

Mahalo Commission Estimator

Setup Guide

2019



Aloha and Hello:

I'm so excited to share Mahalo Commission Estimator with you. There are just a few things we'll need to get set-up before you start building your first commission plan. *If you are not a Salesforce System Administrator for your org, please request their assistance to help with the next three steps.*

My Promise To You: If you have any questions during the setup process please email me directly at doug@mahalo-commissions.com and I'll be happy to assist you right away! Of course, installation & configuration is always **FREE**, and I want you to start enjoying Mahalo Commission Estimator as soon as possible.

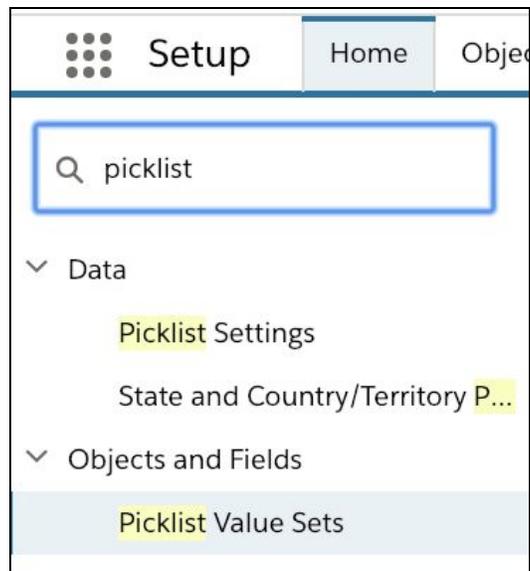
Step 1: Configure Global Picklists

There are three global picklists that will need to be configured for your org.

- 1) Opportunity Team Role
- 2) Opportunity Type
- 3) Product Family

These picklists will need to be updated to match the actual Roles / Opportunity Types / Product Families that your company is currently using. Once these global picklists are updated, you will be able to reference these values on the Commission Plan Builder.

To update the global picklists go to **Setup** > search: "**picklist**" > select **Picklist Value Sets**



From here you will be presented with at least 4 picklists. Start by clicking on the **Opportunity Team Role**. **If your company has NOT enabled "Team Selling" you can skip this step.*

Picklist Value Sets

Global picklist value sets let you share the values across the organization and allow users to inherit its values. The value set is restricted so users can only see the values that are assigned to them.

View: All ▾ [Create New View](#)

A | B | C | D | E | F | G | H

Action	Label ↑
Edit Del	Opportunity Team Role
Edit Del	Opportunity Type
Edit Del	Period Duration
Edit Del	Product Family
Deleted Global Value Sets (0)	

By default, the most common Opportunity Team Roles have been already been added. But, it is likely your company has customized the team roles, so you will need to include your custom roles by selecting **New**, and then typing your custom roles into the box as shown below.

Picklist Value Sets

Global picklist value sets let you share the values across the organization and allow users to inherit its values. The value set is restricted so users can only see the values that are assigned to them.

View: All ▾ [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L

Global Value Sets
[New](#)

Add Picklist Values

Opportunity Team Role

Add one or more picklist values below. Each value should be on its own line and include the API name.

If a value matches an inactive value's API name, that value is reactivated with its API name.

If a value matches an inactive value's label but not the API name, a new value is created.

SDR

Inside Sales Rep

Solution Engineer

Add the new picklist values to all Record Types that use this Global Value Set.

Save Cancel

If you are unsure if your company has any custom team roles. Go to *Object Manager* > **Opportunity Team Member** > *Fields & Relationships* > **Team Role** to see a list of your active team roles.

The screenshot displays the Salesforce Object Manager interface for the 'Opportunity Team Member' object. The left sidebar contains navigation options: Details, Fields & Relationships (selected), Page Layouts, Buttons and Links, Compact Layouts, Field Sets, Object Limits, Triggers, and Validation Rules. The main content area is titled 'Opportunity Team Member Field Team Role' and includes a 'Back to Opportunity Team Member Fields' link. At the top right, there are buttons for 'Edit', 'Set Field-Level Security', and 'View Field Accessibility'. Below this is the 'Field Information' section, which shows the field label 'Team Role', data type 'Picklist', and help text. The 'Field Dependencies' and 'Validation Rules' sections both indicate that no dependencies or rules are defined. The 'Team Role Picklist Values' section features buttons for 'New', 'Reorder', 'Replace', 'Printable View', and 'Chart Colors'. A table below lists the picklist values with their respective actions and API names.

