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### CloudComp App Install

#### App Install: Always Grant Access for System Administrators Only

Click through the install screens and accept the defaults.

If you're installing CloudComp in a Production Salesforce Org, the recommended approach is to Select <u>Specific Profiles</u> and then accept the default of <u>System Administrator Only</u>. If your user does not have the standard System Administrator Profile, then you can select the System Administrator Profile in addition to your own profile which will be selected by default. It is very important to understand that when Salesforce displays the choice of "Admins Only" on an App install, this will include any of the profiles that Salesforce considers to contain Admin-level system permissions, such as view-all or modify-all. If you install a Salesforce Managed App for "Admins Only", such profiles will be granted App permissions by Salesforce that will likely be greatly in excess of what may be expected.

#### **App Install: Assign Licenses**

Navigate to Setup->Installed Packages->CloudComp and click Manage Licenses.

#### **App Install: Permission Sets**

There are Permission Sets included with CloudComp which will set the access for Compensation Recipients and Compensation Administrators. To use the Permission Sets, simply assign them to Salesforce Users when you're ready to grant access.

#### User Requirements for CloudComp

- **a.** Active Salesforce or Platform User with a CloudComp App License.
- **b.** CloudComp Plan Assignment to a CloudComp Compensation Plan with date range that overlaps at least 1 day of the fiscal period in which compensation is being generated.







**c.** Has at least 1 CloudComp Quota for fiscal period in which compensation is being generated that matches the Quota Type referenced by at least 1 Compensation Plan Tier on the assigned Plan.

### **CloudComp Quotas and Compensation Setup**

#### CloudComp Revenue Types™

CloudComp Revenue Types enable you to create any number of custom definitions of Quantity or Revenue using any standard or custom objects in your Salesforce org. All you need is a Number or Currency field, a Date field and either a lookup field referencing the User object, or a text field or formula of type text containing a valid Salesforce User Id.

#### Setup Step 1: Create a Revenue Type

- a. Navigate to the CloudComp Revenue Types Tab and click "New".
- b. You may accept the defaults for Opportunity object with Amount, Close Date and Ownerld, or you may optionally select other valid fields on the object, (such as a custom Opportunity Amount Field) or you may select a different standard or custom object and associated fields according to your specific Compensation requirements. Name your Revenue Type using a descriptive name as shown.

IT REVENUE TYPE		
Name	Opportunity Amount by CloseDate	
Object	Opportunity	•
Data Type	Revenue	\$
Revenue Field	Amount	<b>*</b>
Date Field	CloseDate	\$
Identifier	User Id (default)	*
User Id Field	OwnerId	\$
Deal Object	Opportunity	*
Deal Name Field	Name	*
Deal Sequence Field	CloseDate	*
Deal Id Field	Id	*
Expense Date Field	CloseDate	*
Release Date Field	CloseDate	<b>_</b>





#### Setup Step 1: Add Revenue Type Filters

Revenue Type Filters enable you to add conditions such as IsWon equals true, which selects for Won Opportunities.

You may create up to 6 Filters and you can also include filter logic (click "Use Filter Logic'). Single picklist entries are presented as multi picklists and within the context of each individual filter, if you select more than 1 option, they are combined as alternate ("OR") choices. If you wish to implement complex logic, you can also create a formula field on your standard or custom object that encapsulates your logic and then reference your new formula field from a Revenue Type Filter.

#### **To Create Filters:**

- c. Click "Add Filter"
- d. Select Field, Operator and Value as shown. A typical filter would be the IsWon field equals true, which will select for only Closed Won Opportunities.
- e. Click "Save" or "Quick Save".

Opportunity Amou	int by CloseDate	Quick Save	Save	Cancel	
DIT REVENUE TYPE					
Name	Opportunity Amount by C	loseDate			
Object	Opportunity			•	
✓ Select				•	
Account[Account]->				•	
Campaign[Campaign]->					
Contract[Contract]->		_		•	
Pricebook2[Pricebook2	]->			\$	
CreatedBy[User]->					
LastModifiedBy[User]->	,			÷	
LeadGenerator_r[User]	->				
Owner[User]->				•	
rfSplitsTemplater[rf	_SplitsTemplate_c]->			<b></b>	
AccountId		-		•	
Amount				\$	
Campaignid					
ClosedWap a				÷	
Contract Start Date of				•	
CreatedByld				•	
CustomRevenueField				<u> </u>	
CustomRevenue c	, ,			•	
Fiscal				\$	
FiscalQuarter					
FiscalYear					
ILTEF ForecastCategory					
ForecastCategoryName					
HasOpenActivity					
HasOpportunityLineIten	n	ve Save	Cancel		
Filter		Operator		Value	Delete
IsClosed				- Turuc	
1 IsDeleted		None			
Iswon		_			
LastModifiedBuild					





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### **CloudComp Commission Anything™ Admin Guide - Spring 2025**

# Setup Step 1 (Example 2): Track Quantity for a specific Product Family

- a. Create a new Revenue Type.
- **b.** Object: Select OpportunityLineItem.
- c. Data Type: Quantity.
- **d.** Date Field: ServiceDate to use the Date field from the Product, or Opportunity.CloseDate to use the Close Date of the parent Opportunity.
- e. Identifier: UserId
- f. User Id Field: Opportunity.OwnerId
- **g.** Add filter: Opportunity.IsWon equals True, to capture only those product records that are children of Closed Won Opportunities.
- **h.** Add filter: Product2.Family equals [Product Family of your choice]
- i. Click Save.

### **Clone Revenue Types**

Navigate to the Revenue Type. Click "Clone". A new clone of the Revenue Type record will open in the CloudComp Revenue Type Management Interface along with any associated Revenue Type Filters.

	e TYPE rtunity Produ	ct QTY - Fam	ily = Su	Quick Save	Save	Cancel		
EDIT REVENUE	ТҮРЕ							
	Name	Opportunity Pre	oduct QTY - Family	= Subscription	S			
	Object	OpportunityLine	Item			•		
	Data Type	Quantity				\$		
	Quantity Type	Field				\$		
	Quantity Field	Quantity				\$		
	Date Field	Opportunity.Clo	seDate			÷		
	Identifier	User Id (default)				\$		
	User Id Field	Opportunity.Ow	nerId			\$		
	Deal Object	Opportunity				\$		
	Deal Name Field	Opportunity.Na	ne			\$		
De	al Sequence Field	Opportunity.Clo	seDate			\$		
	Deal Id Field	Opportunity.Id				\$		
E	xpense Date Field	ServiceDate				\$		
F	Release Date Field	ServiceDate				\$		
FUTERS								
FILIERS								
		Add Filte	r Quick Save	Save	Cancel			
Filter Field					Operator		Value	Delete
1 Oppor	tunity.IsWon			÷	equals	\$	True 🛟	Î
2 Produc	ct2.Family			\$	equals	\$	Services Subscriptions Support	ŵ





Revenue Type Field	s Reference
Name	Name of Revenue Type
Object	Object (Salesforce standard or custom object)
Data Type	Revenue: Currency fields
	Quantity: Number fields or record count
Date Field	Date field to use on selected object for alignment with Fiscal Periods (for quotas, compensation etc.) Example: If Date Field is set to Close Date, Close Dates between 1/1/2020 and 1/31/2020 would qualify for a Jan FY 2020 Quota
Identifier	<ul> <li>User Id (default): Assign record according to User Id</li> </ul>
	<ul> <li>Sales Team Id: For special cases where Sales Team Id is assigned to data records (not to be confused with team-based quotas)</li> </ul>
User Id Field	User Id field on object being queried by Revenue Type
Deal Object	Object that will be declared as the "Deal Object" for Revenue Type. Example: If Object is
	OpportunityLineItem, then Deal Object would be set as Opportunity
Deal Name	
Field	Path to Name field of Deal Object from Object
Deal Sequence	
Field	Date or Date/Time field to sequence records by for tiers and accelerators.
Deal Id Field	Path to Id of Deal Object from Object





Revenue Type Field	s Reference
Expense Date Field	Default: Set to same field as Date Field. ASC 606 Example: Running compensation on revenue schedule entries where the rep accrues compensation on a multi-year contract at Close Date and is commissioned after closing the deal, then the Date Field will be set to Close Date and Expense Date Field will be set to Schedule Date of the revenue schedule entries. This will enable export of all multi-tier compensation data from CloudComp ordered by Expense Dates thereby enabling recognizing commission expenses in accordance with revenue recognition.
Release Date	
Field	Date field for alignment with Pay Periods for Payment. Default: Set to same field as Date Field.





Revenue Type Filters: Select single or multiple picklist options

Picklist entries are presented as multi pick lists in Revenue Type Filters.

Within the context of each individual filter, if you select more than 1 picklist option, they are combined as alternate ("OR") choices.

Filter #2 in the screenshot will query for Type = New Logo OR Upsell.

Opportunity Amt by (	Owner and CloseDate	Quick Save	Save	Cancel						
EDIT REVENUE TYPE										
Name	Opportunity New Logo / Upsell ARR by Owner and Clo	seDate	Ī							
Object 🚺	Opportunity		Ø							
Data Type 🧃	Revenue		Ø							
Revenue Field 🖪	ARRc		Ø							
Date Field 🖪	CloseDate		0							
User Id Field 🕚	Ownerld		Ø							
Deal Object 🧃	Object () Opportunity				Ø					
Deal Name Field 🧃	Deal Name Field () Name				Multiple options selected for a picklist are processed as "OB". So these would					
Deal Sequence Field 🔇	CloseDate		Ø	query for Type = "New Logo" OR "Upsell"						
Deal Id Field 🔇	ld			1						
Expense Date Field 🖪	CloseDate		0							
Release Date Field 📵	CloseDate		Ø	0						
Rate Type Field 📵			Ø							
FILTERS Use Filter Logic	Add Filter Quick Sa	re Save	Cancel							
Filter Field		Operator		1	/alue	Delete				
1 IsWon		equals		<b></b>	TRUE	Ū				
2 Туре		¢equals		;	New Logo Renewal Upsell					





Revenue Type Filters: Query for multiple string values

You can query for single or multiple text (string) values. To query for multiple text strings in a single filter, concatenate them with a double bar "||" as shown in the screenshot. This will query for your multiple text strings as alternate (OR) values.

Filter #2 in the screenshot will query for Account Name starts with Grant OR Cassin.

Opportunity	Amoun	t by Owner and C	loseDate		Quick Save	Save	Cancel				
EDIT REVENUE TYPE											
	Name	Opportunity Amount	by Owner and	CloseDate		Ī					
C	bject 🕕	Opportunity				Ø					
Data	Type 🚯	Revenue				Ø					
Revenue	Field 🚯	Amount				0					
Date	Field 🚯	CloseDate	CloseDate								
User Id	Field 🚯	Ownerld				Ø					
Deal C	bject 🕕	Opportunity				Ø					
Deal Name	Field 🕕	Name				Ø					
Deal Sequence	Field 🚯	CloseDate				Ø					
Deal Id	Field 🚯	ld				Ø					
Expense Date	Field 🕕	CloseDate				0	Query multiple text (strir	ar) ontions by			
Release Date	Field 🚯	CloseDate				concatenating with double bar "II"					
Rate Type	Field 🚯					ø to	o signify "OR".				
FILTERS Nam Use Filter Logic	ie is a t	ext (string) data	type								
_			Add Filter	Quick Save	equals						
Filter Field					contains	110	alue	Delete			
1 IsWon					does not	contain		Ш			
2 Account.Name	9			Account.Name			Grant  Cassin	Ē			





#### **Revenue Type Filters: Use Filter Logic**

When you create two or more filters, the conditions will be combined together such as "1 AND 2". In other words, both conditions must be true in order to select any particular record. Filter Logic enables you to create combinations of filters with logic such as "1 AND (2 OR 3)".

Click "Use Filter Logic" and the filter logic box will appear above your Revenue Type Filters. Initial filter logic will be created automatically for all existing filters combined with AND such as "1 AND 2 AND 3". This default filter logic simply mirrors the way filters are already handled without filter logic being invoked.

You can now modify the filter logic to meet your needs such as "1 AND (2 OR 3)" as shown. The filter logic will be validated when you click "Save" or "Quick Save". If your filter logic is not valid, an error message will be displayed. If you add or delete filters, you will need to update your filter logic in order for it to be valid.

• O	PPORTUNITY PE	t by Owner and Close	eDate	Q	uick Save	5	Save	Cancel		
T REV	ENUE TYPE									
	Name	Opportunity Amount by Ow	mer and CloseD	ate		]				
	Object 🚯	Opportunity				],	Ø			
	Data Type 🚯	Revenue				0				
	Revenue Field 🚯	Amount				6	Ŷ			
	Date Field 🚯	CloseDate					Ø			
	User Id Field 🚯	Ownerld	Jwnerld							
	Deal Object 🚯	Opportunity	pportunity							
	Deal Name Field 🚯	Name				] ,	Ø			
	Deal Sequence Field 🚯	CloseDate			],	Ø				
	Deal Id Field 🕚	Id				] ,	Ø			
	Expense Date Field 🚯	CloseDate				Ø				
	Release Date Field 🚯	CloseDate				0				
	Rate Type Field 🚯					0				
	<b>O 1 1 1</b>									
	Click "U	se Filter Logic"	ar vour filter	r logic						
			your mo	liogio						
e Filte	r Logic									
	1 AND (2 OR 3)									
er	Field	A	d Filter Qui	ck Save	Save	Ca	ncel /alue		Delete	
	IsWon		equals		```	1	TRUE		1	
	Account.Name		starts with		、	Ĩ	Grant  C	assin	Ť	
	Туре		equals		```	i	New Log	30	Û	





#### **Revenue Type Test Panel**

The Test Panel is an essential tool for exploring your sales data and validating your CloudComp configurations.

The easiest way to set up CloudComp is to use Salesforce reports to query sets of records that you consider to qualify for Quotas or Commissions (we call these "Reconcile Reports"), then use the Revenue Type Test Panel to confirm that you have configured CloudComp to query the same sales data records as your Salesforce reports.

Going forward through setup, go-live and production you will consistently have a rock-solid approach to reconcile your CloudComp input and output.

To use the Test Panel, enter a User, set the date range and click "Run". For Sales Team (overlay) commissions, enter a Team Member. For larger data sets, reduce the date range and / or increase the Query Limit up to 1000 records.

