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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 and maximizing 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. With our new Deluxe Edition, you can even obtain information on the efficacy of your managers, and reward them for the performance of their teams. Needless to say, the features have 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

**Important Note: Always back up your database before installing or modifying any piece of software on a live website. Though just a precaution, this step is particularly important for those upgrading from Basic or Deluxe versions.**

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 $100/hour. A typically installation takes 1-2 hours.

## b) Data Migration (For Existing Users of Basic & Pro Only)

Deluxe Edition uses a more complex database structure, which requires users of Pro and Basic to upgrade. To prevent confusion or false payments, Managers and Manager Commissions will **not** be assigned to older, migrated-orders.

**Important Note: If you are upgrading from Basic or Pro Edition, you must uninstall the existing module first! This is done in the same place as the installation process:**


**Once you have backed up your data, we will need to manually migrate your data to the new database structure.**
Lucid Path Consulting can do the migration for you at no charge.

To request a migration of your existing data, please visit http://lucid-path.com/support and create a new ticket. We need the following information:

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

Data migrations are performed in the order they are received. We strive to complete all tickets within 48 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 tab with information about Sales Reps and Managers
- 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 is an entire (and very long) list of permissions you'll need to specify for each of the various roles.

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 | | |
| Module is Active | ◆ Yes<br>◆ No | Choose whether or not the module will be active. If there are any issues with the module, you should set this to "No" while you await a response to your support ticket. |
| Commissions | | |
| Default Status for New Orders | ◆ Unpaid<br>◆ 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 Sales Rep Commission % | {Text Field} | Choose what the default commission rate will be (individual reps' rates and product rates can vary, this is just the default) |
| Default Manager Commission % | {Text Field} | What percentage should managers be paid? Below you'll specify what this percentage is applied against. |
| Manager Commission based on | ◆ Order Subtotal<br>◆ Employee Commission | Do you want your managers commission to be a percentage of the order subtotal, or of the employee commission? For example, you can reward the manager with 1% of the order subtotal, or give him 10% of the commission earned by his employee (if you rely heavily on product-specific rates, for example). |
| Checkout | | |
| Display representative selector at back-end (admin) checkout | ◆ Yes<br>◆ 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<br>◆ 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? |

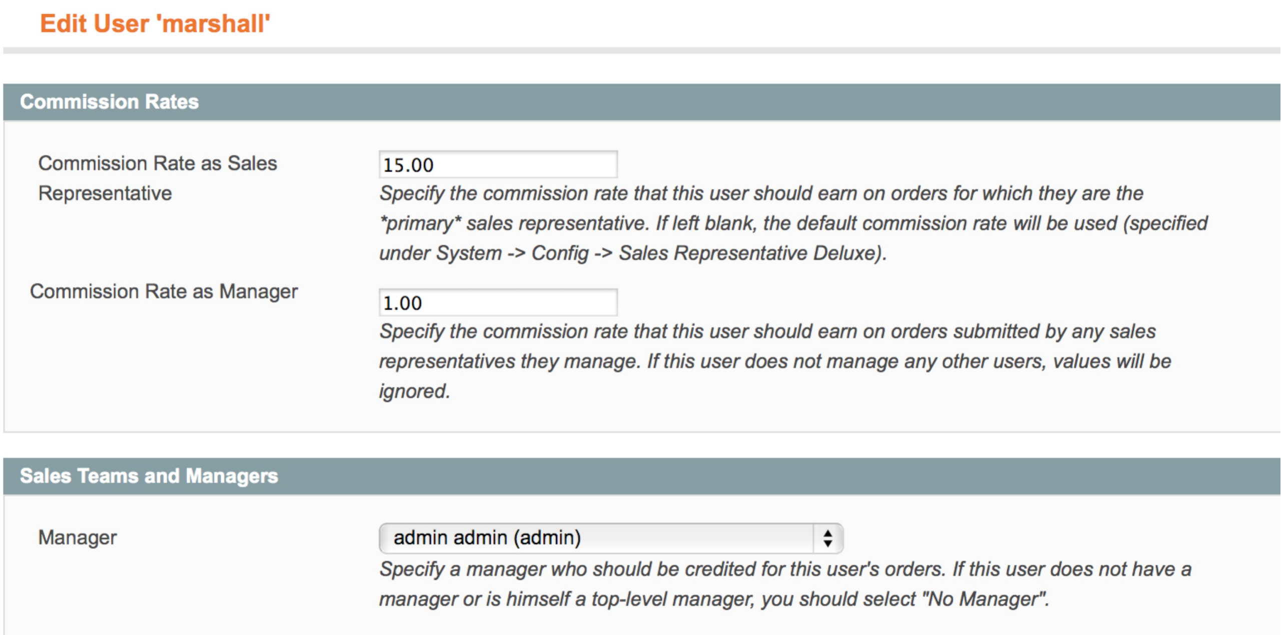
| | | |
|---|---|---|
| Users | {Selection Field of Users} | Use the Ctrl key to select multiple users to display on the front end. Those not selected will not be shown |
| **Report Defaults** | | |
| Order Statuses | ◆ Complete<br>◆ On Hold<br>◆ Processing<br>◆ (etc etc) | Which order statuses would you like to be shown by default when the report is generated? |
| Sales Rep. | (List of your users) | Which reps would you like to be shown by default when the report is generated? |
| **Email Reports** | | |
| Send Report | ◆ Yes<br>◆ No | Do you want the reports to be emailed automatically? |
| 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 | ◆ Employees Only<br>◆ Managers Only<br>◆ Admins Only<br>◆ Employees & Managers<br>◆ Managers & Admins<br>◆ Everyone | 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<br>◆ Every Weekday<br>◆ Every Friday<br>◆ 15th & Months End<br>◆ Months End | How frequently email reports are sent. Month's end is the last day of the month, be it $29^{th}$, $30^{th}$, or $31^{st}$. |

