Commission Craft

Extension for ZOHO CRM

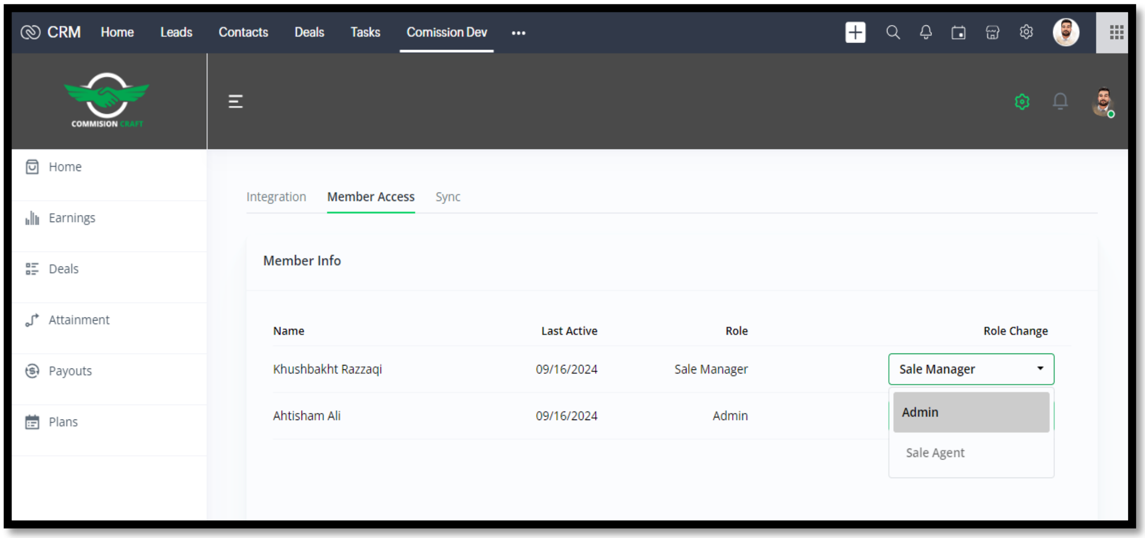
Commission Craft is a powerful sales compensation and commission tracking software designed to streamline and automate the management of sales compensation plans. Whether you're a small startup or a large enterprise, Commission Craft helps ensure accurate and timely commission payouts, enhances transparency, and boosts sales team performance by reducing administrative burdens. This guide provides an in-depth overview of Commission Craft, including setup, key features, best practices, and tips for maximizing its potential.

Commission Craft is designed to simplify the complex process of managing sales compensation and commissions. By automating calculations, tracking performance in real-time, and providing insightful analytics, Commission Craft helps businesses ensure their sales teams are motivated and fairly compensated. This leads to increased productivity, higher sales, and improved employee satisfaction.

Role and Access:

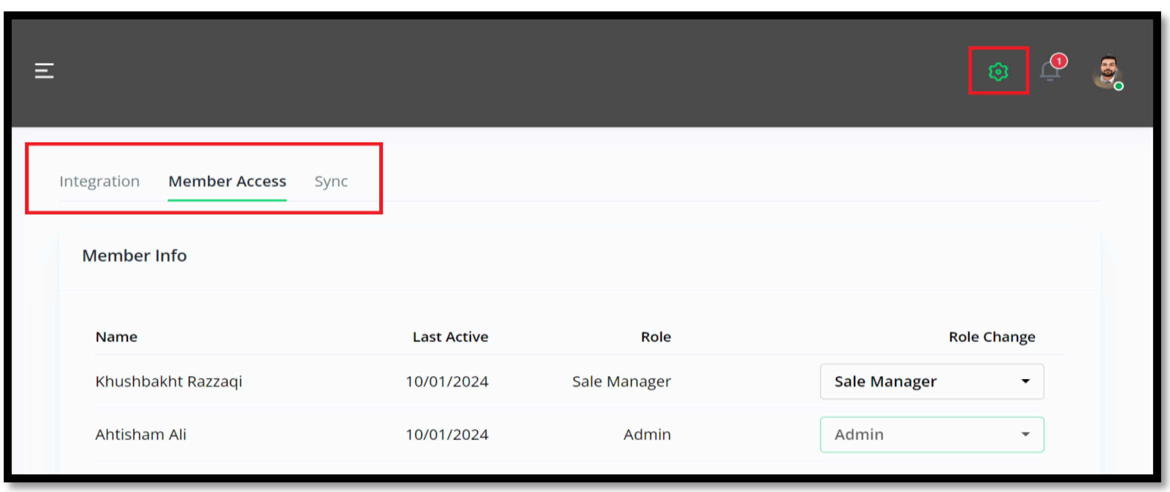
In Commission craft the roles are automatically set according to the Roles in Zoho CRM in the organizational hierarchy. The Super Admin and Admins will be at the same administrator level in Commission Craft and will possess the same powers of approval and payout as well.

Users that are rolled as Sales manager or agents will not be able to change their roles they can only access to limited options.



