



## Commission Craft

Extension for ZOHO CRM

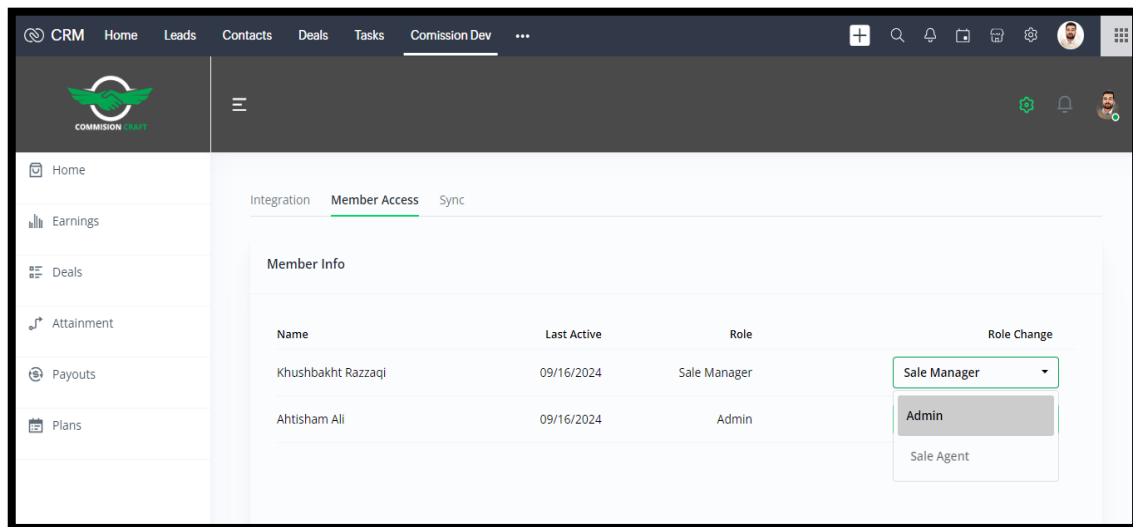
Commission Craft is a powerful sales compensation and commission tracking software designed to streamline and automate the management of sales compensation plans. Whether you're a small startup or a large enterprise, Commission Craft helps ensure accurate and timely commission payouts, enhances transparency, 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:**

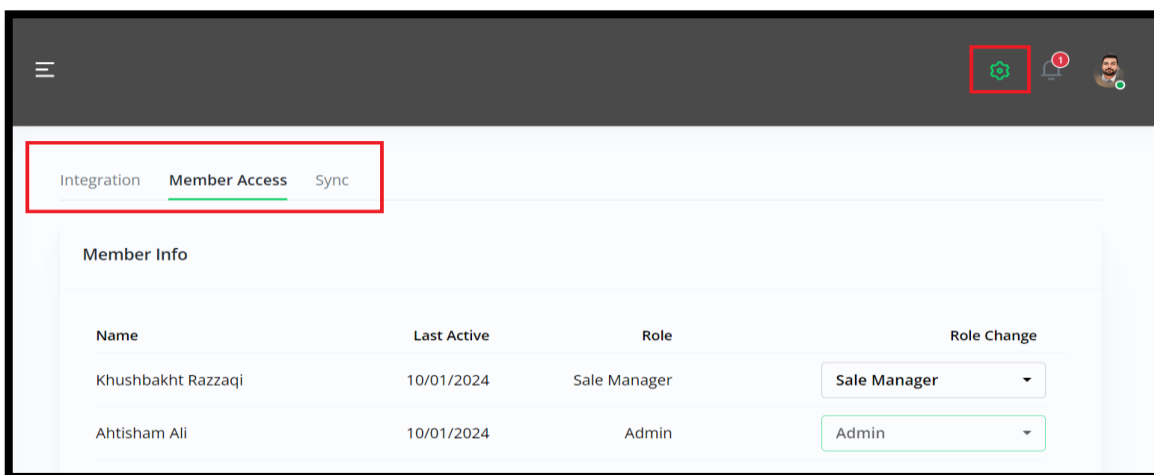
In Commission craft the roles are automatically set according to the Roles in Zoho CRM in the organizational hierarchy. The Super Admin and Admins will be at the same administrator level in Commission Craft and will possess the same powers of approval and payout as well.