## b) Permissions

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

### i) Users

In the User Permissions area, we specify a few key user-specific settings. These include custom commission rates where applicable, as well as manager/employee relationships.




Any values input (including 0) in the Commission fields will override the defaults you have set in the Main Configuration Screen. If you leave these fields blank, the defaults will be used.

Furthermore, here you are able to specify a manager who should be credited for this user's orders. If this user does not have a manager or is himself a top-level manager, you should select “No Manager.” For more detailed explanations, see the italic text below each of the fields on the Users Permissions screen.

To configure this section:

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 “Commission” tab on the left
4. Enter the custom commission rates (Manager and Sales Rep) for that user
5. Select a Manager for this user from the list of active users (or select “No Manager”)
6. Click “Save User” on the top right
7. Repeat for all employees who earn a custom commission rate or have a manager

### 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.

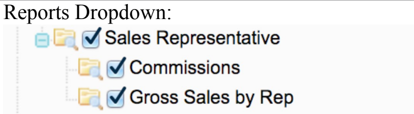
For the Deluxe Edition of our app, we have offered more flexibility and detail than ever before, and have organized all permissions into one area for your convenience.

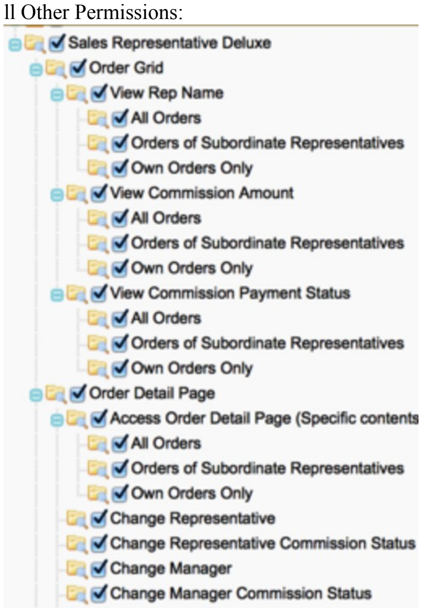
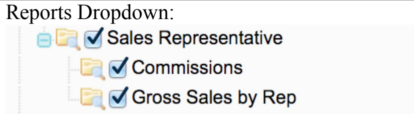
**Typically, we recommend having at least 3 levels of permissions: Admin (Store Owner), Manager, and Sales Rep.** For your convenience, we will show you examples below of how we suggest you configure the permissions for each of these roles.