Action	Values	API Name	Chart Colors
Rename Del Deactivate	Account Manager	Account Manager	Assigned dynamically
Rename Del Deactivate	Channel Manager	Channel Manager	Assigned dynamically
Rename Del Deactivate	Executive Sponsor	Executive Sponsor	Assigned dynamically
Rename Del Deactivate	Lead Qualifier	Lead Qualifier	Assigned dynamically
Rename Del Deactivate	Pre-Sales Consultant	Pre-Sales Consultant	Assigned dynamically
Rename Del Deactivate	Sales Manager	Sales Manager	Assigned dynamically
Rename Del Deactivate	Sales Rep	Sales Rep	Assigned dynamically
Rename Del Deactivate	Opportunity Owner	Opportunity Owner	Assigned dynamically

After the Opportunity Team Roles picklist has been updated, continue the same process to update the next two picklists. Return to the *Picklist Value Sets* and select **Opportunity Type**.

Picklist Value Sets

Global picklist value sets let you share the value set to inherit its values. The value set is...

View: All [Create New View](#)

A | B | C | D | E | F | G | H

Action	Label ↑
Edit Del	Opportunity Team Role
Edit Del	Opportunity Type
Edit Del	Period Duration
Edit Del	Product Family
Deleted Global Value Sets (0)	

Again the most common opportunity types have already been added, but you can add any custom opportunity types by selecting **New** and adding them to the box provided.

Global Value Set Detail [Edit](#)

▼ Information

Label	Opportunity Type
Name	Opportunity_Type
Description	
Namespace Prefix	MahaloComm

[Edit](#)

Values [New](#)

If you are unsure about the custom opportunity types your company is using, go to *Object Manager* > **Opportunity** > *Fields & Relationships* > **Type** to see a list of your active opportunity types.

Lastly, return to *Picklist Value Sets* and select **Product Family** to update this picklist as well.

Picklist Value Sets

Global picklist value sets let you share the value set to inherit its values. The value set is...

View: [Create New View](#)

A | B | C | D | E | F | G | H

Global Value Sets

Action	Label ↑
Edit Del	Opportunity Team Role
Edit Del	Opportunity Type
Edit Del	Period Duration
Edit Del	Product Family

[Deleted Global Value Sets \(0\)](#)

Click **New** to add all of your custom Product Families to this global picklist in the box provided.

Global Value Set Detail

▼ Information

Label	Product Family
Name	Product_Family
Description	
Namespace Prefix	MahaloComm

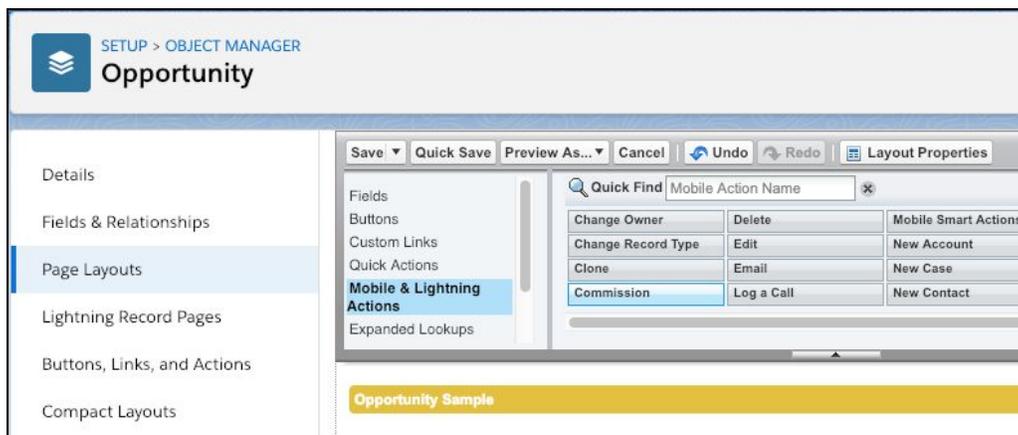
Values

If you are unsure about the custom product families that your company is using, go to *Object Manager* > **Product** > *Fields & Relationships* > **Product Family** to see a list of your active product families.