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



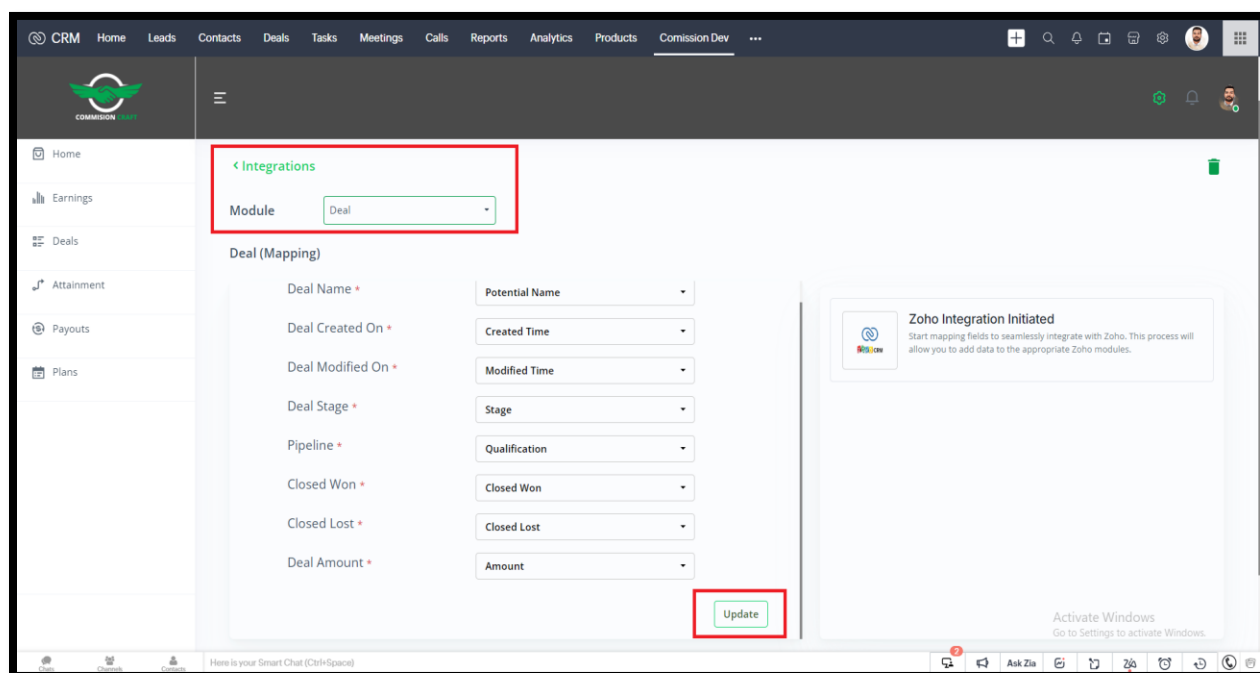
### Settings:

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.



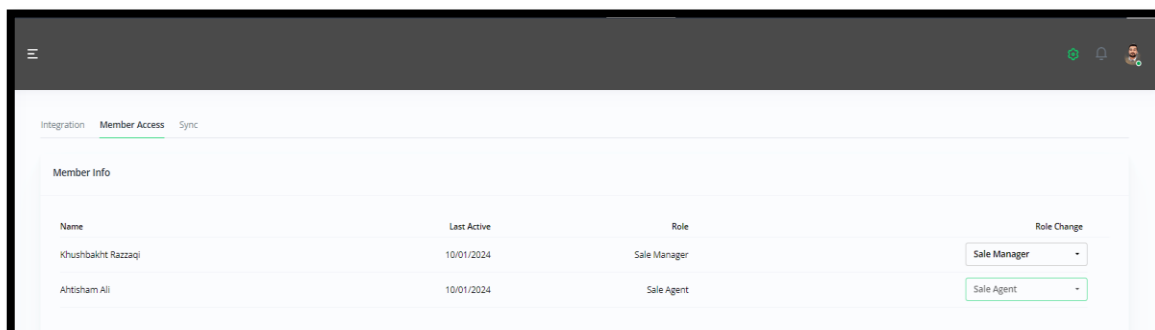
## Integrations:

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.