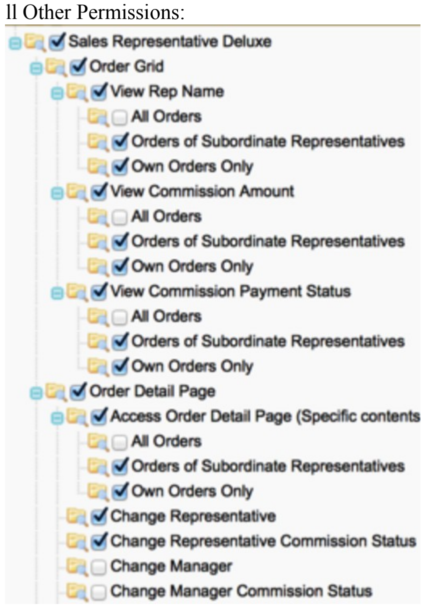
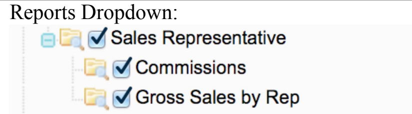
To configure these roles:

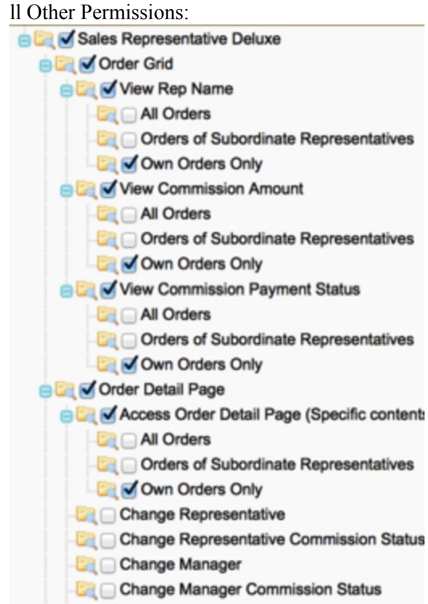
1. Head over to System -> Permissions -> Roles
2. Create or Select the first group (You may need to add a new ones via "Add New Role")
3. Click the "Resources" tab on the left
4. Select the appropriate permissions according to the group (see below for guidance)
5. Click "Save Role"
6. Repeat for each of your permissions roles

These permissions should be fairly self-explanatory, and we recommend thinking about your business' specific needs in order to design a custom permission-set for each role that suits your needs. However, in order to get you started, here are our suggested permissions.

<table>
<tr><th>Admin (Store Owner)</th><th>Manager</th><th>Sales Representative</th></tr>
<tr>
<td>Summary: The admin should be able to see and modify ever aspect of the module's functionality. The easiest way to do this is to assign "All" resource access in the dropdown, however, if you have a partner, high level manager, or for some reason want to withhold certain permissions from an admin-level login, you can select "Custom" and select however many "All Users" checkboxes as you see fit. Of course, having multiple levels of Admins is an option, as well.</td>
<td>Summary: Managers should be able to see and modify the orders of the people they manage, and also their own orders. It's up to you to decide if managers have the capability to modify commissions, commission rates, payment statuses, assigned sales representatives, depending on the level of trust you place in your managers. Optionally, you can create multiple classes of managers, giving more permissions to some managers.</td>
<td>Summary: Sales Reps should only be able to view commission details of their own orders, unless you wish for them to see the commissions of other reps as a motivational tactic. Under almost no circumstances should they be able to update commissions, rates, or commission payment statuses, nor should they be able to change the assigned rep on an order. It's generally a good idea to allow reps to see who is the assigned rep on an order, though, for customer service efficiency.</td>
</tr>
<tr>
<td>Reports Dropdown:


ll Other Permissions:

</td>
<td>Reports Dropdown:


ll Other Permissions:

</td>
<td>Reports Dropdown:


ll Other Permissions:

</td>
</tr>
</table>


It's worth investing time in creating these roles and permissions, as mistakes can be costly and embarrassing. Put in the time to think about what roles your reps, managers, and fellow admins should be able to fulfill in the order and commission process.