TAILS	FILTERS	QUOTA TYPES	PLAN TIERS	TEST	Date range		
EST REV	VENUE TYPE	Entor	loor to toot				Click Run
		Enter C	JSET ID IESI				
User		Begi	nning CloseDate	Ending CloseDate	Query Limit (max: 1000)	Run 🗡	
В	ailey May	× * 1/	1/2021	12/31/2021	500	Run	

AILS FILTERS QUOTA TYPES PLA	N TIERS TEST	All Re	cords are	Close	ed Won	
EST REVENUE TYPE					Type = Ne	ew Logo
User Beginning Cl	oseDate Ending Clo	seDate	Query imit (r	nax: 100(	0) Run	
▲ Hailey May × ▼ 1/1/2021	12/31/20	21	500		Run	
Name	Amount	CloseDate	Ownerld	IsWon	Account.Name	Туре
1 Brakus, Parker and Price - Training	\$179,963.64	1/30/2021	Hailey May	$\checkmark$	Brakus, Parker and Price	New Logo
2 Fay, Fay and Bruen - Implementation	\$116,772.04	3/5/2021	Hailey May	$\checkmark$	Fay, Fay and Bruen	New Logo
3 Dicki Group - App Subscription	\$375,376.20	4/13/2021	Hailey May	$\checkmark$	Dicki Group	New Logo
	\$182,790.40	5/17/2021	Hailey May	$\checkmark$	Nienow-Mueller	New Logo
4 Nienow-Mueller - App Subscription				~	Wintheiser-Hvatt	New Logo
4 Nienow-Mueller - App Subscription 5 Wintheiser-Hyatt - App Subscription	\$62,336.01	6/6/2021	Halley May	*		
<ol> <li>A Nienow-Mueller - App Subscription</li> <li>Wintheiser-Hyatt - App Subscription</li> <li>Conn, Wyman and Bernhard - App Subscription</li> </ol>	\$62,336.01 tion \$275,800.23	6/6/2021 7/31/2021	Halley May Hailey May	~	Conn, Wyman and Bernhard	New Logo
<ol> <li>Nienow-Mueller - App Subscription</li> <li>Wintheiser-Hyatt - App Subscription</li> <li>Conn, Wyman and Bernhard - App Subscript</li> <li>Cassin LLC - Implementation</li> </ol>	\$62,336.01 tion \$275,800.23 \$10,723.02	6/6/2021 7/31/2021 8/5/2021	Hailey May Hailey May Hailey May	~ ~	Conn, Wyman and Bernhard Cassin LLC	New Logo Renewal
<ol> <li>A Nienow-Mueller - App Subscription</li> <li>Wintheiser-Hyatt - App Subscription</li> <li>Conn, Wyman and Bernhard - App Subscript</li> <li>Cassin LLC - Implementation</li> <li>Grant and Sons - Implementation</li> </ol>	\$62,336.01 tion \$275,800.23 \$10,723.02 \$1,082.60	6/6/2021 7/31/2021 8/5/2021 8/13/2021	Hailey May Hailey May Hailey May Hailey May	~ ~ ~	Conn, Wyman and Bernhard Cassin LLC Grant and Sons	New Logo Renewal Renewal





#### CloudComp Quota Types™

Quota Types enable CloudComp Quotas to be categorized according to Revenue Type, Fiscal Period (Month, Quarter, Year or Custom), and Individual or Team. CloudComp Compensation Plans enable you to configure your compensation rules according to Quota Types and Revenue Types for each Plan Tier (rather than by particular Users or particular Quotas). This enables you to assign users with different Quota amounts to common Compensation Plans, which can be used for any number of Users across any number of Fiscal Periods, while only updating Quotas and Plan Assignments.

#### Setup Step 2: Create a Quota Type

- **a.** Navigate to the Quota Types related list under your Revenue Type and click "New".
- **b.** Choose the Fiscal Period Type that you want for the associated Quotas, choose Individual or Team and Click "Save".
- **c.** Team Quota Type (Optional) if you would like to create Quotas for managers who will be compensated on the production of their CloudComp Sales Teams, create another Quota Type based on the same Revenue Type and set the Revenue Source to "Team".

#### **Clone Quota Types**

Navigate to the Quota Type. Click "Clone". A new clone of the Quota Type record will open in the CloudComp Quota Type Management Interface.

opportainty /			
LS FILTERS	QUOTA TYPES PLAN TIERS T	EST	
EVENUE TYPE DETAI	LS		
Field	Value	Status	
Revenue Type Name	Opportunity Amount by CloseDate	0	
Object	Opportunity	0	
Data Type	Revenue	0	
Revenue Field	Amount	0	
Date Field	CloseDate	0	
Identifier	UserId	0	
User Id Field	OwnerId	0	
Deal Object	Opportunity	0	
Deal Name Field	Name	0	
Deal Sequence Field	CloseDate	0	
Deal Id Field	Id	0	
Expense Date Field	CloseDate	0	
Release Date Field	CloseDate	0	

IT QUOTA TYPE				
Quota Type Name	None Month			
Period Type	√ Quarter			
Revenue Type	Opportunity Amount by	CloseDate	* *	
Revenue Source	Individual		\$	
Description				







🤹 🥺	QUOTA TYPE Mo-Team-Amount by Product Date										
DETAILS	QUOTAS	PLAN TIERS									
QUOT	A TYPE DETAII	LS									
		Quota Type Name	Mo-Team-Amount by Product Date								
		Period Type	Month								
		Revenue Type 🥥	Amount by Product Date								
		Revenue Source	Team								
		Description									





#### **CloudComp Quotas**

CloudComp Quotas can be utilized independently or in conjunction with CloudComp Compensation Plans. They store related lists of "Attainment" records which reference the records in Salesforce that the associated Revenue Type has been configured to query. When CloudComp Sync runs, Attainment records are created, updated or deleted in Quotas to maintain an ongoing, reportable view of the Compensation Recipient's progress toward their Revenue or Quantity Goals. When configuring CloudComp for "Straight Commissions" (where the compensation will not be tiered or variable according to Quota Attainment), you will still create Quotas in order to provide the containers for the Quantity or Revenue for each Recipient to be stored, but the quota amounts (targets) you enter will not affect compensation.

# Setup Step 3: Create Quotas for an Individual Salesforce User

- **a.** Navigate to the Quotas Related list under your new Quota Type and click "New"
- **b.** Enter an active Salesforce or Force.com licensed User in the User field
- c. Click "Next".

QUOTA TYPE Qtr-Indv-Opp	portunity Amount by Clos	t Delete
DETAILS QUOTAS	PLAN TIERS	
QUOTA TYPE DETA	ILS	
Quota Type Name	Qtr-Indv-Opportunity Amount by CloseDate	
Period Type	Quarter	
Revenue Type 🥥	Opportunity Amount by CloseDate	
Revenue Source	Individual	
Description		

🤹 Quo Qtr	TA TYPE -Indv-Oppo	rtunity Am	ount by C	loseD	Edit Del	ete		
DETAILS	QUOTAS	PLAN TIERS						
QUOTAS	là		New C	Quota				
Quota Nam	ne User Start	Date End Da	te Revenue	Quota Atta	ined Revenue	Quantity Quota	Attained Quantity	Sales Team
	LOUDCOMP Ianage Quotas	;-			Cancel			
QUOTA SETU	Ρ							
USER Select a Us amanda	er A Next	QUOTA TYPE	RANGE START	FISCAL YEAR	RANGE LENGTH	PLAN ASSIGNMENT	DATA TYPE SOURC	PERIOD TYPE





. **Tip:** CloudComp relies on the Salesforce Period Standard Object to align its Fiscal Period records with the Fiscal Year Settings of each Salesforce Org. If you get an error message from CloudComp Quotas saying that Fiscal Periods are not available, enable Forecasting in your Org and save an Opportunity in several years before and after the current year. This will trigger Salesforce to generate its Period records for your Org and CloudComp will then be able to access them to align its Fiscal Periods with your particular settings.

- d. Confirm that the Range, Start and Fiscal Year are the desired settings.
- e. Click "Edit Quotas" to enter your Quantity or Currency Quota Amounts. Use the blue fill-down arrows to fill your entries down through multiple records or your tab key to set values individually.
- f. Check the Recipient and Manager Sharing checkboxes to provide read-only access as desired and Click "Save".

	iotas - Amanda Bishop		Save	Quotas Ca	ancel				
						1			
QUOTA SETUP									
USER	QUOTA TYPE	RANGE START	FISCAL YEAR	RANGE LEN	GTH PLAN	ASSIGNMENT	DATA TYPE	SOURCE	PERIOD TYPE
Amanda Bishop [change]	Qtr-Indv-Opportunity Amount by Clos	Q1 🛟	2020 🛟	Auto	‡ Aut	:o 🛟	Revenue	Individual	Quarter
QUOTAS									
QUOTA NAME		START DATE	END DATE	REVEN	IUE QUOTA		R SHARE	MGR SHARE	THIS QUARTER
Q1 FY 2020 - Amanda Bishop	- Qtr-Indv-Opportunity Amount by CloseDate	1/1/2020	3/31/2020	1.8M		+ 🛛			\$1,640,636.93
Q2 FY 2020 - Amanda Bishop	- Qtr-Indv-Opportunity Amount by CloseDate	4/1/2020	6/30/2020			↓ 🖸			\$1,642,216.29
Q3 FY 2020 - Amanda Bishop	- Qtr-Indv-Opportunity Amount by CloseDate	7/1/2020	9/30/2020			↓ 🛛			\$2,076,882.57
Q4 FY 2020 - Amanda Bishop	- Qtr-Indv-Opportunity Amount by CloseDate	10/1/2020	12/31/2020			↓ 🛛			\$1,952,758.40





Manage Quotas - Amanda Bishop		Edit Qu	otas Cancel				
QUOTA SETUP							
USER QUOTA TYPE	RANGE START F	FISCAL YEAR	RANGE LENGTH	PLAN ASSIGNMENT	DATA TYPE	SOURCE	PERIOD TYPE
Amanda Bishop [change] Qtr-Indv-Opportunity Amount by Clos 💠	Q1 🛟	2020 🛟	Auto 🗘	Auto 🛟	Revenue	Individual	Quarter
QUOTAS							
QUOTA NAME	START DATE E	ND DATE	REVENUE	QUOTA	USER SHARE	MGR SHARE	THIS QUARTER
Q1 FY 2020 - Amanda Bishop - Qtr-Indv-Opportunity Amount by CloseDate	1/1/2020 3/	/31/2020	\$1,800,00	0.00	✓	✓	\$1,640,636.93
Q2 FY 2020 - Amanda Bishop - Qtr-Indv-Opportunity Amount by CloseDate	4/1/2020 6/	/30/2020	\$1,800,00	0.00	✓	✓	\$1,642,216.29
Q3 FY 2020 - Amanda Bishop - Qtr-Indv-Opportunity Amount by CloseDate	7/1/2020 9/	/30/2020	\$1,800,00	0.00	✓	<	\$2,076,882.57
Q4 FY 2020 - Amanda Bishop - Qtr-Indv-Opportunity Amount by CloseDate	10/1/2020 12	2/31/2020	\$1,800,00	0.00	✓	<	\$1,952,758.40

#### Viewing CloudComp Quotas

To view a CloudComp Quota, click on the Quota Name.

If the Compensation Recipient has data in your Org that matches the Revenue Type and Fiscal Period, then attainment records will be loaded to the Attainments related list under each Quota when you run CloudComp Sync.

To return to the Quota Management Interface from the Quota View Page, Click "Edit". To review the Read-Only Sharing rules that have been applied for Recipient and Manager, click on "Sharing".





CloudComp Quotas display live data in real-time to enable users and managers to see performance as it happens throughout the day (see "Revenue (live data)")

Attainment records are generated for CloudComp Quotas when CloudComp Sync is run, either from the UI in the App or during the regular scheduled CloudComp Sync jobs.







#### Viewing CloudComp Quota Attainment

To review the Attainment records for a Quota, click on the Attainment tab on the Quota.

	CLOUDCOMP     Edit     Delete     Sharing       Quota - Q2 FY 2020 - Amanda Bishop - Qtr-Indv-Opportunity Amount by CloseDate     Edit     Delete     Sharing												
DETAILS	ATTAINM	ENT											
QUOTA A	TTAINMENT												
Attainmen	it Name Us	er	Deal DateTime	<b>↓1</b> Date	Expense Date	Release Date	Record Name	Deal Name	Quantity	Revenue	Subtotal (Quantity)	Subtotal (Revenue)	Attainment Percentage
A-28279	An	nanda Bishop	4/5/2020 12:00 AM	4/5/2020	4/5/2020	4/5/2020	Howe and Sons - Training	Howe and Sons - Training	0.00	\$78,121.36	0.0000	\$78,121.3600	4.34007556%
A-28280	An	nanda Bishop	4/5/2020 12:00 AM	4/5/2020	4/5/2020	4/5/2020	Brekke-Kutch - Training	Brekke-Kutch - Training	0.00	\$217,703.43	0.0000	\$295,824.7900	16.43471056%
A-28281	An	nanda Bishop	4/6/2020 12:00 AM	4/6/2020	4/6/2020	4/6/2020	Zulauf-Greenfelder - Training	Zulauf-Greenfelder - Training	0.00	\$55,996.73	0.0000	\$351,821.5200	19.54564000%
A-28282	An	nanda Bishop	4/13/2020 12:00 AM	4/13/2020	4/13/2020	4/13/2020	Schmitt and Sons - App Subscription	Schmitt and Sons - App Subscription	0.00	\$131,126.42	0.0000	\$482,947.9400	26.83044111%
A-28283	An	nanda Bishop	4/15/2020 12:00 AM	4/15/2020	4/15/2020	4/15/2020	Kautzer Inc - Support Contract	Kautzer Inc - Support Contract	0.00	\$129,043.20	0.0000	\$611,991.1400	33.99950778%
A-28284	An	nanda Bishop	4/21/2020 12:00 AM	4/21/2020	4/21/2020	4/21/2020	Cummings, Graham and Schulist - Implementation	Cummings, Graham and Schulist - Implementation	0.00	\$358,662.87	0.0000	\$970,654.0100	53.92522278%
A-28285	An	nanda Bishop	4/24/2020 12:00 AM	4/24/2020	4/24/2020	4/24/2020	Beatty LLC - Support Contract	Beatty LLC - Support Contract	0.00	\$206,331.12	0.0000	\$1,176,985.1300	65.38806278%
A-28286	An	nanda Bishop	5/7/2020 12:00 AM	5/7/2020	5/7/2020	5/7/2020	Howe and Sons - Training	Howe and Sons - Training	0.00	\$73,197.24	0.0000	\$1,250,182.3700	69.45457611%
A-28287	An	nanda Bishop	5/23/2020 12:00 AM	5/23/2020	5/23/2020	5/23/2020	Zboncak-Wehner - Implementation	Zboncak-Wehner - Implementation	0.00	\$286,416.76	0.0000	\$1,536,599.1300	85.36661833%
A-28288	An	nanda Bishop	6/1/2020 12:00 AM	6/1/2020	6/1/2020	6/1/2020	Schneider Inc - Support Contract	Schneider Inc - Support Contract	0.00	\$1,443.00	0.0000	\$1,538,042.1300	85.44678500%
A-28289	An	nanda Bishop	6/24/2020 12:00 AM	6/24/2020	6/24/2020	6/24/2020	Runte and Sons - Support Contract	Runte and Sons - Support Contract	0.00	\$104,174.16	0.0000	\$1,642,216.2900	91.23423833%
Reco	rds Per Page:	20		\$	F	Records: 11 of	11						







#### **CloudComp Sales Teams**

CloudComp Sales Teams enable you to measure and reward the performance of your managers according to the performance of Sales Teams comprised of any CloudComp-Licensed, active Users in your Org. You can make as many Sales Teams as you wish. Sales Teams are assigned to Quotas when the Revenue Source of the Quota Type is set to "Team" and they include Start Dates and End Dates for Team Members for change management purposes. When CloudComp Sync runs, Team-based Quotas will be populated with Attainment entries for referenced records that match the criteria of the underlying Revenue Type where the User Id of the records match the User Ids and date ranges of the Team Members.