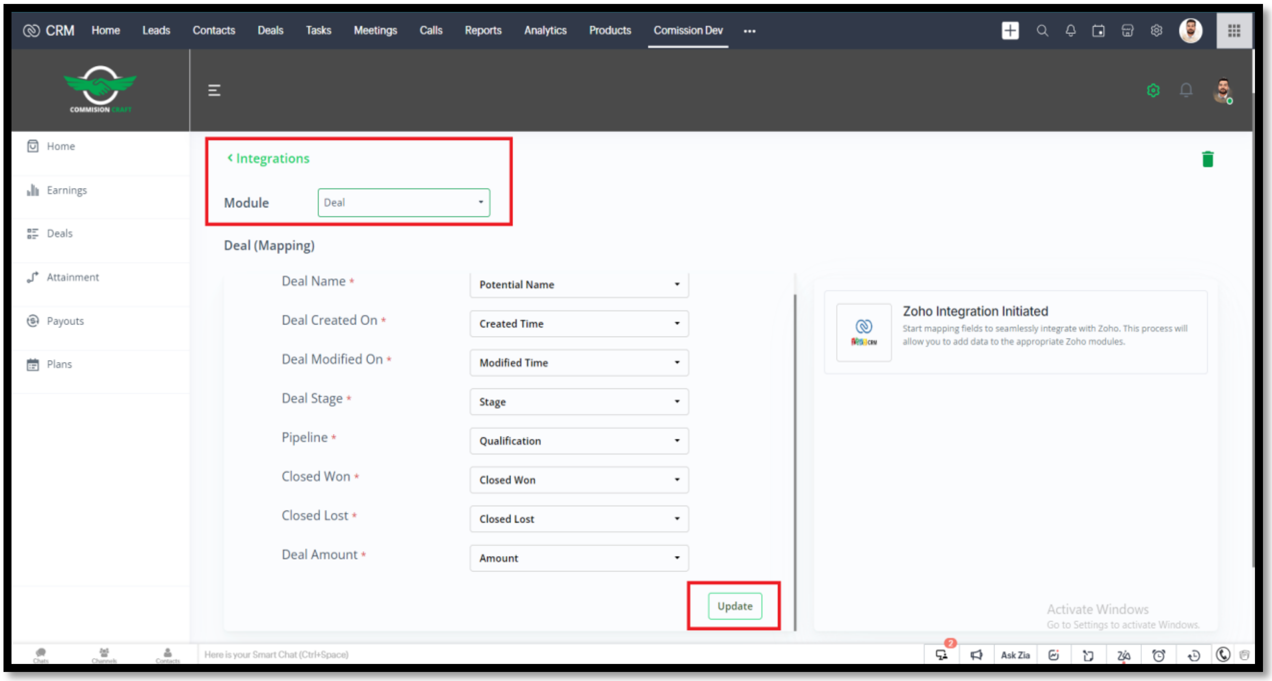
Settings:

Settings button is only visible for the admins. Setting includes the integration, Member Access and Sync. Creating the deals sync, integrating the application with Zoho CRM, or changing the user's role is only allowed to Admin.



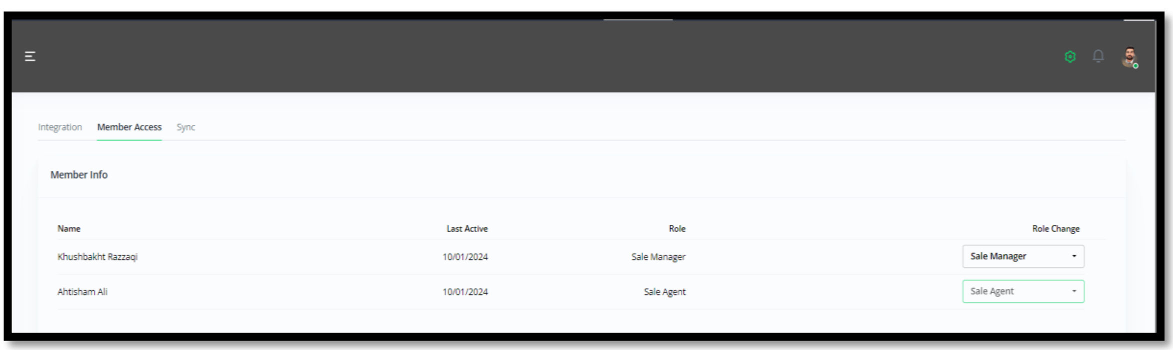
Integrations:

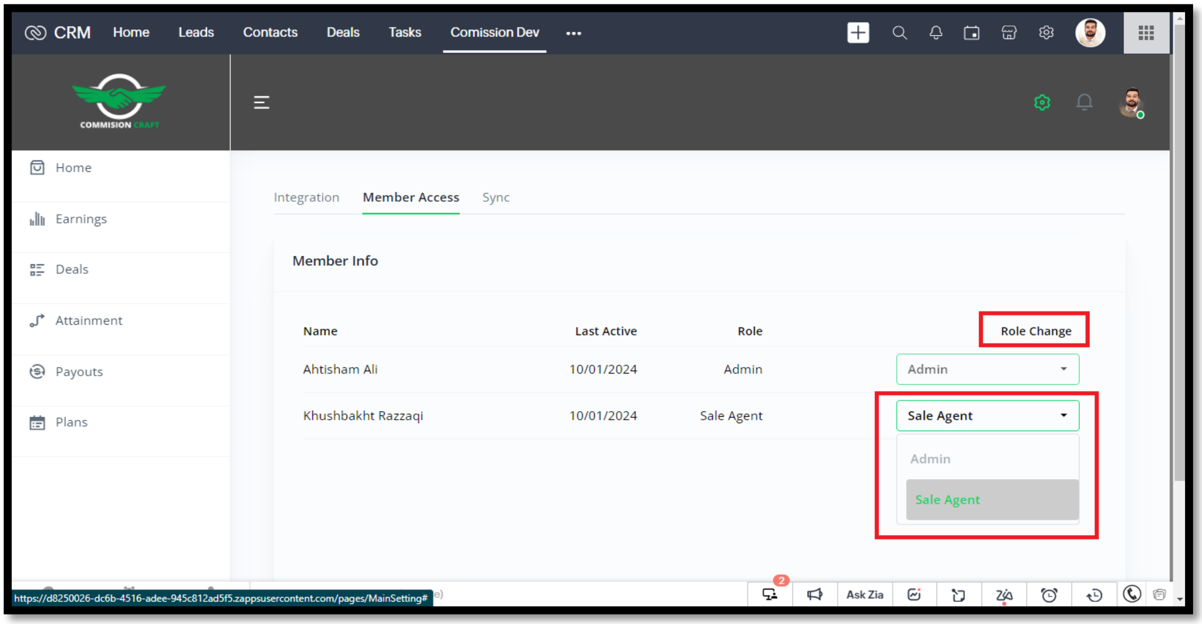
Integration tab is basically your connection to your desired/ customized module in Zoho CRM for fetching the deals from your Zoho CRM to commission craft. Map the field according to field names in Zoho CRM and commission craft.



