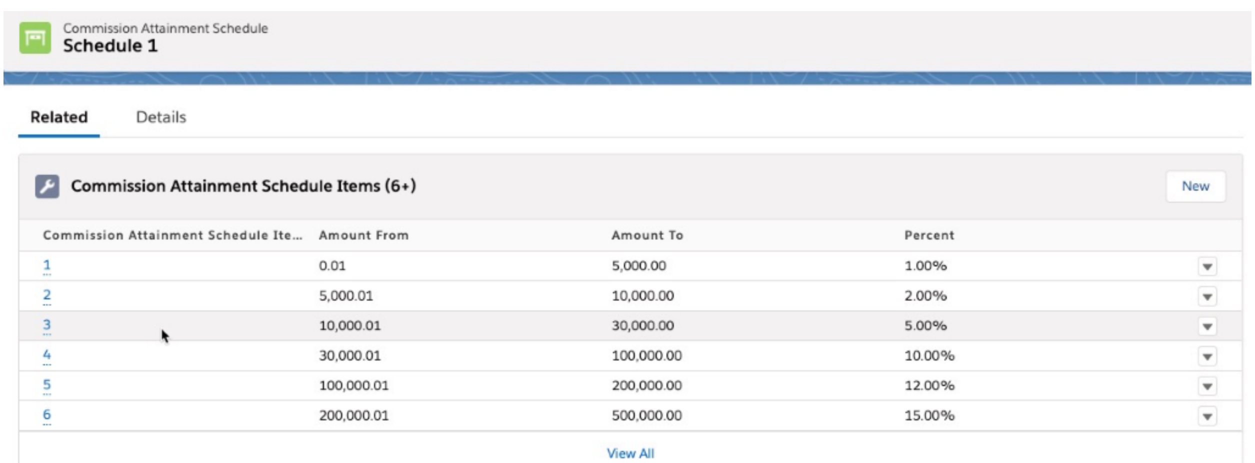
15,000.00

*Percent

0.01%

Cancel | Save & New | Save

You would make as many Schedule Items as you have Tiers and you would end up with something like this:



Commission Attainment Schedule

Schedule 1

Related | Details

Commission Attainment Schedule Items (6+)

New

Commission Attainment Schedule Ite...	Amount From	Amount To	Percent
1	0.01	5,000.00	1.00%
2	5,000.01	10,000.00	2.00%
3	10,000.01	30,000.00	5.00%
4	30,000.01	100,000.00	10.00%
5	100,000.01	200,000.00	12.00%
6	200,000.01	500,000.00	15.00%

View All

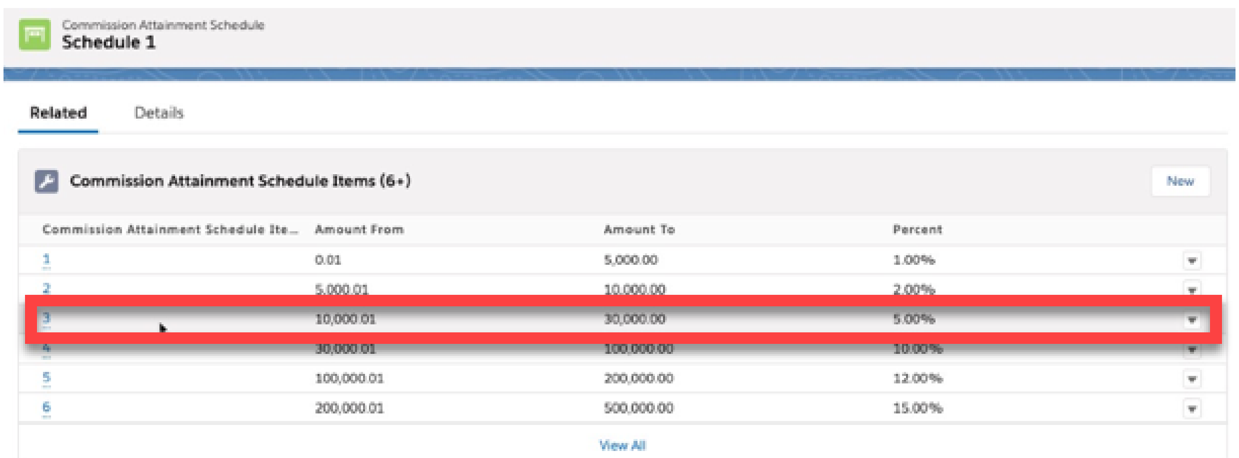
For this tier, the items are configured such that from $0.01 to $5000 the person would get 1% of their gross profit, from $5,000.01 - $10,000 they would get 2%, and so on...

Let’s review the two schedule calculation types: tier attained vs. step.

AgileComp uses gross profit (or however you set up your calculation template) to roll through the tiers and it is calculated in the Commission Base Input object as Split Extended Sales - Split Extended Cost - Split Extended Freight. You control how those fields are loaded but the system will process based on that calculation. Let's examine the following example:

Steve is on a team that is assigned Schedule 1 that was shown above. For this period Steve has sales, cost, and freight that equals $12,500.00 in gross profit.

Under “Tier Attained”, we would simply take the $12,500 and compare against the amount from to amount to and determine that this amount falls under tier 3, Steve would get 12,500 * 5% or $625.00:



Commission Attainment Schedule
Schedule 1

Related Details

Commission Attainment Schedule Items (6+) New

Commission Attainment Schedule Ite...	Amount From	Amount To	Percent
1	0.01	5,000.00	1.00%
2	5,000.01	10,000.00	2.00%
3	10,000.01	30,000.00	5.00%
4	30,000.01	100,000.00	10.00%
5	100,000.01	200,000.00	12.00%
6	200,000.01	500,000.00	15.00%

View All

If the same schedule was configured as “Step”, AgileComp would apply his gross profit amount ($12,500) through the tiers.

Level	Tier Amount Range	Commission Amount
Tier 1	$4,999.99 * 1%	$49.99
Tier 2	$4,999.99 * 2%	$99.99
Tier 3	$2,499.99 * 5%	$124.99
Total	$12,500	$264.97

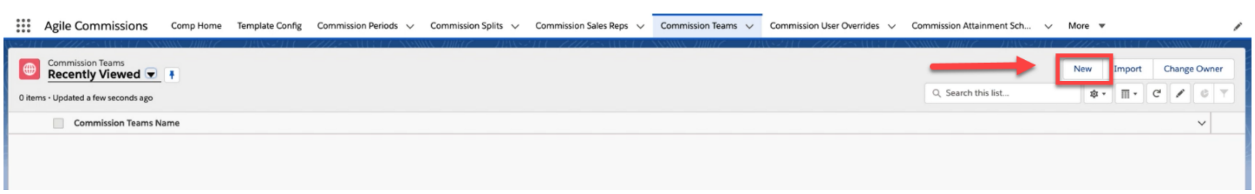
The difference between the two methods is approximately $265.00 vs $625.00.

Commission Teams

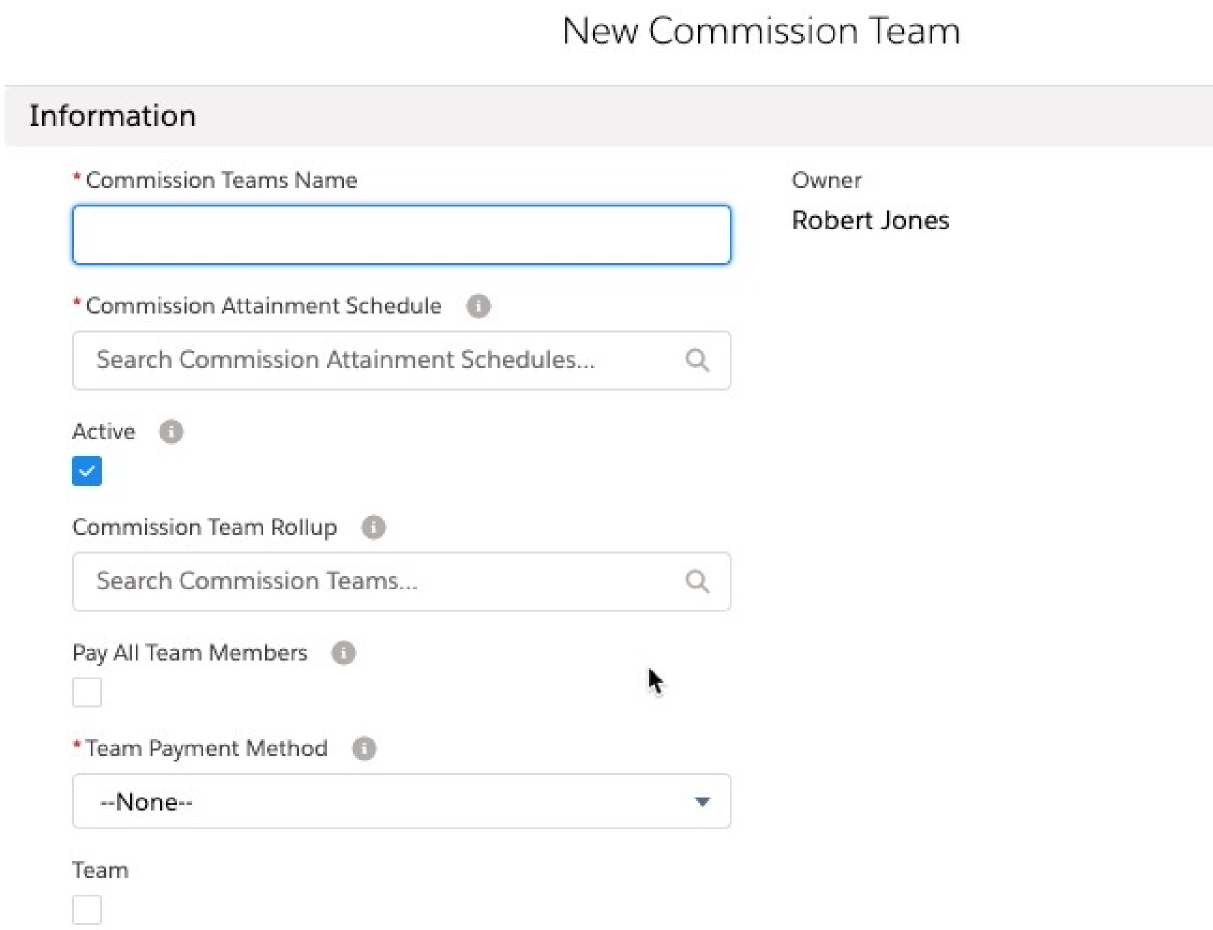
Each person who will have commissions calculated for them must be assigned to a commission team. Team setup ties together the attainment schedule and sets the default team attainment tiers. Commission teams allow for the aggregation of values and to treat a group of commissionable people the same way. The system allows for many situations such as overrides where a person may be on a specific team, but your contributions (commissionable dollars) are treated differently. The reason for this functionality is that even though the person's plan may compute their gross profit one way, their gross profit dollars(contribution) might be used for a team calculation or another roll-up calculation. There are six different payment methods to choose from for your team. Payment Methods are team-based and you can have different teams paid with different payment methods. You can roll team attained values to other teams which becomes very handy to calculate commissions for sales leaders that are compensated based on their team's performance.

To create a team, find the Commissions Team tab and click on it:

From the main screen click on "New":



You will be presented with the "New Commission Team" modal. Fill in the required fields and select the options needed to configure the team:



Commission Team Name	Select a name that is descriptive and easily identifiable because this field/label is used in many places. This field is required.
Commission Attainment Schedule	Select an attainment schedule that has been previously created(remember the schedule has the tiers for commission payouts)
Active	Checkbox for making the team active or not.
Commission Team Rollup	If the commission dollars for this team rollup to another team then select that team here. For example, a divisional or department manager who has their own attainment schedule based on the performance of their team. If you were creating the team for the salespeople

	here then you would select the manager's team in this field.
Pay All Team Members	When creating a team, all members' contributions or gross profit is calculated and the members are paid based on the collective amounts. If you check this box then everyone on the team is paid per the attainment schedule even if they did not contribute any gross profit.

Team Payment Method	1. Total Team Contribution
	    a. Team checkbox must be checked
	    b. All team gross profit dollars are used to calculate the total for the attainment schedule
	2. Individual Contribution
	    a. The team members are paid using their own gross profit dollars only, no other contributions or dollars apply
	3. Commission Year Individual Period Payout Tier
	    a. Utilizes the YTD Individual Dollars to determine the payout tier
	4. Commission Year Individual Period Payout Step
	    a. Utilizing the YTD Individual Dollars to determine tier, but then remove the current period gross profit to determine if the person has traversed a tier or more. If so, use the step methodology to traverse the tiers that have been passed through.
	5. Commission Year Total Team Period Payout Tier
	    a. Using the YTD Team gross profit dollars (contribution), determine the payout tier.
	6. Commission Year Total Team Period Payout Step
	    a. Using the YTD Team gross profit dollars, determine tier, but then remove the current period Team gross profit dollars, if that traverses tiers, then step through the tiers as in step calculation.

Team	Check this box if this team's commissions calculations for the attainment schedule should be made using the team gross profit and not the individual's gross profit.

Commission Team setup validations:

1. If the Attainment schedule calculation type = Step, you cannot pick any of the Commission Year Payment methods.
2. You cannot have "Pay All Team Members" selected with "Individual Payout" payment method.
3. If Team is unchecked you cannot check "Pay All Team Members".
4. If Team is checked you cannot have "Individual Contribution" Payment Method with a step-based attainment schedule.
5. If Team is unchecked, you cannot use any payment method using "Team" contributions

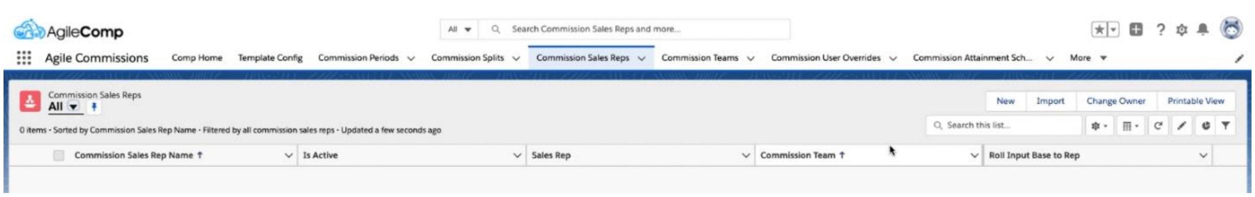
Commission Sales Reps

Each Salesforce User who will have commissions calculated for them based on sales transactions (or however you calculate gross profit) must be added be to AgileComp as a Commission Sales Rep. Each Person is then assigned a Team.