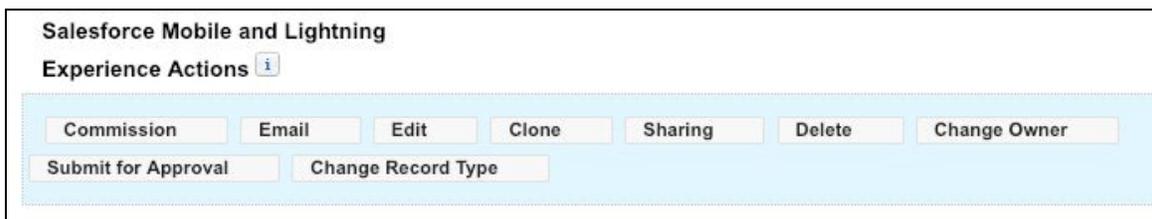
Step 2: Enable Mobile Commission Estimates

If your company is already using the Salesforce mobile app, your sales team can easily view their commission estimates on the go. *If your company restricts mobile access to data, please skip this step.*

To view commission estimates on a mobile device, you'll need to add the **Commission** field, found under "Mobile & Lightning Actions", to the list of *Salesforce Mobile and Lightning Experience Actions* on the Opportunity Page Layout.



Drag the **Commission** field down to the section labeled *Salesforce Mobile and Lightning Experience Actions*.



*For easy access, place the **Commission** field as far left as possible.

Step 3: Assign Permission Sets

There are two permission sets included with this app.

Commission User

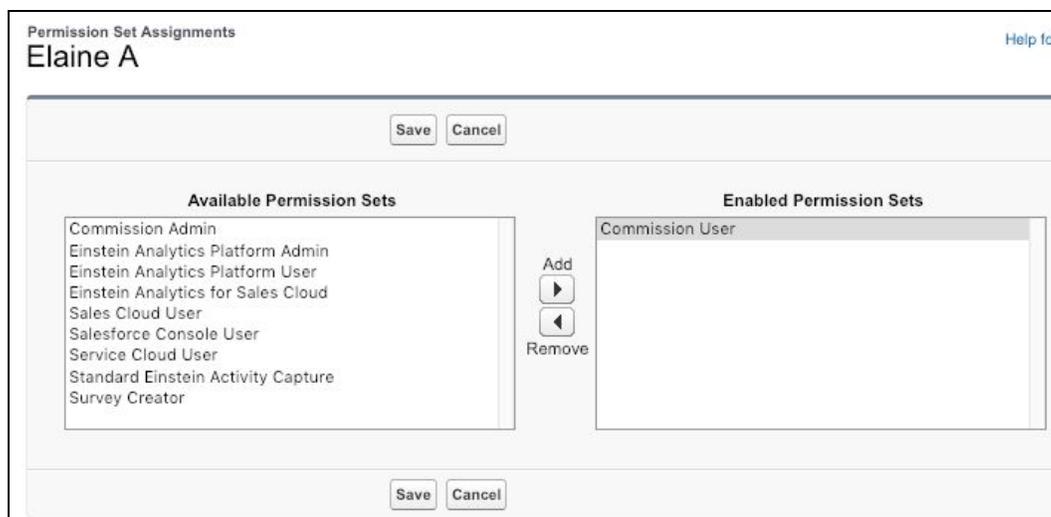
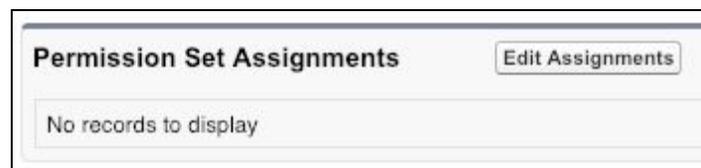
This is the most common permission set and will give the payees read-only access to their commission estimates and statements.

Commission Admin

This permission set should only be assigned to the user(s) that is (are) responsible for managing all commission calculations, as well as setting up and assigning commission plans to the other users.

To assign a permission set to a user go to Setup > *Users* > **Users**. Select the user's name to update their permission set assignments.

Select **Edit Assignments** and then add the appropriate permission set.