* Sales Team Name	Enterprise Sales Team - Rihanna Farmer	Parent Team	VP of Sales - Stephen Matthews ×
Description		Inactive 🕕	
			Cancel Save & New Sa





**Tip:** Sales Team Member Contribution Rate is defaulted to 100% which will usually be correct and Start and End dates are optional, so if you're not doing anything intentional with these fields, it will be advisable to accept the defaults of no dates and 100% Contribution Rate.

#### **CloudComp Sales Team Hierarchy**

CloudComp Sales Teams includes a drag-and-drop Hierarchy. All members of child teams are rolled up to parents, which enables only entering each member on a single team and allowing their User Id to qualify for manager overrides via team quotas referencing parent teams any number of levels above.

Ø			All 🔻 Q	Search Salesforce				*• =	
* * * * * * *	CloudComp Light	Home (	Opportunities 🗸	My Compensation	Reports 🗸	Dashboards 🗸	Revenue Types 🗸 🗸	Manage Sales Teams	
2	CLOUDCOMP Manage Sales Teams								
SALES	TEAMS TEAM HIERARCHY								
Te	am Hierarchy Refresh								
<u>ل</u> الار ا	CEO - Amanda Bishop								
-	SVP of Sales US - Carter Khai Image: SVP of Sales - Stephen Ma	n atthews							
	- 💭 Channel Sales Team - Andy Kimura								
	🔊 Enterprise Sales Team - Rihanna Farmer								
	🛄 Inside Sales Team - S	Stacy Owen							





#### Step 4 (Optional): Create CloudComp Sales Teams

- a. Navigate to the CloudComp Manage Sales Teams Tab and click "New".
- b. Enter a descriptive name for your new Sales Team and click "Save".
- **c.** Navigate to the "Sales Team Members" related list underneath your new Sales Team and click "New". Enter a User and accept the defaults.
- **d.** Enter the Start and End Dates for which Quantity or Revenue should be allocated for the team member. Quota Attainment records will only be assigned to Quotas for each Team Member according to these dates. Optionally, you may also modify the Contribution Rate if you wish to modify the amount of Quantity or Revenue that the user will contribute to the managers Quota.

	(Optional this team	) Date to begin accruing att member	tainment for
Team Member Name	tm12	Start Date	
Sales Team	Enterprise Sales Team - Rihanna Farmer	End Date 🕕	ä
User	Priscilla Niles X	Contribution Rate 🕕	100.0000%
Description			
			Cancel Save & New







### Setup Step 5 (Optional): Create Team Quotas for Managers

- a. Create a Quota Type with Revenue Source set to "Team".
- **b.** Create new Quotas for Managers from this Team Quota Type and populate the Sales Team Field in the Quotas with the Sales Teams.

						Sav	ve Quotas	Cancel							
QUOTA SETUP															
USER	QUOTA TYPE				RANGE START		FISCAL YEA	R	RANGE LEN	GTH	PLAN	ASSIGNMENT	DATA TY	PE	SOURCE
Andy Kimura [change]	Mo-Team-Amount by Pr	roduct Date		\$	Jan	\$	2020	¢	Auto	\$	Auto	\$	Revenue		Team
QUOTAS															
QUOTA NAME		START DATE	END DATE				REVENUE Q	UOTA	SALES TE	AM		USER	SHARE	🗆 MGF	SHARE
Jan FY 2020 - Andy Kimura - Mo-Tear	n-Amount by Product Date	1/1/2020	1/31/2020				4,000,000	Channel Sales × ×		× •	▼				
Feb FY 2020 - Andy Kimura - Mo-Tear	m-Amount by Product Date	2/1/2020	2/29/2020				4,000,000	00	Channel	Sales	× •				
Mar FY 2020 - Andy Kimura - Mo-Tea	m-Amount by Product Date	3/1/2020	3/31/2020				4,000,000	00	Channel	Sales	× •				
Apr FY 2020 - Andy Kimura - Mo-Tear	m-Amount by Product Date	4/1/2020	4/30/2020				4,000,000	00	Channel	Sales	× •				
May FY 2020 - Andy Kimura - Mo-Tea	m-Amount by Product Date	5/1/2020	5/31/2020				4,000,000	00	Channel	Sales	× •				
Jun FY 2020 - Andy Kimura - Mo-Tear	m-Amount by Product Date	6/1/2020	6/30/2020				4,000,000	.00	Channel	Sales	× •				
Jul FY 2020 - Andy Kimura - Mo-Team	-Amount by Product Date	7/1/2020	7/31/2020				4,000,000	.00	Channel	Sales	× •				
Aug FY 2020 - Andy Kimura - Mo-Tea	m-Amount by Product Date	8/1/2020	8/31/2020				4,000,000	.00	Channel	Sales	× •				
Sep FY 2020 - Andy Kimura - Mo-Tear	m-Amount by Product Date	9/1/2020	9/30/2020				4,000,000	.00	Channel	Sales	× •				
Oct FY 2020 - Andy Kimura - Mo-Tear	m-Amount by Product Date	10/1/2020	10/31/2020				4,000,000	.00	Channel	Sales	× •				
Nov FY 2020 - Andy Kimura - Mo-Tea	m-Amount by Product Date	11/1/2020	11/30/2020				4,000,000	00	Channel	Sales	× •				
Dec FY 2020 - Andy Kimura - Mo-Tea	m-Amount by Product Date	12/1/2020	12/31/2020				4,000,000	00	Channel	Sales	× •				





**Tip:** All Compensation rules are established via Compensation Plan Tiers. Each Tier requires a reference to a Quota Type and Revenue Type which must be related to the same object in Salesforce.

#### **CloudComp Compensation Plans**

CloudComp provides you the flexibility to define any number of detailed compensation plans to which you can assign one or many users for particular date ranges. Compensation Plans are comprised of a Compensation Plan object with a child object called Compensation Plan Tier where a compensation rules are configured. Each Plan Tier constitutes a Compensation rule. Each Plan Tier relates to a particular Object (standard or custom) and Fiscal Period type (month, quarter or year).

Users are assigned to Compensation Plans via Plan Assignments which can cover any date range and are not required to align with the boundaries of Fiscal Periods.

#### **Compensation Plan Edit Interface**

When you click "Edit" or "Clone" on a Compensation Plan, the Compensation Plan Edit Interface enables you to rapidly add new Plan Tiers and edit fields in multiple Plan Tiers using the blue fill arrows to fill down columns and the yellow fill arrow on the left to fill down entire rows.

All Plan and Tier fields in the Compensation Plan Edit Interface are configured via field sets on the Compensation Plan and Plan Tier Objects.





9 items	Compensation Plans All	d a few seconds ago	New Cange Owner Prin this list	itable View
	Plan Name 🕇	✓ Created Date	✓ Last Modified Date	~
1	AE - Channel Sales 2020 - (Product Basis)	12/10/2019 9:41 PM	12/10/2019 9:41 PM	
2	AE - Enterprise - 2020 (Product Mo Basis)	12/10/2019 9:41 PM	12/10/2019 9:41 PM	
3	AE - Inside Sales - 2020 (Product Basis)	12/10/2019 9:41 PM	12/10/2019 9:41 PM	•
4	CEO - 2020 (Deal Basis)	12/10/2019 9:41 PM	12/10/2019 9:41 PM	
5	Manager - Channel Sales - 2020 - (Product Basis)	12/10/2019 9:41 PM	12/10/2019 9:41 PM	•
6	Manager - Enterprise Sales - 2020 (Subscription Mo Basi	s) 12/10/2019 9:41 PM	12/10/2019 9:41 PM	•
7	Manager - Inside Sales - 2020 (Product Basis)	12/10/2019 9:41 PM	12/10/2019 9:41 PM	•
8	SVP - Sales - 2020 (Product Basis)	12/10/2019 9:41 PM	12/10/2019 9:41 PM	•
9	VP - Sales - 2020 (Product Basis)	12/10/2019 9:41 PM	12/10/2019 9:41 PM	•

#### Setup Step 6: Create a Compensation Plan

- a. Navigate to the Compensation Plans Tab and click "New".
- b. Enter a descriptive name for your Compensation Plan and Click "Save" or "Quick Save".





#### **Compensation Plan Tiers**

The Plan Tiers related list under CloudComp Compensation Plans is where you configure your compensation rules. Each Plan Tier is specific to a particular CloudComp Quota Type. Each Plan Tier applies to the of Fiscal Period type (month, quarter, year) specified in the Quota Type selected for the Tier and each Tier can calculate Compensation according to the Quota Attainment records, and also accrue Compensation against them, or alternatively can calculate compensation against separate Revenue or Quantity as defined by a different Revenue Type (example: a general quota type for all sales based on Opportunity Product Total Price could be entered on five Plan Tiers using five different Revenue Types which filter for a different Product Family and a separate Commission Percentage for each Product Family.

#### Setup Step 7: Create Plan Tiers

- a. Navigate to your Compensation Plan and Click "Edit" to enter the CloudComp Compensation Plan Editing interface.
- b. Click "New Plan Tier" for each rule you wish to create.
- c. Populate Tiers according to your Compensation rules.
- d. Click "Save" to save Compensation Plan and Tiers.

### **Compensation Plan Tier Field Descriptions**

1. Plan Tier Name

Name of Tier. Reflected in names of Compensation Tiers generated for user's Compensation records.

2. Calculation Method





- a. <u>Incremental</u> If Attainment Base is achieved; commissionable value will be incremental Quantity or Revenue as defined by the range between Attainment Base and Attainment Top (when applied to the target and attained quantity or revenue of user's quota).
- b. <u>All</u> (Retroactive). All Quantity or Revenue will be commissioned when Plan Tier Attainment Base % is achieved. When the Attainment Base % is achieved of Plan Tiers with > 0% Attainment Base, they will generate commissions retroactively across all records that qualify according to the associated Revenue Type, back to the beginning of the Fiscal Period (according to the associated Quota Type) and will continue executing beyond the Attainment Top to the end of the Fiscal Period. When Retroactive Tiers execute against prior records, Release Dates will be set to the Deal Date Time when the Tier Tier Base % was achieved, thereby enabling the new Retroactive Commissions to be associated with the current Pay Period.

If your Compensation Model calls for multiple Tiers of Retroactive Attainment-Based Commissions such as Tier 1: 4%, Tier 2: 8%, Tier 3: 10%, Configure your CloudComp Compensation Plan Tiers with Calculation Method: set to "All" and just add the difference between the Tiers Base: 4%, Tier 2: 4%, Tier 3: 2%. This is because Calculation Method "All" ignores the Attainment Top % on the Plan Tier, so Tier 1 is still delivering 4%, so you only need to add an additional 4% to achieve your retroactive 8% result for Tier 2.

#### 3. Attainment Method

<u>Sequence</u>: Commissionable amounts are applied to tiers according to attainment percentages calculated by datetime sequencing of deals ("Deal Sequence Field" on Revenue Type).

<u>Period</u>: Commissionable amounts are applied to tiers according to proportion of attainment by tier for fiscal period.







#### 4. Attainment Base

Attainment Percentage for base of Tier (when applied to the target and attained quantity or revenue of user's quota).

#### 5. Attainment Top

Attainment Percentage for top of Tier (when applied to the target and attained quantity or revenue of user's quota).

#### Quota Type

Tier will only be applied to Users Quotas of this particular Quota Type. This brings all attributes of each Quota into Tier calculations including Attainment, Sales Team, etc.

#### 6. Revenue Type

<u>Same Revenue Type</u> (as referenced by quota type on tier): Enter the same Revenue Type that the selected Quota Type is based upon. Quota Attainment will be used as Commissionable Quantity or Revenue according to rules in Tier.

<u>Different Revenue Type</u>: Establishes Attainment Percentages according to the Quota Type but filters the Commissionable Quantity or Revenue for commissions according to a separate Revenue Type (example: same quota type for general sale quota on all tiers with different revenue types on separate tiers filtering for different types of records for separate commission rates, such as separate products).

#### 7. Commission Percentage

Percentage commission to pay against "Incremental" or "All" commissionable amount if Tier Base is achieved.

#### 8. Commission Per Unit







9. Amount to pay per unit of Quantity.

#### 10. Bonus

Lump sum to pay when Attainment Base is achieved. Bonus can be accrued once per fiscal period as defined by Quota Type for tier. A Bonus can execute once per monthly, quarterly or annual Quota.

#### 11. Performance Award

References non-cash CloudComp Performance Award if Tier Base is achieved. A Performance Award can execute once per monthly, quarterly or annual Quota.

#### 12. Rate Table

CloudComp Rate Tables support multiple entries (Rate Table Lines) containing Commission Rates for Field Values in your sales data such as Insurance plan codes, product skus, product codes, product families, opportunity types, custom field values, etc. Rate Tables are perfect for situations where you have a detailed matrix of different commission rates which would otherwise result in a great number of Compensation Plan Tiers. See CloudComp Rate Tables section in the Admin Guide for more information on Rate Tables.