Member Access:

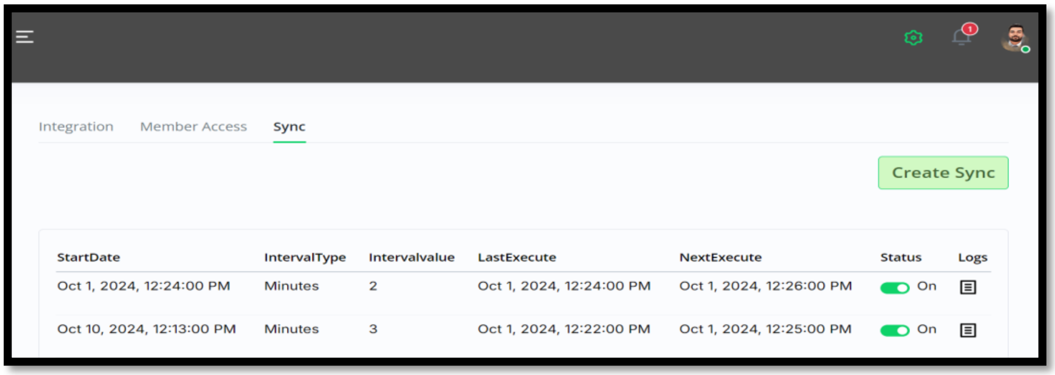
Member access is only allowed to admins. Admins can view all the members and their roles, not only view they can edit the roles for members as well.

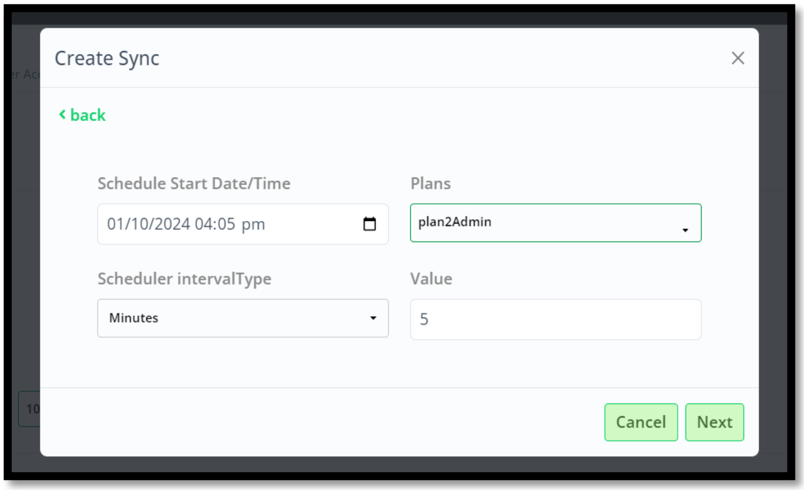




Sync:

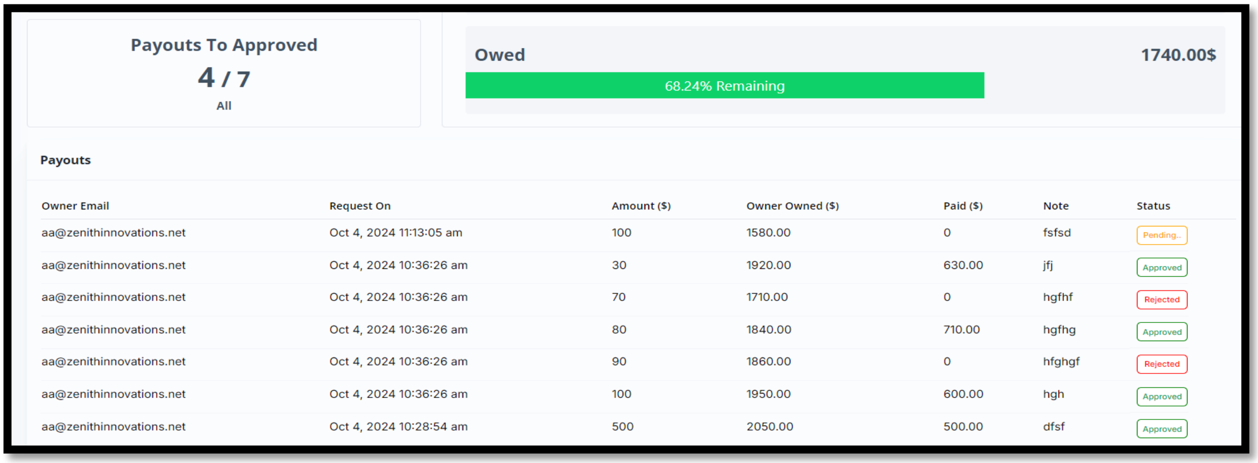
Sync is basically the criteria for the deals. When to add the deals, after what time intervals which deals should be added and to which plans the deals should be added. This is all defined in sync. Turn this auto sync on or off according to your ease.





Approvals:

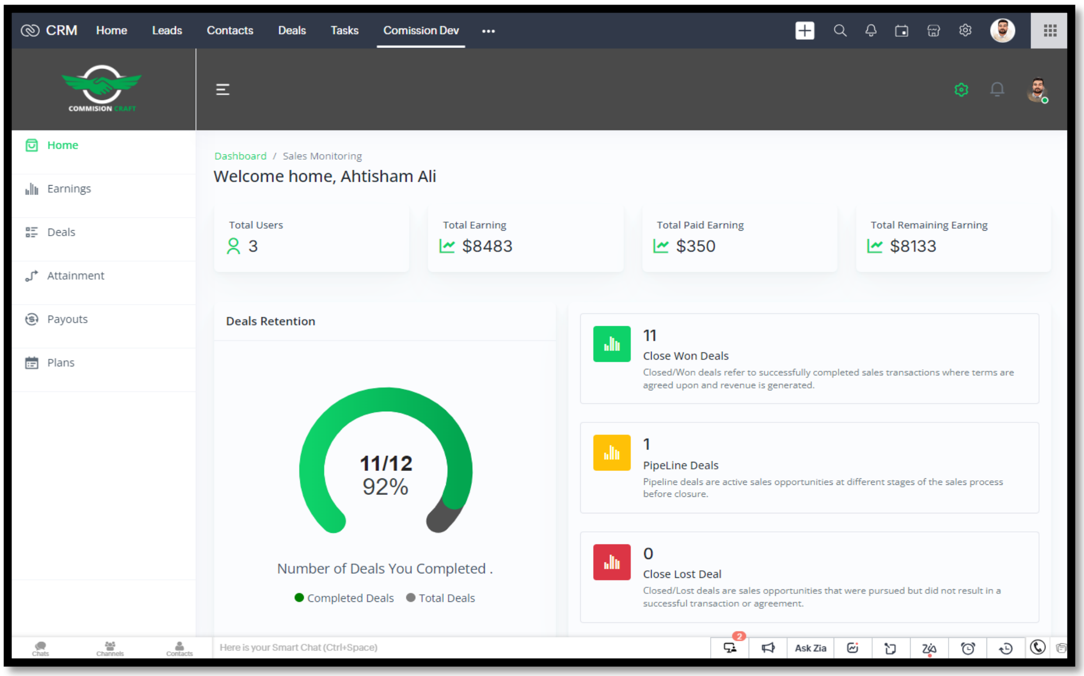
Plans created by the members, payout requested by the members, requires approval of the admin. Also when the deals are added the admin will review the deal then approve it.