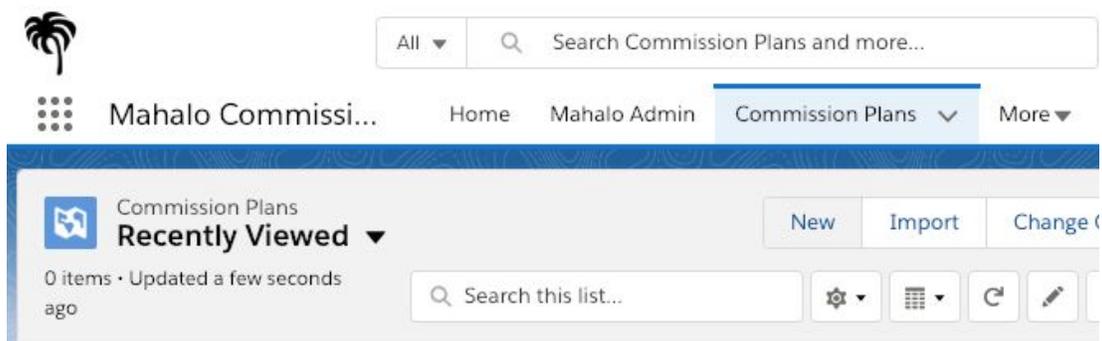


Building Your First Commission Plan

Building a commission plan is easy. Just follow the two steps below and Mahalo Commissions will take care of the rest.

Step 1: New Commission Plan

Navigate to the **Commission Plans** tab and click **New**.



Then, simply fill in the fields on the commission plan template. It takes just a few minutes to define commission plans for your users. There is in-line help available for all fields, as well as full descriptions of each field below.

Commission Plan Name: It is best to give plans a generic name, such as “Inside Sales Commission Plan 2019” since you will later be assigning this plan to multiple payees.

Commission Plan Type: This is an optional field, but it can be helpful for reporting purposes.

Start Date / End Date: Select the dates you want this plan to start and finish. For example, if this plan is valid for all of 2019 select 1/1/19 through 12/31/19. You will set the payment frequency next.

Payment Frequency: Select how often you want to make payments on this plan. Options include Month, Quarter, Quarter-To-Date, and Year. With the Quarter-To-Date payment frequency, payees will be paid out monthly, but performance will still be measured against a quarterly quota.

The next three fields will help you filter for qualifying sales.

Who is Eligible: If your company has enabled “Team Selling” any role attached to the opportunity can earn commission on the deal. Simply select all the roles you want to include on this plan. If your org has not yet enabled team selling, only the opportunity owner will be eligible for commission.

*Enabling team selling does not take long, speak to your System Administrator if you are interested in this feature.

What Opportunity Type(s) Are Eligible: Each Opportunity has a standard field called “Type”, which most companies use to distinguish between New Accounts / Add-Ons / Renewals. Often commission rates will differ

depending on the opportunity type. If this is the case at your company, select the Type(s) that will be eligible for commission on this plan.

Which Product Families Are Eligible: If your company is using product families, you can select the product families that will qualify for commission on this plan. Using this field you can pay different commission rates for different products sold.

Amount Eligible For Commission: The default for this field is “Just The Products Eligible For Commission Above” which will only give the payee credit for the eligible product sold. Yet in some cases, the “The Entire Opportunity Amount” is eligible for commission.

Assign quota and commission rates to this plan.

Quota Amount: This is the generic quota that will be assigned to each payee per payment frequency set above. You will have an option to update this per payee and per month later. If your plan does not have a quota attached, simply enter \$0.

Commission Rate (Base): Enter the lowest commission rate that the payees will earn on this commission plan. If the commission rate increases based on quota attainment, you can enter these rates later.

Quota Threshold 1: If the commission rate increases based on quota attainment, enter the percent (%) of quota attainment which will trigger an increased commission rate. **NOTE:** This will increase the commission rate paid on ALL qualifying sales closed during the commission period.

Commission Rate (Threshold 1): This will be the new commission rate for the period after Quota Threshold 1 has been met.

Example: A commission plan, with a monthly quota of \$25,000, pays a base rate of 5% until the payee earns 90% of their quota, then adjusts to a 6% commission rate for the month. Enter the rates as shown below:

Enter Quota & Commission Rate	
* Quota Amount i	Commission Rate (Base) i
<input type="text" value="\$25,000.00"/>	<input type="text" value="5.0000%"/>
Enter Commission Rate Table (if applicable)	
Quota Threshold 1 i	Commission Rate (Threshold 1) i
<input type="text" value="90.00%"/>	<input type="text" value="6.0000%"/>

If the payee closes \$24,000 of their \$25,000 quota (96% attainment) they will be paid $\$24,000 \times 6\% = \$1,440$ for the month.