# 4. Orders

## a) Order Grid

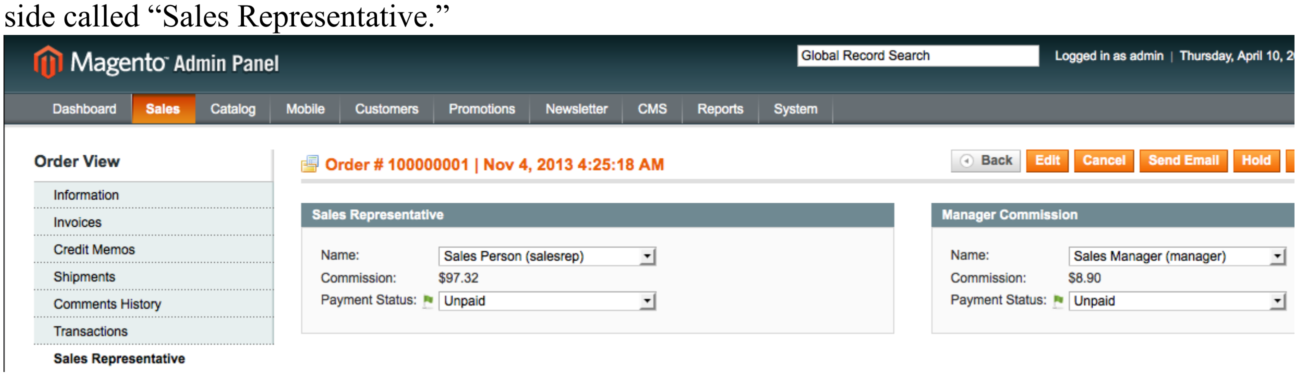
| | | | | | | |
|---|---|---|---|---|---|---|
| $404.95 | $404.95 | Canceled | Yuriy Malov | $38.00 | Canceled | View |
| $384.95 | $384.95 | Pending | Yuriy Malov | $36.00 | Unpaid | View |
| $254.97 | $254.97 | Pending | Yuriy Malov | $24.00 | Unpaid | View |
| $254.97 | $254.97 | Pending | Yuriy Malov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

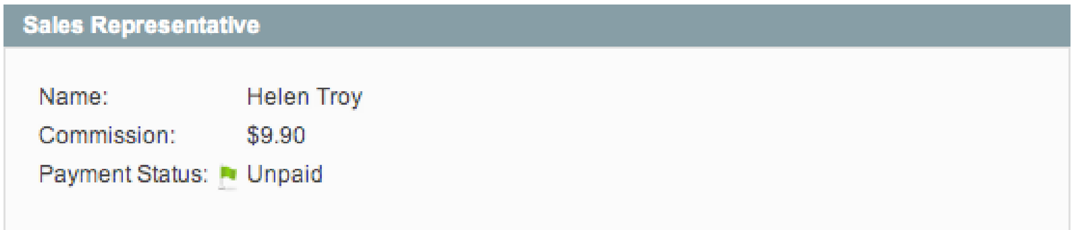
Unlike previous editions, Deluxe moves all commission information into a new tab on the left hand side called “Sales Representative.”




This area can look very different to different user roles, depending on the Permissions you’ve assigned in the Permissions -> Roles -> Resources area detailed above.

Here are some examples of how the Sales Representative block could look, depending on the different permissions sets. Note that the Manager block can be similarly configured, and is independent of the Sales Representative block.


View Rep Name Permission selected, but no others




View Rep Name, View Commission Amount, View Rep Commission Payment Status all selected.


Admin View, or any permissions class where Change Representative and Change Representative Commission Status are enabled.

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

- Name of the representative assigned to the order
- Name of the manager assigned to the order
- Commission Earned by the Sales Rep
- Commission Earned by the Manager
- Payment Status of the Sales Rep's commission
- Payment Status of the Manager's commission
- Dropdowns that allow admins to change the commission earner or payment status

It's up to you to decide if reps can see other reps' commissions, their manager's commissions, and so on.

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

Admins (or managers with appropriate permissions) can easily update commission payment status to reflect whether or not commissions are eligible or paid. The default, as assigned in the first step of the configuration, will be applied to all new orders.

