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1. Overview

Lucid Path's Sales Rep Commission Manager is a sophisticated utility built to aid an important function of every manager's job: determining employee efficacy. With our module , you can obtain a wealth of information regarding your sales representatives performance, such as their sales, return percentages, commissions earnings, and even trends in their selling ability. Needless to say, this information has a myriad of uses ranging from friendly office competitions to bonus and promotion decisions, and can even serve as grounds for rightful termination of an underperformer.

The sales rep module was originally built because of a costly mistake in my own business, years ago. We had an employee who wasn't performing, but we had no idea just how bad this guy was, because orders were coming in. It turned out, we learned after 9 months, that he had been surfing YouTube 8 hours a day while other employees picked up the slack. It was a mistake that cost me tens of thousands. After designing the seminal version of SRC, underperformers knew they couldn't hide, and everyone really stepped it up.

-Jonathan Levi, Founder of Lucid Path Consulting

2. Getting Started

a) Installation & Data Migration (For Existing Users)

For most, installation of our module is simple, and conforms to the Magento approved “Connect” installation procedure.

- i) Navigate to [yoursite.com/downloader](#).
- ii) Re-authenticate
- iii) Upload the .tgz package file as it is to the upload field
- iv) Installation will proceed automatically
- v) Just in case, we recommend flushing the cache, logging out, and logging back in

If your cart is modified heavily, you may need to manually copy/paste files into their appropriate location. This is accomplished by unpacking the .tgz file on your local machine and mimicking the file structure inside. You will need to create folders and place files inside of them. Make sure you do not forget a single file.

For heavily modified carts, we offer professional installation services for \$49/hour. A typically installation takes 2-3 hours.

Important Note: If you are upgrading from an older edition, you must uninstall Basic first! This is done in the same place as the installation process:

Manage Existing Extensions

Check for Upgrades

Channel: Magento Community Edition

Commit Changes

☐ Clear all sessions after successful install or upgrade:

Package Name	Installed	Actions	Summary
LucidPath_SalesRep	1.0.0 (stable)	Uninstall ↕	Monitor and track sales representative performance on a daily, weekly, monthly, or yearly basis. This module empowers you to implement a commission program, or simply to make sure your employees are continuing to improve.

Commit Changes

Furthermore, for early customers of Sales Rep Commission Manager, the database columns will need to be migrated to retain existing data.

To migrate your existing data, please visit <https://ecommerce.c minds.com/cm-support/> and create a new ticket. We need the following information:

- FTP URL (ex: [ftp.yourwebsite.com](#))
- FTP Username

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- FTP Password

Data migrations are performed in the order they are received. We strive to complete all tickets within 24 hours.

b) Orientation

When you log back in after installation, your cart will look different in a number of ways.

- Inside orders, there will be a new tab of information for assigned sales rep
- Your “Reports” dropdown will have a new section with a new report
- Under “System -> Configuration” you will see a new section at the bottom for Lucid Path. This is where the majority of configuration happens
- Under “System -> Permissions -> Roles,” you will have a new category for Sales Representative Basic. This is where you’ll configure permissions for the module.

Each of these sections will be covered in depth (with screenshots) in their respective sections. Out of the box, the module will begin working. Without the appropriate configuration, however, it may not perform as desired. Thus, proper configuration should be your first priority, before even taking time to acquaint yourself with the software.

3. Configuration

a) Main Configuration Screen

The main configuration screen is broken down into sections with a number of options.

Title	Options	Explanation
Module Status Heading		
Module is Active	<ul style="list-style-type: none"> • Yes • No 	Choose whether or not the module will be active
Checkout Heading		
Header	{Text Field}	What should the title of the heading be at checkout? Default text included
Label	{Text Field}	How do you wish to explain the selection? Default text included
Error Message	{Text Field}	What error message is displayed when the customer does not make a selection?

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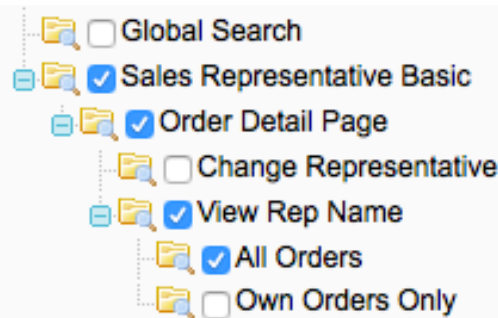
Users	{Selection Field of Users}	Use the Ctrl key to select multiple users to display on the front end. Those not selected will not be shown
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b) Permissions

There are a couple of areas where you'll need to configure permissions.

i) Roles

Here we specify how each role (i.e. Sales Rep, Store Owner, Manager) interacts with the module. You can set a different set of permissions for each depending on what their needs and abilities should be.



1. Head over to System -> Permissions -> Roles
2. Select the first permissions group (you will have to do each individually)
3. Click the "Resources" tab on the left
4. Modify the following checkboxes according to the desired permissions for that group:
 - Sales -> Sales Representative Basic (Outer checkbox will select both the following checkboxes)
 - Order Detail Page
 - Change Sales Representative
 - View Rep Name (For all orders or for their own orders only)
 - Reports -> Sales Representative
5. Click "Save Role"
6. Repeat for each of your permissions roles

These permissions should be fairly self-explanatory, and with some forethought, you should be able to determine what you wish each level of permissions to have access to. As an example, though, you may determine:

- Employees can see reports, but cannot change anything or access config
- Managers can do all this, plus change payment statuses, but not Config
- Admins can do absolutely everything


4. Orders

a) Order Page

The order page will now have a tab for Sales Representative, which some users can modify from

Order View

- Information
- Invoices
- Credit Memos
- Shipments
- Comments History
- Transactions
- Sales Representative**

 **Order # 145000008 | Apr 17, 2015 11:32:07 AM**

Sales Representative

Name:

inside the order (if permissions allow them to do so)

5. Reports

a) Gross Sales By Rep

This report is fairly basic, in that it only shows the bottom line sales of a report, without any consideration for subtotals, totals, or commissions. It is meant to show you raw performance numbers.

For this reason, it is especially important to use the “Include Order Status” selection if you wish to get more specific information. You may not, for example, want to count an order towards an employee’s quota if payment has yet to come in. Conversely, you may want to run a report to see how many orders are being returned, to see if an employee is perhaps being too pushy with your customers.

Filter

Breakdown

Daily

From *

4/25/12

To *

4/25/12

Include Order Status

Specified

▲ Applies to Any of the Specified Order Statuses

Canceled

Closed

Complete

Suspected Fraud

On Hold

Payment Review

Pending

Pending Payment

Pending PayPal

Processing

As with both our reports, you are able to specify the breakdown to determine how many subtotals you would like to see, as well as a time period.

6. Tips & Tricks

- From our experiences, it is best to let employees see each other's sales as a motivational technique.
- The bottom line is to make sure you are cautious and use the software correctly!
- Please note that more premium versions of the software, including [Pro and Deluxe](#), offer significantly more functionality, which will allow you to actually calculate commissions, determine how much you owe your employees, and manage very sophisticated permissions. We strongly recommend checking into them and upgrading, as they offer much more value than the Basic edition.

7. Feedback & Support

We greatly appreciate your inputs as to how we can improve our products in the future. Please, send us your recommendations, or any bugs you may find!

We have recently partnered with Magento experts CreativeMinds for all sales, distribution, and support. If you need any support, please submit a ticket at:

<https://ecommerce.cminds.com/cm-support/>

CreativeMinds will get back to you as soon as possible.