#### 13. Enable Year to Date Quotas

Checkbox on Plan Tier enabled via field set. The Year-To-Date Quotas Feature generates a related list of Quotas under associated Compensation Tiers. Bases Attainment percentage on To-Date Quota Amounts but pays against accrued amounts for current period. To set and view To Date Quotas amounts, add To Date Quota fields to Quota object field sets.





### Open a Compensation Plan for editing

Navigate to the Plan and Click "Edit"

Con AE	ppensation Plan - Channel Sales 2022 - (Product B		Ne	ew Contact	New Opportunity	Edit	New Case	New Lead	•		
Plan Tiers (6) Plan Assignments (4) 🗿 Compensation (10+)			+)								
$\sim < 10$	-21 ( M. M. M. A. A. A. M 2 ( /// -		$\sim 2600 \sim$	15		$\sim 211$	100000000000	11/:/~``	\_25/L		(° 1/
Details Click "Edit" to edit an existing Compensation Plan											
Plan N	Plan Name AE - Channel Sales 2022 - (Product Basis)			Owner ScloudComp Administrato				strator	r É		
Integr	ation Id 1										
Create	Created By 🛛 CloudComp Administrator , 12/10/2019 S			Last Modified By			🗟 CloudComp Administrator , 2/20/2022 12:22 AM				
6 items •	n Tiers (6) Sorted by Attainment Base • Updated a few second	ls ago								\$ • C	, ,
P	lan Tier Name	~	Attainment Base ↑	$\sim$	Attainment Top	∨ Quota	Гуре		~ F	evenue Type	
1 1	lew Logo App Subscriptions Year 1		0.0000000%		1,000.00000009	% Mo-Ind	v-All Sales - Won by P	roduct Dat	e N	lew Logo - App Sub	oscri
2	lew Logo App Subscriptions Year 2		0.0000000%		1,000.0000000% Mo-Indv-All Sales - Won by Product Da				e New Logo - App Subscri		oscri
3 1	3 New Logo App Subscriptions Year 3				1,000.00000009	% Mo-Ind	v-All Sales - Won by P	e N	New Logo - App Subscri		
4 5	Support – All		0.0000000%		100.0000000%	Mo-Ind	v-All Sales - Won by P	roduct Dat	e S	upport	
5 1	raining - All		0.0000000%		100.0000000%	Mo-Ind	v-All Sales - Won by P	roduct Dat	e T	raining	
6 /	App Subscriptions - All		100.0000000%		200.0000000%	Mo-Ind	v-All Sales - Won by P	roduct Dat	e A	pp Subscriptions -	All
			View	/ All							





*Tip:* To efficiently clone tiers or copy down columns, use the Sort Button to position your tiers for copying. For example, to create 4 more very similar Tiers to an existing Tier, sort the Tiers to position the existing one at the bottom of the list. Then click "New Plan Tier" 4 times and then use the yellow arrow to copy down the contents of the first Tier to the 4 new Tiers. Perform the edits on the new Tiers, and then use Sort again to establish your desired order.

#### **Clone Tiers and Copy down Columns**

Use the yellow arrows to copy down (clone) entire Tiers from row position to bottom. Use the blue arrows to copy the contents of columns to the left of the arrows from row position to bottom

COMPENSATION PLAN AE - Channel Sales 2022 - (Product Basis)								
COMPENSATION PLAN DETAILS								
Plan Name AE - Channel Sales 2022 - () Use the yellow arrows to copy (clone) entire Plan Tiers down from row								
Owner ID * CloudComp Administrate	Owner ID CloudComp Administrate Q							
New Plan Tier Save Quick Save	New Plan Tier         Save         Quick Save         Delete Selected         Undo         Sort Tiers         Cancel							
PLAN TIERS	Use the blue arrows to fill contents of column to the left down from row							
Plan Tier Name	Calcustion Method Attainment Method Attainment Base Attainment Top Quota Type							
□ ↓ <sup>•</sup> New Logo App Subscription:	↓ ↓ Sequence ↓ ↓ 0.00000000 ↓ 1,000.000000 ↓ Mo-Indv-All Sales - Won by Product Date × ▼							
New Logo App Subscription:	Incremental 🗘 🗼 * Sequence 🗘 🗼 * 0.00000000 🗍 * 1,000.0000000 ↓ * Mo-Indv-All Sales - Won by Product Date * *							
New Logo App Subscription:	↓ Incremental ↓ Sequence ↓ O.00000000 ↓ I,000.000000 ↓ Mo-Indv-All Sales - Won by Product Date × ▼							
□ ↓ • App Subscriptions - All	↓ Incremental ↓ Sequence ↓ I00.00000000 ↓ Mo-Indv-All Sales - Won by Product Date * ▼							
Training - All	↓ • All ↓ • Sequence ↓ • 0.00000000 ↓ • 100.0000000 ↓ • Mo-Indv-All Sales - Won by Product Date × ▼							
Support - All	▲       ▲							
New Plan Tier Save Quick Save	Delete Selected Undo Sort Tiers Cancel							






#### **Clone Compensation Plans**

Navigate to the Compensation Plan, click "Clone". A new clone of the Comp Plan will open in the CloudComp Compensation Plan Management Interface along with all of its Compensation Plan Tiers and Plan Tier Relationships (if you have created any for the Plan). You can edit and modify the new cloned Comp Plan as you wish, change the name and save the plan.

#### Sort Compensation Plan Tiers

From the Compensation Plan Edit Interface, click "Sort Tiers".

Select one Tier or command-select multiple Tiers, then use the up and down buttons to move the selected Tiers. To close the sort interface, click "Done". Click "Quick Save" or "Save" to save your new Sort Order.

COMPENSATION PLAN AE - Channel Sales 2022 - (Product Basis)	AE - Channel Sales 2022 - (Product Basis
COMPENSATION PLAN DETAILS	PLAN TIERS
	New Logo App Subscriptions Year 1
Plan Name AE - Channel Sales 2022 - (I	New Logo App Subscriptions Year 2
Owner ID * CloudComp Administrate Q	New Logo App Subscriptions Year 3
	App Subscriptions - All
New Plan Tier Save Quick Save Delete Selected Unito Sort Tiers Cancel	Training - All
	Support - All
PLAN TIERS	
Plan Tier Name Calculation Method Attainment Method A	Done
□ ↓ * New Logo App Subscription: ↓ * Incremental ↓ * Sequence ↓ ↓	







### **Setup Step 8: Create Compensation Plan Assignments**

- a. Navigate to the Plan Assignments Tab or related list and click "New Plan Assignment".
- **b.** Enter a descriptive name for your Assignment.
- c. Enter the User.
- d. Enter Start and End Dates (assignment dates should be at least the length of the largest Quota Fiscal Period).
- e. Enter the Recipient and Manager Sharing settings and Click "Save".

* Plan Assignment	Enterprise Sales 2020 - Rihanna Far	mer	Owner	Jotham Fisher Smith
* User	Rihanna Farmer	×	<ul> <li>Compensation Plan</li> </ul>	Manager - Enterprise Sales - 2 ×
• Start Date 🕕	12/29/2019	▦	Recipient Share (Read-Only) 🔞	
• End Date 🚯	12/31/2020		Recipient Manager Share (Read-Only)	
Payment Schedule	Biweekly 2020	×		
Payment Setup 🕦	Manager - Enterprise Sales - 2	×		
Notes				
Mataa				







### Setup Step 9: Run CloudComp Sync to Generate Quota Attainment and Compensation Records

You can run the Sync from the App whenever you wish using the CloudComp Sync Interface.

In production, CloudComp Sync will be scheduled to run as a daily / nightly batch job in your Salesforce org (see Schedule CloudComp Sync).

Sync	
DETAILS	
Quota Start Dates Greater Than or Equal To $ {}^{*}$	1/1/2020
Quota End Dates Less Than or Equal To $^*$	2/31/2020
Batch Size	1 (max batch size: 5)
Object	Opportunity 🛟
Users	All Assigned
	Run CloudComp Sync
STATUS	





#### To run CloudComp Sync:

- **a.** Navigate to the CloudComp Sync Tab.
- Select Start and End dates which encompass the Quotas and Compensation Plans you wish to Sync.
- **c.** Select an Object from the Object pick list which references the Object that Quotas are based on.
- d. On the "Users" picklist, accept the default "All Assigned", or select "Specific Users" to run sync for particular users.
- e. Click "Run CloudComp Sync" (repeat process for each object referenced by your quotas and compensation plans).

A batch job will be started usually within a few seconds. Specific timing depends on Salesforce batch job Queue timing. The page will refresh to display progress

\$	cloudcomp <b>Sync</b>					
DETA	ILS					
	Quota Star	t Dates Greater Than or E	qual To *	1/1/2020		
	Quota	End Dates Less Than or E	qual To *	12/31/202		
		Ва	tch Size	1 (max b	oatch size: 5)	
			Object	Opportunity		\$
			Users	All Assigned		\$
				Run CloudCon	np Sync	
STATI	15					
JIAI	Sync Jobs Co	mpleted				
Statu	S	Job	Tota	l Batches	Total Processed	Errors
Com	pleted	Quotas	12		12	0
Com	pleted	Compensation Tiers	24		24	0







as the Job is processed. When completed, the interface will display results as shown in screenshot below. You can also monitor the progress of your CloudComp Sync Job by navigating to Setup->Monitor-> Apex Jobs.

#### Schedule CloudComp Sync - Overview

CloudComp Sync Scheduled Jobs enable you to automatically run CloudComp Sync to update CloudComp Quotas and Compensation data as many times per day as you wish.

CloudComp Sync Scheduled Jobs can be easily configured from within the Salesforce UI via CloudComp Batch Job Setup Custom Metadata Types and Scheduled Apex Jobs. If you want to schedule CloudComp Sync Jobs on more than one object, create a CloudComp Batch Job Setup (custom metadata type) record for each object and use the Job Sequence field to establish the order in which you want the jobs to run.

Custom Metadata Typ	es			
CloudComp Batch Job Se	tup			Help for this Page 🤣
CloudComp Batch Job Setup Edit	Save Save & New Cancel			
Information				= Required Information
Label Opportunity - CloudComp Batch Job Setup Name Opportunity_	1 +1 Mo 1_1_Mo	Protected Component Active 😡	l i	
Job Sequence D	Svino vel	Previous Periods	1	4
Object Name  Opportunity		Period Type 😡	Month V	
Record Ownership   All Users	Save Save & New Cancel			
	Gave a New Cancel			





### Schedule CloudComp Sync – Batch Job Setup

- **a.** Navigate to Setup->Custom Metadata Types->CloudComp Batch Job Setup
- b. Click "Manage"
- c. Click "New"
- d. Enter a descriptive name in "Label"
- e. Object: Enter the full API Name of the Object
- f. Period Type: Select the Period Type according to the largest fiscal period you have in CloudComp Quotas (example if you have Monthly, Quarterly, and Annual Quotas, Select "Fiscal Year")
- **g.** Previous and Future Periods: Set Previous and Future Periods (if you set both to zero, then the current fiscal period will be synced)
- h. Job Sequence: Enter a number 0 or greater to establish the sequence for jobs (batch jobs are chained sequence)
- i. Click "Active" (only active records will be run)
- j. Click "Save"

### Schedule CloudComp Sync – Schedule Apex

- a. Navigate to Setup->Apex Classes
- b. Click "Schedule Apex"







- c. Enter a descriptive name in "Job Name"
- d. Select Apex Class "RcSyncBatch"
- e. Select Frequency = "Weekly"
- f. Check all 7 days of the week
- g. Enter Start Date and End Date for job
- h. Click "Save"

#### Schedule CloudComp Sync – Review Scheduled Jobs

You can review your CloudComp Sync Scheduled Jobs (and all of your scheduled jobs) by Navigating to Scheduled Jobs in Setup as shown in screenshot.







### Viewing CloudComp Compensation Data

#### **View Compensation Records**

Navigate to a Compensation Record from the Compensation related list under any Plan Assignment, the CloudComp Compensation Tab or from a Report. Compensation Records are assigned to users according to the Fiscal Period type of the Quota Types referenced by your Compensation Plan Tiers (Month, Quarter, or Year).

🔲 Cor	npensation - Jar	FY 2020 - Chuck Roth				Sharing	Submit for App	proval	Delete
ETAILS	TIERS PAID								
СОМР	ENSATION DETAILS		COMPENSATION E	BY DATE		COMPEN	SATION PAID		
	Approval		30000	/		30000	1		
	User	Chuck Roth	24000 -			24000 -			
	Compensation Plan	AE - Enterprise - 2020 (Product	18000 -			18000 -			
	Plan Assignment	AE - Enterprise Sales 2020 - Rot	15000 - 12000 -			15000			
	Period Name	Jan FY 2020	9000 -			9000 -			
	Start Date	1/1/2020	3000 -			3000			
	End Date	1/31/2020	Start	Jan	End	0	Accrued	Paid	Outstandin
Qua	lifying Revenue (sum)	\$838,559.85							
Attainn	ment Percentage (avg)	68.59							
	Commission (sum)	\$29,405.85							
	Bonus (sum)	\$.00							
Total Co	ompensation Accrued	\$29,405.85							
	Total Paid	\$29,405.85							
	Total Outstanding	\$.00							







#### **Compensation Tiers**<sup>™</sup>

CloudComp Compensation Tiers are a related list under each Compensation record. To view Compensation Tiers, click on the "Tiers" tab on the Compensation Record.

CLC Co	CLOUDCOMP Compensation - Jan FY 2020 - Chuck Roth						Submit	for Approval	Delete	
DETAILS	TIERS	PAID								
COMPE	NSATION	TIERS COMP TIER NAME	REVENUE OUOTA	ACCRUED REVENUE	ATTAINM	ENT PERC	ENTAGE	OUALIFYING	REVENUE	COMMISSION
Jan FY 20	)20	New Logo App Subscriptions Year 1 - Jan FY 2020 - Chuck Roth	\$1,000,000.00	\$139,030.04	68.5896%	b		\$139,030.04		\$11,122.40
Jan FY 20	)20	New Logo App Subscriptions Year 2 - Jan FY 2020 - Chuck Roth	\$1,000,000.00	\$139,030.04	68.5896%	b		\$139,030.04		\$8,341.80
Jan FY 20	)20	New Logo App Subscriptions Year 3 - Jan FY 2020 - Chuck Roth	\$1,000,000.00	\$.00	68.5896%	b		\$.00		\$.00
Jan FY 20	)20	App Subscriptions - All - Jan FY 2020 - Chuck Roth	\$1,000,000.00	\$458,223.05	68.5896%	b		\$458,223.05		\$6,873.35
Jan FY 20	)20	Training - All - Jan FY 2020 - Chuck Roth	\$1,000,000.00	\$.00	68.5896%	b		\$.00		\$.00
Jan FY 20	)20	Support - All - Jan FY 2020 - Chuck Roth	\$1,000,000.00	\$102,276.73	68.5896%	þ		\$102,276.73		\$3,068.30

After you create and assign Quotas and Compensation Plans and run CloudComp Sync, there will be a related list of Compensation Tiers under each Compensation record.