Commission Sales Rep can be part of a team but you can override their attainment schedule, payout amount, or the payout percentage. This is ideal in situations where you have a Commission Sales Rep that you want to guarantee their attainment or where you want to ensure they make a certain salary for a given period. It also works when you want to pay out a single individual under a different attainment schedule than their current team.

Navigate to the Commission Sales Reps tab and click on it:

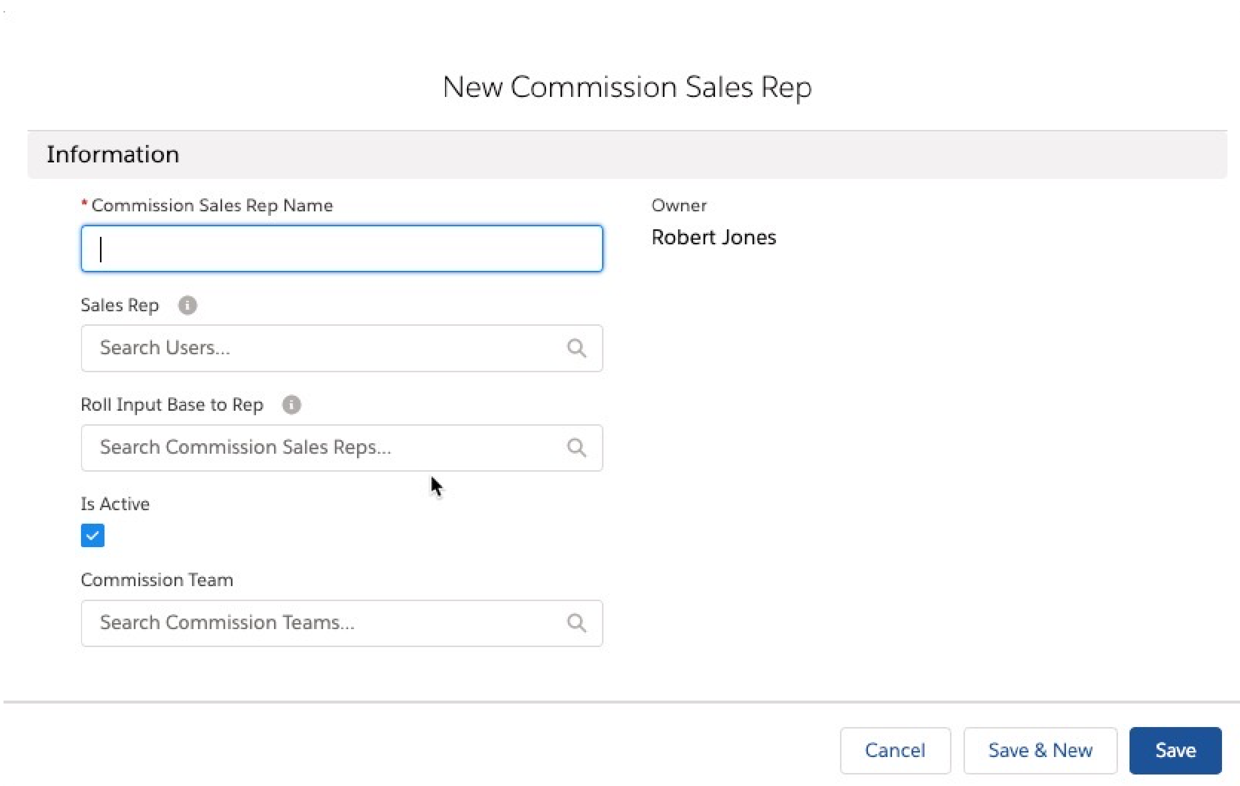
Which opens the main page for this setup:



Before you create a Commission Sales Rep, you must have an available AgileComp license that can be consumed by the user. You also need to assign a license to users who will set up and administer AgileComp. Additionally, if a commissionable person (Sales Rep) is not assigned a license then the system will not compute commissions for them, nor will they have access to their statements.

To create a Sales Rep for a user who is in Salesforce and if you have available licenses, click "New":

This will open the "New Commission Sales Rep" modal:



Commission Sales Rep Name	Select a name that is descriptive or mimics the User you will select. This field is required.

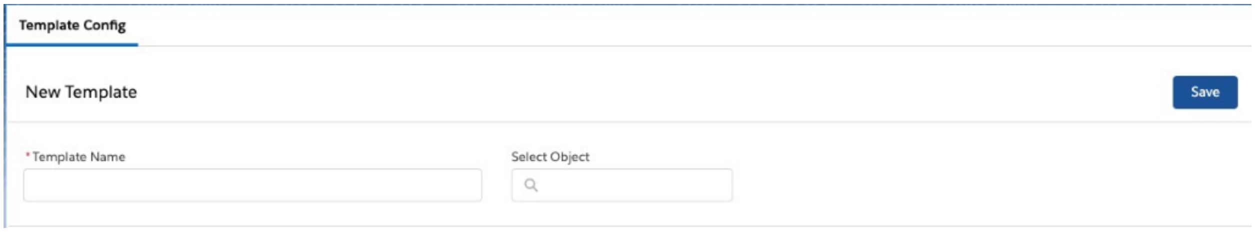
Sales Rep	Lookup to the User table in Salesforce. This field is required.
Roll Input Base to Rep	This is a Lookup to Commission Sales Rep and allows you to roll the values from this user to another user. This is where the Document Sales Rep Vs Commission sales rep is taken into account. An example of this situation is a Business development Rep or Sales Assistant who has ownership of documents or transactions that feed into the system but their gross profit dollars(contribution) should go against someone other than themselves
Commission Team	This is a Lookup to Commission Teams. A Commission Sales Rep can be assigned to one team but can have an override (this will be covered later in this document)

Template Config

AgileComp allows the administrator to quickly build templates that import data from any Salesforce object (Core Salesforce, Custom, or Third-Party Package). The template builder starts with a base object, then has the user map values into the staging table. Within the template builder, you can pull fields from the base object and up to 4 related levels deep.

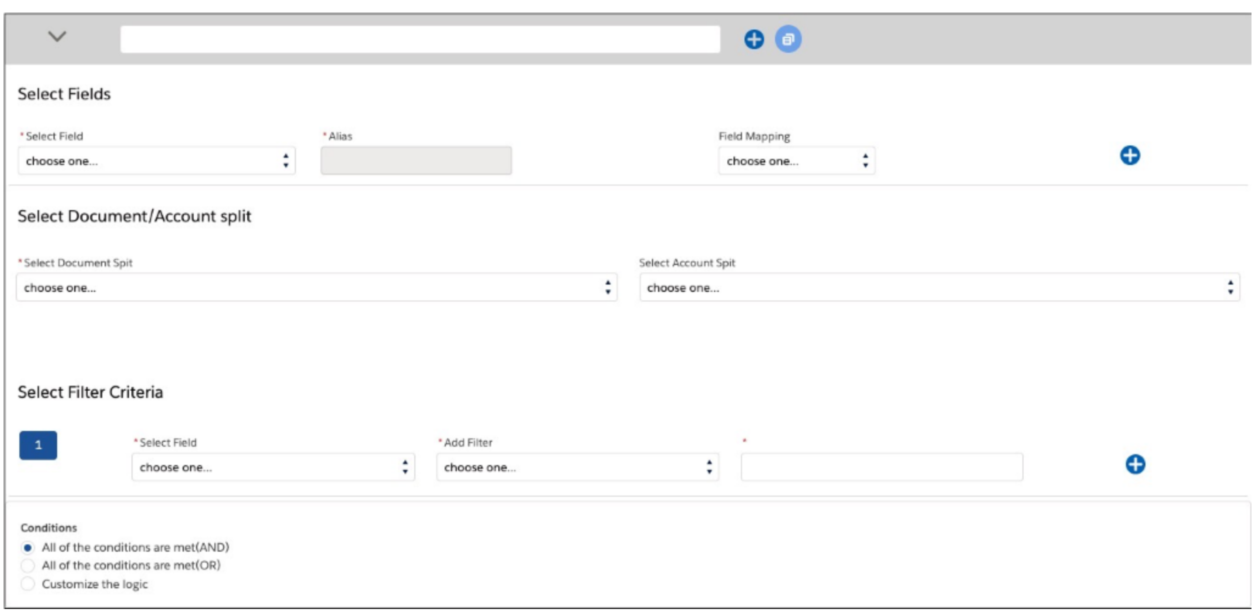
Click on "Template Config" tab, which will display any existing templates and allow you to create new ones.

Click "New" to create a new template.



Template Name	Name your template something descriptive.
Select Object	The object you want to base the load from. This should be the lowest level of data. You can search up to 4 levels from this object. In our case, we will base our information on the quote line item object. ** **note the search searches on the API name, not the Label. This is important if you feel you are not finding your object.**

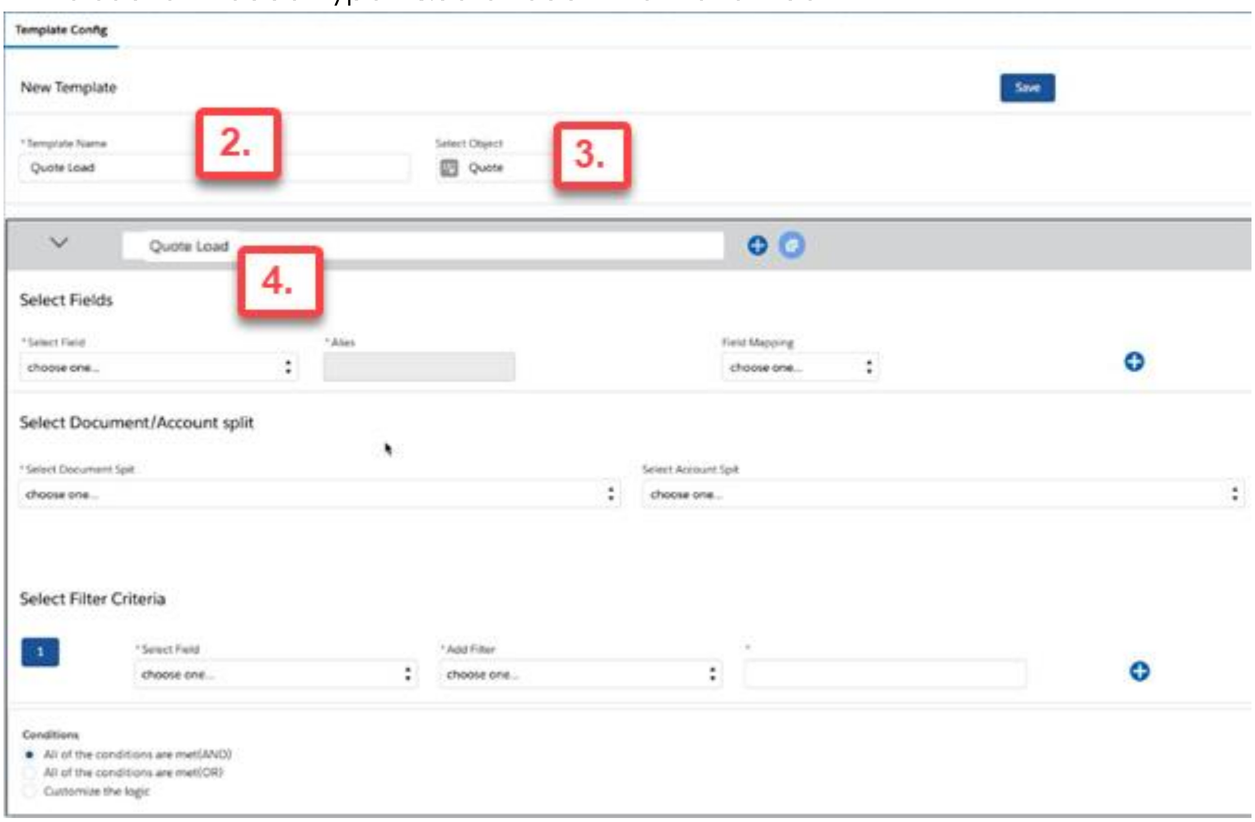
Once you select your object, you will notice there is now a section on which to begin building a base for your transaction import. In most situations, you will have at least two sections, Revenue in one section and Cost in another section unless you can get both at the same time to calculate your commission base value. If you need different criteria for multiple commission transactions, then simply create a separate section. Think of each section as a group and sum of the values that are shown.