The screenshot shows the 'Member Access' page in a CRM system. The page has a navigation menu on the left with options like Home, Earnings, Deals, Attainment, Payouts, and Plans. The main content area is titled 'Member Info' and contains a table with columns for Name, Last Active, and Role. There are two rows of data:

Name	Last Active	Role	Role Change
Ahtisham Ali	10/01/2024	Admin	Admin
Khushbakht Razzaqi	10/01/2024	Sale Agent	Sale Agent

Red boxes highlight the 'Role Change' column header and the dropdown menus for the two members. The dropdown for 'Ahtisham Ali' shows 'Admin' selected, and the dropdown for 'Khushbakht Razzaqi' shows 'Sale Agent' selected.

### 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.

The screenshot shows the 'Sync' page in the CRM system. The page has a navigation menu on the left with options like Integration, Member Access, and Sync. The main content area is titled 'Sync' and contains a table with columns for StartDate, IntervalType, Intervalvalue, LastExecute, NextExecute, Status, and Logs. There are two rows of data:

StartDate	IntervalType	Intervalvalue	LastExecute	NextExecute	Status	Logs
Oct 1, 2024, 12:24:00 PM	Minutes	2	Oct 1, 2024, 12:24:00 PM	Oct 1, 2024, 12:26:00 PM	On	Logs
Oct 10, 2024, 12:13:00 PM	Minutes	3	Oct 1, 2024, 12:22:00 PM	Oct 1, 2024, 12:25:00 PM	On	Logs

A green 'Create Sync' button is visible in the top right corner of the main content area.

Create Sync
✕

[< back](#)

Schedule Start Date/Time

Plans

Scheduler intervalType

Value

Cancel
Next

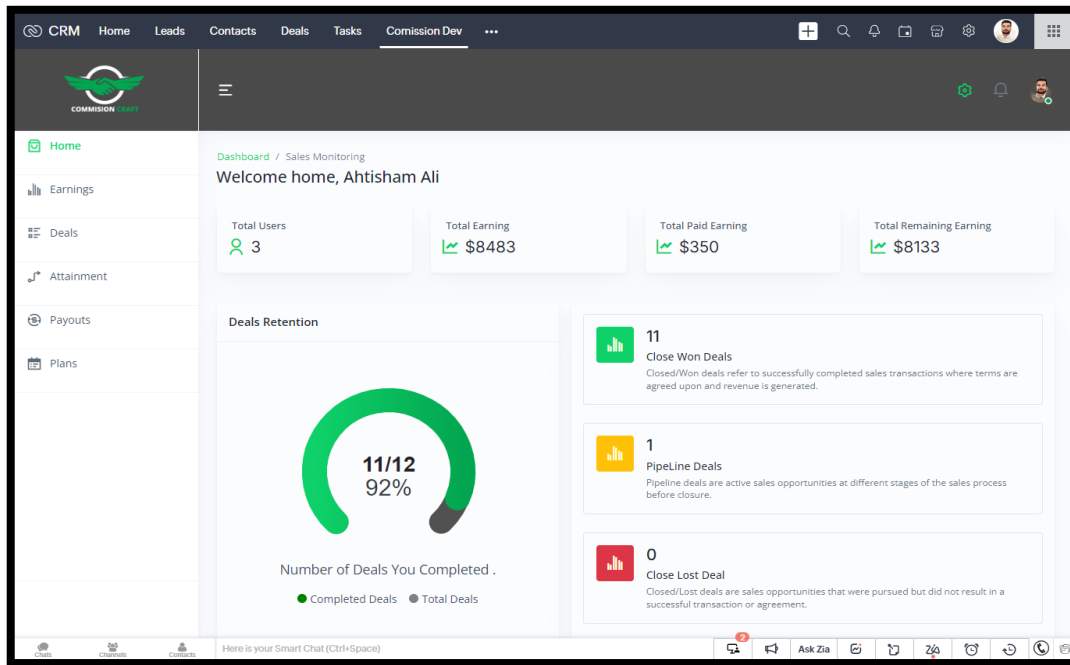
### Approvals:

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	hfgghf	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	dfsdf	Approved

## Dashboard:

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

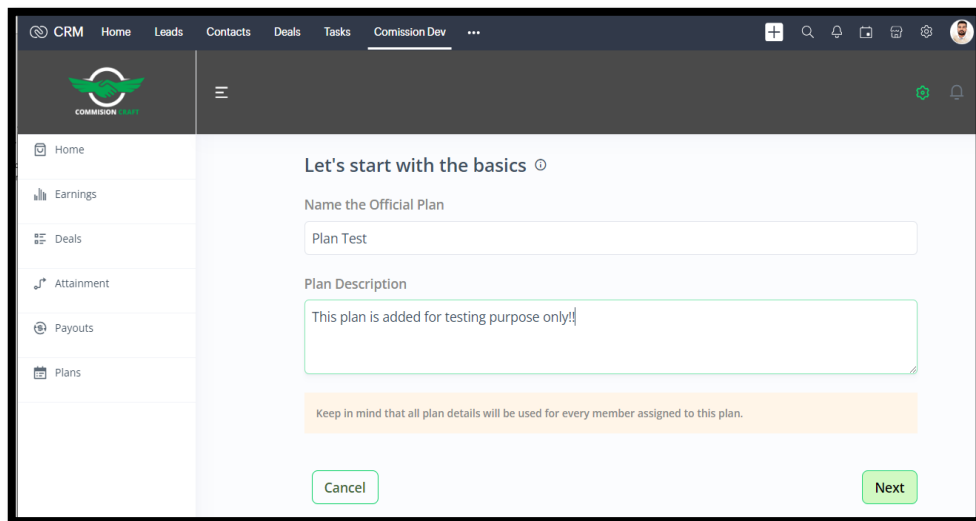


Earning Graph in the dashboard reflects the plans and earnings respectively. You can select the plan from the dropdown to see its earning graph. Also the Most Recent Earnings are shown below the graph.



## 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.

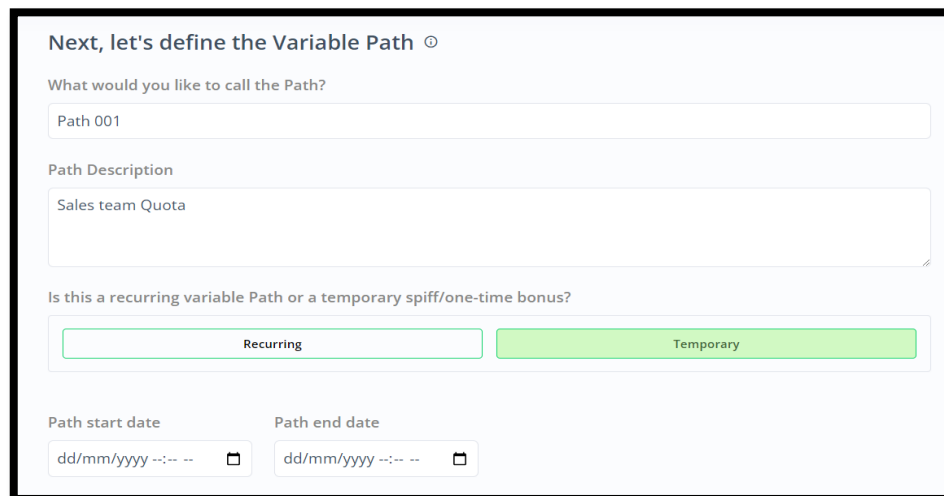


The screenshot shows a web application interface for creating a plan. The top navigation bar includes 'CRM', 'Home', 'Leads', 'Contacts', 'Deals', 'Tasks', and 'Comission Dev'. The left sidebar lists 'Home', 'Earnings', 'Deals', 'Attainment', 'Payouts', and 'Plans'. The main content area is titled 'Let's start with the basics' and contains the following fields:

- Name the Official Plan:** A text input field containing 'Plan Test'.
- Plan Description:** A text area containing 'This plan is added for testing purpose only!'.
- Warning:** A yellow box with the text 'Keep in mind that all plan details will be used for every member assigned to this plan.'
- Buttons:** 'Cancel' and 'Next' buttons.