Each Compensation Tier represents the results of execution of one Compensation Plan Tier as applied to a Recipients' particular Quota during a particular Fiscal Period.

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Compensation Tier New Logo App Su	Compensation Tier New Logo App Subscriptions Year 1 - Jan FY 2020 - Chuck Roth New Contact New Oppo							
Qualifying Records (10+)	To-Date Quotas (0)							
		(1000000)						
Details								
Compensation 🕕	Jan FY 2020 - Chuck Roth	Compensation Plan 🕕	AE - Enterprise - 2020 (Product Mo Basis)					
Comp Tier Name	New Logo App Subscriptions Year 1 - Jan FY 2020 - Chuck Roth 🥒	Compensation Plan Tier 🚯	New Logo App Subscriptions Year 1					
User Name 🚯	Chuck Roth	Fiscal Period 🕕	Jan FY 2020					
Start Date 🕕	1/1/2020	End Date 🕕	1/31/2020					
✓ Attainment Levels for Tie	r							
Quota RevenueType 🚯	Amount by Product Date	Data Type 🚯	Revenue					
Tier Base (Revenue) 🕕	\$0.0000000	Tier Base (Quantity) 👔	0.0000000					
Tier Top (Revenue) 🕦	\$10,000,000.0000000	Tier Top (Quantity) 🕕	0.0000000					
✓ Quota Attainment								
Quota 🚯	Jan FY 2020 - Chuck Roth - Mo-Indv-Amount by Product Date	Quantity Quota 🕕	0.00					
Attainment Percentage 🕕	68.5896%	Attained Quantity 🕕	0.00					
Revenue Quota 📵	\$1,000,000.00							
Attained Revenue 🕕	\$685,895.88							
✓ Amounts Accrued								
Accrued Revenue Type 🕕	Jan FY 2020 - Chuck Roth - New Logo - App Subscription Year 1	RevenueTypes Match 🕕						
Accrued Revenue 🕕	\$139,030.0350	Accrued Quantity 👔	0.0000					
Qualifying Revenue 🕕	\$139,030.0350	Qualifying Quantity 🚯	0.0000					
✓ Compensation								
Commission (1)	\$11,122.4028	Commission (Per Unit) 👔	\$0.0000					
Bonus 👔	\$0.00	Performance Award 🗊						





#### **Qualifying Records**<sup>™</sup>

CloudComp Qualifying Records (QR), are children of Compensation Tiers and are the granular detail level of CloudComp Compensation data.

QR represent "Earned Commissions". They are created, updated and deleted by CloudComp Sync jobs according to changes in your sales data.

QR are generated for every instance of any source record being qualified for any Compensation Plan Tier for any User / Fiscal Period combination.

	Cor Ne	npensation Tier W Logo App Su	bscriptions Year 1 -	Jan FY 2020 - C	huck Roth			Ne	w Contact	New Opportur	nity New Case	New Lead	Delete	Ŧ
$\sim$	Com	pensation												
	Comr	mission 🚯	\$11,122.4028				Commission (Per Unit)	\$0.0	000					
	Bonu	s 🚯	\$0.00				Performance Award 📵							
>	To D	ate Quotas												
>	Syste	em Information												
_	-,													
6	Qu	ualifying Records											<b>\$</b> -	C'
104	item	s · Sorted by Deal DateTi	ime • Updated a few seconds	ago										
		Qualifying Re 🗸	Deal DateTime 🕇 🛛 🗸	Date $\checkmark$	Expense Date 🗸 🗸	Percentage Q 🗸	Qualifying Re 🗸	Commission	~ (	Qualifying Qu 🗸	Commission ( $ \lor $	Bonus	$\sim$	
1		rfs-20202	1/20/2020 12:00 AM	1/20/2020	1/20/2020	100.000000%	\$11,585.8363	\$926.8669	C	.0000	\$0.0000	\$0.00		•
2		rfs-38235	1/20/2020 12:00 AM	1/20/2020	2/20/2020	100.000000%	\$11,585.8363	\$926.8669	C	.0000	\$0.0000	\$0.00		•
3		rfs-38236	1/20/2020 12:00 AM	1/20/2020	3/20/2020	100.000000%	\$11,585.8363	\$926.8669	C	.0000	\$0.0000	\$0.00		•
4		rfs-38237	1/20/2020 12:00 AM	1/20/2020	4/20/2020	100.000000%	\$11,585.8363	\$926.8669	C	.0000	\$0.0000	\$0.00		•
5		rfs-38238	1/20/2020 12:00 AM	1/20/2020	5/20/2020	100.000000%	\$11,585.8363	\$926.8669	C	.0000	\$0.0000	\$0.00		•
6		rfs-38239	1/20/2020 12:00 AM	1/20/2020	6/20/2020	100.000000%	\$11,585.8363	\$926.8669	C	.0000	\$0.0000	\$0.00		•
7		rfs-38240	1/20/2020 12:00 AM	1/20/2020	7/20/2020	100.000000%	\$11,585.8363	\$926.8669	C	.0000	\$0.0000	\$0.00		•
8		rfs-38241	1/20/2020 12:00 AM	1/20/2020	8/20/2020	100.000000%	\$11,585.8363	\$926.8669	C	.0000	\$0.0000	\$0.00		•
9		rfs-38242	1/20/2020 12:00 AM	1/20/2020	9/20/2020	100.000000%	\$11,585.8363	\$926.8669	C	0.0000	\$0.0000	\$0.00		•
1	0	rfs-38243	1/20/2020 12:00 AM	1/20/2020	10/20/2020	100.000000%	\$11,585.8363	\$926.8669	C	0.0000	\$0.0000	\$0.00		•
						View	All							





Each QR is a reference to a record that has been allocated to the recipient (such as an Opportunity, Opportunity Product, Revenue Schedule Entry, Custom Object Record, etc.) and contains the date of the transaction, currency or quantity value, percentage of the referenced record that applies to the parent Compensation Tier, Compensation Accrued.

When you run Payments in CloudComp, QR which have Release Dates between the start date and the end date of a pay period are referenced by CloudComp Payment Lines, which (like their parent payment records), are persistent and not change after creation.

Qualifying Record rfs-20202			New Contact	New Opportunity	New Case	New Lead	Printable View
Payment Lines (1)							
Deteile	11/2 0)VZNII (72475 (971/2 0)VZ	SM/ (77			iz Uli	20)/~///	
Details							
Compensation Tier 🕕	New Logo App Subscriptions Year 1 - Jan FY 2 Chuck Roth	2020 -	Qualifying Record N	ame rfs-20202			1
Date 🚯	1/20/2020	1. Constanting of the second s	Attainment 🕕				11°
Release Date 🕕	1/20/2020	1	Accrued Revenue	AR-1327			1
Expense Date 📵	1/20/2020	1					
User 🕕		1					
∨ Deal Info							
Deal Object 🚯	Opportunity	1	Deal Name 🕕	Eichmann	-Turner - App S	Subscription	1
Deal DateTime 🚯	1/20/2020 12:00 AM	1. Constanting of the second s	Deal Id 🕦	0060H00	000pwF5bQA	E	1.
✓ Commissions							
Object 🚯	rfOpportunityLineItemSchedulec	1					
Attainment Percentage 🕕	62.340123%	1	Percentage Qualifie	d 🕕 100.0000	00%		1
Revenue 🕕	\$11,585.84	1	Qualifying Revenue	\$11,585.8	3363		1. Constanting of the second s
Quantity 🚯	0.00	1	Qualifying Quantity	0.0000			1
Commission % 📵	8.0000%		Commission 🚯	\$926.866	9		
Amount Per Unit 📵	\$0.0000		Commission (Per Ur	nit) 🕕 \$0.0000			
			Bonus 🙃	\$0.00			1





### **MyCompensation Page**









The MyCompensation Page is a dynamic compensation and payments interface for use in desktop and mobile devices. It opens for the running user and displays a rollup of up to 5,000 Qualifying Records, their related Compensation Tiers and Payments within the date range of Start Date to End Date.

MyCompensation opens defaulted to the current Fiscal Year and the dates can be adjusted by the user to view other date ranges of their choosing. The user is not changeable by Compensation Recipients, but Compensation Administrators can view MyCompensation for any User.





5pm PT M-F

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### **CloudComp Commission Anything™ Admin Guide - Spring 2025**

Report: Compensation with Comp Tiers & Qualifying Records

### CloudComp Reporting

CloudComp Data is 100% Salesforce Native and as such, it is 100% compatible with Salesforce Reporting, Dashboards, and Analytics. All of your Compensation data can be easily exported to Excel from Salesforce Reports.

To view your CloudComp Data in Reports, navigate to the Reports Tab and view the example reports included in the CloudComp Reports folder.

If you have followed Salesforce and CloudComp best practice security configurations, Compensation Recipients and their Managers should only be

Jser Name ↑ 🛛 💌	Compensation Plan Tier: Plan Tier Name 🕇 💌	Date → ▼	Q1 CY2020	Q2 CY2020	Q3 CY2020	Q4 CY2020	Total
Catherine Davidson	App Subscriptions - All	Sum of Qualifying Revenue Sum of Commission	\$172,781.0100 \$2,591.7152	\$583,948.1500 \$8,759.2223	\$225,123.1800 \$3,376.8477	\$244,655.7800 \$3,669.8367	\$1,226,508.1200 \$18,397.6219
	New Logo App Subscriptions Year 1	Sum of Qualifying Revenue Sum of Commission	\$74,651.1600 \$5,972.0928	\$78,776.2700 \$6,302.1016	\$0.0000 \$0.0000	\$0.0000 \$0.0000	\$153,427.4300 \$12,274.1944
	Support - All	Sum of Qualifying Revenue Sum of Commission	\$298,015.9000 \$8,940.4770	\$378,207.5100 \$11,346.2253	\$323,757.4000 \$9,712.7220	\$591,745.6400 \$17,752.3692	\$1,591,726.4500 \$47,751.7935
	Training - All	Sum of Qualifying Revenue Sum of Commission	\$464,569.5400 \$13,937.0862	\$585,835.9400 \$17,575.0782	\$585,040.4300 \$17,551.2129	\$378,453.4800 \$11,353.6044	\$2,013,899.3900 \$60,416.9817
Church Dath	Subtotal	Sum of Qualifying Revenue Sum of Commission	\$1,010,017.6100 \$31,441.3712	\$1,626,767.8700 \$43,982.6274	\$1,133,921.0100 \$30,640.7826	\$1,214,854.9000 \$32,775.8103	\$4,985,561.3900 \$138,840.5915
Chuck Roth	App Subscriptions - All	Sum of Qualifying Revenue Sum of Commission	\$986,421.0700 \$14,796.3161	\$1,152,068.6700 \$17,281.0301	\$420,337.4000 \$6,305.0609	\$195,947.1500 \$2,939.2073	\$2,754,774.2900 \$41,321.6144
	New Logo App Subscriptions Year 1	Sum of Qualifying Revenue Sum of Commission	\$184,766.3400 \$14,781.3072	\$0.0000 \$0.0000	\$68,874.0633 \$5,509.9251	\$11,103.1625 \$888.2530	\$264,743.5658 \$21,179.4853
	New Logo App Subscriptions Year 2	Sum of Qualifying Revenue Sum of Commission	\$184,766.3400 \$11,085.9804	\$0.0000 \$0.0000	\$68,874.0633 \$4,132.4438	\$11,103.1625 \$666.1898	\$264,743.5658 \$15,884.6140
	New Logo App Subscriptions Year 3	Sum of Qualifying Revenue Sum of Commission	\$45,736.3050 \$1,829.4522	\$0.0000 \$0.0000	\$61,807.1200 \$2,472.2848	\$11,103.1625 \$444.1265	\$118,646.5875 \$4,745.8635
	Support - All	Sum of Qualifying Revenue Sum of Commission	\$338,774.6400 \$10,163.2392	\$205,697.8500 \$6,170.9355	\$382,402.1700 \$11,472.0651	\$481,981.5900 \$14,459.4477	\$1,408,856.2500 \$42,265.6875
	Training - All	Sum of Qualifying Revenue Sum of Commission	\$37,342.8800 \$1,120.2864	\$800,028.8900 \$24,000.8667	\$1,143,434.1500 \$34,303.0245	\$332,328.9800 \$9,969.8694	\$2,313,134.9000 \$69,394.0470
	Subtotal	Sum of Qualifying Revenue Sum of Commission	\$1,777,807.5750 \$53,776.5815	\$2,157,795.4100 \$47,452.8323	\$2,145,728.9667 \$64,194.8042	\$1,043,567.2075 \$29,367.0937	\$7,124,899.1592 \$194,791.3117
Hailey May	App Subscriptions - All	Sum of Qualifying Revenue Sum of Commission	\$323,268.2800 \$4,849.0242	\$1,017,429.0400 \$15,261.4357	\$475,163.7000 \$7,127.4556	\$253,319.4100 \$3,799.7911	\$2,069,180.4300 \$31,037.7066
	New Logo App Subscriptions Year 1	Sum of Qualifying Revenue Sum of Commission	\$0.0000 \$0.0000	\$286,082.1900 \$22,886.5752	\$58,777.0982 \$4,702.1679	\$0.0000 \$0.0000	\$344,859.2882 \$27,588.7431
	New Logo App Subscriptions Year 2	Sum of Qualifying Revenue	\$0.0000	\$223,746.1800	\$54,255.7830	\$0.0000	\$278,001.9630

able to see the records that have been shared with them according to the Recipient and Manager sharing settings in Compensation Plan Assignments and Quotas, so you shouldn't need to make a special reports for individual users.





*Tip: Clone the Managed Report Types to create your own Customizable Report Types*: To make customizable report types from managed report types, simply create clones of the managed report types that installed with the managed App. Now you will have fully customizable Report Types that can be edited to include your custom fields. Use these customizable report types to create your production reports. New custom fields you create in the future will also be able to be added to your customizable report types and all reports that are based upon them.

#### **Create Customizable Report Types**

Salesforce custom report types define the underlying queries that some Salesforce Reports are based upon. All custom report types that are included with Salesforce Managed Apps are <u>managed objects</u>, which means that they are not editable after install.