Let’s do an example with a Quote:

1. On the Template Config screen select “New”

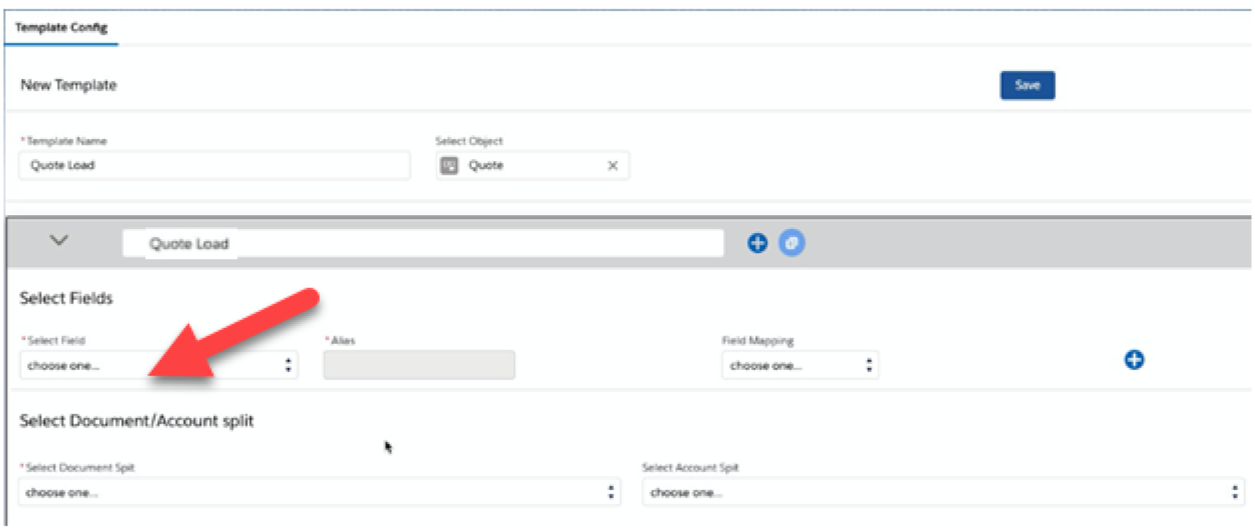
2. Enter “Quote Load” into the template name field
3. In the “Select Object” lookup type “quote” and select the Quote object
4. In the Section Header type “Quote Load” into the text box



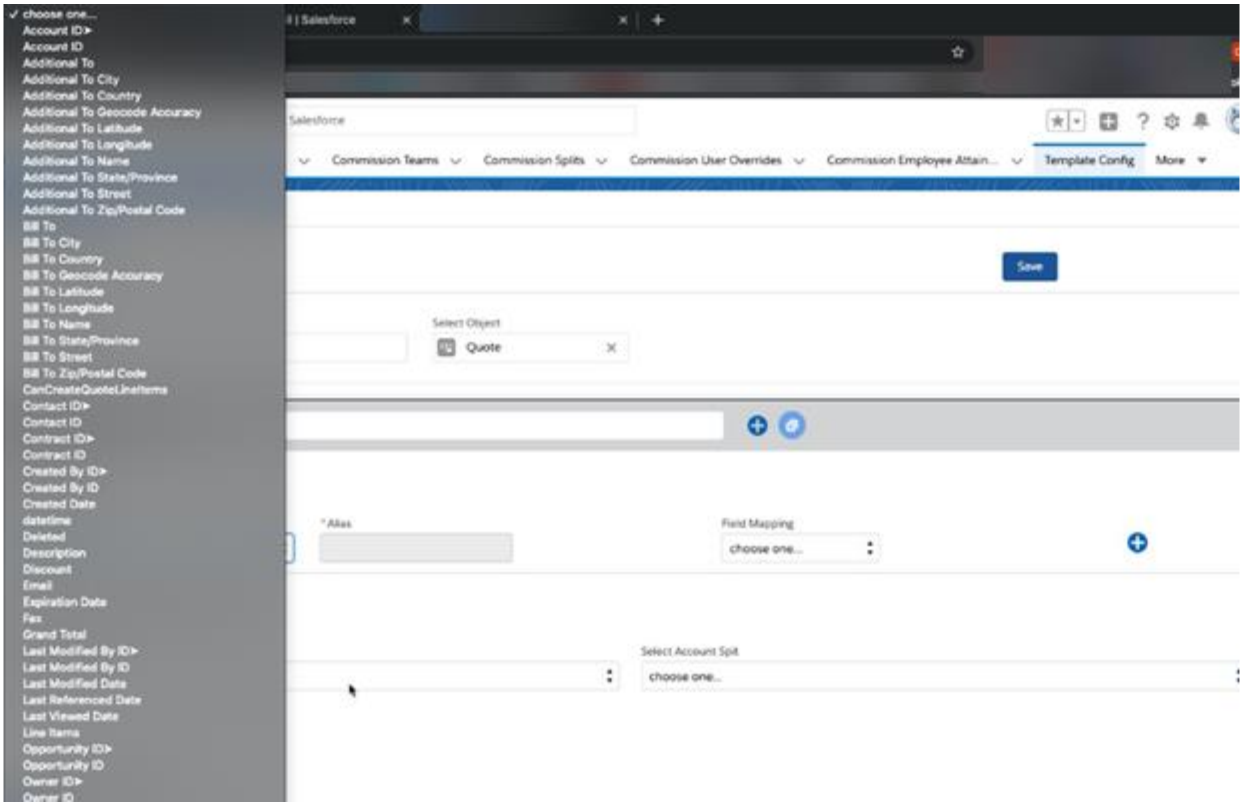
As a general rule, to provide any commission system with enough pertinent data consider ensuring you select, at a minimum, these fields:

1. Document ID – in this example we want the Quote ID field or whatever document id reference you configured
2. Document Date – in this case, we calculate based on Quote Date. AgileComp requires date fields be a date format, not datetime, this may require you to use a formula field to properly format the field
3. Revenue $ - Sales Amount related to the Document ID
4. Cost $ - Your cost related to Document ID, if you don't have or use cost consideration, you can ignore this field
5. Freight $ - Your freight cost related to Document ID, if you don't have or use freight cost consideration, you can ignore this field

The next step is to select the fields we will use in our transaction capturing. Click the "Select Field" lookup:



You will be presented with a lookup that shows all the available fields on the Quote object. Fields with a ▶ next to them denote a lookup that can drill down 4 levels:

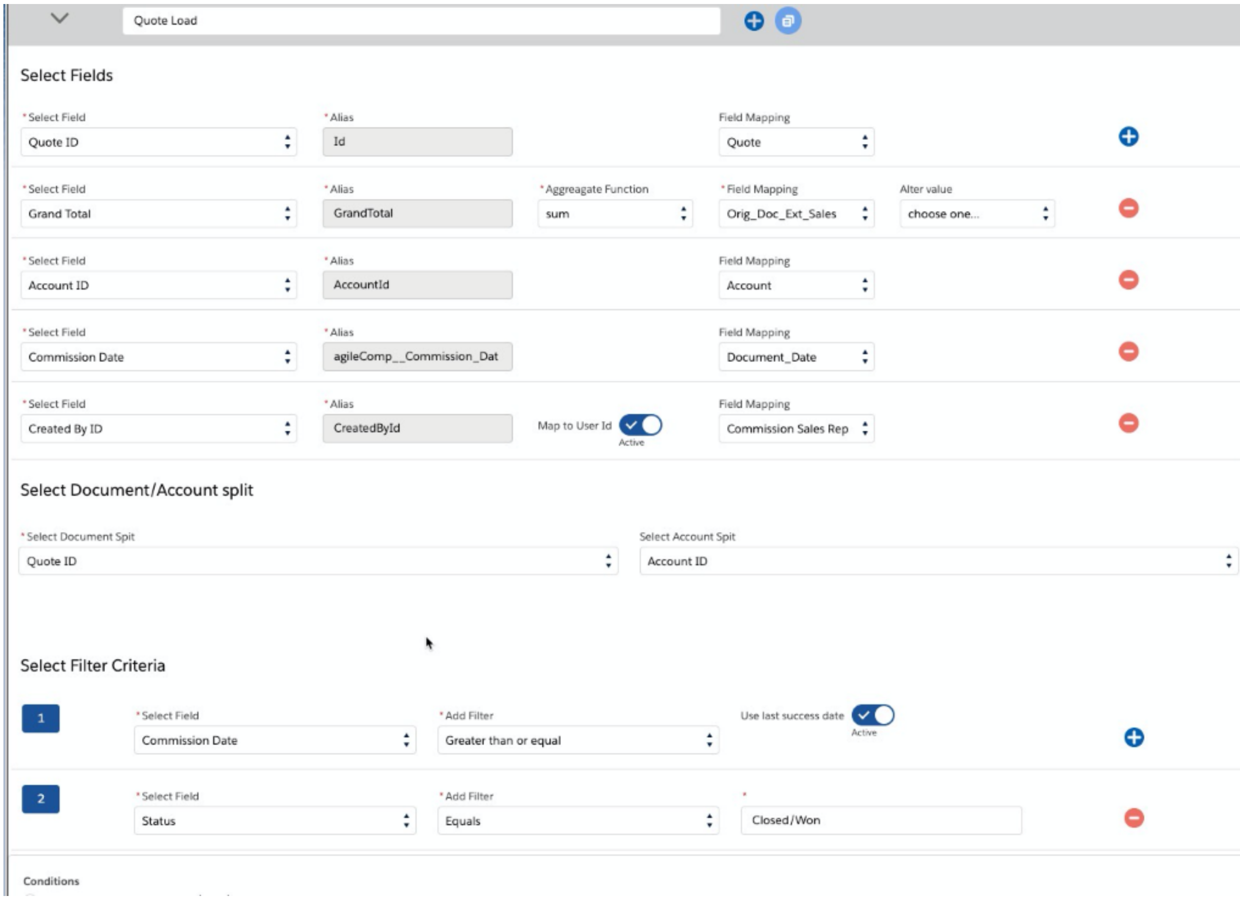


Start selecting fields, use the button to add more rows or the button to remove a row:

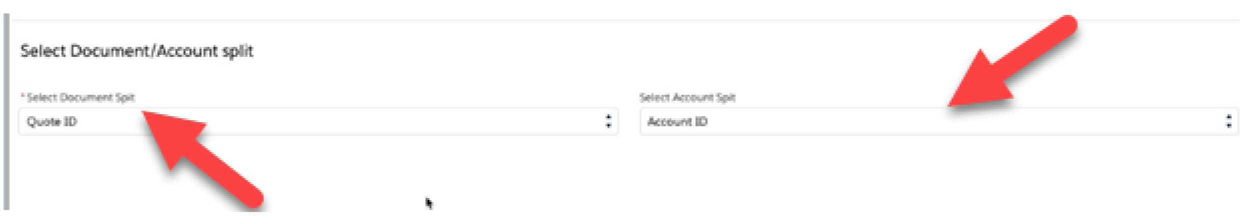
Quote ID	The Quote object is referenced as a source object by default. If you were to use a different object i.e. Opportunity, you would need to add a field to the commission base input object that is a lookup to Opportunity.
Grand Total	The object you want to base the load from. This should be the lowest level of data. You can search up to 4 levels from this object. In our case, we will base our information on the quote line item object. ** **note the search searches on the API name, not the Label. This is important if you feel you are not finding your object.**
Account	Since we can split commissions by account, the account field is necessary so the process can properly identify the record. There is a section called

	(Select Document / Account Split) where you tell the system which fields have been selected designate if there is an account and/or document split.
Last Modified Date	This is the date used for Document Date. However, you will need to strip off the time portion of that field with a formula field on the quote called Commission Date, which is simply datevalue(lastmodifiedDate).
Created By ID	***** IMPORTANT ***** **This is the source ID field for the sales rep (lookup to User). When you select the mapping field of Commission Sales Rep, you will be presented with a toggle**  **(The toggle will cross-reference the mapped User ID to the Commission Sales Rep that you will set up). This step is very important because Commission Sales Rep MUST BE provided, or the system does not work. If the LookUp cannot be completed the calculation will be created with a blank sales rep and will not be included in system calculations.** **You may need to add a Sales Rep lookup on your source object (Lookup to User).**

**it is important to understand that the fields selected here are grouping fields and you must treat the calculation as such. For example, if you were using Quote Lines as the base transaction object then the system would group by QuoteID, Account, Last Modified Date, and Created By ID to SUM (in this example or to apply the selected aggregate function) the field Grand Total.

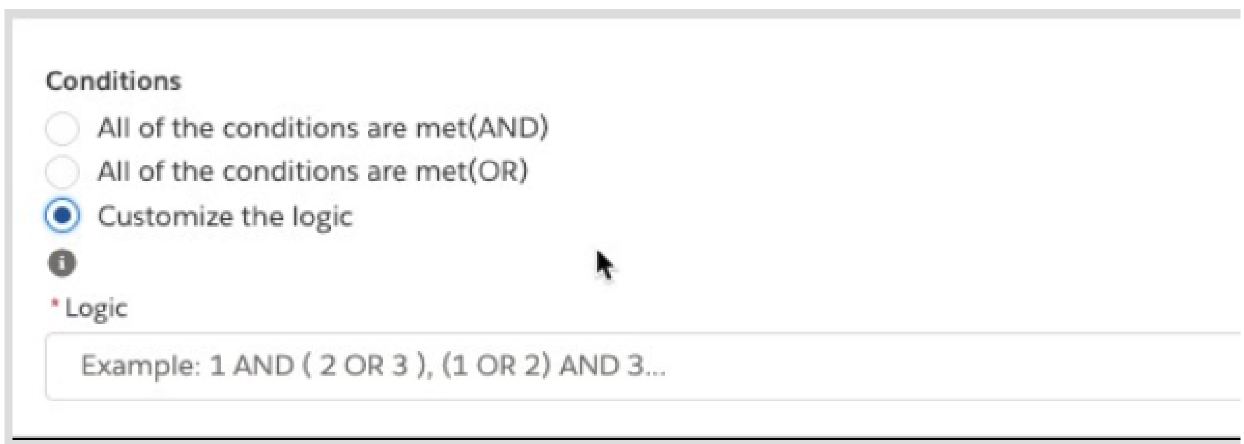


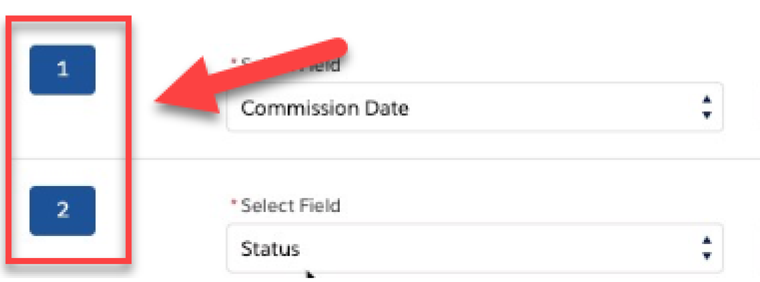
The user then maps values for document and Account splits (This allows for shared commissions between sales reps at the account or document level.):



Take note of the "Filter Criteria" section. The business decision will have to be made as to which criteria will constitute a valid commission transaction. In the example, the system will be programmed to look at Quote objects that have the status of "Closed/Won" and Commission Date is greater than or equal to the last successful date that the template ran. In the filter you can use either date or datetime fields as your criteria, the system allows either.