For tips and tricks on how to best use the Commission Status feature, check out section 7.

# 5. Customers

In the Deluxe Edition, customers can be assigned semi-permanently to a rep. This means that all future orders from that customer, whether entered in the front end or back end, will be credited to the rep they are assigned, until changed by an Admin or Manager with sufficient permissions.

If a rep inputs an order for a customer that is not his own, he will not have the ability to assign himself as the commission earner, unless he has been given the appropriate permissions.

## a) Assigning Representatives to Customers

If a representative creates a new customer from the back-end, he will automatically be assigned as the representative for that customer. This can be changed by an Admin or Manager with appropriate permissions.

Any customer that has already been assigned to a sales representative will **not** see the checkout selector or checkout step on the front end of the website.

If a customer *without* a rep creates an order on the front-end of the site where the front-end selector has been enabled, his choice of rep will be **not** be assigned to his account automatically. This is to allow for customers to be served by multiple reps in the future.


To assign a representative to a specific customer:

1. Navigate to Customers -> Manage Customers
2. Select the Customer you wish to assign
3. Click the “Sales Representative” tab on the left
4. Select the appropriate representative from the dropdown
5. Click “Save Customer” on the top right
6. Repeat for each of the customers you wish to assign.

Note that if “No Sales Representative” is selected, the customer will be able to choose a sales representative at checkout. If he has an assigned representative, the checkout selector will not show at all.

### b) Changing Assigned Representatives

Assigned representatives can be changed by an Admin or Manager with appropriate permissions, using the same process as manually-assigning a representative for the first time.

Once the representative is changed, the manager will also be changed to coincide with the manager of the newly-assigned rep.

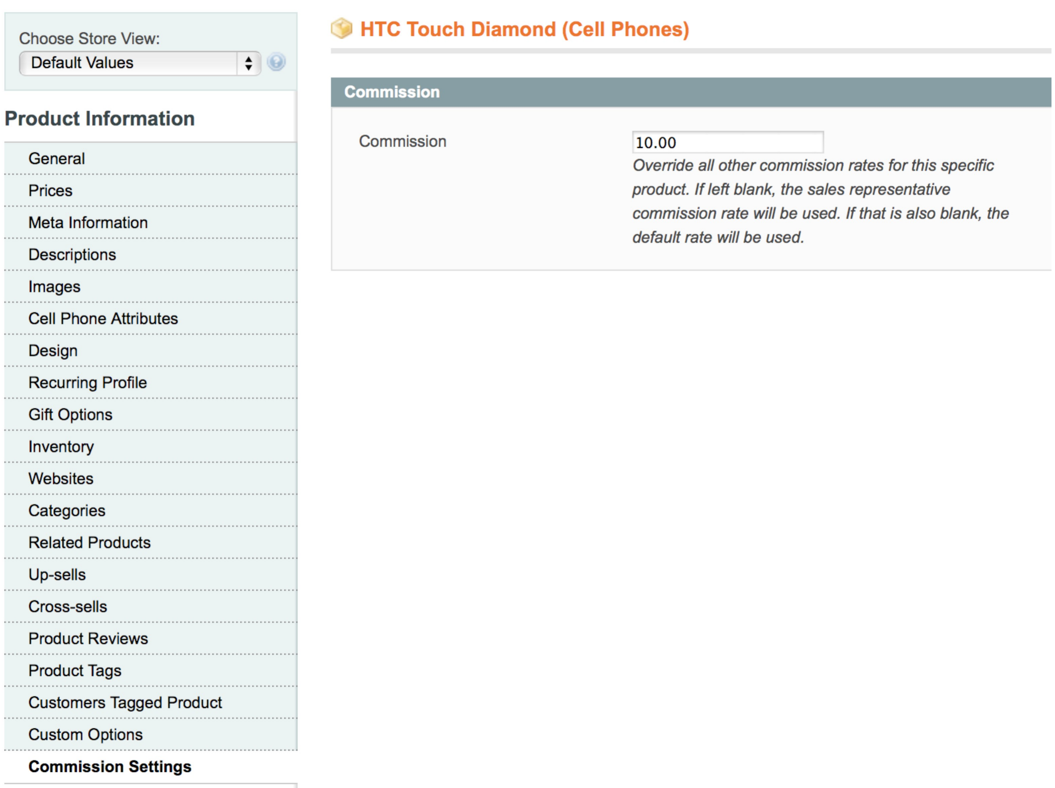
Furthermore, all previous orders will remain unchanged, and will still be credited to the rep that served the customer at the time of placement.