## 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.



The screenshot shows a form titled 'Next, let's define the Variable Path'. It contains the following fields and options:

- What would you like to call the Path?:** A text input field containing 'Path 001'.
- Path Description:** A text area containing 'Sales team Quota'.
- Is this a recurring variable Path or a temporary spiff/one-time bonus?:** Two radio buttons, 'Recurring' and 'Temporary'. The 'Temporary' button is selected and highlighted in green.
- Path start date:** A date input field with the format 'dd/mm/yyyy --:-- --' and a calendar icon.
- Path end date:** A date input field with the format 'dd/mm/yyyy --:-- --' and a calendar icon.

## 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.

CRM Home Leads Contacts Commission Dev ...

Home Earnings Deals Attainment Payouts Plans

### Next, let's define the Variable Path

What would you like to call the Path?  
Single Path Plan

Path Description  
a commission based path for sales team

Is this a recurring variable Path or a temporary spiff/one-time bonus?  
Recurring Temporary

You'll define this as monthly, quarterly, semi-annually, or yearly a little later.

Back Cancel Next

**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

What new field name do you want to use?  
ARR

Be descriptive! It can be MRR, Contract Term, Service Amount, Bookings, Demos, Demo Appt, Renewal Amount or some other name that's related to users' deals.

Need unique quotas for each member? You'll be able to set individual quotas for each member after assignment. We'll use the amounts below as defaults to get you started!

ARR Amount \$ 5000

With in what timeframe?  
Weekly  
Monthly  
Quarterly  
Half Yearly  
Yearly

Attainment Multiplier  
Apply a multiplier to accelerate attainment. For example, set a multiplier of 1.5 to provide 50% more attainment. If more than one multiplier apply to the same attainment field but should only be multiplied once.

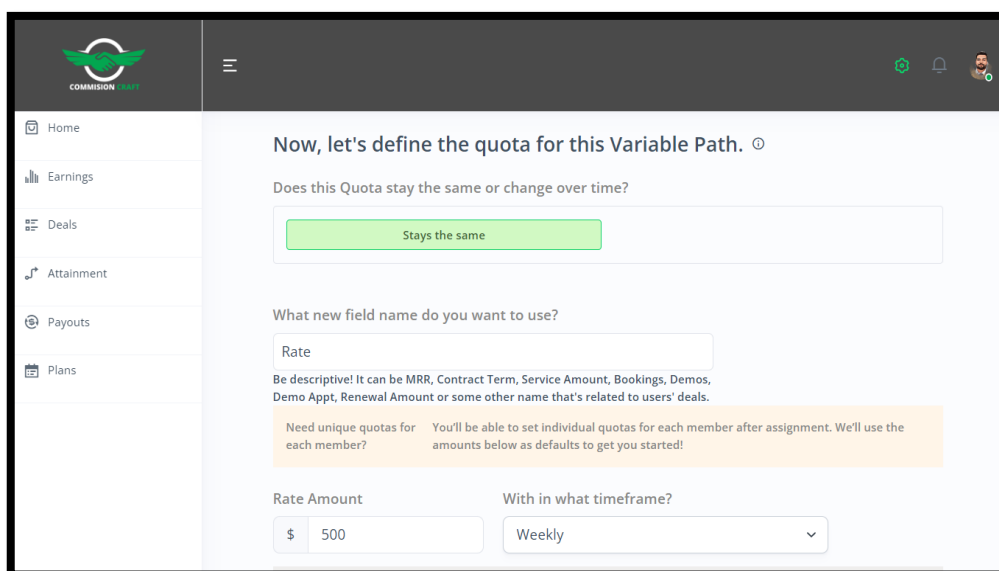
Add multiplier



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.