You can continue to add to the filters by clicking on the button. The system allows you to use the AND or the OR operator on all the listed criteria. If you have a complex decision structure for your criteria, then you can use customized filter criteria logic. This is achieved by selecting the "Customize the logic" option and entering your grouping logic using the block numbers next to your select filter fields.

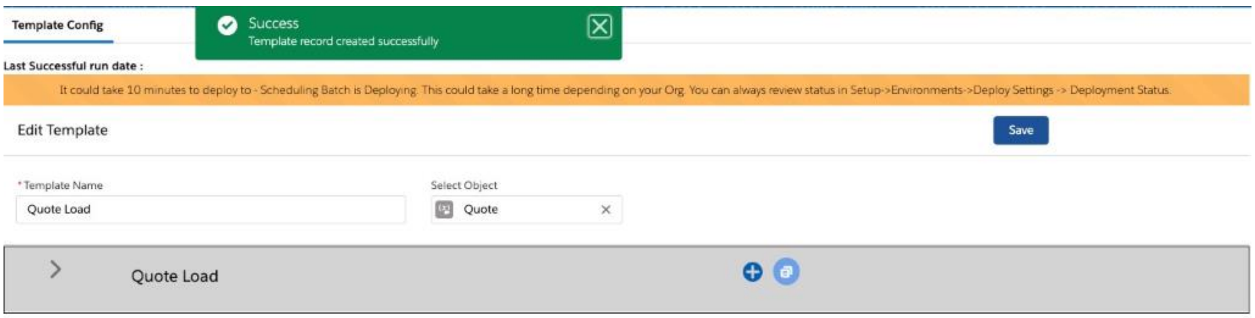




When you click "Save" on a new template, the system does something very distinct: it creates a deployment of a schedulable batch class. This batch class is attached to this specific template. The reason for this is to keep Batch Process details visible and related to this particular template.

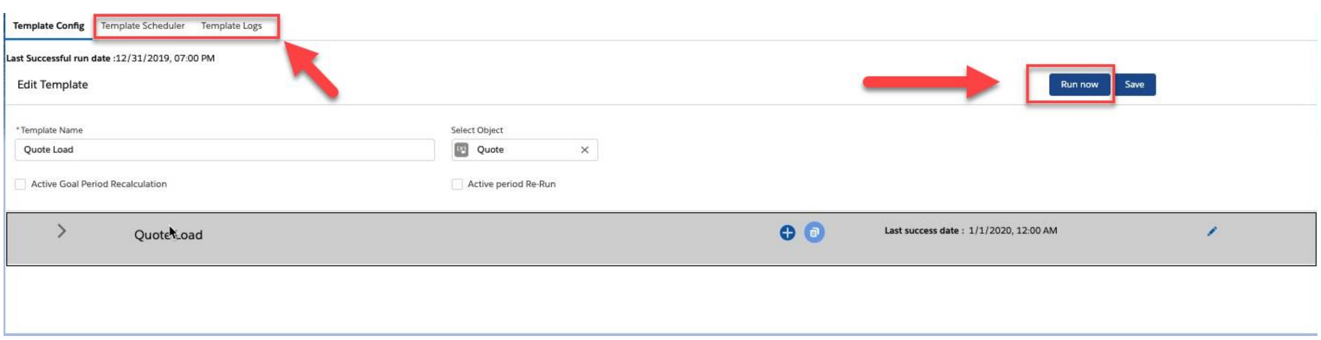
***** NOTE: in some large organizations this process could take a long time to complete. The template is unusable until the process has been completed.**

To check on the progress of the deployment navigate to Setup ▶ Environments ▶ Deploy ▶ Deployment Status.



Once this step is complete you will notice additional tabs in the Template screen: Template Schedular and Template Logs, as well as a Run Now button. This is very helpful if you have a template for one-time loads, or you want to load history. Please note that if you run the template twice, you will duplicate your data and there is no validation that data is duplicated.

<u>If you run in duplicate data, you will need to manually remove it from the commission base input table via Dataloader.</u>



The Template Scheduler is very easy to configure! To set a timer for your Commissions processing:

1. Select a user for the job to run as (should be a system administrator or system user that is not deactivated).
2. Choose how you want to run the process, one time or multiple times (recurring)
3. Click "Schedule it!"

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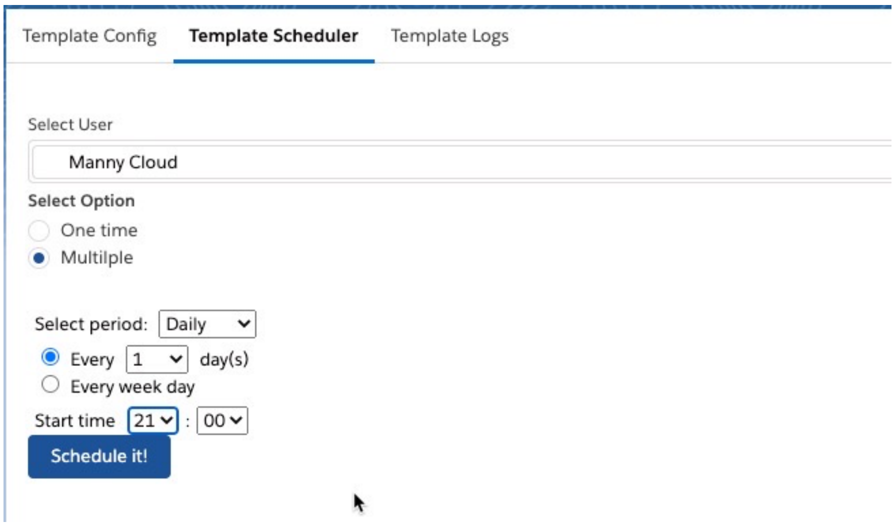
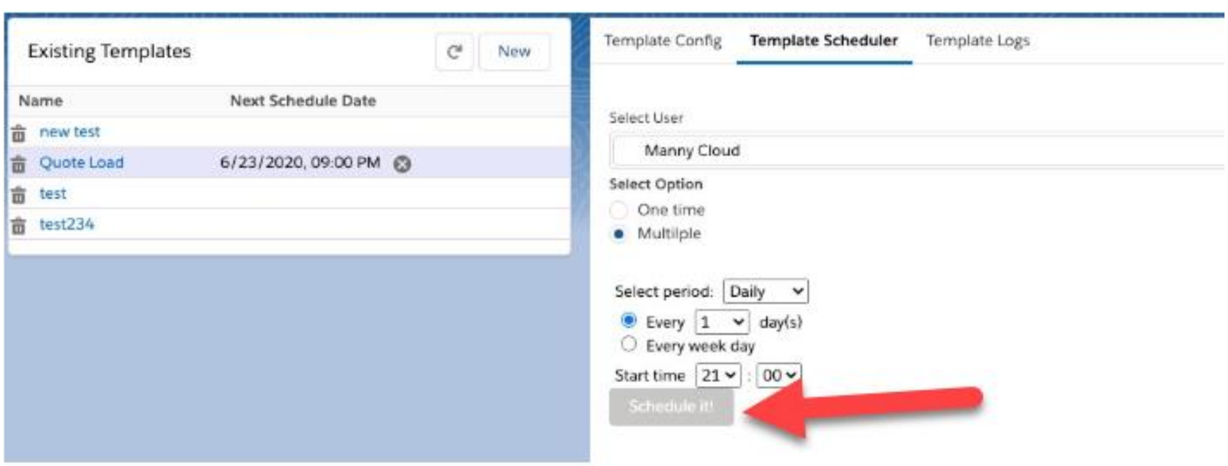
In this example the process will run will every day @ 9 pm under the context of user Manny Cloud.

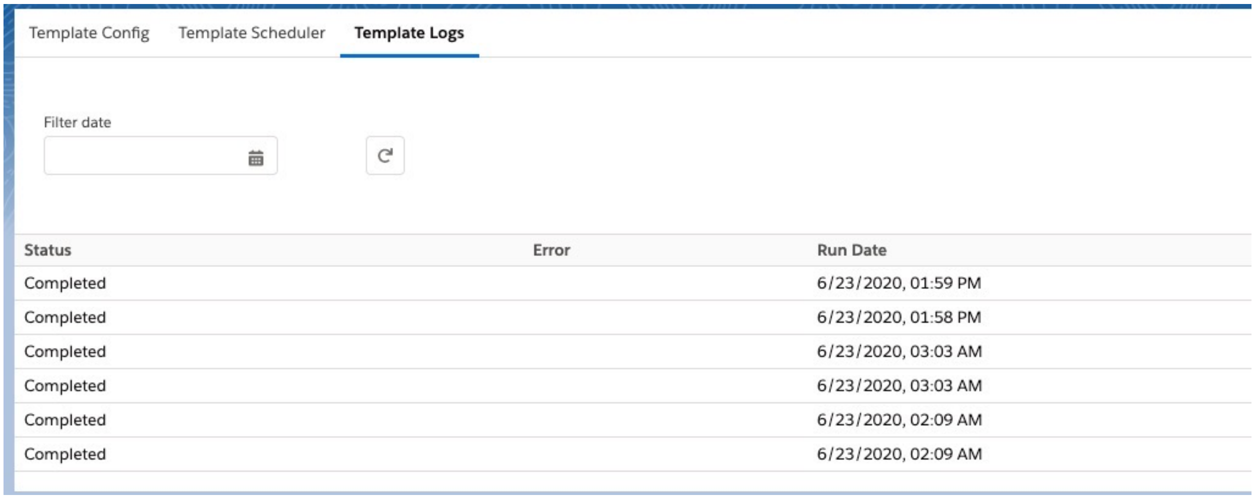


Once Scheduled, you will see the following:

1. The existing Templates list will show the next scheduled date, you can click the X next to the "Next Schedule Date" to unschedule the run.
2. You will notice the "Schedule it!" button is grayed out:

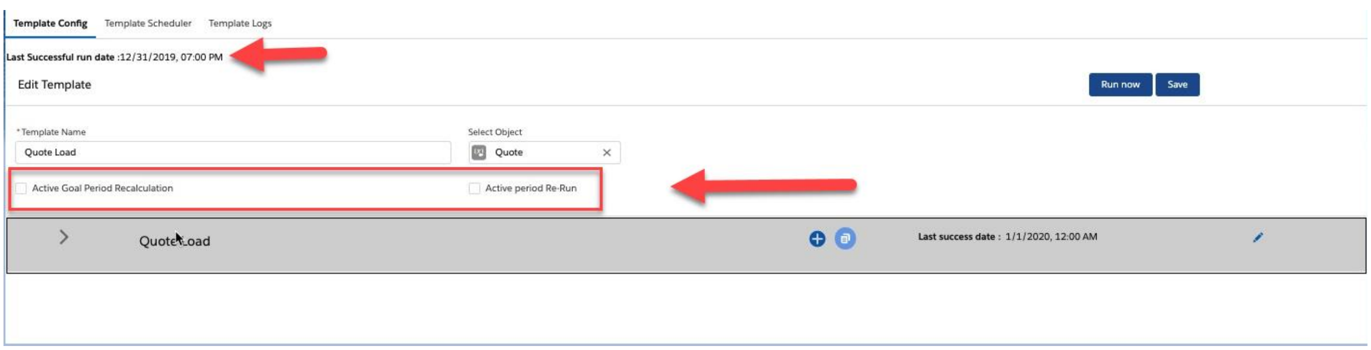


The Template Logs section shows a history of process runs including the Status, Error (if any), and the Run Date. Every run whether it is run via the "Run Now" button or the scheduler will write logs to this section. If errors occurred, you would see them here as well.



Template Processing Results

On the top of the Template Config screen the system shows the "Last Successful Run Date" field:

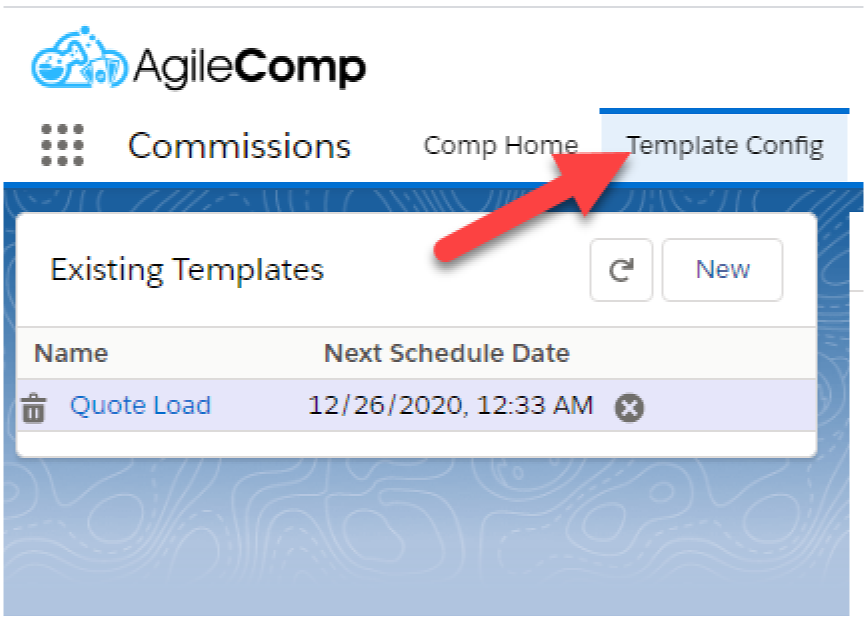


There are also two options to choose how the template calculates when a period runs:

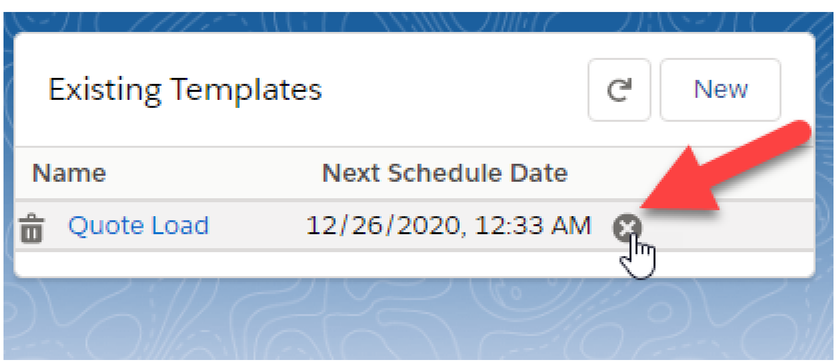
1. Active Goal and period calculation:
   a. If the goal period is within the data being updated, then the goal period will be recalculated.
2. Active Period Re-Run
   a. The current active period will be run (This is independent of the dates being downloaded).