## 6. Products

One of the most anticipated features of our Deluxe Edition is the ability to assign specific commission rates to individual products. This allows you to incentivize representatives to sell particularly profitable products (either permanently or temporarily). It also allows you to prevent losing money on products with tight margins. Once a commission rate is changed, past orders will not be affected.

If you do not wish for a product to have a special commission rate, you can simply leave it be and the default commission rate will be used.

### a) Changing the commission rate on a specific product




To change the commission rate of a specific product:

1. Navigate to Catalog -> Manage Products
2. Select the Product you wish to modify
3. Click the "Commission Settings" tab on the left
4. Input the custom commission rate you wish to use
5. Click "Save" on the top right
6. Repeat for each of the products you wish to override

## 7. Reports

In Deluxe, unlike Pro or Basic, we keep track of Manager commissions and the sales of a Manager's team. All information is shown in the same reports, in order to give you a complete picture of both Managers and their teams in one glance. For this reason, it's necessary to designate between a Manager's own sales and those of his employees.

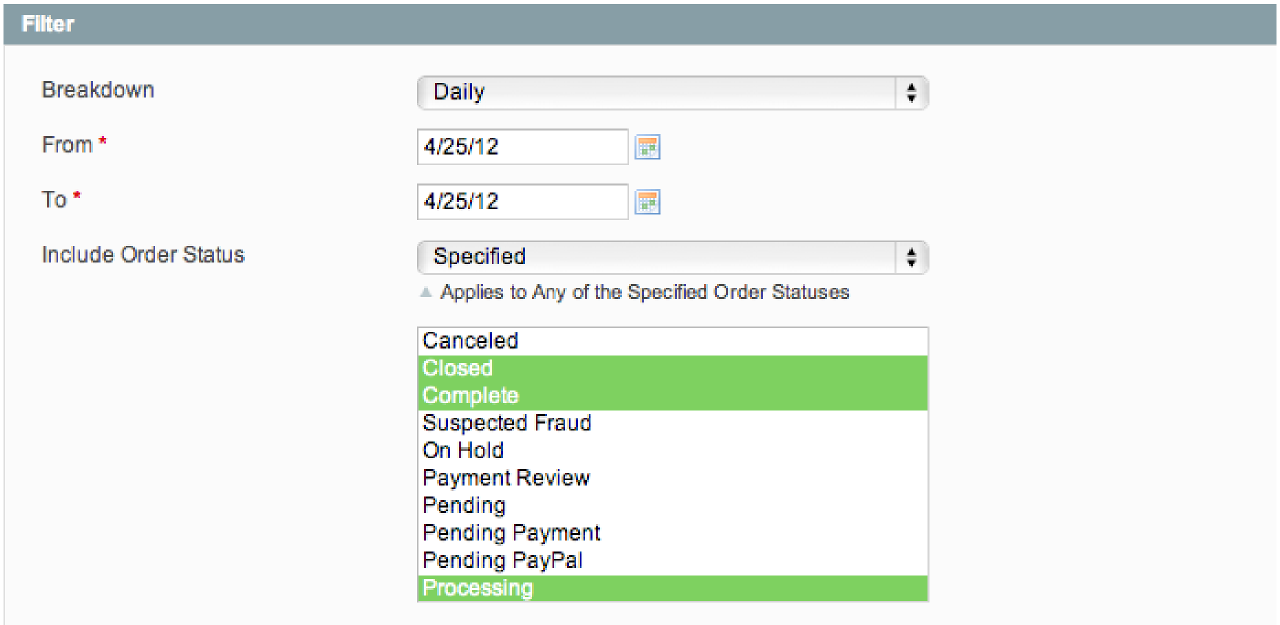
Orders submitted by Managers themselves will appear as normal. However, orders submitted by a Managers' team will appear under that Managers' column with (M) after it.