It is a best practice in Salesforce to ensure that all of your production reports are based on <u>customizable report types</u>. It is especially important with CloudComp, because of the extremely dynamic nature of the CloudComp data model.

Managed report types are not customizable. One might think of this as an unintended consequence of the Salesforce Application Packaging model.

Video: Use Custom Report Types with CloudComp







To make customizable report types from the managed ones, simply clone the managed report types that installed with the App. After creating the cloned report types, you can include all of your custom fields into your customizable CloudComp report types.

For example, if you want to perform deeper analysis into the Quota Attainment that you're Reps are achieving, you're going to want to have access not only to Attained Quantity and Revenue, but many other attributes, such as Account, Territory, Time to Close, etc. With CloudComp, you're going to be able to access all of that in your Quotas with Attainment reports, but you're going to need to work with Customizable Report Types to do so.

Q report types	Report Types
Feature Settings	
<ul> <li>Analytics</li> <li>Reports &amp; Dashboards</li> </ul>	Edit Custom Report Type Help for this Page 🤣
Report Types	Define the Custom Report Type Save Cancel
	Report Type Focus = Required Information
Didn't find what you're looking for? Try using Global Search.	Primary Object Compensation
	Identification
	Report Type Label     Comp with Comp Tiers & Qual Recs CUSTOM       Report Type Name     Compensation_with_Cor i       Note: Description will be visible to users who create reports.       Description       Compensation with Comp Tiers & Qualifying Records CUSTOM
	Report Type Category Other Reports
	Deployment
	A report type with deployed status is evailable for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates. Deployment Status In Development Opployed
	Save





### **CloudComp Performance Awards**

### Create CloudComp Performance Awards™

CloudComp Performance Awards are the perfect way to reward exceptional performance with non-cash awards such as year-end trips to Quota Club for Sales Reps etc., but they also can be used to easily provide positive reinforcement to any User in your Org for any task performed in Salesforce, or even for Management by Objective outcomes populated by Managers. CloudComp Performance awards take a few seconds to create and you can make an unlimited number of them.

To Create a Performance award, navigate to the Performance Awards tab and Click "New". Populate the rich text field with whatever you like, or simply enter the URL to an image on an internal or external website (as shown in screen shot). To assign the Performance Award, simply apply it to the Compensation Plan Tier of your choice in the Performance Award Tier. The Award will be assigned to the associated Compensation Tiers for users when the Quota Attainment Percentage requirements for the Plan Tier are achieved by the user for the particular Quota and Fiscal Period.







### **CloudComp Payments**<sup>™</sup>

#### CloudComp Payments<sup>™</sup> Overview

- Establish one or many CloudComp Payment Schedules for Weekly, Biweekly, Semi-Monthly, Monthly, Quarterly, Annual or Custom Pay Periods.
- Easily assign Users to Payment Schedules via CloudComp Compensation Plan Assignments.
- Optionally configure Recoverable Draws, Non-Recoverable Draws, Base Salary, Deductions and more via CloudComp Payment Setups (also assigned to Users via CloudComp Compensation Plan Assignments).
- Automatically generate detailed Payment Records at set number of days after end of each Pay Period.
- Perform manual adjustments on Payments with automatic recalculation of Carry-Over and Balance-Forward between Payments.
- Run automated Adjustment records for Claw-Backs or Increases of Compensation in prior Pay Periods.

\$	Payment PMT - 8/1/202	23 - 8/31/2023 - Luke Page		New Contact N	ew Case Edit New Lead Delete
D	etails	View CloudComp P	aymer	t (top of page)	>
~	Payment		Γ		Payment Summary PDF
	Payment Name	PMT - 8/1/2023 - 8/31/2023 - Luke Page		Payment Summary	View PDF   Save Attachment (refresh page
	Approval 🚯			Payment Schedule	2023 - USD - Monthly
				Pay Period 🚯	8/1/2023 - 8/31/2023
	User 🚯	Luke Page		Payment Run 🕚	PMT - 2023 - USD - Monthly (8/1/2023 - 8/31/2023) - 3
	Plan Assignment 🚯	AE - Inside Sales - 2023 - Luke Page		Туре 🚯	Payment
	Effective Date 🚯	9/4/2023		Void 🚯	
	Balance Forward (	\$0.00		Void Reason 🕕	4
	Carry Over Total 🚯	\$0.00		Payment Total 🔋	\$18,619.51
/	Commissions by Tie	r			Payment Total
	Commission Subtotal	\$17,119.51		Recalculate 🕚	
	Commission ( Adjustment	\$0.00 Commission Total	>/	Commission (per unit) Subtotal	<b>()</b> \$0.00
	Commission Total 🚯	\$17,119.51		Commission (per unit) Adjustment	\$0.00
	Bonus Subtotal 🕚	\$0.00		Commission (per unit) Total	\$0.00
	Bonus Adjustment 🕚	\$0.00	and the		
	Ropus Total	\$0.00			





#### Payments Configuration Step 1 – Create Payment Schedules

- **a.** Navigate to the Payment Schedules tab and click "New".
- Enter fields following example in screen shot and according to Payment Schedule Fields Reference table (below).
- c. Click "Generate Pay Periods".
- **d.** Save Payment Schedule.

YMENT SCH	EDULE DETAILS				
	Generate Pay Periods	Save	Quick Save	Delete Selected	Cancel
	Active i	<b>~</b>			
	Payment Schedule Name	Biwe	ekly 2020		
	Owner ID	Jotha	am Fisher Smith	<u>_</u>	
	Start Date i	12/2	9/2019		
	End Date i	1/9/			
	Frequency i	Biwee	ekly		
	Days to Payment Run 👔	5			
	Run As i	All	\$		
Gener	ate Compensation Paid i				
Recip	oient Share (Read-Only) i	<ul> <li>Image: A start of the start of</li></ul>			
Man	ager Share (Read Only) i				





Biweekly 2020			
PAYMENT SCHEDULE DETAILS			
Generate Pay Periods	ave Quick Sav	ve Delete Selected	Cancel
Active 1			
Payment Schedule Name	Biweekly 2020		
Owner ID	Jotham Fisher Sm	hith 🔍	
Start Date i	12/29/2019		
End Date i	1/9/2021		
Frequency i	Biweekly	Biweekly pa	ly periods
Days to Payment Run 👔	5	generated b	
Run As i	All 💠		62
Generate Compensation Paid			
Recipient Share (Read-Only)			
Manager Share (Read Only)	<b>U</b>		
Generate Pay Periods	Save Quick Sav	ve Delete Selected	Cancel
Generate Pay Periods	Save Quick Sav	ve Delete Selected	Cancel
Generate Pay Periods PAYMENT SCHEDULE	Save Quick Sav	ve Delete Selected	Cancel
Generate Pay Periods PAYMENT SCHEDULE	Save Quick Sav	Delete Selected	Cancel
Generate Pay Periods PAYMENT SCHEDULE Pay Period Name	Save Quick Sav Start Date	Delete Selected	Cancel
Generate Pay Periods PAYMENT SCHEDULE Pay Period Name 12/29/2019 - 1/11/202C	Save Quick Sav Start Date 12/29/2019	ve Delete Selected	Cancel
Generate Pay Periods           PAYMENT SCHEDULE           Pay Period Name           12/29/2019 - 1/11/2020           1/12/2020 - 1/25/2020	Save Quick Sav Start Date 12/29/2019 1/12/2020	Ve Delete Selected	Cancel
Generate Pay Periods           PAYMENT SCHEDULE           Pay Period Name           12/29/2019 - 1/11/202C           1/12/2020 - 1/25/2020           1/26/2020 - 2/8/2020	Save Quick Sav Start Date 12/29/2019 1/12/2020 1/26/2020	Pe Delete Selected	Cancel
Payment Schedule           Pay Period Name           12/29/2019 - 1/11/202C           1/12/2020 - 1/25/2020           1/26/2020 - 2/8/2020           2/9/2020 - 2/22/2020	Save Quick Sav Start Date 12/29/2019 1/12/2020 1/26/2020 2/9/2020	Pe Delete Selected	Cancel
Payment Schedule           Pay Period Name           12/29/2019 - 1/11/202C           1/12/2020 - 1/25/2020           1/26/2020 - 2/8/2020           2/9/2020 - 2/8/2020           2/9/2020 - 2/22/2020           2/23/2020 - 3/7/2020	Save Quick Sav Start Date 12/29/2019 1/12/2020 1/26/2020 2/9/2020 2/23/2020	Pe Delete Selected	Cancel
Generate Pay Periods           PAYMENT SCHEDULE           Pay Period Name           12/29/2019 - 1/11/202C           1/12/2020 - 1/25/2020           1/26/2020 - 2/8/2020           2/9/2020 - 2/8/2020           2/9/2020 - 2/22/2020           2/23/2020 - 3/7/2020           3/8/2020 - 3/21/2020	Save Quick Sav Start Date 12/29/2019 1/12/2020 1/26/2020 2/9/2020 2/23/2020 3/8/2020	Pe Delete Selected	Cancel
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www.surfwriter.com (888) 231-3646 9am-5pm PT M-F

### **CloudComp Commission Anything™ Admin Guide - Spring 2025**

B	Biweekly 2020				New Contact	New Opportuni	ty Edit M	New Case	New Lead
ay P	Periods (10+)	Payment Runs	(4) 📑 Plai	n Assignments (10+) 🛛 🔊	Payments (10+)				
etai	ls Activity			2112 AV Z SUU CA		2311 21 Se		N Z (77)	
Pav	ment Schedule Name	Riwookly 2020			Payment Sch	nedule with Pa	y Periods		
Sta	rt Date	12/20/2010	,		Run As	All			
Enr	i Date	1/0/2021			Active @				
Ero		1/9/2021			Daus to Daymont Bun	F			
Ger	parate Companyation	ымеекіу			Days to Payment Run	5			
Paie	d	y 💌							
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Ma	nager Share (Read (								
	1)								
On	Pay Poriods								
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Payment Schedule Fields Refe	erence
Active	Payment Schedule is Active.
Name	Payment Schedule Name.
Owner Id	Owner of record.
Start Date	Start Date of Pay Periods (Semi-Monthly must start on 1 <sup>st</sup> or 16 <sup>th</sup> ).
End Date	End Date of Pay Periods for Payment Schedule (Schedule may be extended later by updating End Date and generating additional Pay Periods).
Frequency	Type of Pay Periods to Generate (Weekly, Biweekly, Semi-Monthly etc).
Days to Payment Run	Number of Days after End Date of Each Pay Period in Payment Schedule to Run Payments.
Run As	"All": Payments will be generated for Payment Schedule when Scheduled job is running as any CloudComp Administrator.
	"Owner": Payments will only be generated for Payment Schedule when Scheduled job is running as owner of Payment Schedule.
Generate Compensation Paid	Generates Compensation Paid Records under Compensation Records according to the particular Payment Lines from Payment that relate to the Fiscal Period of Compensation Record. Populates Compensation Paid in Compensation Record Interface and bar graphs.
Recipient Share (Read-Only)	Sets read-only sharing for Recipient on all Payments generated from Payment Schedule.





Payment Schedule Fields Reference						
Manager Share (Read-Only)	Sets read-only sharing for Manager of Recipient (Manager Field in User setup) on all Payments					
	generated from Payment Schedule.					

#### Configure Draws and Salary with CloudComp Payment Setups™

CloudComp Payment Setups enable you to create Recoverable and Non-Recoverable Draws, Salary and Deductions to be applied to each Pay Period for any Users who are assigned to Payment Schedules.

Payment Setups are Optional. If you do not wish to configure Draws or Salary, you can skip this step.

#### Payments Configuration Step 2 – Create a Payment Setup record

- a. Navigate to the Payment Setups tab and click "New".
- **b.** Enter Name, Set Active = true.
- c. Save Payment Setup.

New Payment Setup									
Information									
Payment Setup * Name	AE - Channel Sales 2020	Owner	CloudComp Administrator						
Description	\$1500.00 Base \$500.00 Recoverable Draw								
Active 🕦									
			Cancel Save & New Save						





### **Payments Configuration Step 2**

### - Create Payment Setup Lines

- **a.** Navigate to the Payment Setup Lines related list and click "New".
- **b.** Enter Name (to be displayed in Payments).
- c. Enter Amount.
- **d.** Enter Start Date and End Date (optional) for phasing payment rules in or out.
- e. Save Payment Setup Line.

Information		
Payment Setup • Line Name	Draw (Recoverable)	
Туре	Draw (Recoverable)	
•Amount 🕕	\$500.00	
Start Date 🕕	苗	
End Date 🕕	<b>#</b>	
Payment Setup	AE - Channel Sales - 2 ×	





Payment Setup AE - Channel Sales - 2020	D		New Contact	New Opportun	ity Edit	New Cas	e New Lead 🔻	•
📔 Payment Setup Lines (2) 📗 Plan Ass								
Details Activity	16.1167 2016 99.1	OM/sS(5	1750 Zill	5 9.Y AWAR	1227	216-22.0		
Payment Setup Name AE - Chan	nel Sales - 2020		Paymont	Sotup with Dovr	ont Sotup	Linos	2	
Description \$1500.00 \$500.00 R	Base Recoverable Draw	>	Payment	Setup with Payn	ient Setup	Lines		
Active 🕦 🗸		sull'i						
Payment Setup Lines 2 items • Sorted by Payment Setup Line Nam	ne • Updated a few seconds ago					1	ậ ▼ Cł New	
Payment Setup Line N 🕇 🗸	Туре 🗸	Amount	~	Start Date	$\sim$	End Date	$\sim$	
1 Base Salary	Salary	\$1,500.00						
2 Draw (Recoverable)	Draw (Recoverable)	\$500.00						
		View	All					





Payment Setup Line Fields Re	ference
Payment Setup Line Name	Name is used as reference to Payment Setup Line throughout Payments. You can use Name to rename any of the picklist choices to match your particular terminology. For example, choose "Salary" from Type pick list and Name the line "Base".
Туре	<ul> <li>Type of payment line.</li> <li>Salary: Amount of base pay or salary to assign to user for each pay period.</li> <li>Draw (Recoverable): Recoverable draws are assigned as part of total payment for each pay period and are deducted from total commissions accrued for pay period. If total of recoverable draw &gt; total commissions, remainder of recoverable draw is assigned to carry-over which becomes balance forward in next pay period.</li> <li>Draw (Non-Recoverable): Non-Recoverable draws are assigned as part of total payment for each pay period and are deducted from total commissions accrued for pay period but they do not result in carry-over or balance forward.</li> <li>Deduction: Negative amount to be deducted from salary total for each pay period.</li> <li>Other: Other payment amount.</li> </ul>
Amount	Currency amount to be assigned for line.
Start Date	Start Date to begin assigning payment lines for rule (optional). For phasing rules in or out.
End Date	End Date to stop assigning payment lines for rule (optional). For phasing rules in or out.
Payment Setup	Parent Payment Setup record.