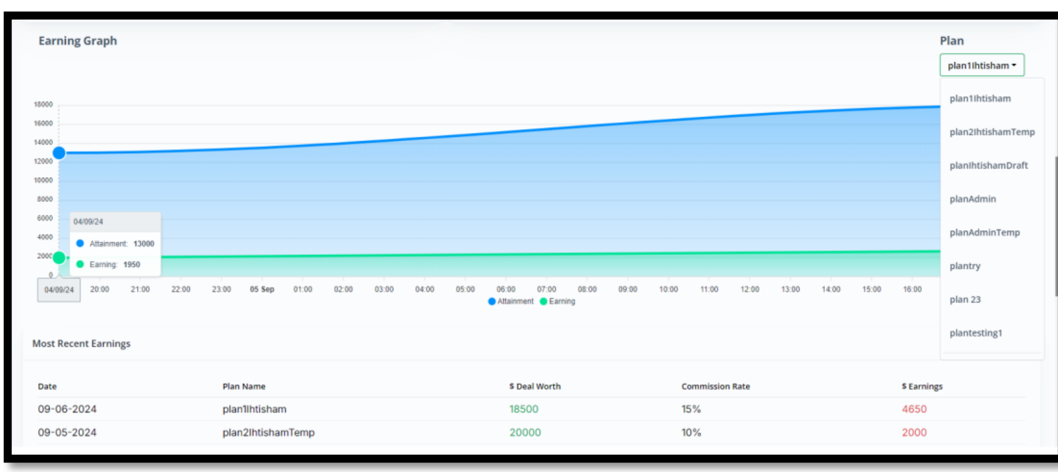
Owner Email	Request On	Amount ($)	Owner Owned ($)	Paid ($)	Note	Status
aa@zenithinnovations.net	Oct 4, 2024 11:13:05 am	100	1580.00	0	fsfsd	Pending..
aa@zenithinnovations.net	Oct 4, 2024 10:36:26 am	30	1920.00	630.00	jfj	Approved
aa@zenithinnovations.net	Oct 4, 2024 10:36:26 am	70	1710.00	0	hgfhf	Rejected
aa@zenithinnovations.net	Oct 4, 2024 10:36:26 am	80	1840.00	710.00	hgfhg	Approved
aa@zenithinnovations.net	Oct 4, 2024 10:36:26 am	90	1860.00	0	hfghgf	Rejected
aa@zenithinnovations.net	Oct 4, 2024 10:36:26 am	100	1950.00	600.00	hgh	Approved
aa@zenithinnovations.net	Oct 4, 2024 10:28:54 am	500	2050.00	500.00	dfsf	Approved

Dashboard:

Admins dashboards contains Total Users, Total Earning, Total Paid Earning, Total Remaining Earning, Total Payouts, Payouts Overview Pie chart.

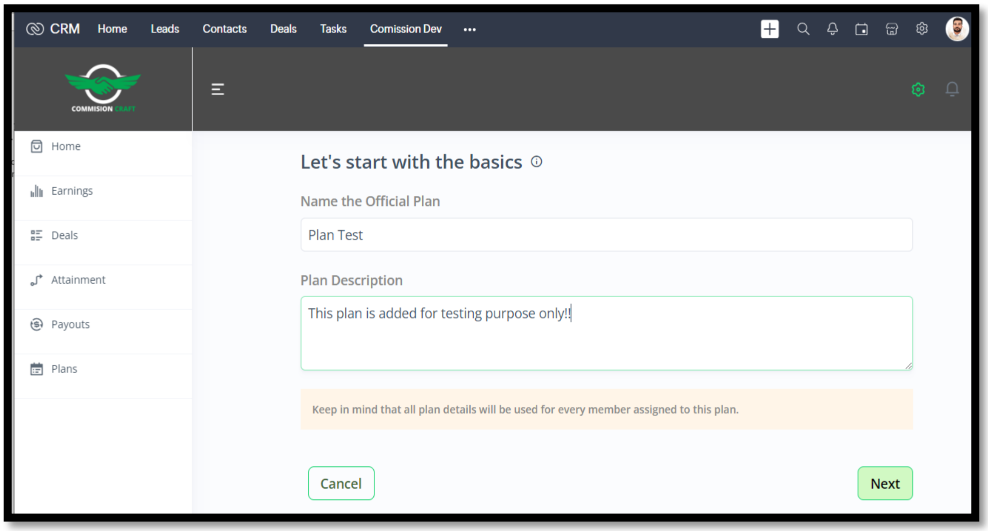


Earning Graph in the dashboard reflects the plans and earnings respectively. You can select the plan from the dropdown to see its earning graph. Also the Most Recent Earnings are shown below the graph.