Modifying Templates and Rescheduling

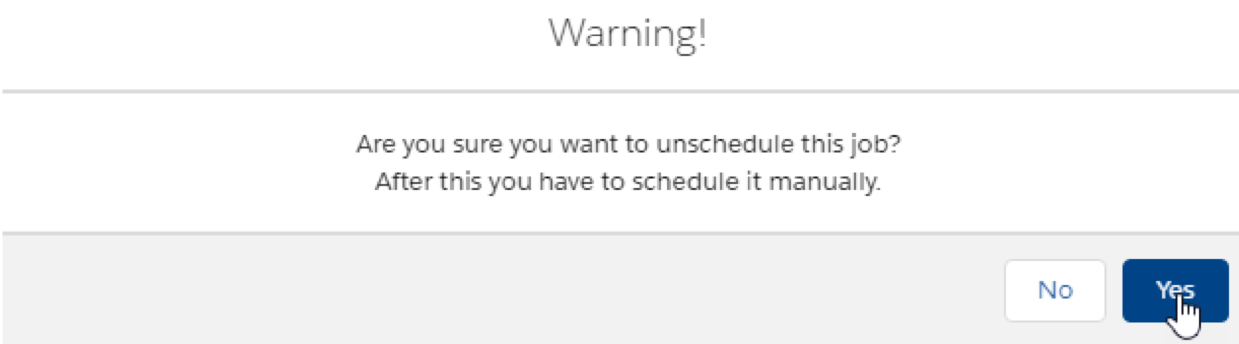
If you make changes to the template and have it set up to run via the built-in scheduler, you need to remove the schedule and then reschedule the template in order for the modifications to take effect. To do this, go to the main Template Config screen:



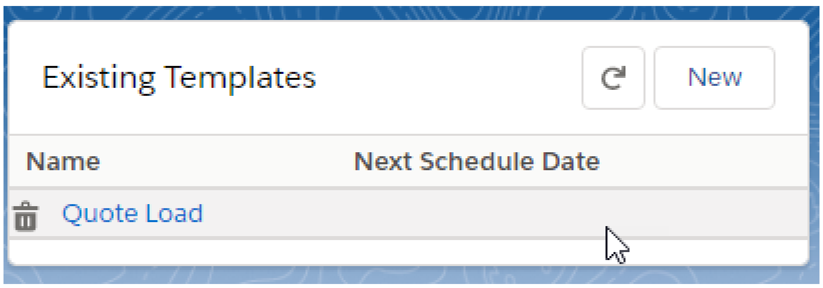
Find the template you are going to modify or have already modified and if there is a "Next Scheduled Date" entry click the "X" to remove the schedule:



And answer "Yes" to the prompt:



You will see the schedule has been removed:



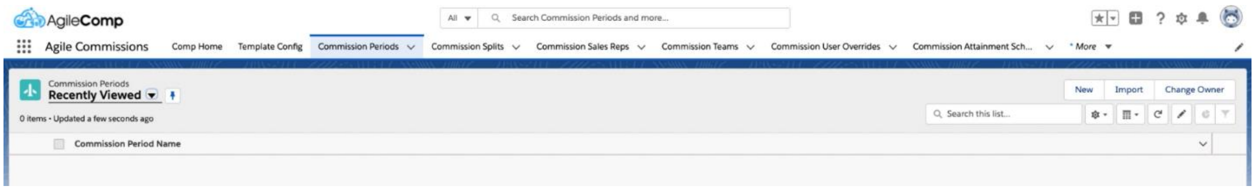
Commission Periods

Commission Periods drive the calculation process of the system. They help define the period or scope that the sales rep will be analyzed against. Some companies do this monthly, others do it under different periods. We offer the flexibility for you process commissions Daily, Weekly, Bi-Weekly, Monthly, Quarterly, etc…

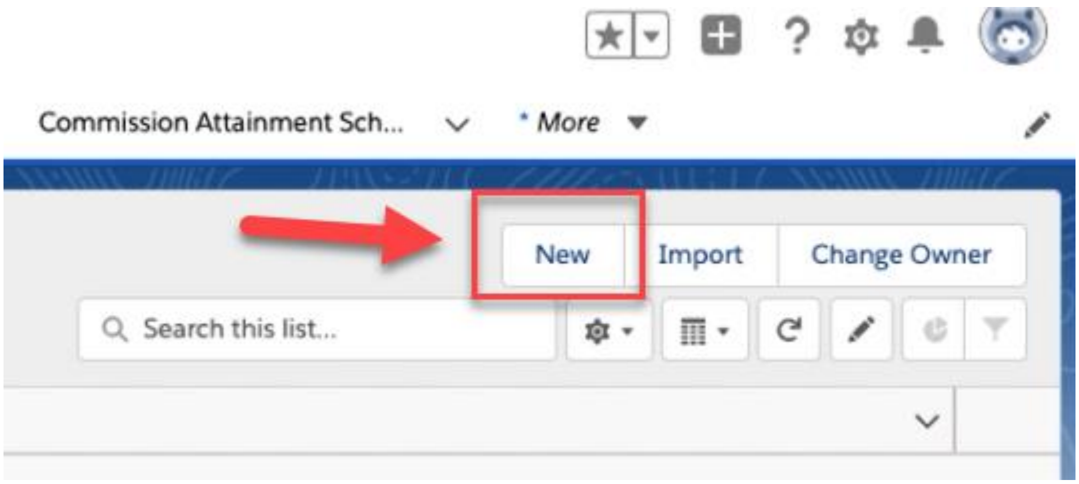
Create a Commission Period

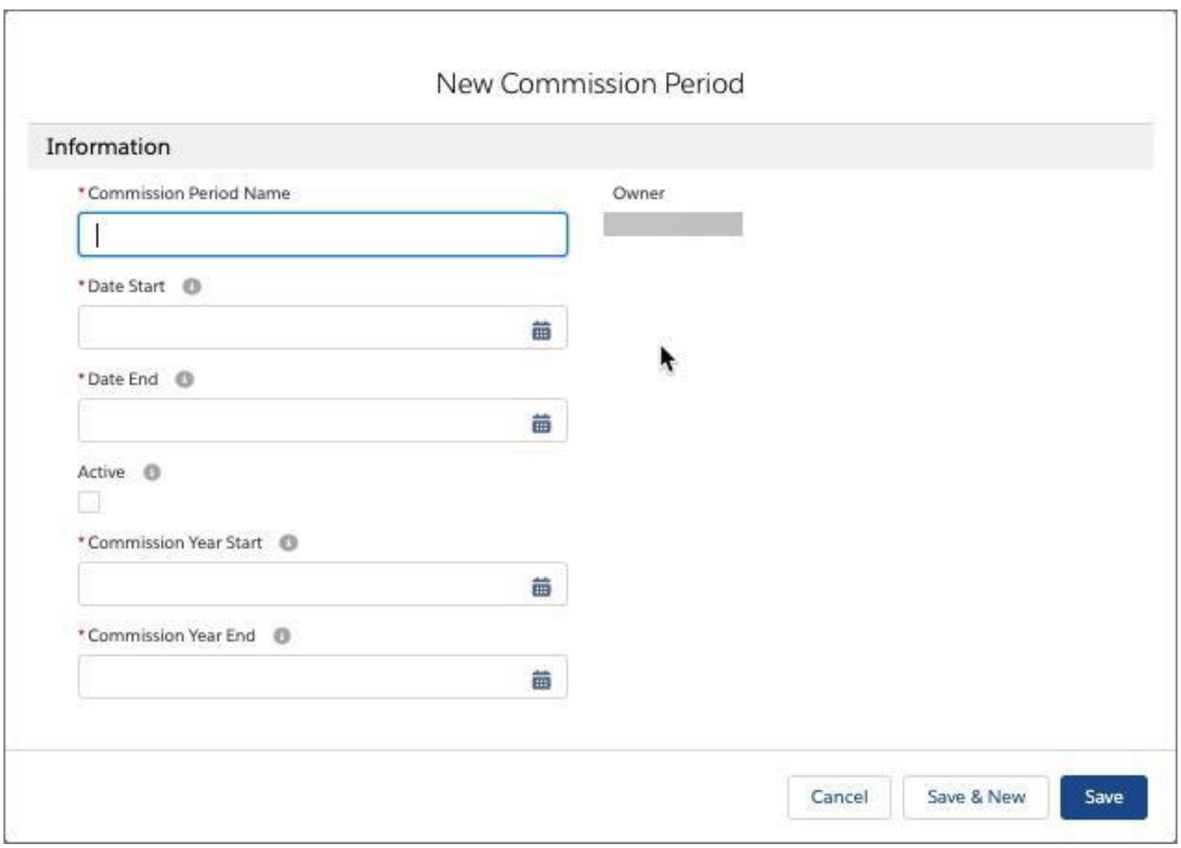
Find the tab for Commission Periods and click it:

Which will take you to the main screen:



Click on the "New" Button:



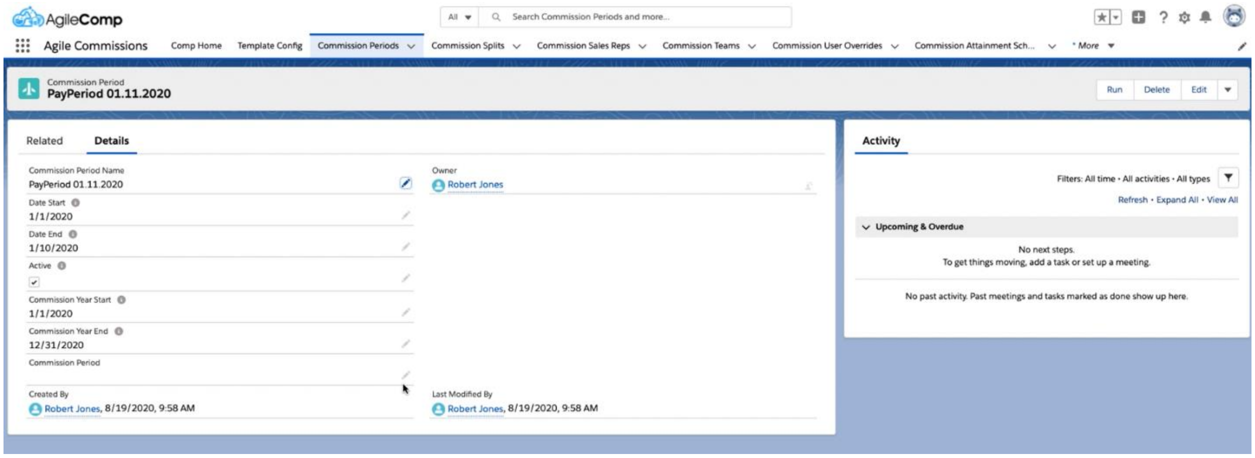


Create a new Commission Period by entering the following information:

Commission Period Name	Select a descriptive name. This field is required.
Date Start	This signifies the start date of the data that will be pulled from the commission base input table. Remember that on the Template config screen, we assigned a date to the Document Date field. This now utilizes that field to pull the transactions into the calculation process. This field is required.
Date End	This field represents the last day of the period. Like "Date Start", this date field is related to Document Date but is the end of the date range. This field is required.
Active	There can only be one active period at a time, and you cannot go back and activate a period that is in the past. Active periods are those that have not had any generated calculations or the current period that does not have any Employee Attained Value records.
Commission Year Start	This is the commission year start date. This field is utilized used to calculate Individual and team YTD numbers and in some of the Payment Methods. Generally, this your fiscal year or your commission plan year start date. This field is required.
Commission Year End	This is the commission ear end date. This field is utilized used to calculate Individual and team YTD numbers and in some of the Payment Methods. Generally, this your fiscal year or your commission plan year-end date. This field is required.

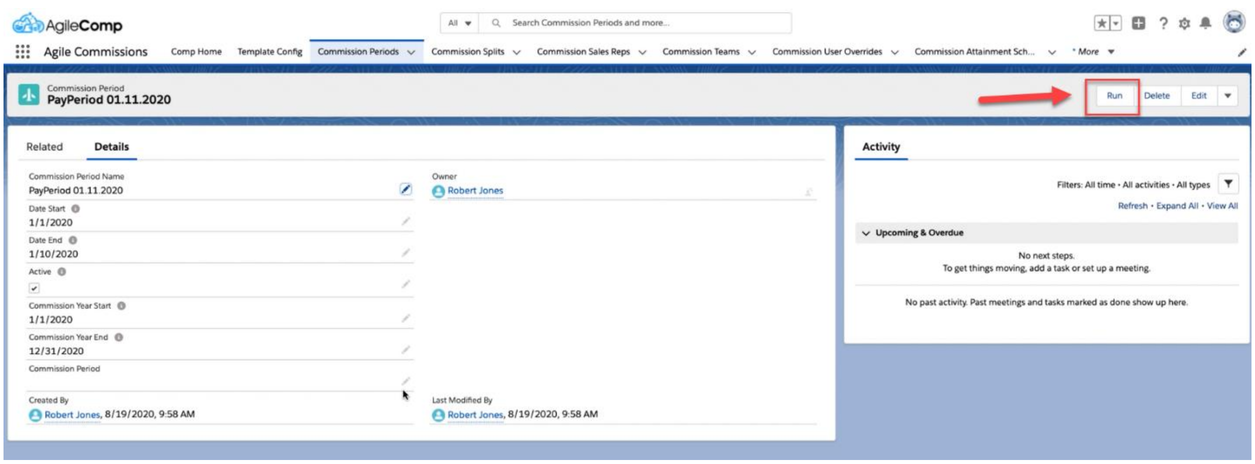
Click "Save" or "Save & New".

From the main screen select a period to see the details:



Processing a Commission Period

Periods can be processed manually or through the templates. On the period screen, you can run the processing for the current active period. Just open the commission period and click the "Run" button:



What happens? When you click the "Run" button, the system will aggregate all of the gross profit (based on your setup) for each commission sales rep in commission base input table. The system will then Upsert transactions into the commission employee attained value and details object. Please note, you can run this button as often as you like since the action does an update (existing transactions) or insert (if a new transaction). The process does not remove any manual adjustments already in place for this period.