The screenshot shows the Commission Hero dashboard interface. On the left is a navigation sidebar with menu items: Home, Earnings, Deals, Attainment, Payouts, and Plans. The main content area is titled "Now, let's define the quota for this Variable Path." and contains the following configuration steps:

- Question: "Does this Quota stay the same or change over time?" with a selected "Stays the same" button.
- Question: "What new field name do you want to use?" with a text input field containing "Rate".
- Instruction: "Be descriptive! It can be MRR, Contract Term, Service Amount, Bookings, Demos, Demo Appt, Renewal Amount or some other name that's related to users' deals."
- Informational box: "Need unique quotas for each member? You'll be able to set individual quotas for each member after assignment. We'll use the amounts below as defaults to get you started!"
- Form fields: "Rate Amount" set to "\$ 500" and "With in what timeframe?" set to "Weekly".

### 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  $\leq 100$ . Set a percentage Rate and click the save button. Your plan is successfully created now.

The screenshot shows a configuration screen for a plan in the Commission CRM. The interface includes a sidebar with navigation options: Home, Earnings, Deals, Attainment, Payouts, and Plans. The main content area contains the following configuration steps:

- What are users' earnings based on?
- How is the commission rate determined?
- Define the commission rate:  of Rate
- What is the commission rate based on?

At the bottom, there are three buttons: "Back", "Cancel", and "Next".

### 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.

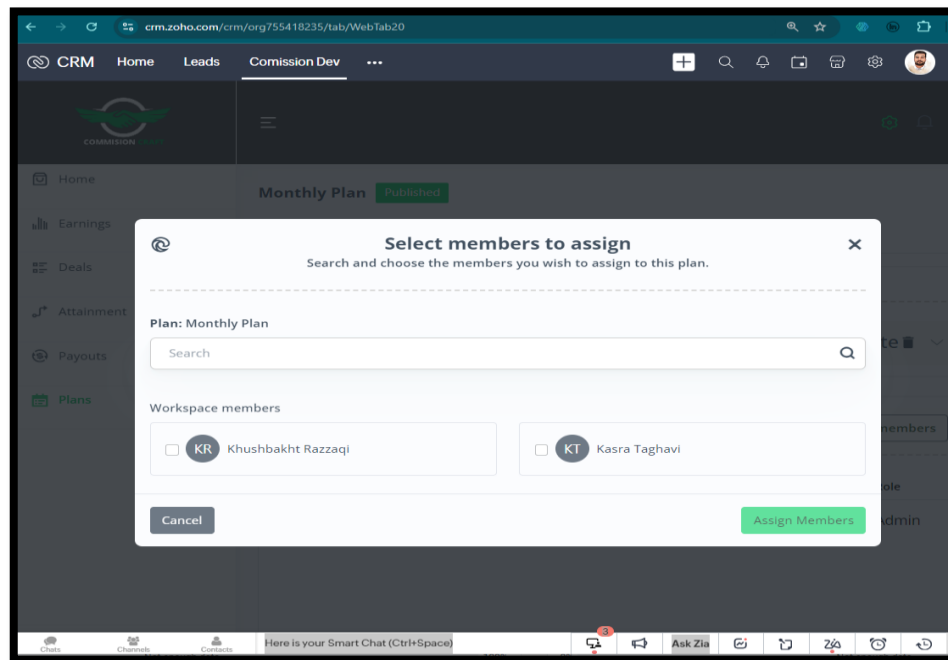
The screenshot shows the "Plans" dashboard in the Commission CRM. The page title is "Welcome to Plans" and there is a "+ Create Plan" button. The dashboard displays a table of plans with the following data:

Plan name	Plan Status	Assigned members	Creator	Verified
Plan Test	Draft	1	aa@zenithinnovations.net	<input type="button" value="Publish plan"/>

At the bottom of the table, there is a "View Plans Per Page" dropdown set to "1" and a pagination control showing "1" of 5 pages.