| Brian Salesmanne | | admin admin | | No Sales Rep. |
|---|---|---|---|---|
| 100000010 | $75.00 | 100000008 | $75.00 | 100000003 |
| 100000013 | $95.00 | 100000010 (M) | $7.50 | 100000006 |
| 100000014 | $79.95 | 100000013 (M) | $9.50 | 100000011 |
| 100000026 | $75.00 | 100000014 (M) | $8.00 | 100000016 |
| 100000028 | $75.00 | 100000026 (M) | $7.50 | 100000018 |
| 100000031 | $75.00 | 100000028 (M) | $7.50 | 100000020 |
| 100000037 | $75.00 | 100000031 (M) | $7.50 | 100000022 |
| 100000040 | $20.00 | 100000037 (M) | $7.50 | 100000024 |
| | | 100000040 (M) | $2.00 | 100000029 |
| **Orders:** 8 | **Subtotal:** $569.95 | **Orders:** 9 | **Subtotal:** $132.00 | |
| change selected to: | | change selected to: | | |
| **Paid Total:** | **$0.00** | **Paid Total:** | **$0.00** | |
| **Unpaid Total:** | **$569.95** | **Unpaid Total:** | **$132.00** | |

### 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.

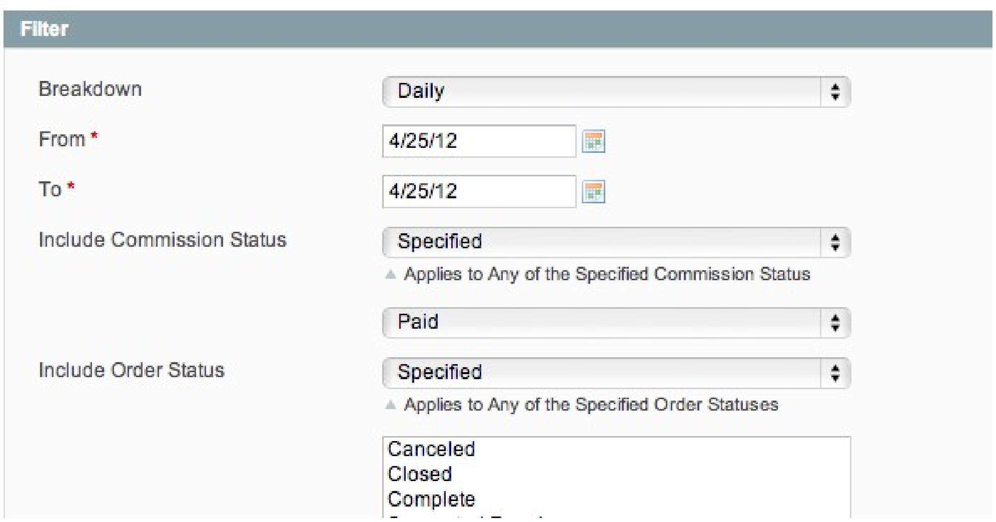
For this reason, it is especially important to use the "Include Order Status" selection if you wish to get more specific information. You may not, for example, want to count an order towards an employee's quota if payment has yet to come in. Conversely, you may want to run a report to see how many orders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

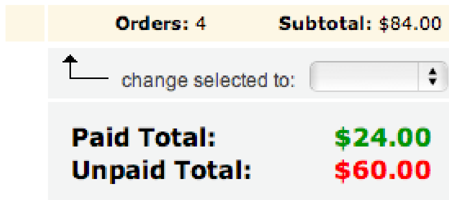
## b) Commissions

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!

Likewise, if you need help, we are here to serve you.

The best way to get in touch with us if you have problems is to use the support ticket system at http://lucid-path.com/support
The second-best way is to email jon@lucidpathconsulting.com
You can also give us a call at (408) 663 – 1887, but please note that we work very strange hours and generally are not available during US business hours!

Thank you for reading, and we hope you enjoy our Deluxe Edition. If you do, please take a moment and write us a review on Magento Connect!