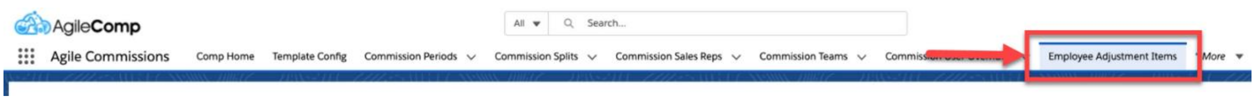
***Note:** This button executes a batch process in the background and may take a couple of minutes to complete.

Employee Adjustments

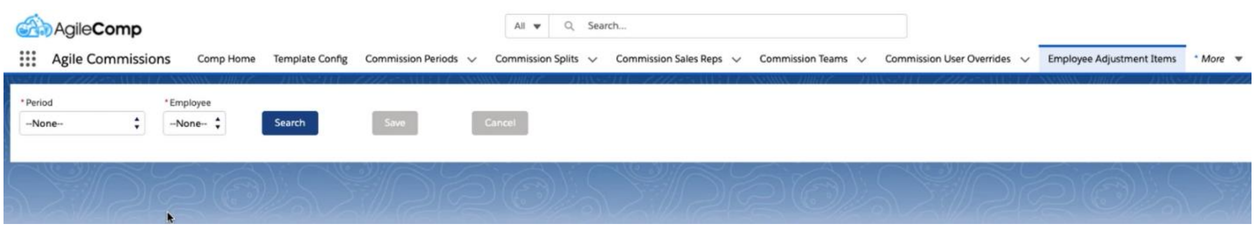
AgileComp provides a simple method for administrators to review calculations and easily make adjustments in the Employee Adjustment Items screen.

When dealing with multiple adjustments for more than one employee, use the multi adjustment screen for quick data entry.

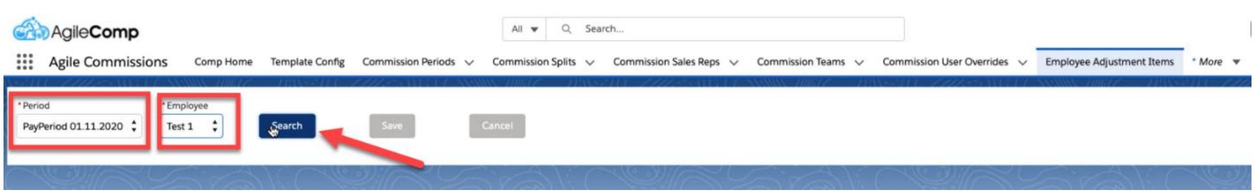
Find the "Employee Adjustment Items" tab and click it:



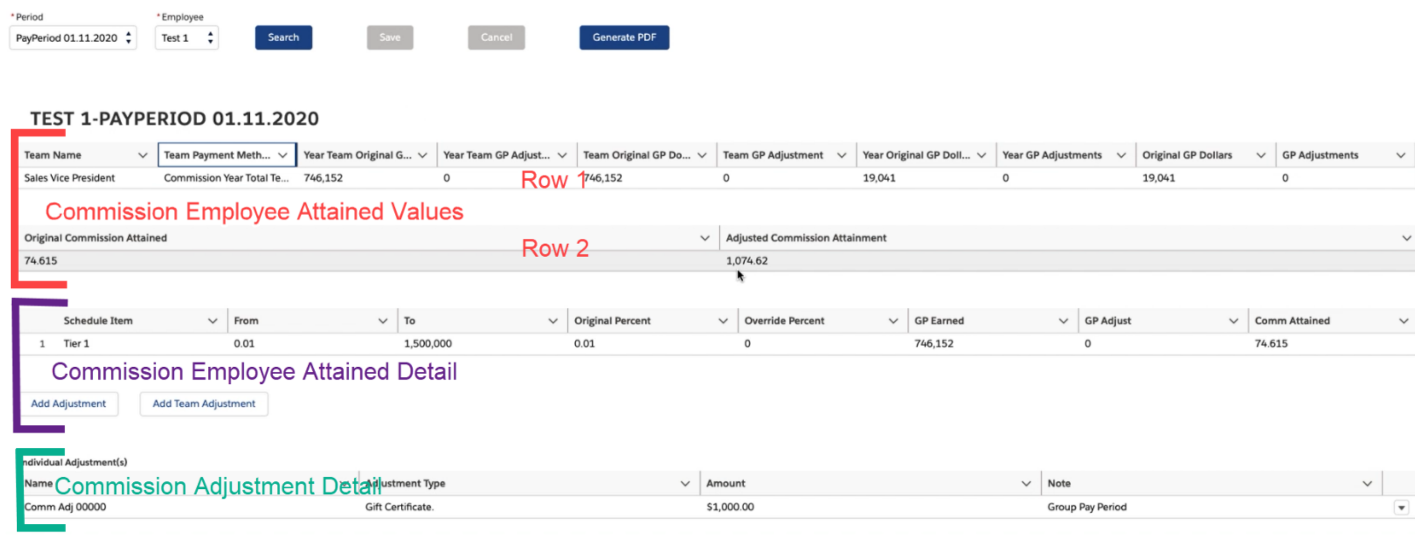
This will take you to the main screen where you will be able to select and perform adjustments for processed items:



To make an adjustment, select a Period and Employee (Commission Sales Rep) then click "Search":



All detail for that employee and period will load on the page:



The detail page has three sections:

- Commission Employee Attained Values
- Commission Employee Attained Detail
- Commission Adjustment Detail

The first two sections have display fields that can be controlled by fieldsets:

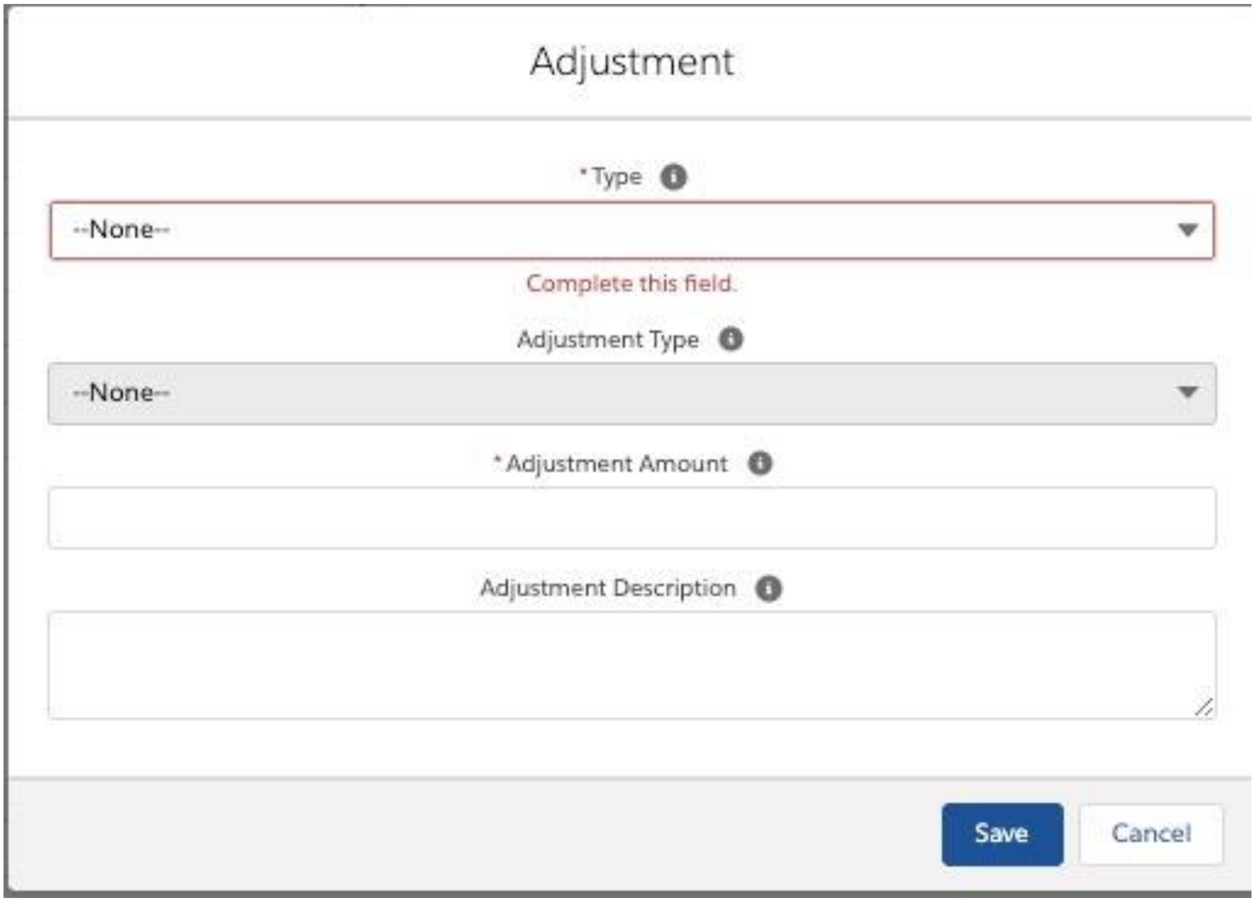
- Commission Employee Attained Values
  - Fieldset: EAV Attainment Form controls the first row in the section
  - Fieldset: EAV Attainment Form Extra Fields control the second row in the section
- Commission Employee Attained Detail
  - Fieldset: EAD Attainment Form

Adjustments

You can add two categories of adjustments to a Commission Sales Rep (Employee)

- Individual
- Team

To add an adjustment for the current Commission Sales Rep click "Add Adjustment". This presents the Adjustment modal window:

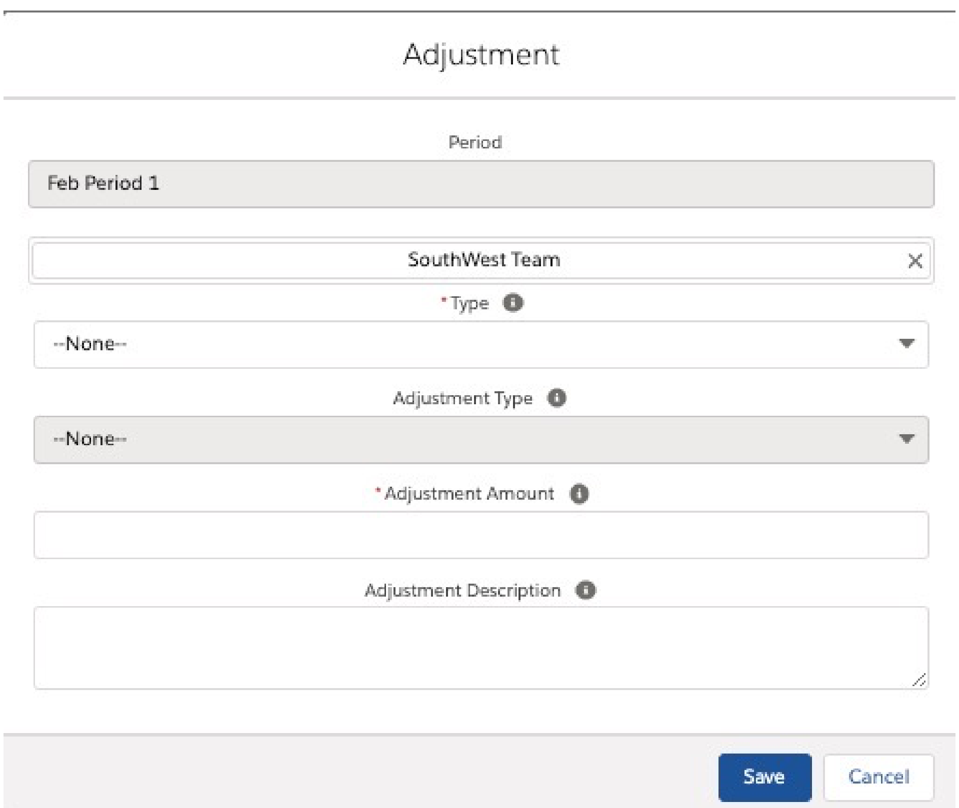


Type **(DO NOT CHANGE OR REMOVE)**	1. Gross Profit Adjustments • Gross profit adjustments adjust this user's gross profit values. You add or subtract gross profit from a user but realize you may also affect other Commission Sales Reps that this person's gross profit contributes to or is part of. For example, if this user was part of a team then any adjustment would affect the gross profit of the entire team's calculations • Because gross profit adjustments affect other members of the team, any adjustments that affect the team are displayed on this screen. This enables an admin to determine what constitutes the adjustment dollars. 2. Commission Adjustments • Commission adjustments directly change the computed commission amount. An

	example of this may be a bonus for selling a particular item or service where the dollar amount is going directly to this user only. These adjustments do not affect any other individual.
Adjustment Type	Configurable and base on "Type" above. Picklist value that is installed by the system.
Adjustment Amount	The amount of the adjustment. This can be a positive or negative number.
Adjustment Description	Enter a description of the adjustment. It should be very explanatory because it will be included in the person's commission statement.

Since adding an adjustment object creates a master/detail relation to the Commission Sales Rep (Employee) values, we roll up the values of gross profit and commission adjustments and they are used in the related calculations.

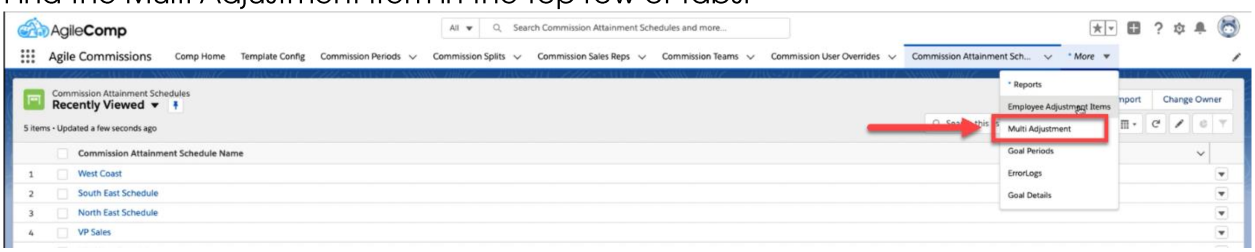
For a Team Adjustment click "Add Team Adjustment":



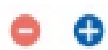
Like the individual Adjustments, when this type of adjustment is created it could result in Team Adjustments being added for each team member. This is a fast way to enter a gross profit or commission adjustment that will be equally applied to an entire team for the active period.