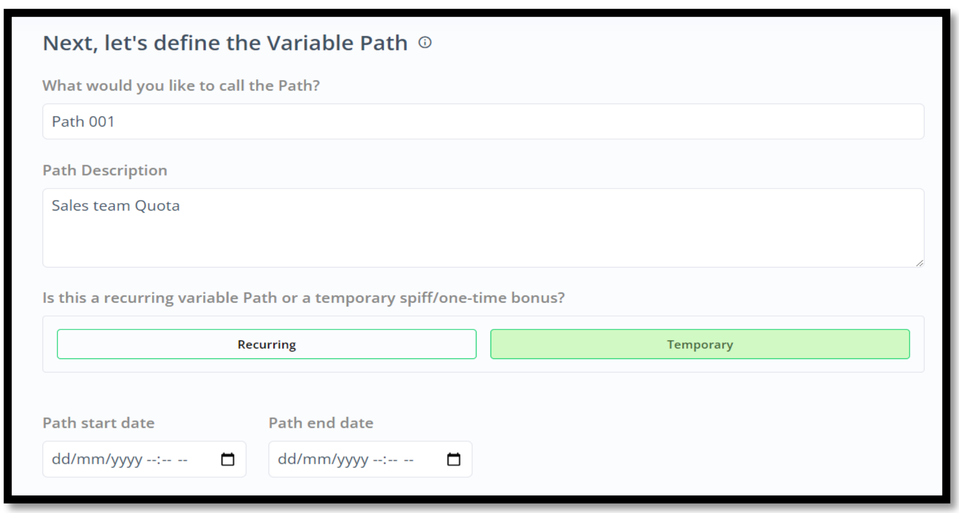
Plan:

Creating a plan consist of multiple steps, firstly name the plan and provide a specific short description of the plan. Plan name must be a unique name, can't be a replicate.



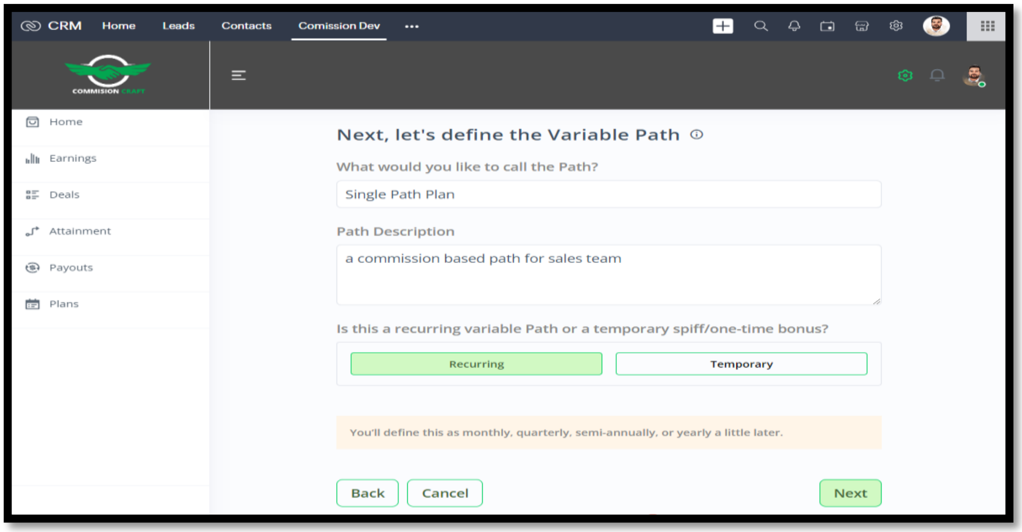
Path:

For a single plan there could be multiple paths to achieve the goals. For now, Users are able to add single path in a single plan which will be extended to multiple in the coming version.



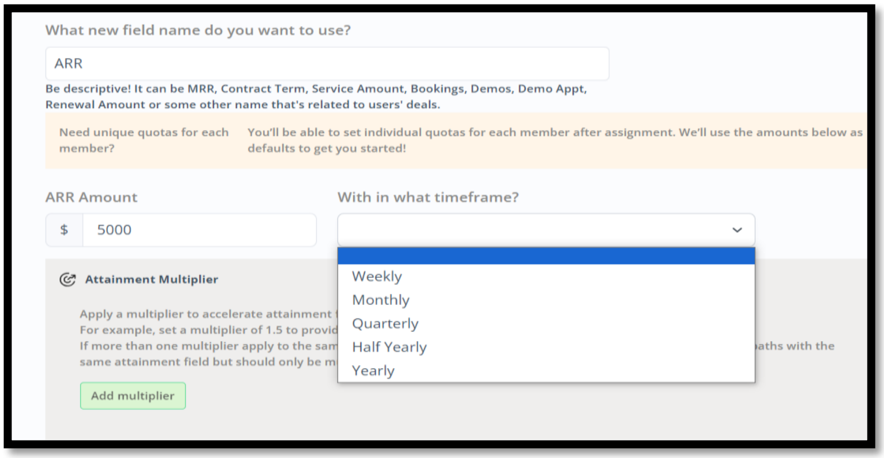
Type of Path:

Path can either be recurring or a temporary plan. Temporary path after a due date ends and does not reoccurs. While a recurring plan is the one that can be set to repeat itself after a week, quarter, half or yearly. It reoccurs whatever the time is set for the plan.



Temporary path plan are the ones that have a start date and an end date so these plans after the set time automatically ends and the earning based on the commission rate are added in to the attainments and the earnings are shown under the earning tab.

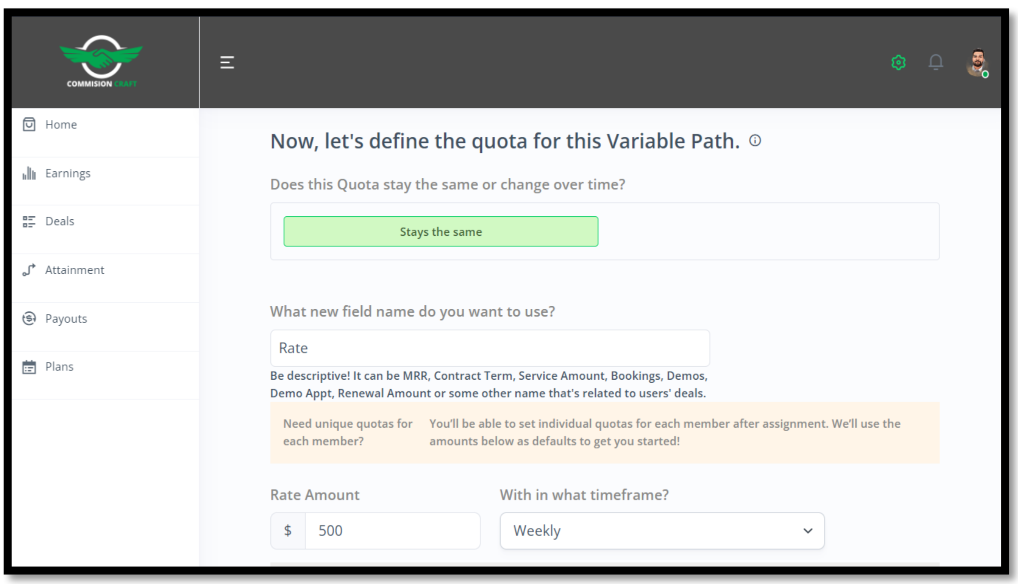
For the **Recurring path plan** user needs to define the time frame for this quota. It could be weekly, monthly, quarterly, half yearly or yearly



For a recurring plan the renewal date and the stats of the attainments will be shown under the attainment tab. Delete the plan if you no longer want the plan to renew, it will not affect the earning, attainment and history of the plan. The pending approvals or earnings should be all cleared before you delete the plan.