You will have the option to add 4 more Quota Threshold percentages and respective rates in the fields below.

Accelerator Floor 1: If the commission plan pays incremental commission on over-performance, enter the quota attainment percentage that will trigger an accelerator. Typically, accelerators kick-in at 100%, with additional accelerators for performance over 125% of quota. *Accelerators are a good way of controlling additional incentives on over-performance.*

Accelerator Rate 1: Simply enter the additional commission percentage that will be paid on over-performance.

Example: A plan with a monthly quota of \$25,000, a commission rate of 5%, and an accelerator of 1% for all sales over 100% of quota.

Enter Any Accelerators (if applicable)

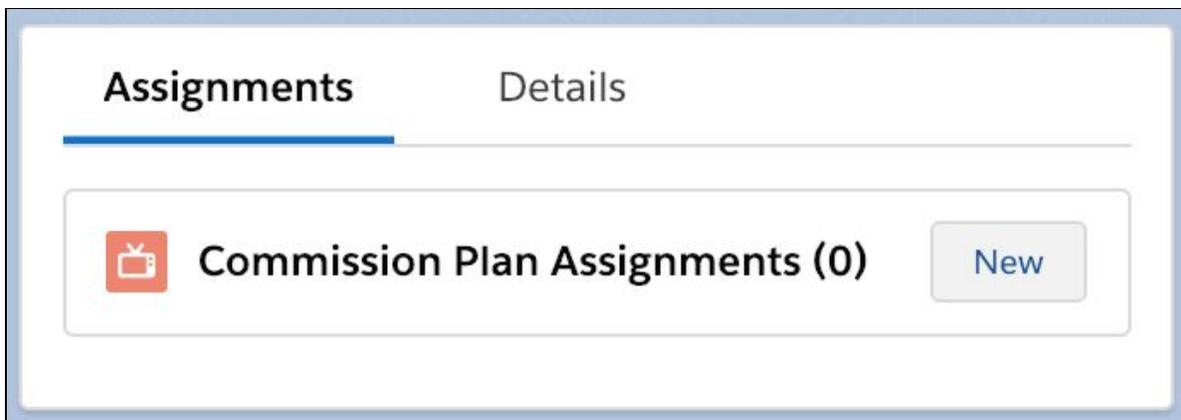
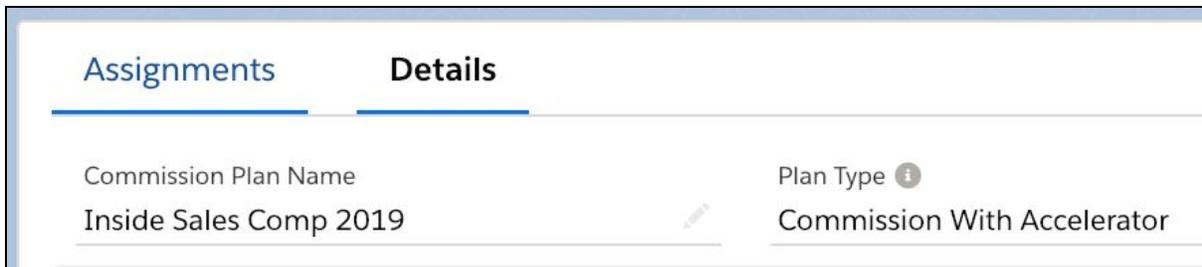
Accelerator Floor 1 i	Accelerator Rate 1 i
<input type="text" value="100.00%"/>	<input type="text" value="1.0000%"/>

If the payee closes \$26,000 of their \$25,000 quota (104% attainment). They would be paid commission of $5\% \times \$26,000 = \$1,300$, plus an accelerator of $\$1,000 \times 1\% = \10 for a total of \$1,310 for the month.