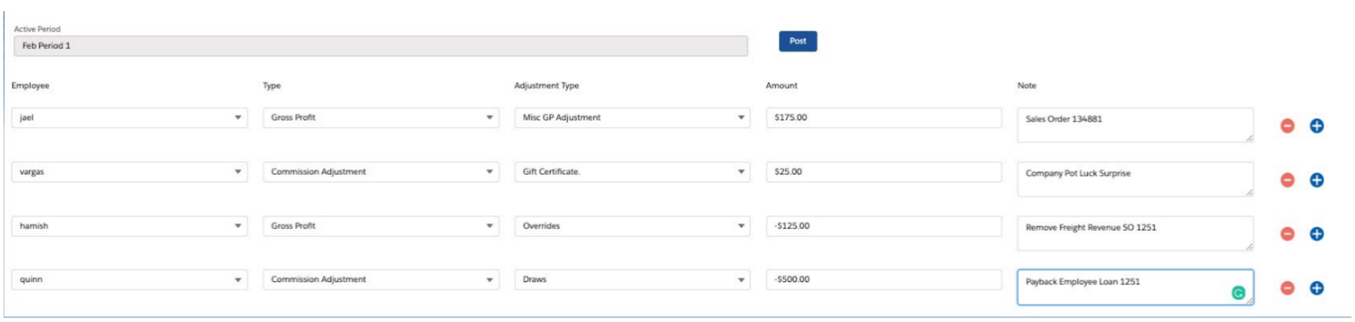
The Multi Adjustment screen allows you to quickly enter adjustments for multiple people at one time. This is very convenient when you need to work through a small spreadsheet and make several adjustments for people (Commission Sales Reps). The screen has the same functionality as the individual adjustments screen.

Find the Multi Adjustment item in the top row of tabs:



Select an Employee (Commission Sales Rep) and create your adjustment. Use

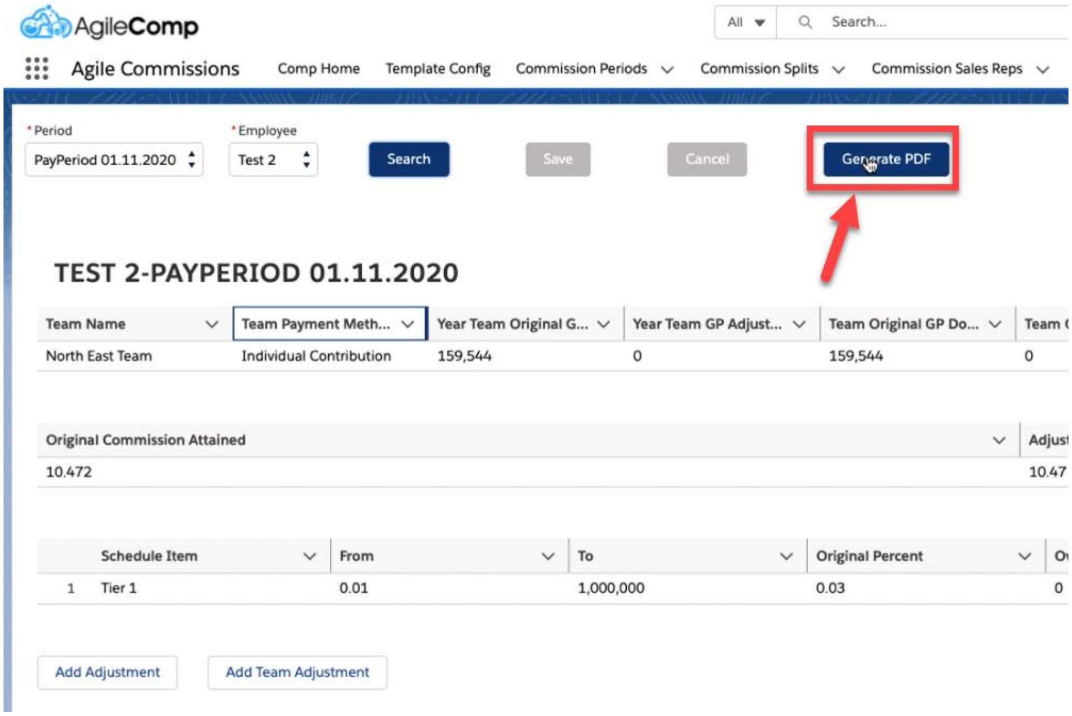
 to remove the current adjustment or create an additional one.



Once you are finished creating adjustments click "Post" 

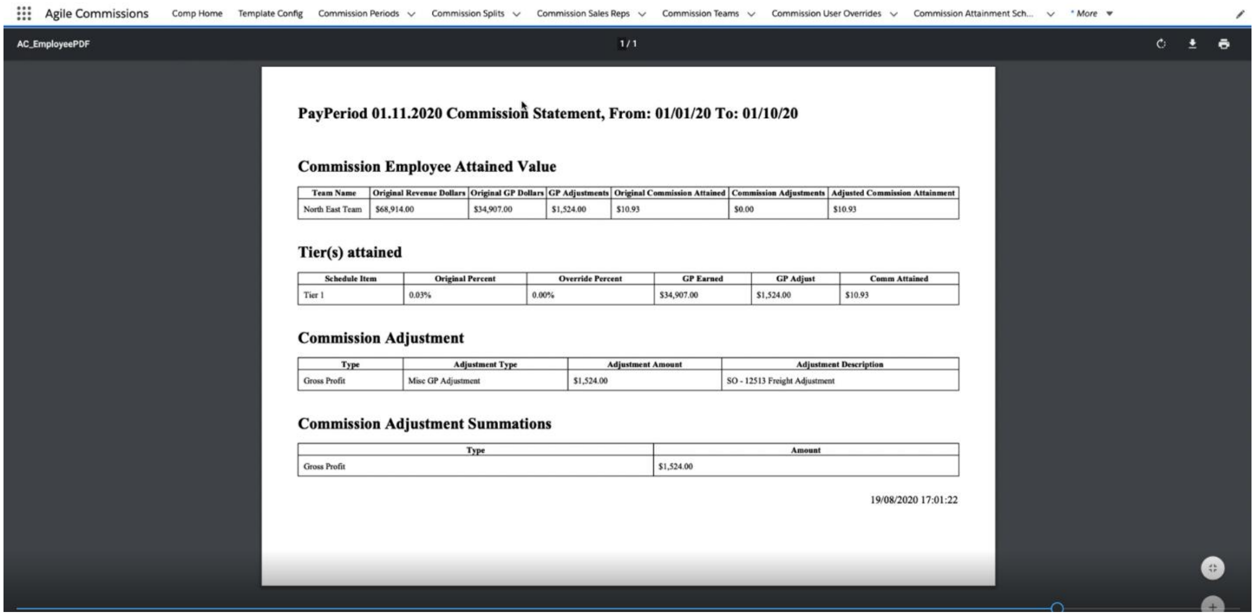
Generating a Commission Statement (Admin)

AgileComp provides a mechanism that allows an admin and commissions processor(s) to create a PDF for the item contained on this screen. To generate a statement click the "Generate PDF" button:



Like the screen, there are distinct sections:

- Commission Employee Attained Value
- Tier(s) Attainted
- Commission Adjustment
- Commission Adjustment Summations (is the Commission Adjustment section summed and grouped by Type)



PayPeriod 01.11.2020 Commission Statement, From: 01/01/20 To: 01/10/20

Commission Employee Attained Value

Team Name	Original Revenue Dollars	Original GP Dollars	GP Adjustments	Original Commission Attained	Commission Adjustments	Adjusted Commission Attainment
North East Team	$68,914.00	$34,907.00	$1,524.00	$10.93	$0.00	$10.93

Tier(s) attained

Schedule Item	Original Percent	Override Percent	GP Earned	GP Adjust	Comm Attained
Tier 1	0.03%	0.00%	$34,907.00	$1,524.00	$10.93

Commission Adjustment

Type	Adjustment Type	Adjustment Amount	Adjustment Description
Gross Profit	Misc GP Adjustment	$1,524.00	SO - 12513 Freight Adjustment

Commission Adjustment Summations

Type	Amount
Gross Profit	$1,524.00

19/08/2020 17:01:22

This report also has display fields that can be controlled by fieldsets:

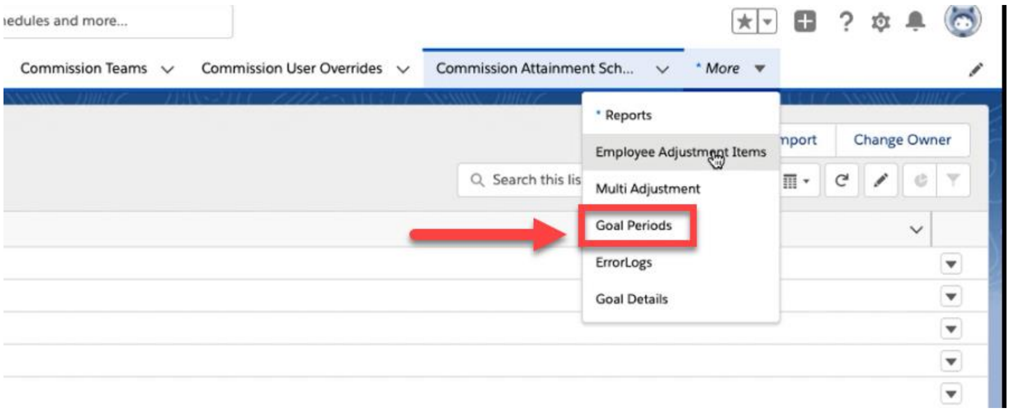
- Commission Employee Attained Values
  - Fieldset : EAV_CommStmtFieldSet
- Tier(s) Attained - Commission Employee Attained Detail
  - Fieldset : EAD_CommStmtFieldSet
- Commission Adjustment Detail
  - Fieldset: Adj_Comm_Stmt

Goal Periods

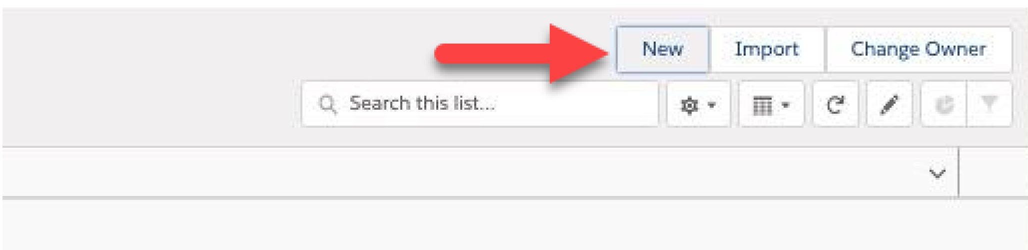
Goals allow a user to set up a comparison of performance to expectation. It provides a mechanism to "measure" the attainment of a "Commission Sales Rep" against a threshold (expectation).

**Note: Individual period adjustments are not included in Goal calculations. Goals are based on template data loads only.

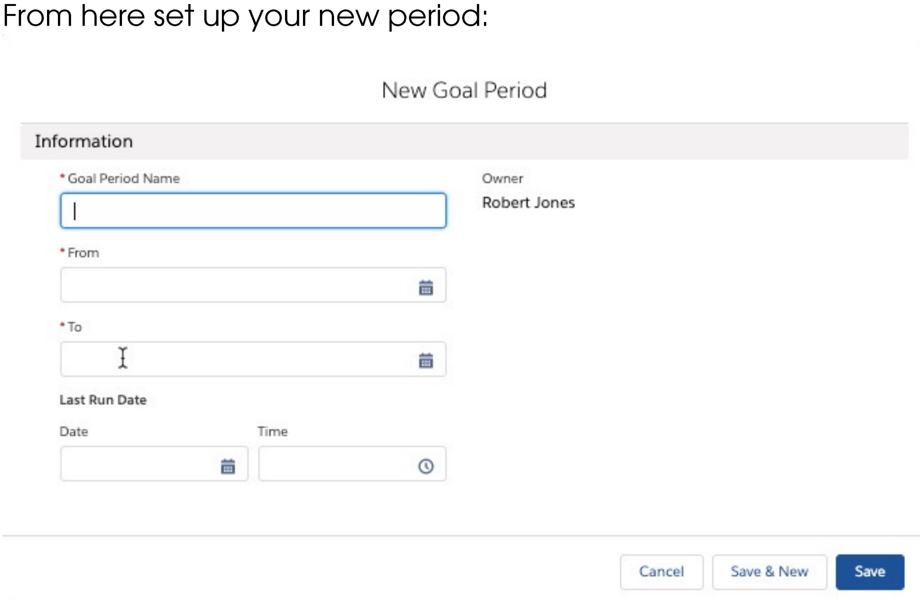
To create Goals, you first need to set up a Goal Period. Navigate to "Goal Periods" in the top tab list:



Click “New”:



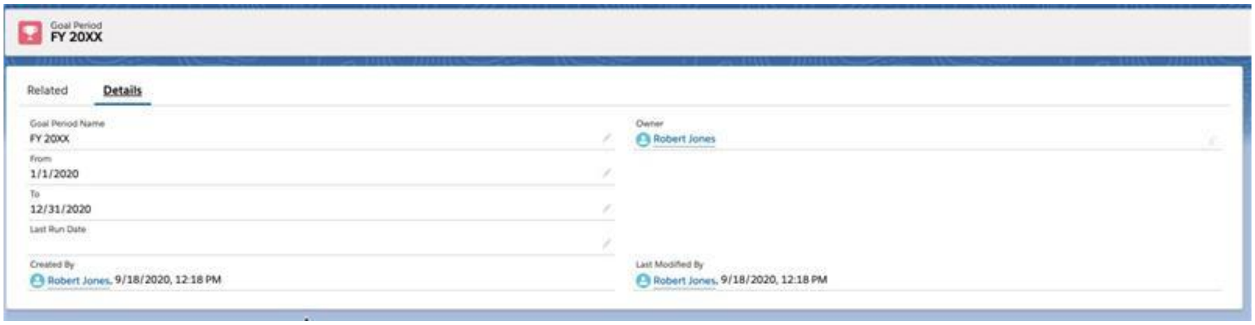
From here set up your new period:



Goal Period Name	Select a name that is descriptive of the period you are creating. This field is required.
From	Goal Period begin date. This field is required.
To	Goal Period end date. This field is required.