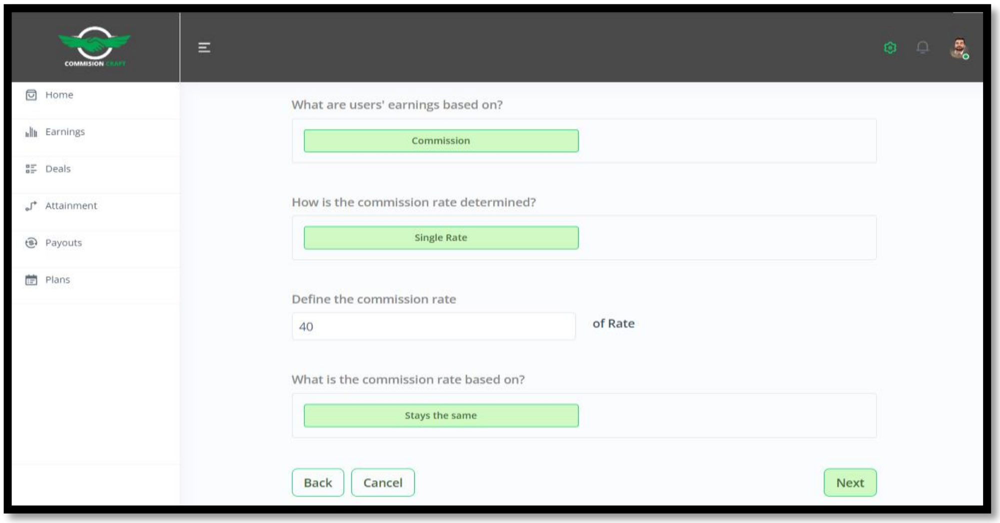
Quota:

Quota can change over time or either it could remain same as well. For a better understanding the Quotas are set as "**Stays the same".** Name the quota whatever you want it to be and enter the amount that is the goal or target amount for this plan.



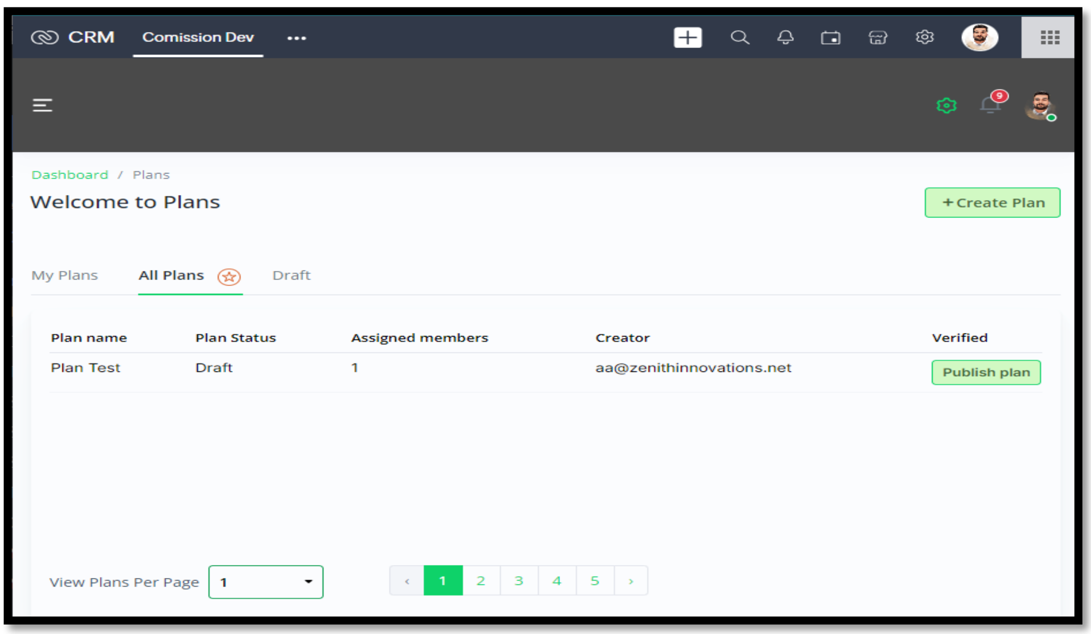
Commission Rate:

The last step for the plan is to add the commission rate for the members. Commission rate is the percentage of the commission a person gets if the Sales Agent successfully closes the deal. Keep noticed that the percentage can only be a number and must be <= 100. Set a percentage Rate and click the save button. Your plan is successfully created now.



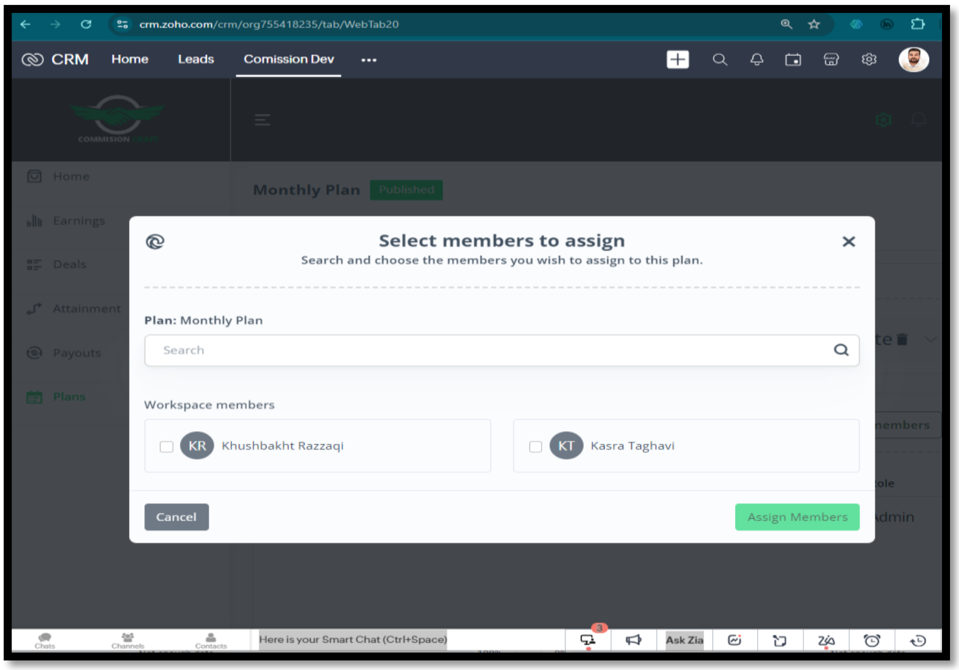
Publish a plan:

A plan can only be published by the admin. A sales manager is allowed to make a plan but this plan resides in the drafts until the admin reviews and approves the plan. For an admin plan can be published by him at any time. Basically the plan will start from the date when it is published. Plan does not depend on the creation day it can be created anytime but it only starts the day when it is published.



Add Members:

You can add multiple members in a plan. When a user is added in a plan user will be notified about the plan and the user will be able to see the plan and its description. The paths, Quota and commission rate as well.

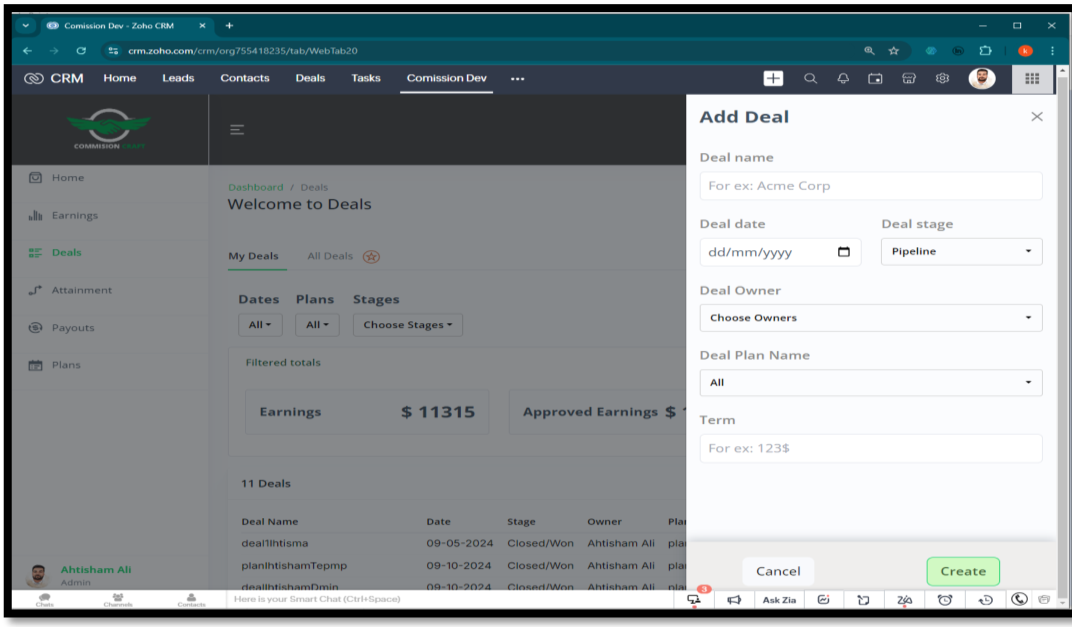


Create Deals:

Deals can be created by the create Deal button in Commission craft or these can be synced directly through the Zoho CRM instead of creating deals manually. (See Sync Heading in the doc.)

When a deal is created by the user this deal needs an approval of the admin, no actions can be performed on deals until the admin approves the deals.

Deals that are created by the admin himself does not require any approval process to be followed. Deals created by admins are approved by default.

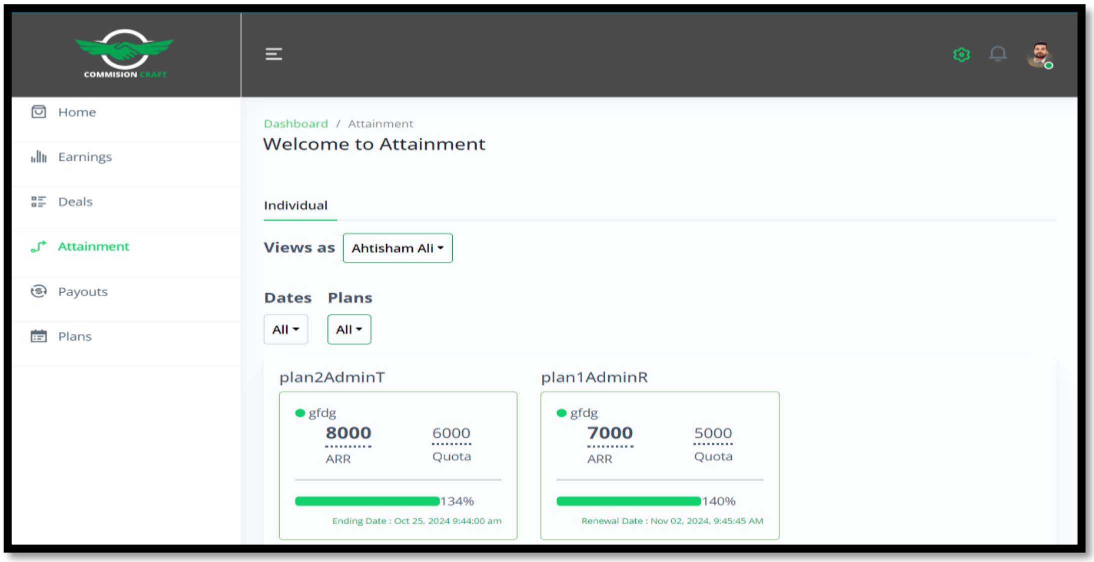


Initially the Deal Stage is "Pipeline", earnings or attainments are calculated only when the quota amount is reached. For Example the Quota/ ARR/ MRR Amount you set for the deal is an amount of 5000$ for ABC Plan and the ABC plan consist of 5 closed won and 3 closed lost deals. Now the value of the closed won deals, if greater or equals to 5000$ the attainments and earnings will be calculated. If the value doesn't exceeds 5000$ there won't be any earnings calculated until the target is achieved.

