Table of Contents

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 Basic Edition, you must uninstall Basic first! This is done in the same place as the installation process:

Furthermore, for early customers of Sales Rep Commission Manager Basic, the database columns will need to be migrated to retain existing data.
To migrate your existing data, please visit https://ecommerce.cminds.com/cm-support/ and create a new ticket. We need the following information:

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

- 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.

- Your order grid will now have 3 more columns, which you can disable if you like
- Inside orders, there will be a new block of information about commissions & reps
- Your "Reports" dropdown will have a new section with 2 new reports
- 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 -> Users" you will see a new tab for each user, allowing you to specify individual commission rates
- Under "System -> Permissions -> Roles" there are a few new checkboxes where you will need to select what each role is permitted to do

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	• Yes • No	Choose whether or not the module will be active
Commissions Heading		
Default Status for New Orders	• Unpaid • Ineligible	When a new order is created, what should it be marked as? "Ineligible" is mostly for companies where not every order earns a commission. Commission status is separate from order status.

Default Commission Rate	{Text Field}	Choose what the default commission rate will be (individual rates can vary)
Pay Commissions Based On	• Subtotal • Grand Total	Determines how commissions are calculated. Ideal for environments where shipping is a profitable product.
Order Grid Heading		
Commission Earner	• Yes • No	Display this column in the order grid?
Commission Amount	• Yes • No	Display this column in the order grid? If you did not give non-admin users permissions to see other commissions, this area will show blank except for their own orders. Admins will of course see full info here.
Commission Payment Status	• Yes • No	Display this column in the order grid?
Email Reports Heading		
Email Template	• SalesRep Commission Report (Default)	Uses the default email template, which you can customize just like you would order emails. The default template uses the same exact design as the back-end report.
Send Reports To	• Employee & Admin • Admin Only	Who will receive reports? Note that if you did not give non-admin users permissions to see others' earnings or names above, these columns will show blank according to your selections
Hour	{Each hour of the day}	Uses the time your server is set to
Minute	{15 Minute Increments}	Uses the time your server is set to
Frequency	• Every Day • Every Weekday • Every Friday • 15th & Months End • Months End	How frequently email reports are sent. Month's end is the last day of the month, be it 29th, 30th, or 31st.
Checkout Heading		
Display representative selector at back-end (admin) checkout	• Yes • No	When creating orders in the back end, should there be a selector? This selector shows ALL usernames, regardless of which are shown on the front end?
Display representative selector at front-end (customer) checkout	• Yes • No	Show a selector on the front end? Uses the selection below to determine which names display
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?

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

b) Admin Theme

In order to prevent conflicting design changes from other modules in the back end, we use a custom admin theme. In order to do this follow the directions elow:

b) Permissions

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

i) Users

Here we determine the custom commission rates (if any)

1. Head over to System -> Permissions -> Users
2. Select an employee who has a custom commission rate (higher or lower than default)
3. Click the "User Commission" tab on the left
4. Enter the custom commission rate
5. Click "Save User"
6. Repeat for all employees who earn a custom commission rate

ii) 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.

The permissions area will look as follows:

- Sales Representative Pro
  - Order Grid
    - View Rep Name
      - All Orders
      - Own Orders Only
    - View Commission Amount
      - All Orders
      - Own Orders Only
    - View Commission Payment Status
      - All Orders
      - Own Orders Only
  - Order Detail Page
    - Change Representative
    - Change Representative Commission Status
    - View Rep Name
      - All Orders
      - Own Orders Only
    - View Rep Commission Amount
      - All Orders
      - Own Orders Only
    - View Rep Commission Payment Status
      - All Orders
      - Own Orders Only
  - Sales & Commission Reports
    - View Order List & Representative Name
      - All Orders
      - Own Orders Only
    - View Commission Amount
      - All Orders
      - Own Orders Only
    - View Commission Payment Status
      - All Orders
      - Own Orders Only
- Emailed Commission Reports
  - Include Order List & Representative Name
    - All Orders
    - Own Orders Only
  - Include Commission Amount
    - All Orders
    - Own Orders Only
  - Include Commission Payment Status
    - All Orders
    - Own Orders Only