### Payments Configuration Step 3 – Add Payment Schedules to Plan Assignments

- a. Navigate to the Plan Assignments tab, select Plan Assignment (or mass edit from list view).
- b. Set Payment Schedule (required for payments).
- c. Set Payment Setup (optional)
- d. Save Payment Plan Assignment.

Plan Assignment AE - Channel Sa	ales 2020 - Sylvia Yarlett		New Contact	New Opportunity	Edit	New Case	New Lead
Quotas (10+)	Compensation (10+) Payments (4)		Notes & /	Attachments (0)			
atails Activity	6.2%, OMANGTAN ZHO 2%, OM	1-11-	1757 <i>Mi</i> le	2Yowkward	$ \rightarrow \geq$	16 9 7 A M	446765
	AE Channel Salas 2020, Subia Variatt	a <sup>2</sup>	Owner	Cloud	a na na A al a		
Plan Assignment	AE - Channel Sales 2020 - Sylvia fariett	A.Com	Owner		omp Aan	ninistrator	
User	Sylvia Yarlett	all the second s	Compensation Pla	an AE - Channe	el Sales 2	020 - (Product	Basis) 🥒 🖉
Start Date 🕕	12/29/2019 Payment Schedule	>	Recipient Share (F Only)	Read- 🕕 🖌			1
End Date 🕕	12/31/2020	and the second s	Recipient Manage Share (Read-Only	r 🚯 🗹			, di
Payment Schedule 🕕	Biweekly 2020		hun (dana calar				





#### **Run Payments – New Payment Run**

- a. Navigate to your Payment Schedule and select a Pay Period
- b. Navigate to the Payment Runs related list and click "New"

	Pay Period 2/9/2020 - 2/22/2020		New C	New Contact New Opportunity		Edit	New Case	New Lead		
2	Payment Runs (0)	Payments (0)								
D	<b>etails</b> Activity	263.SMAMMONTA CASS	-////0111/	<i>:31(CS</i> -1)						271152
	Pay Period Name	2/9/2020 - 2/22/2020	1	Payme	nt Schedule	Biwee	kly 2020			
	Start Date 📵	2/9/2020	1. Carlos	Closed	0				Å	2
	End Date 🕕	2/22/2020	1. Constanting of the second s							
0	<ul> <li>Payment Runs</li> <li>items • Sorted by Effective</li> <li>Payments</li> <li>items • Sorted by Effective</li> </ul>	ve Date • Updated a few seconds ago ve Date • Updated a few seconds ago						New	Change Own	er







- c. Accept default field settings as shown in screen shot.
- d. Click "Run Payments" (screen will update to show progress of payment processing).

DIT PAYMENT RUN					
Name	PMT - Biweekly 2020 (2/9/2020 - 2/22/2	020)			
Payment Schedule 👔	Biweekly 2020	\$	Run Date i	12/13/2019	
Pay Period 🚺	2/9/2020 - 2/22/2020	\$	Effective Date 👔	2/27/2020	
Payment Type 👔	Payment	\$	Existing Payments i	Void	
Users i	All Assigned	\$			







e. When Payment Run Screen shows "Jobs Completed", click on "Close" button or Pay Period to return to Pay Period and review your new payments.

PMT - Biweekly 2020 (2/9/2020 - 2/22/20									
DIT PAYMENT RUN									
Name PMT - Biweekly 2020 (2/9/2020 - 2/22/2020) Payment Schedule i Biweekly 2020 Run Date i 1: Pay Period i 2/9/2020 - 2/22/2020 Effective Date i 2: Payment Type i Payment Existing Payments i We Users i All Assigned									
STATUS	ated								
STATUS Jobs Comple	eted								
STATUS Jobs Comple	Batches	Processed	Status	Errors					
Jobs Comple Job Creating Payment Records	Batches	Processed 2	Status Completed	Errors O					
Jobs Comple Job Creating Payment Records Generating Payment Lines	Batches 2 55	Processed 2 55	Status Completed Completed	Errors O O					





#### **View CloudComp Payments**

All Payments generated for each Pay Period are located on the Payments related lists under Pay Period and Payment Schedule.

Payments are comprised of a parent Payment object and a child Payment Lines object. Each Payment Line is a persistent record of either a CloudComp Qualifying Record (QR), or a CloudComp Payment Setup Line (PSL). Each Payment Line which references a QR is populated with copies of all of the fields of Qualifying Record at the time of the Payment Run.

CloudComp Payment Run jobs are totally separate from CloudComp Sync jobs and specifically designed to not be affected by changes to sales data or CloudComp Compensation data.

CloudComp Payments are persistent samples of QR by QR Release Date and Pay Period date range at the time of the Payment Run. Payment amounts and totals <u>will not</u> <u>change</u> in spite of changes to sales data and subsequent CloudComp Sync jobs even if the QR referenced by Payment Lines are updated or deleted.

2 21	/9/2020 -	2/22/2	020		New	Contact Nev	v Opportunity	Edi	t New Case	New Lead
Payme	ent Runs (1)	۶	Payments (10+)							
etail	s Activi	ty	- <i>3116-</i> 1116-1111			MENCA MARTS				
Pay F	Period Name	2/9/2	2020 - 2/22/2020			Payment Sche	edule Biweel	kly 20	020	
Start	t Date 🚯	2/9/2	2020			Closed 🕕				, de la
End I	Date 🚯	2/22/	2020		and the second					
Pa	ayment Run	5 tive Date ∙ U	pdated a few seconds	ago			1	¢ -	C' New	Change Owner
	Payme	nt Ru 🗸	Payment Sc 🗸	Payment Ty	~	Existing Pay 🗸	' Status	$\sim$	Users 🗸	Effective ↑
1	PMT -	Biweekly	Biweekly 2020	Payment		Void	Completed		All Assigned	2/27/2020
Ø D-	avmonte				V	liew All				
Pa D+ item	<b>ayments</b> ns • Sorted by E	ffective Date	• Updated a few seco	nds ago	V	iew All			¢ • C	Change Owner
Pa D+item	ayments ns • Sorted by E	ffective Date	• Updated a few seco Effective 1 V	nds ago User	v ~	ïew All Balance For ∨	Commissio	~	Ø∗ C⁺ Draw (Reco ∨	Change Owner Salary Total
Pa D+ item	ayments Ins · Sorted by E Payme PMT -	ffective Date ant N ✓ 2/9/202	Updated a few seco Effective ↑ ∨ 2/27/2020	nds ago User Andy Kimura	~	Balance For ~ \$0.00	<ul> <li>Commissio</li> <li>\$46,287.18</li> </ul>	~	\$ ▼ C Draw (Reco ∨ \$1,500.00	Change Owner Salary Total 52,500.00
Pa D+ item 1 2	ayments ns · Sorted by E Payme PMT - PMT -	ffective Date ent N ✓ 2/9/202 2/9/202	Updated a few seco Effective ↑ ∨ 2/27/2020 2/27/2020	nds ago User Andy Kimura Rihanna Farm	v v	Balance For ~ \$0.00 \$0.00	<ul> <li>Commissio</li> <li>\$46,287.18</li> <li>\$4,361.11</li> </ul>	~	\$\$	Change Owner Salary Total \$2,500.00 \$2,500.00
Pa D+ item 1 2 3	ayments ns · Sorted by E Payme PMT - PMT - PMT -	ffective Date ant N V 2/9/202 2/9/202 2/9/202	Updated a few seco Effective	nds ago User Andy Kimura Rihanna Farm Stacy Owen	v v	Balance For ∿ 50.00 \$0.00 \$0.00	Commissio 546,287.18 54,361.11 55,352.43	~		Change Owner Salary Total 52,500.00 52,500.00 52,500.00
Pa D+ item 1 2 3 4	ayments s - Sorted by E Payme PMT	ffective Date nt N 2/9/202 2/9/202 2/9/202 2/9/202	- Updated a few seco Effective   2/27/2020 2/27/2020 2/27/2020 2/27/2020 2/27/2020	nds ago User Andy Kimura Rihanna Farm Stacy Owen Carter Khan	v	Balance For ∨ \$0.00 \$0.00 \$0.00 \$0.00	<ul> <li>Commissio</li> <li>S46,287.18</li> <li>S4,361.11</li> <li>S5,352.43</li> <li>S13,895.63</li> <li>S13,895.63</li> </ul>	~	Image: Control         Image: Control           Draw (Reco         V           \$1,500.00         \$1,500.00           \$1,500.00         \$10,000.00	Change Owner Salary Total 52,500.00 52,500.00 52,500.00 50.00
P: 0+ item 1 2 3 4 5	ayments ns · Sorted by E Payme PMT - PMT - PMT - PMT -	ffective Date int N V 2/9/202 2/9/202 2/9/202 2/9/202 2/9/202	- Updated a few seco Effective 1 ~ 2/27/2020 2/27/2020 2/27/2020 2/27/2020 2/27/2020	nds ago User Andy Kimura Rihanna Farm Stacy Owen Carter Khan Stephen Matt	v v her	Balance For ∨ \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	<ul> <li>Commissio</li> <li>\$46,287.18</li> <li>\$4,361.11</li> <li>\$5,352.43</li> <li>\$13,895.63</li> <li>\$13,246.59</li> </ul>	~	\$\$ *         \$\$ C'           Draw (Reco \$>         \$\$ 1,500.00           \$\$ 1,500.00         \$\$ 1,500.00           \$\$ 1,500.00         \$\$ 1,000.00           \$\$ 10,000.00         \$\$ 1000.00	Change Owner Salary Total \$2,500.00 \$2,500.00 \$2,500.00 \$0.00 \$0.00
Pri Pri 1 2 3 4 5 6	ayments s · Sorted by E Payme PMT -	ffective Date int N V 2/9/202 2/9/202 2/9/202 2/9/202 2/9/202 2/9/202 2/9/202	- Updated a few seco Effective 1 ~ 2/27/2020 2/27/2020 2/27/2020 2/27/2020 2/27/2020 2/27/2020	nds ago User Andy Kimura Rihanna Farm Stacy Owen Carter Khan Stephen Matt Natalie Price	v v	Balance For ~ 50.00 50.00 50.00 50.00 50.00 (5500.00) 50.00	<ul> <li>Commissio</li> <li>S46,287.18</li> <li>S4,361.11</li> <li>S5,352.43</li> <li>S13,895.63</li> <li>S13,246.59</li> <li>S6,783.08</li> <li>S6,783.08</li> </ul>	~	\$\$ *         \$\$ C'           Draw (Reco \$>         \$\$1,500.00           \$\$1,500.00         \$\$1,500.00           \$\$1,500.00         \$\$10,000.00           \$\$10,000.00         \$\$500.00	Change Owner Salary Total 52,500,00 52,500,00 52,500,00 50,00 51,500,00 51,500,00
Pr Pr 1 2 3 4 5 6 7	ayments Payme PMT	ffective Date int N V 2/9/202 2/9/202 2/9/202 2/9/202 2/9/202 2/9/202 2/9/202	- Updated a few seco Effective 1 ~ 2/27/2020 2/27/2020 2/27/2020 2/27/2020 2/27/2020 2/27/2020 2/27/2020	nds ago User Andy Kimura Rihanna Farm Stacy Owen Carter Khan Stephen Matt Natalie Price Luke Page	v v	Balance For ~ 50.00 50.00 50.00 50.00 50.00 50.00 50.00 50.00 50.00	<ul> <li>Commissio</li> <li>S46,287.18</li> <li>S4,361.11</li> <li>S5,352.43</li> <li>S13,895.63</li> <li>S13,246.59</li> <li>S6,783.08</li> <li>S3,296.77</li> <li>S4,908.96</li> </ul>	~	Image: Cell           Draw (Reco >           \$1,500.00           \$1,500.00           \$1,500.00           \$1,500.00           \$1,000.00           \$10,000.00           \$500.00           \$500.00           \$500.00	Change Owner Salary Total 52,500.00 52,500.00 52,500.00 50.00 51,500.00 51,500.00
Pi Pi 1 1 2 3 4 5 6 7 8 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	ayments solved by E Payme PMT - PMT -	ffective Date int N V 2/9/202 2/9/202 2/9/202 2/9/202 2/9/202 2/9/202 2/9/202 2/9/202	- Updated a few seco Effective 1 ~ 2/27/2020 2/27/2020 2/27/2020 2/27/2020 2/27/2020 2/27/2020 2/27/2020 2/27/2020	nds ago User Andy Kimura Rihanna Farm Stacy Owen Carter Khan Stephen Matt Natalie Price Luke Page Susan Rogers	v v h	Balance For ∾ \$0.00 \$0.0	<ul> <li>Commissio</li> <li>S46,287.18</li> <li>S4,361.11</li> <li>S5,352.43</li> <li>S13,895.63</li> <li>S13,246.59</li> <li>S6,783.08</li> <li>S3,296.77</li> <li>S4,898.86</li> <li>S1132.82</li> </ul>	~	Image: Cell           Draw (Reco >           \$1,500.00           \$1,500.00           \$1,500.00           \$1,500.00           \$10,000.00           \$10,000.00           \$500.00           \$500.00           \$500.00           \$500.00           \$500.00           \$500.00	Change Owner Salary Total 52,500,00 52,500,00 52,500,00 50,00 51,500,00 51,500,00 51,500,00