Attainments:

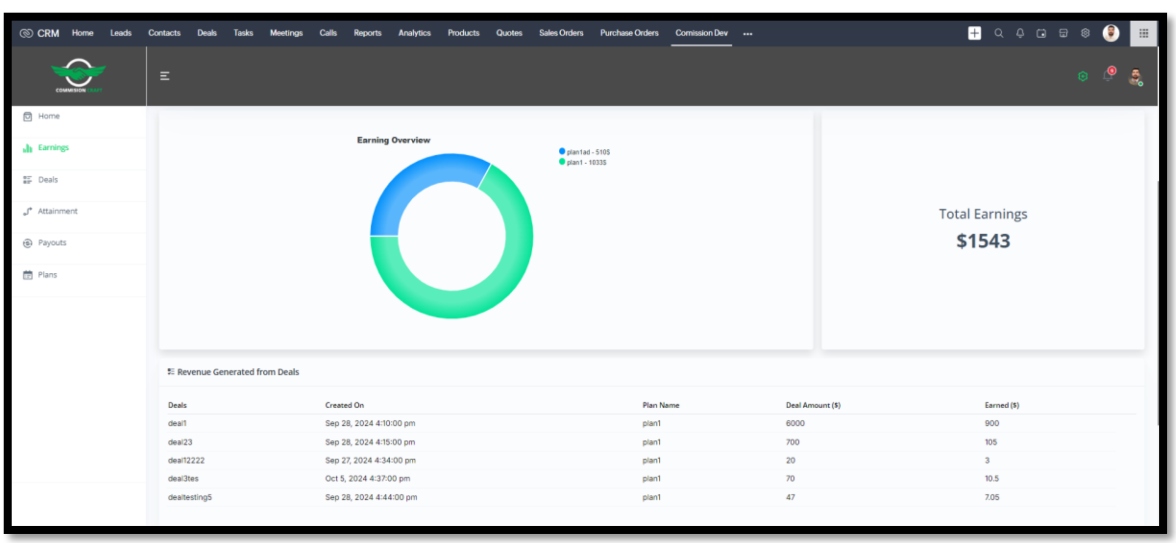
Attainments are the total achieving where a user can see the plans, quota and the total sales amount. These attainments can be viewed in the form of charts and also the filters can be applied, these filters let you select a specific plan separately to see the earnings made through the selected plan.

Sales managers are able to see their own attainments and plans while the admins are able to see the progress of all the users.



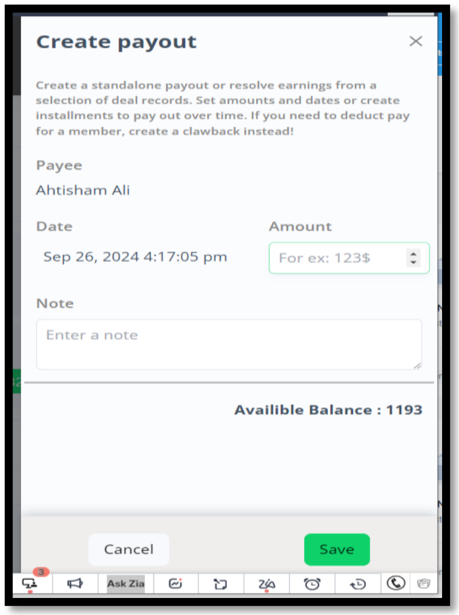
Earnings:

Earnings of the user depends on the plan, its commission Rate and Quota. Once a plan ends or reoccurs all the deals under the plan that are closed won and passes the quota eligibility criteria are added to the earnings of the user. In the earnings module user (Sales Manager) is able to see earnings based on each plan and the overall total earnings. Users are able to see their own earnings while the admin is able to see the earnings of the sales managers too.

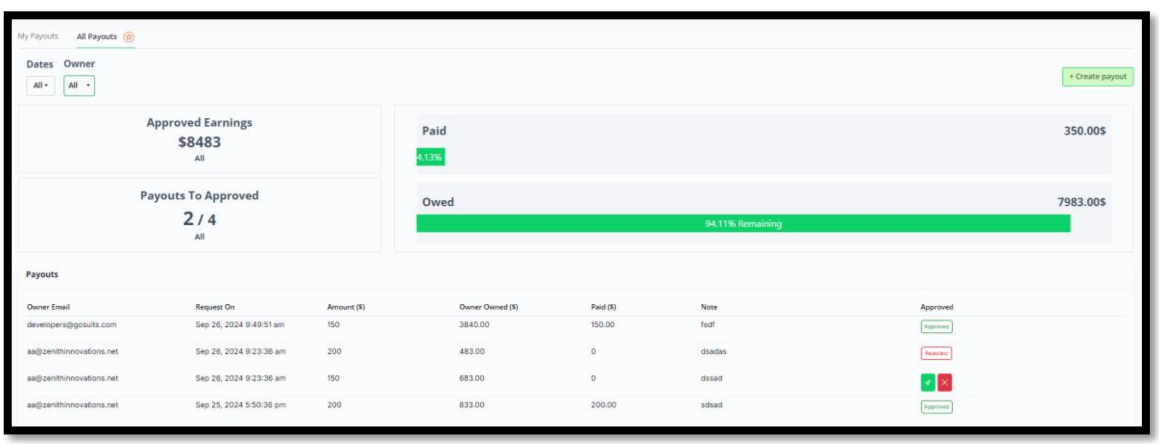


Payouts:

Members can request the payouts of their total earnings, once a plan ends, all the deals that are closed won their value is added and compared with the quota. If the deals value collectively (all the deals in the Plan) are greater than the Quota value the commission will be distributed among the users based on their commission rate percentage.



The status of the payout is **"Pending Approval"**. The payouts are sent to the admins for the Approval once it is approved by the admin, the user receives a notification of approval and the payout amount is deducted from the total earnings of the member.



In case of any problem or query, feel free to contact us at:

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