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 nested checkboxes (pictured above) according to the desired permissions for that group
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 all 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 Grid

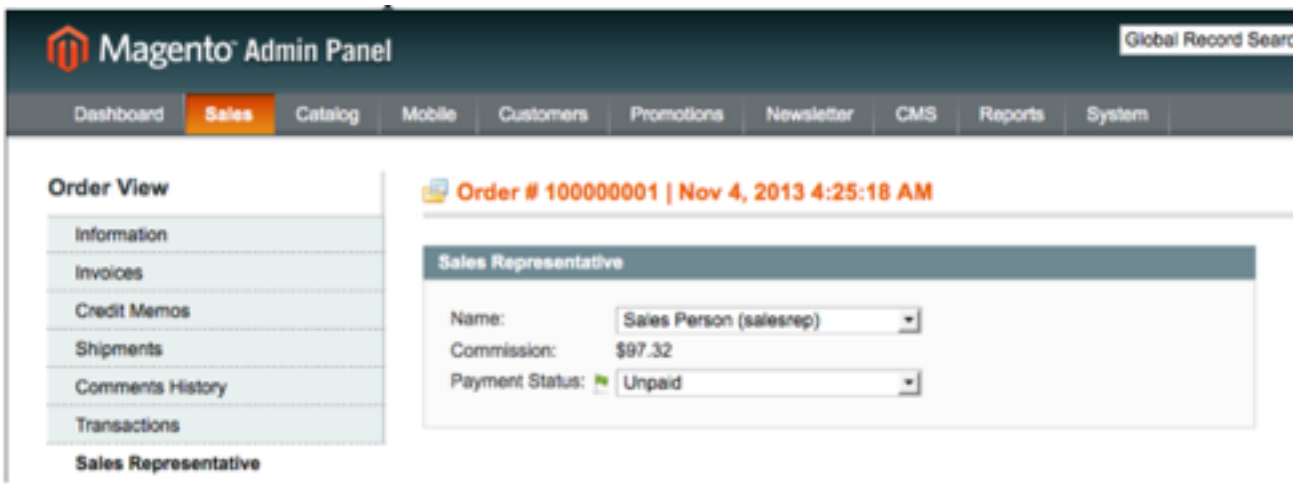
$404.95	$404.95	Canceled	Yuriy Malov	$38.00	Canceled	View
$384.95	$384.95	Pending	Yuriy Malov	$36.00	Unpaid	View
$254.97	$254.97	Pending	Yuriy Malov	$24.00	Unpaid	View
$254.97	$254.97	Pending	Yuriy Malov	$24.00	Paid	View

Depending on the options you selected during configuration, your order grid may show new columns. Though information cannot be changed from the order grid directly, this offers a great "at-a-glance" perspective on how your team is performing in real time.

Keep in mind that admins can see all information here, but depending on which option you selected under "Non-Admin Users Can See," Other employees may not be able to see earnings or even names.

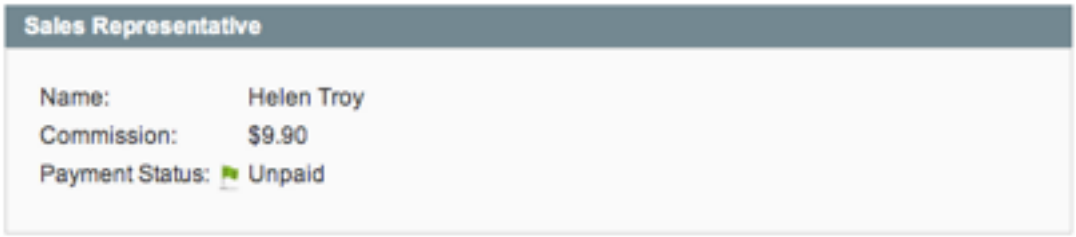
b) Order Page

In the order page, you will now see a new tab, which features all information about Sales Representatives:



The contents of this tab will look different depending on user permissions:

Names Only



Names & Earnings

Admin View

Depending on the user's permissions, he or she will see

- Name of the representative assigned to the order
- Commission Earned on the Order
- Payment Status of the order commission
- Dropdowns that allow admins to change the commission earner or payment status

Because different users may have different commission rates, the commission amount will be dynamically updated any time the commission earner is changed.