### 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.

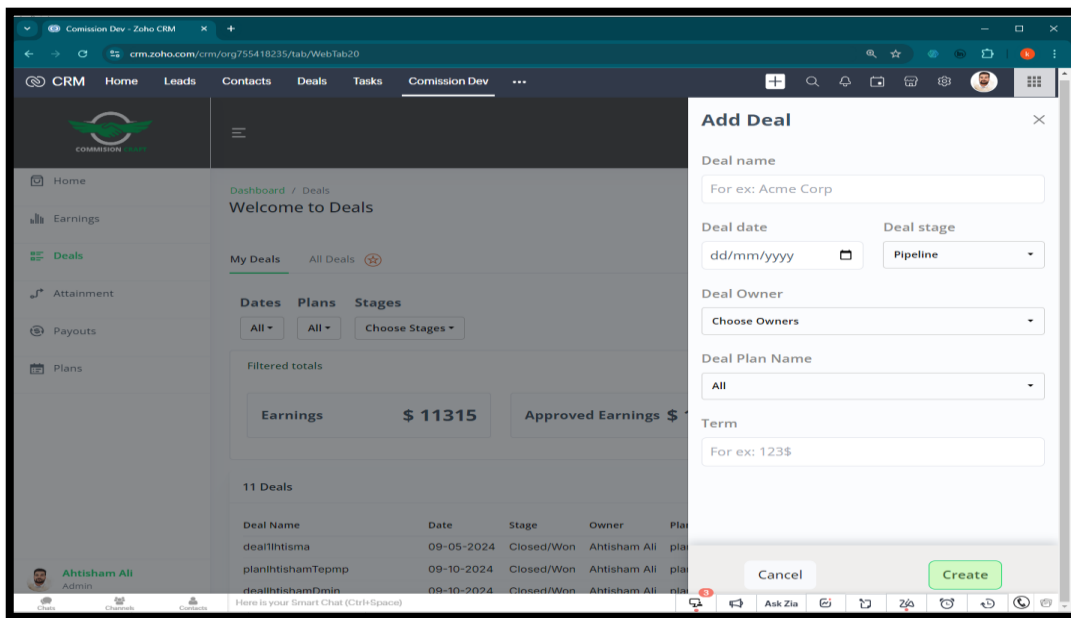


### Create Deals:

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.

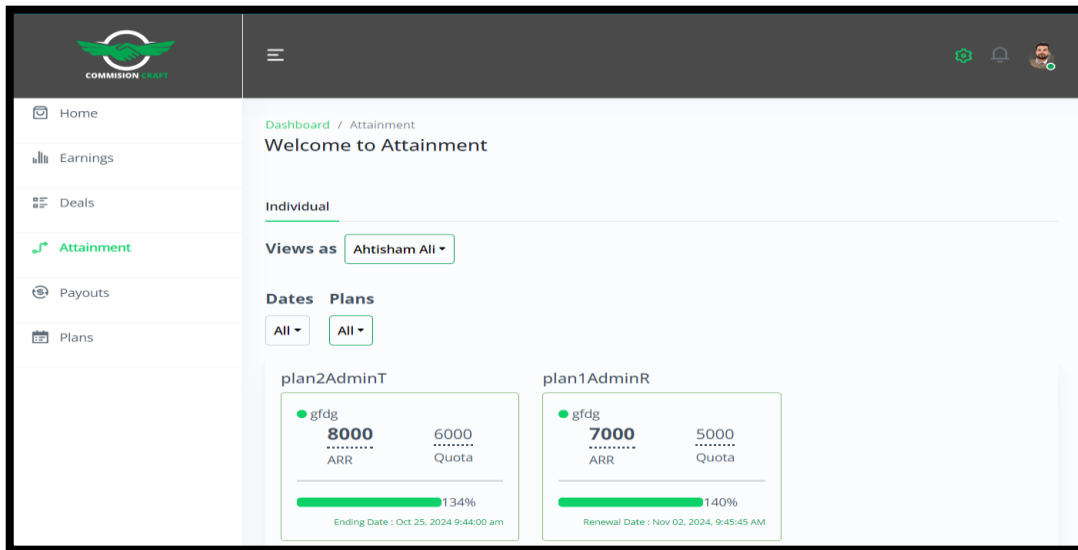


Initially the Deal Stage is “Pipeline”, earnings or attainments are calculated only when the quota amount is reached. For Example the Quota/ ARR/ MRR Amount you set for the deal is an amount of 5000\$ for ABC Plan and the ABC plan consist of 5 closed won and 3 closed lost deals. Now the value of the 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:

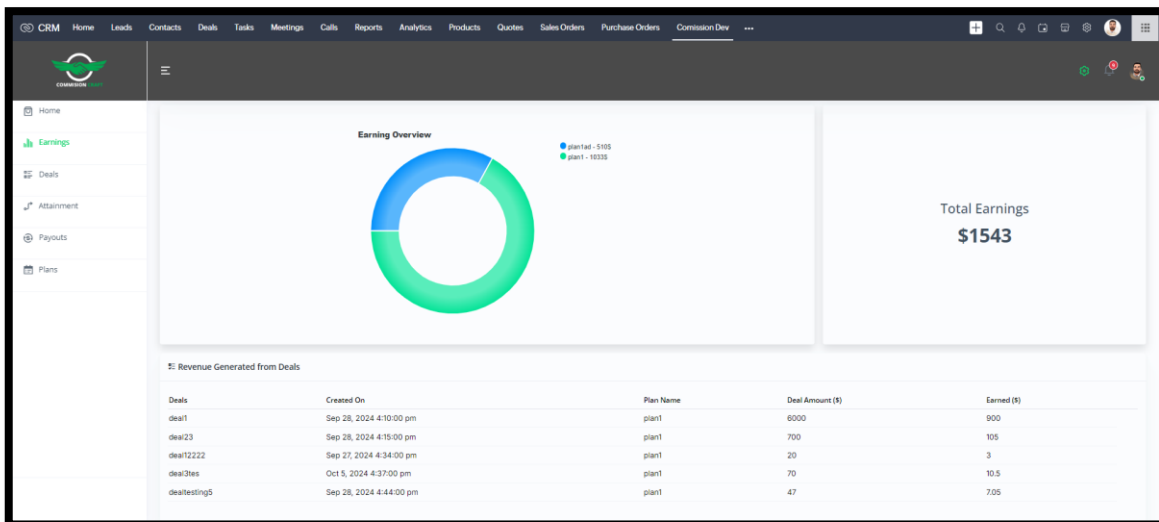
Attainments are the total achieving where a user can see the plans, quota and the total sales amount. These attainments can be viewed in the form of charts and also the filters can be applied, these filters let you select a specific plan separately to see the earnings made through the selected plan.

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.

**Create payout**

Create a standalone payout or resolve earnings from a selection of deal records. Set amounts and dates or create installments to pay out over time. If you need to deduct pay for a member, create a clawback instead!

Payee  
Ahtisham Ali

Date  
Sep 26, 2024 4:17:05 pm

Amount  
For ex: 123\$

Note  
Enter a note

Available Balance : 1193

Cancel Save

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.

My Payouts All Payouts

Dates Owner

All All

Approved Earnings  
\$8483  
All

Payouts To Approved  
2 / 4  
All

Paid 350.00\$  
4.13%

Owed 7983.00\$  
94.11% Remaining

+ Create payout

Owner Email	Request On	Amount (\$)	Owner Owed (\$)	Paid (\$)	Note	Approved
developers@gosults.com	Sep 26, 2024 9:49:51 am	150	3840.00	150.00	fsdf	Approved
aa@zenithinnovations.net	Sep 26, 2024 9:23:36 am	200	483.00	0	dsadas	Pending
aa@zenithinnovations.net	Sep 26, 2024 9:23:36 am	150	683.00	0	dsad	Pending
aa@zenithinnovations.net	Sep 25, 2024 5:50:36 pm	200	833.00	200.00	dsad	Approved

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

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