

# CASE STUDY

## Commission Automation & Accounting Management on **Salesforce**



### ■ Industry

Financial Services

### ■ Engagement Type

Product Implementation & Customization

### ■ Product

Salesforce CRM, Apex, Lightning Web Components (LWC), Experience Cloud Portal

## Client Overview

WealthVest is a financial services firm specializing in distributing low-risk, high-quality products to banks and broker-dealers. The company had already adopted Salesforce but faced significant challenges in managing its complex accounting and commission processes. Disconnected systems, manual commission calculations, and limited transparency in payouts led to inefficiencies, errors, and slower operational workflows.

## Key Challenges

WealthVest had a vision to maximize its Salesforce investment by centralizing critical financial and operational processes. Their existing accounting setup was managed outside Salesforce, creating data silos and making it hard to maintain accurate, real-time financial insights.

- **Fragmented Systems Led to Data Silos**

Multiple platforms handling different parts of the accounting cycle resulted in data mismatches and manual reconciliations.

- **Manual Commission Calculations**

Brokers, vendors, and employees all had varying commission structures, leading to errors and time-consuming manual efforts.

- **Limited Reporting and Visibility**

Reporting relied on outdated methods, making it hard to track real-time payment statuses, commissions, and overall financial health.

- **Scalability and Efficiency Concerns**

As WealthVest grew, the existing setup couldn't keep pace with the increased volume of transactions and payouts.

# The Solution

The Ping Clouds developed a robust Commission Engine App natively within Salesforce, leveraging Apex, Lightning, and Experience Cloud components. This unified system automated commission calculations and payments, eliminated manual work, and offered real-time insights into financial data.

## Salesforce Integration & Architecture

We centralized WealthVest's data by integrating existing accounting information into Salesforce. This unified setup ensured seamless data flow and minimized manual efforts.

## Commission Calculation & Payment Automation

Custom Apex logic handled the varying commission structures, automating workflows for approvals and payouts to brokers, vendors, and employees.

## Custom Development & UI

Lightning Web Components and Visualforce pages delivered an intuitive user experience for tracking commissions, generating reports, and managing payments.

## Testing & Deployment

The solution was thoroughly tested in a sandbox environment, then deployed in phases to ensure a smooth transition and adequate training for end users.

# Impact

- **Streamlined Operations:** Automated commission processes reduced manual entries, cutting down on errors and operational overhead.
- **Real-Time Financial Insights:** Custom dashboards and reports in Salesforce provided immediate visibility into commission statuses and payment analytics.
- **Scalable Infrastructure:** Built on Salesforce's robust environment, the solution accommodates higher transaction volumes without performance bottlenecks.
- **Enhanced Transparency:** Brokers and employees could easily track their commission calculations, fostering trust and improving satisfaction.

# Result

By implementing the Commission Engine App natively on Salesforce, we delivered a highly automated, scalable solution that significantly streamlined WealthVest's accounting and commission distribution processes. This project's success underscored the power of Salesforce-based automation to enhance operational efficiency, reduce errors, and support the company's continued growth.

89%

Faster  
Commission  
Processing

90%

Reduction  
in Data  
Entry Errors

80%

Decrease in  
Operational  
Costs

95%

Increased  
User Adoption  
of Salesforce

# Client Testimonial



The Ping Clouds transformed our accounting and commission operations by consolidating everything into Salesforce. Their automation solution eliminated manual inefficiencies, gave us crystal-clear visibility into our finances, and scaled effortlessly as we grew. We now operate faster, smarter, and with a level of accuracy we couldn't achieve before!

**John Francis,**  
Key Stakeholder, WealthVest