An explanation of the symbols displayed for each commission payment status. *Remember that commission payment status is entirely separate from order status!*

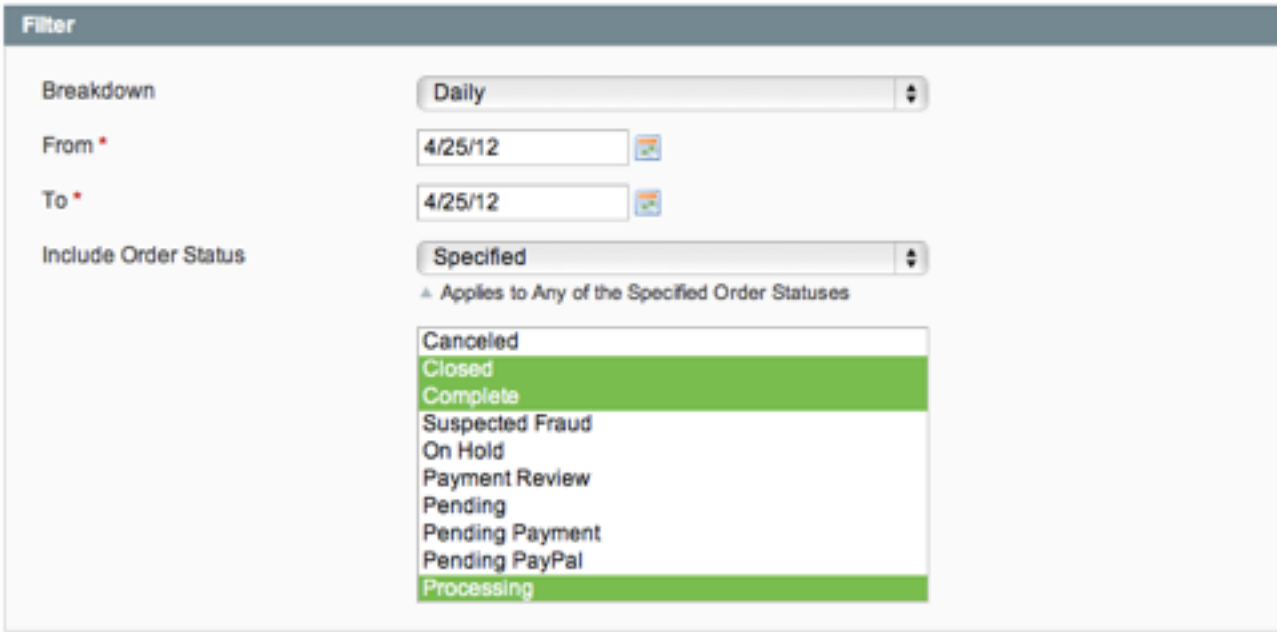
- Canceled
- Ineligible
- Unpaid
- Paid

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.

