



EASY INCENTIVIZER

COMMISSION CALCULATION MADE EASY!

An AppExchange Application by [Cyntexa](#)

Installation Guide

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🌐 www.cyntexa.com/products/easyincentivizer

Cyntexa



1. Install the package **only for Admin**.
2. After installation, you need to set up the following things in your org:
3. If there are managers in your organization then create one role for a manager named as 'Manager Role' (if not already created). After creating the role, assign it to the manager.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'role' and a navigation menu with 'Users', 'Roles' (highlighted), 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The main content area is titled 'Understanding Roles' and includes a search bar, a 'Sample Role Hierarchy' section with a dropdown menu set to 'Territory-based Sample', and a hierarchical diagram. The diagram shows 'Executive Staff' (CEO, President, CFO, VP, Sales) at the top, with arrows pointing down to 'Western Sales Director', 'Eastern Sales Director', and 'International Sales Director'. Each director box includes a title and a subtitle (e.g., 'Director of W. Sales'). To the right of the diagram are two asterisked notes: '* View & edit data, roll up forecasts, & generate reports for all users below' and '* Can't access data of other Executive Staff'.



The top screenshot shows the 'Roles' setup page in Salesforce. The left sidebar contains a navigation menu with 'Users', 'Roles', 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The main content area is titled 'Creating the Role Hierarchy' and shows a tree view of the role hierarchy. A red arrow points to the 'Add Role' link under the 'CEO' role.

The bottom screenshot shows the 'New Role' form. The form has fields for 'Label' (Manager Role), 'Role Name' (Manager_Role), and 'Role Name as displayed on reports' (CEO). A red arrow points to the 'Save' button at the bottom of the form.

4. Create two sharing rules for Commission Template and Calculated Commission.
 - a. For Calculated Commission



Setup

Home

Object Manager

Q sharing

Security

Sharing Settings

Didn't find what you're looking for?

Try using Global Search.

SETUP

Sharing Settings

Streaming Channel Sharing Rules

New

Recalculate

No sharing rules specified.

User Provisioning Request Sharing Rules

New

Recalculate

No sharing rules specified.

Visit Sharing Rules

New

Recalculate

No sharing rules specified.

Calculated Commission Sharing Rules

New

Recalculate

Action

Criteria

Edit | Del

Calculated Commission: Owner NOT EQUAL TO 11111111111111111111

Commission Template Sharing Rules

New

Recalculate

Action

Criteria

Edit | Del

Commission Template: Owner NOT EQUAL TO 11111111111111111111

Setup Home Object Manager

Q sharing

Security

Sharing Settings

Didn't find what you're looking for? Try using Global Search.

SETUP Sharing Settings

Step 1: Rule Name

Label: Sharing Rule For Manage

Rule Name: Sharing_Rule_For_Manag

Description:

Step 2: Select your rule type

Rule Type: ☐ Based on record owner ☒ Based on criteria

Step 3: Select which records to be shared

Criteria	Field	Operator	Value	
	Owner ID	not equal to	11111	AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		

[Add Filter Logic](#)

Step 4: Select the users to share with

Share with: Roles Manager Role

Step 5: Select the level of access for the users

Access Level: Read Only

Save Cancel

b. For Commission Template-

Setup

Home

Object Manager

Q sharing

Security

Sharing Settings

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SETUP

Sharing Settings

Streaming Channel Sharing Rules

New

Recalculate

No sharing rules specified.

User Provisioning Request Sharing Rules

New

Recalculate

No sharing rules specified.

Visit Sharing Rules

New

Recalculate

No sharing rules specified.

Calculated Commission Sharing Rules

New

Recalculate

Action	Criteria
Edit Del	Calculated Commission: Owner NOT EQUAL TO 11111111111111111111

Commission Template Sharing Rules

New

Recalculate

Action	Criteria
Edit Del	Commission Template: Owner NOT EQUAL TO 11111111111111111111

Setup Home Object Manager

Q sharing

Security

Sharing Settings

Didn't find what you're looking for? Try using Global Search.

organizer

Sharing Settings

Label: Sharing rule for manager
Rule Name: Sharing_rule_for_manager
Description:

Step 2: Select your rule type
Rule Type: ☐ Based on record owner ☒ Based on criteria

Step 3: Select which records to be shared

Criteria	Field	Operator	Value	
	Owner ID	not equal to	1111111	AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		

Add Filter Logic...

Step 4: Select the users to share with
Share with: Roles Manager Role

Step 5: Select the level of access for the users
Access Level: Read Only

Save Cancel

5. Assign Permission Sets to manager and sales user-

a. Assign 'Permission Set For Sales User' to salespersons/users.

Setup Home Object Manager

Q permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for? Try using Global Search.

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets Edit Delete Create New View

Action	Permission Set Label	Description	License
Clone	Permission Set For Manager		Salesforce
Clone	Permission Set For Sales User		Salesforce



Q permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for?
Try using Global Search.

SETUP

Permission Sets

Permission Set

Permission Set For Manager

Find Settings... Clone Manage Assignments

Permission Set Overview

Description	
License	Salesforce
Session Activation Required	☐
Last Modified By	Steve smith, 1/13/2021, 4:08 AM

Apps

Now you are ready to go if you need any assistance contact us: hello@cyntexa.com, easyincentivizer@cyntexa.com



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