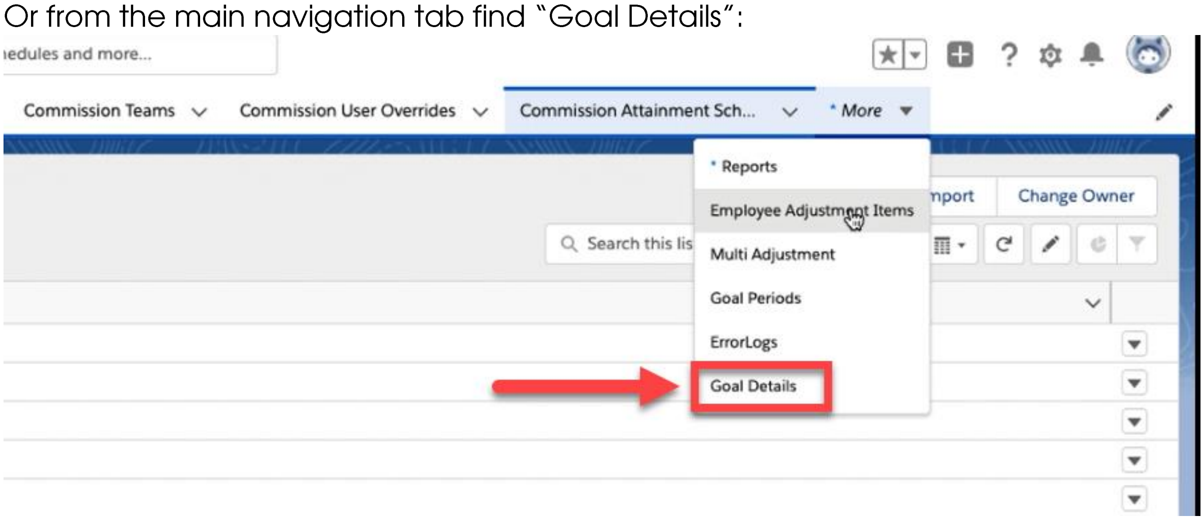
Last Run Date	Last time the goal process ran, you do not need to enter anything here

Click "Save".



Once you have a Goal Period setup, the next step is to add Commission Sales Reps (individuals/Employees) to the Goal Period. You can add people to the period from the Goal Period under "Related" :

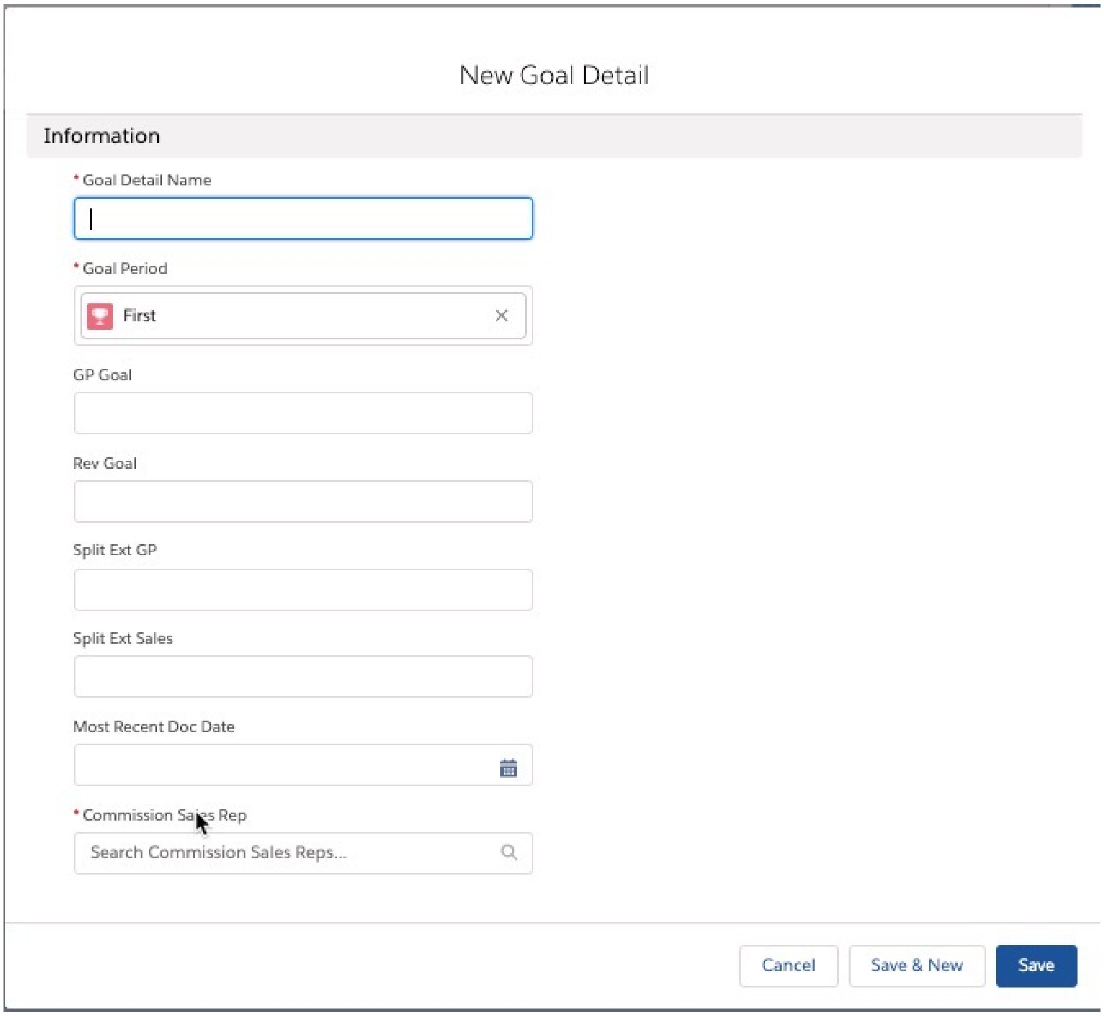
Or from the main navigation tab find "Goal Details":



Click "New":

CloudFirst LABS

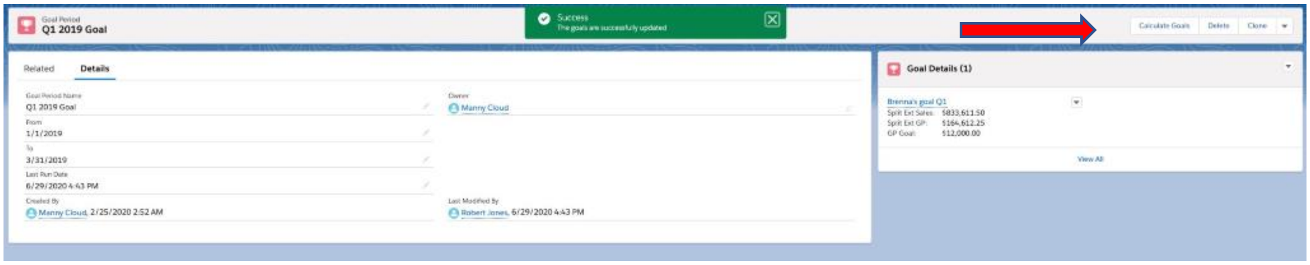
AgileComp



Goal Detail Name	Select a name that is descriptive of the detail you are creating. This field is required.
Goal Period	LookUp to Goal Period. This field is required.
GP Goal	Gross Profit dollar goal for the period.
Rev Goal	Sales Revenue dollar goal for the period.
Split Ext GP	Calculated by the Calculate Goal Process.
Split Ext Sales	Calculated by Calculate Goal Process.
Most Recent Doc Date	Last date a Document/Transaction was calculated against a goal
Commission Sales Rep	Lookup to Commission Sales Rep – assign the individual here. This field is required.

Running the Calculate Goal Process

On the Goal Period screen, there is a button labeled "Calculate Goals" that once clicked initiates the goals processing by the system:



You can also have the Scheduler and a Template automatically calculate the goals upon completion of Period and Detail additions.

As you can see, you now have the split $'s populated also you have the last calculated date and time and the most recent document date. This helps determine if your last document has been accounted for!

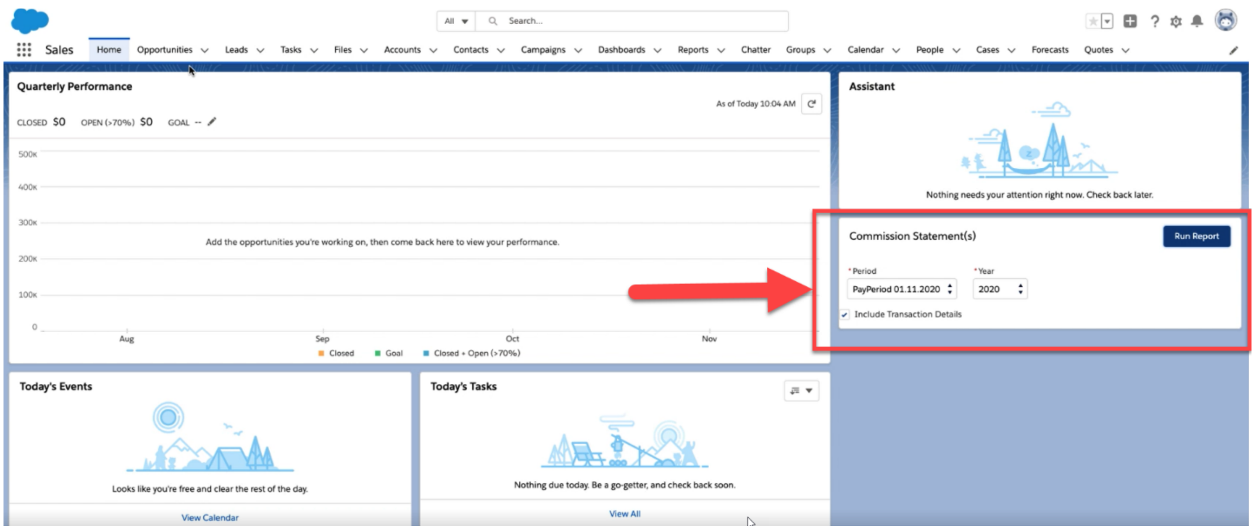
Lightning Component for Viewing Statements

AgileComp provides the flexibility to allow your salespeople to "Self-service" their commission statements. The data shown on these statements is configurable by the administrator and enables the administrator to decide which pieces of information are most relevant to the salespeople.

When editing a page in the Lightning App Builder you will see the AgileComp component on the left side under **Custom – Managed** components named "Commission Statement Lookup".

This Lightning component uses the current user and retrieves only their data. You can configure the Statement to include the detailed transactions that make up the base input detail. The statement generator pager itself is a VisualForce page (rendered as a pdf) which means there are many customizations you can do.

A good place to put the component might be the "Home" screen, but depending on how you use Salesforce (Console Apps, etc.) you can put it in many places.



There are up to four sections to the statement:

1. Commission Earned Attained Value (Header)
2. Commission Earned Details (Detail Tier based data)
3. Commission Adjustment Details (Your Adjustments) and Summations
4. Commission Base Input (The base input detail for the system) (Include Details checkbox).

Each of these objects has a fieldset which represents the parts of this report (Except the Adjustment detail summations section)

This creates a pdf statement for the selected period and employee and these are semi-configurable like the screen (through fieldsets).

The Lightning Component retrieves all the Commission period processing runs allowing the currently logged in user to access their historical statements:

Statement Example:

Feb Period 1 Commission Statement, From: 02/01/19 To: 02/15/19

Commission Employee Attained Value

Team Name	Original GP Dollars	GP Adjustments	Original Commission Attained	Commission Adjustments	Adjusted Commission Attainment
SouthWest Team	$164,612.25	$125.00	$15,918.47	$0.00	$15,918.47

Tier(s) attained

Schedule Item	Original Percent	Override Percent	GP Earned	GP Adjust	Comm Attained
1	1.00%		$4,999.99	$0.00	$50.00
2	2.00%		$4,999.99	$0.00	$100.00
3	5.00%		$19,999.99	$0.00	$1,000.00
4	10.00%		$69,999.99	$0.00	$7,000.00
5	12.00%		$64,612.29	$125.00	$7,768.47

Commission Adjustment

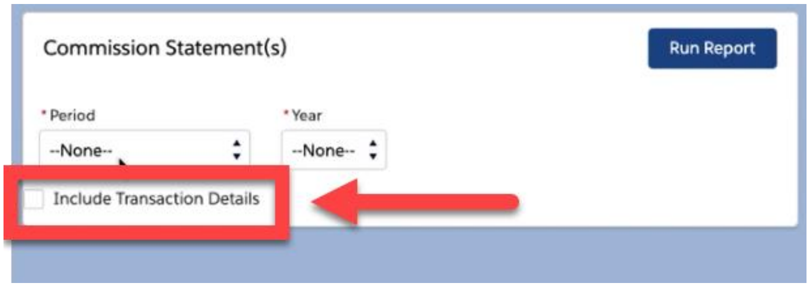
Type	Adjustment Type	Adjustment Amount	Adjustment Description
Gross Profit	Misc GP Adjustment	$125.00	Test Adjustment

Commission Adjustment Summations

Type	Amount
Gross Profit	$125.00

Just like the Employee Adjustment screen, the same objects are in sections.

The last section on this report, which is optional, includes the details stored in the Commission Base Input object. To include this section make sure to check "include Transaction Details".



** Note: Detail transaction fields MUST not contain null values because they are grouped and summed. An error will be thrown if this condition exists "Argument cannot be null."