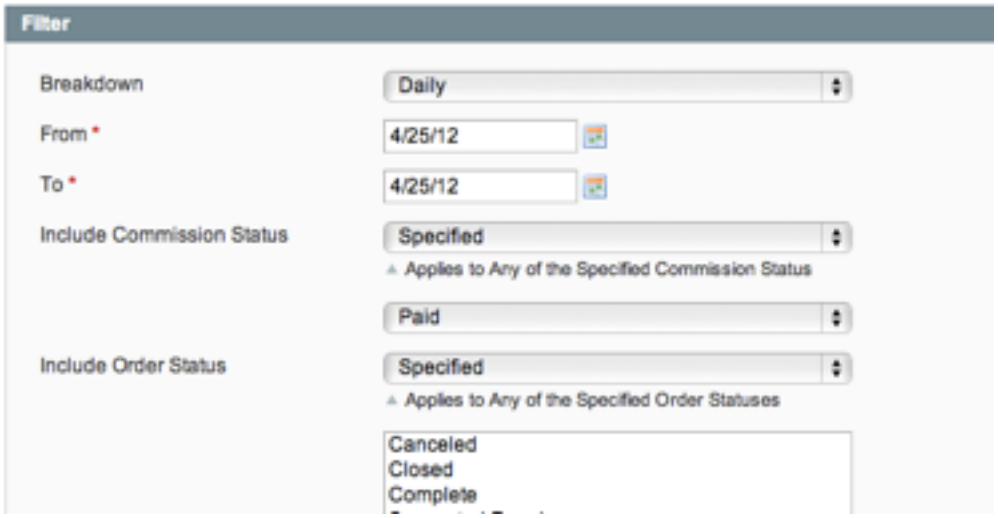
For this reason, it is especially important to use the "Include Order Status" selection if you wish to get more specific information. You may not, for example, want to count an order towards an employee's quota if payment has yet to come in. Conversely, you may want to run a report to see how many orders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



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.

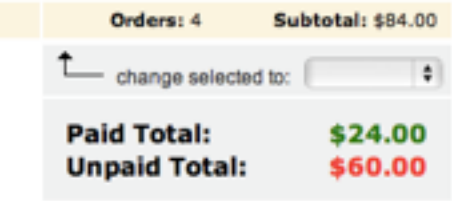
b) Commissions

The commissions report is a little bit more complicated, due to the fact that you can actually change information (in bulk) from within it.



As before, you have breakdown and date range options, as well as the order status inclusion, so that you can run reports and generate commissions only for completed orders, if you like.

In this report, however, you can also choose to generate reports only for PAID or UNPAID commission statuses, which can be extremely helpful. If you choose not to specify, however, the two totals will still be separated at the bottom of the report:



You may also notice a "change selected to" dropdown. This is the fastest and most effective way to change an order's commission payment status.

When doing this in bulk, you should probably take care to uncheck "ineligible" or "canceled" orders from the selection, unless you don't mind about the future "paid total" being inaccurate.

6. Tips & Tricks

- If you don't want to pay commissions on returned orders (this is entirely up to your policy as a business owner), we suggest generating reports and paying commissions for the time period you accept returns. Otherwise, you might pay a commission on an order that is later

returned, and have to retroactively subtract that amount. Due to the complexity of this process and the variances in return periods, we were unable to include this in the software

- From our experiences, it is best to let employees see each other's sales as a motivational technique. If employees have different commission rates, it's up to you. Generally, an organization increases the commission rate based on a sales bracket – i.e. 2 consecutive months of $50,000 sales. If every employee has an equal opportunity to reach the higher commission brackets, it can be highly motivational for them to see other employees' earnings. If, however, the different commission rates are based on other factors that employees have no control over, it's better to only show them names. We actually don't recommend showing employees their earnings only, because it takes away the competitive spirit and is like competing at a track event where each lane is divided by a visual barrier – where is the fun or motivation in that?
- Please be extremely diligent in marking orders when they are returned or canceled. Make sure that the commission status is moved appropriately so that you don't end up paying an employee a commission for an order that never materialized
- Likewise, we recommend deselecting all "pending" and "awaiting" statuses (i.e. orders that haven't actually been paid) when generating the report that will actually result in a check. Unless you're very generous, you probably don't want to give commissions to employees for orders they don't actually close!
- On that note, you should also be diligent in marking commission statuses "paid" – unless you feel like unofficially doubling your employees' commission rate by paying twice!
- The bottom line is to make sure you are cautious and use the software correctly!

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.

Thank you for reading, and we hope you enjoy the fruits of our labor!