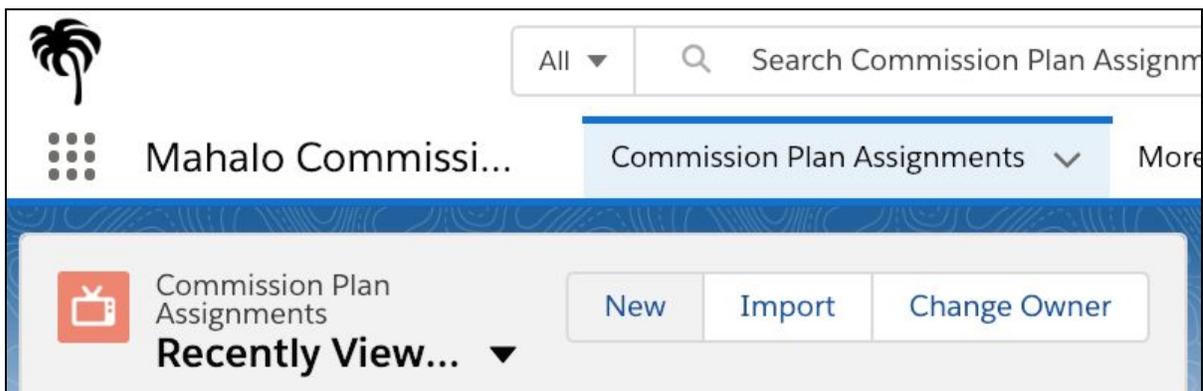
*Congrats, you just finished building your first commission plan. Hit **Save** and on the next screen you will have the option of assigning this plan to the proper users.*

Step 2: New Commission Plan Assignments

Adding payees to the plan you just built is easy. If you are still on the *Commission Plan* tab, and you have the commission plan that you just created open, simply select “**Assignments**” and then click **New**.



Otherwise, you can also navigate to the *Commission Plan Assignments* tab and select **New**.



Now, simply fill out an assignment for each payee that you wish to assign to this commission plan. There is in-line help on each field, and full descriptions are provided below for reference.

Commission Plan Assignment Name: Since plans are assigned individually, it is best to give assignments a more personal name, such as “Lucy D commission 2019”

Commissioned User: Select the payee that will be assigned to this commission plan. Just type the first few letters of the user’s name, and Salesforce will narrow down results for you.

Commission Plan: If you arrived at this screen directly from the *Commission Plans* tab, this field will be auto-populated for you. Otherwise, just start typing the first few letters of the plan name, and Salesforce will narrow down the results for you.

Override Quota Amount: If this payee will have a different quota than the amount set on the commission plan, enter the override quota here. You will still have the option of updating the quota per month (or quarter) later on the *Quota Attainment* records that the system will generate.

Override Start / End Date: If this payee will not be receiving commission during the entire commission plan length, possibly due to a promotion or a mid-year new hire, you can override the effective dates for this payee.

Select **Save**, or **Save & New** to enter another assignment, and Mahalo Commission Estimator will automatically create *Commission Statements* for this user, as well as *Quota Attainment* records for this commission plan.

Making Adjustments

If you need to adjust quota or commission rates further, select the *Quota Attainment* tab and locate the Quota Attainment record you wish to update. This is the best place to enter specific information per payee since Quota Attainment records are unique to each person.

If you want to add a manual adjustment, bonus or draw to a commission statement, select to the *Commission Statements* tab to locate the statement you wish to update. Go to the *Details* sub-tab and scroll to the bottom to add any adjustment and add notes as needed.

The screenshot shows the 'Quota Attainment' record for 'QTA-Inside Sales Comp 2019-Lucy-Month-Jan 19'. The record details are as follows:

Quota Attainment Name	Period Start Date
QTA-Inside Sales Comp 2019-Lucy-Month-Jan 19	1/1/2019
Commission Statement	Period End Date
STMT-Lucy-Jan 19	1/31/2019
Payee	Commission Plan
Lucy D	Inside Sales Comp 2019
Manager	Commission Plan Assignment
	Inside Sales Comp 2019-Lucy-Month
Total Earnings	Plan Type
\$0.00	Commission With Accelerator
	Period Duration
	Month

Commission Summary

Sales	Adjustment Amount
\$0.00	
Total Commissionable Amount	Adjustment Reason
\$0.00	
Assignment Quota	Commission Amount
\$25,000.00	\$0.00

The screenshot shows the 'Details' view of the Commission Statement record for 'STMT-Lucy-Jan 19'. The record details are as follows:

Statement Status	Commission Statement Name
Period Not Started	STMT-Lucy-Jan 19
Payee	Month/Year
Lucy D	January 2019
Manager	Period End Date
	1/31/2019
Total Statement Earnings	
\$0.00	

Earnings Summary

Total Commission Amount
\$0.00
Total Accelerator Payout
\$0.00

Adjustments

Adjustment Amount	Adjustment Reason
Bonus Amount	Bonus Reason
Draw Amount	Notes