### View CloudComp Payment (top of page)

Payment PMT - 8/1/202	3 - 8/31/2023 - Luke Page	New Contact	New Case	Edit	New Lead	Delete	-
Details	View CloudComp Paym	ent (top of page)	>				
✓ Payment	$\sim$		<	Payment	Summary PL	)F	
Payment Name	PMT - 8/1/2023 - 8/31/2023 - Luke Age	Payment Summary	View PD	OF   Save A	Attachment (/	refresh pag	e,
Approval 🚯	/	Payment Schedule	0 2023 -	USD - Mo	nthly		
		Pay Period 🚯	8/1/202	3 - 8/31/2	023		
User 🚯	Luke Page	Payment Run	PMT - 2 8/31/20	2023 - USI 23) - 3	D - Monthly (	8/1/2023 -	
Plan Assignment 🕚	AE - Inside Sales - 2023 - Luke Page	Туре 🚯	Paymen	nt			
Effective Date	9/4/2023	Void 🚯					A.C.
Balance Forward G Total	\$0.00	Void Reason (1)					
Carry Over Total 🚯	\$0.00	Payment Total 🚯	\$18,619	.51			
$\vee$ Commissions by Tie	r			Payn	nent Total	>	
Commission G Subtotal	\$17,119.51	Recalculate 🚯					S. MARY
Commission djustment	\$0.00 Commission Total	Commission (per unit) Subtotal	\$0.00				
Commission Total 🚯	\$17,119.51	Commission (per unit) Adjustment	\$0.00				
Bonus Subtotal 🕕	\$0.00	Commission (per unit) Total	<b>()</b> \$0.00				
Bonus Adjustment 🕚	\$0.00	•					
Bonus Total 🕚	\$0.00						







View CloudComp Payment (bottom of page)

Payment PMT - 8/1/2023 - 8/31/2023 - Luke Pa	ge (	New Contact	New Case	Edit	New Lead	Delete	•
✓ Commissions by Rate Type (rt)	omp Payment	t (bottom of pag	e)				
Commission rt	$\checkmark$	Commission (per unit) rt Subtotal	<b>()</b> \$0.00				
Commission rt 🚯 \$0.00 Adjustment		Commission (per unit) rt Adjustment	\$0.00				A MARY
Commission rt 🚯 \$0.00 Total		Commission (per unit) rt Total	\$0.00				
✓ Draws	overable Draw	•					
Draw (Recover- 🚯 \$500.00 able) Subtotal		Draw (Non- Recoverable) Subtotal	\$0.00				
Draw (Recover- able) Adjustment		Draw (Non- Recoverable) Adjustment	\$0.00				. Mart
Draw (Recover- <b>1</b> \$500.00 able) Total		Draw (Non- Recoverable) Total	\$0.00				
✓ Salary							
Salary Subtotal 🚺 \$1,500.00		Deductions Subtotal	<b>()</b> \$0.00				
Salary Adjustment <b>0</b> \$0.00 Salary		Deductions Adjustment	\$0.00				AMAS
Salary Total 🟮 \$1,500.00		Deductions Total	\$0.00				
✓ Sharing							
Recipient Share (Read-Only)	1	Manager Share (Read Only)	•				



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### View CloudComp Payment (related lists)

Payment PMT - 8/1/2023 - 8/31/2023 - Luke Page	New Contact	New Case E	dit New Lead	Delete 🔻
Payment Lines (10+)     View CloudComp Payme     View CloudComp Payme	ent (related lists			\$\$ * C
Payment Line Name     V     Deal Name	~	Commissi $\lor$	Commission $\smallsetminus$	Release D \
1 🗌 Base Salary - 8/31/2023 - Page		0.0000%	\$0.00	8/31/2023
2 Draw (Recoverable) - 8/31/2023 - Page		0.0000%	\$0.00	8/31/2023
3 rfs-141618 Brown, Kessler and Jer	rde - Training	3.0000%	\$8,748.24	8/28/2023
4 🗌 rfs-137680 Labadie, Leannon and	Morar - Support	3.0000%	\$232.54	8/10/2023
5 rfs-137647 Payment Lines contain the	granular ort	3.0000%	\$232.54	8/10/2023
6 rfs-137682 details of how every penny compensation was calculated	r of	3.0000%	\$232.54	8/10/2023
7 rfs-137681 tier, deal and more.	ied by date,	3.0000%	\$232.54	8/10/2023
8 rfs-137679 Labadie, Leannon and	Morar - Support	3.0000%	\$232.54	8/10/2023
9 rfs-137678 Labadie, Leannon and	Morar - Support	3.0000%	\$232.54	8/10/2023
10 rfs-137677 Labadie, Leannon and	Morar - Support	3.0000%	\$232.54	8/10/2023
View Al	I			
Compensation Paid (1) 1 item • Sorted by Date • Updated a minute Compensation Paid reco granular commissions p periods in which they we	ords relate all aid to the fiscal ere earned.	>		\$\$ * C
_ Name ∨ Amount ∨ Date ↑	Compensation		∨ Туре	~
1 P1307 \$17,119.51 9/4/2023	Aug FY 2023 - L	uke Page	Payment	
Payment History (2) 2 items · Sorted by Date · Updated a minute ago	tains an automatic nge to payment			\$\$ • C'
Date V Field V Use	er	∨ Origin	nal Value 🗸 🗸	New Value
1 9/19/2023 8:20 AM Payment Amount (Calculated) Close	udComp Administrat	tor \$0		\$18,619.51
2 9/19/2023 8:17 AM Created. Close	udComp Administrat	or		
View Al	I			







View CloudComp Payment Summary PDF (top of page)

	Clou Commis	udCom	p™			
Surf <sup>For</sup> Title	Luke Page AE - Inside Sales	Demo Org Paym Date Period	9/4/2023 8/1/2023 - 8/31/2023	Type Void	Paym false	nent
сом	MISSIONS					
		Commission Total	\$17,119.51			
		Commission (per unit) To	tal \$0.00			
		Bonus Total	\$0.00			
		Commission rt Total	\$0.00			
		Commission (per unit) rt	Total \$0.00			
		Total		\$17,119	9.51	
		<b>Commission Deductions</b>				
		Draw (Recoverable) Total	\$500.00			
		Draw (Non-Recoverable)	Total \$0.00			
		Total		\$500	0.00	
		COMMISSIONS PAID		\$16,619	9.51	\$16,
DRAV	NS					
		Draw (Recoverable) Total	\$500.00			
		Draw (Non-Recoverable)	Total \$0.00			
		Total		\$500	0.00	




View CloudComp Payment Summary PDF (bottom of page)

DRAWS				
	Draw (Recoverable) Total	\$500.00		
	Draw (Non-Recoverable) Total	\$0.00		
	Total		\$500.00	
	DRAWS PAID		\$500.00	\$17,119.51
SALARY				
	Salary Total	\$1,500.00		
	Total		\$1,500.00	
	Salary Deductions			
	Deductions Total	\$0.00		
	Total		\$.00	
	SALARY PAID		\$1,500.00	\$18,619.51
BALANCE FORWARD	)			
	FROM LAST PAYMENT		\$0.00	\$18,619.51
PAYMENT TOTAL				\$18,619.51
CARRY OVER				





## **Run Payments – Run Payments for Specific Users**

- a. Navigate to your Payment Schedule and select a Pay Period
- b. Navigate to the Payment Runs related list and click "New"

IT PAYMENT RUN						
Name	PMT - Biweekly 2020 (2/9/2020 - 2/22/2	.020)				
Payment Schedule i	Biweekly 2020	\$	Ru	n Date 👔	12/13/2019	
Pay Period i	2/9/2020 - 2/22/2020	\$	Effectiv	e Date i	2/27/2020	
Payment Type 👔	-None	î	Existing Pay	ments i	Void	ŧ
Users 👔 🗸	All Assigned		]			
	Specific Users		,			





2MT - Biweekly 2020 (2/9/2020 - 2/22/2020) - 2	
iweekly 2020	Run Date i 12/16/2019
/9/2020 - 2/22/2020	Effective Date i 2/27/2020
ayment	Existing Payments i Void
pecific Users	÷
earch By First Name	Search Text Go
	SELECTED USERS
	SELECTED USERS
	PMT - Biweekly 2020 (2/9/2020 - 2/22/2020) - 2 Biweekly 2020 2/9/2020 - 2/22/2020 Payment Specific Users Run Payment Run Payment

#### **Run Payments – Clawbacks and Adjustments**





Many times in Sales Organizations, changes occur to the sales data that constitutes the commissionable value of prior pay periods after sales reps have already been paid commissions for the prior pay periods. When these changes result in a reduction of the commissionable value, they are often referred to as "**Clawbacks**", though they may also represent increases in prior commissionable value as well.

#### **Run Payments – Manual Adjustments**

To perform a manual adjustment to a Payment Record: Click Edit, enter adjustment amounts in any of the adjustment fields on the Payment record, Click Save. All associated totals will be updated in the Payment record and the changes will be permanently recorded in the Payment History related list. In order to balance the Compensation Paid amounts within the Compensation Records with the new manually adjusted Payment, navigate to the Compensation Paid records and apply your adjustments as they relate to the Fiscal Periods where the commissions being adjusted were accrued.

## Run Payments – Payment Type: Adjustment

Clawbacks often require Sales Operations teams to perform retroactive adjustment to the compensation accruals of prior pay periods and carry those negative adjustments forward to current pay periods so that they may be deducted from current commissions. But given the complexity of many modern quota-driven, multi-tier, multi-level compensation plans, these calculations can be extremely challenging for Sales Ops teams to perform manually. This is the problem that is addressed by the CloudComp Adjustment feature (Payment Type: Adjustment").

The CloudComp Adjustments feature compares the commissions accrued for the Pay Period to the Payment Total of the most recent Payment record for each User within the same Pay Period. If the amount of the existing Payment record exceeds the commissions accrued for the period as in the case of a clawback, then the Adjustment record will reflect a







negative Carryover amount equal to the difference. If the difference is positive, then the Adjustment record will reflect the positive amount in the Payment Total field.

**To Run a CloudComp Adjustment:** Navigate to the Pay Period, create a new Payment Run, select Payment Type: "Adjustment", click "Run Payments".

To carry a new clawback (negative balance) amount forward through multiple existing prior Pay Periods, you can run Adjustments for one or many Sales Reps on each period sequentially until you reach the most recent prior Pay Period, thereby carrying forward the changes for processing in the current Pay Period.

In order to capture the new negative carryover amount generated by the new Adjustment record you've created in each prior Pay Period, select Balance Forward: "Previous Period".

ADJ - Biweekly - 2021 (4	/5/2021 - 4/18/2021)	Quick Save	Save Cancel	
EDIT PAYMENT RUN				
Name Payment Schedule 😨 Pay Period 💽 Payment Type 💽 Users 😨	ADJ - Biweekly - 2021 (4/5/2021 - 4/18/2021) Biweekly - 2021 4/5/2021 - 4/18/2021 Adjustment All Assigned	÷	Run Date 💽 Effective Date 🖬 Balance Forward 🖬	8/3/2021 None / Current Period Previous Period
		Run Payments		







## Run Payments – Payment Type: Adjustment (Example)

Andy Kimura Manager – Channel Sales, is on a Compensation Plan in CloudComp in which he receives overlay commission for all of the sales of his team as well as his own deals.

Andy Kimura reports up to **Stephen Matthews VP of Sales**, who gets a multi-tier, quota-driven overlay on all revenue from all three sales teams he manages (Channel, Enterprise and Inside), who in turn reports up to **Carter Khan SVP of Sales**, who gets a multi-tier, quota-driven overlay on all Sales and who in turn reports up to **Amanda Bishop CEO**.







In this example we are going to simulate a **multi-level clawback** on an Opportunity that was closed by Andy Kimura January 6th 2020, called "McLaughlin LLC – App Subscription" The clawback will be triggered by a **50% reduction** in the value of the Opportunity which is applied **after payments have already been made for the Pay Period**.

The Opportunity closed by Andy on 1/6/2020 resulted in commissions being paid out to Andy, Stephen, Carter and Amanda as part of the **Biweekly Pay Period 12/29/2019 –** 1/11/2020







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Opportunity McLaughlin LLC - App	o Subscription		+	Follow Edit New Cas	e New Note De	lete Clone 🔻
~	$\rangle \sim \rangle \sim \rangle$	~		Closed	Won Char	nge Closed Stage
Products (1)	Ifiliment (0)   Opportunity Team	(0) 🚺 Notes & Attack	ments (0) 🧧 Insertio	n Orders (0) 🛛 📔 Invoices	(0)	
Details Activity C	hatter		d we ya			
Opportunity Owner	N Andy Kimura		Close Date	1/6/2020		
Opportunity Name	McLaughlin LLC - App Subscription		Stage	Closed Won		
Account Name	McLaughlin LLC		Probability (%)	100%		
Туре	Renewal		Amount	\$62,787.00		
Lead Generator			contract Start Date			
RevenueCloud Splits Template	Opportunity Amount before	reduction	Override Splits Template	0		
			Margin Amount	\$0.00		
			Set Account Teams Splits			
> RevenueCloud						
> Additional Information						
> System Information						
Products			ŵ	C <sup>I</sup> Add Products	Edit Products Choo	se Price Book 🛛 👻
1 item • Sorted by Sort Order • Update	ed an hour ago					
Product	$\checkmark$ Date $\checkmark$ End	Date 🗸 Quantity	✓ List Price	🗸 Sales Price 🗸 Total Pri	ce 🗸 Line Descri	✓ Sale Type
1 App Subscription	1/6/2020	150.00	\$1,200.00	\$418.58 \$62,787	.00	
		View Al	I			





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Pay Periods > 12/29/2019 - 1/11/2020 Payments Payn	nents for Pay	Period Before Adj	ustment f	or Clawback				XXXXXX 278944		
19 items • Sorted by User • Updated a few seconds ago										
Payment Name 🗸 🗸 🗸	Effectiv 🗸	User 1 v	Bal 🗸	Commi 🗸	Draw (R 🗸	Salary T 🗸	Payment Total	✓ Carry … ✓	Void $\checkmark$	
1 PMT - 12/29/2019 - 1/11/2020 - Aiden Campbell	1/16/2020	Aiden Campbell	\$0.00	\$13,255.43	\$500.00	\$1,500.00	\$14,755.43	\$0.00		
2 PMT - 12/29/2019 - 1/11/2020 - Amanda Bishop	1/16/2020	Amanda Bishop	\$0.00	\$28,693.89	\$0.00	\$0.00	\$28,693.89	\$0.00		
3 PMT - 12/29/2019 - 1/11/2020 - Andy Kimura	1/16/2020	Andy Kimura	\$0.00	\$4,177.93	\$1,500.00	\$2,500.00	\$6,677.93	\$0.00		
4 PMT - 12/29/2019 - 1/11/2020 - Carter Khan	1/16/2020	Carter Khan	\$0.00	\$16,024.64	\$10,000.00	\$0.00	\$16,024.64	\$0.00		
5 PMT - 12/29/2019 - 1/11/2020 - Catherine Davidson	1/16/2020	Catherine Davidson	\$0.00	\$6,386.18	\$500.00	\$1,500.00	\$7,886.18	\$0.00		
6 PMT - 12/29/2019 - 1/11/2020 - Chuck Roth	1/16/2020	Chuck Roth	\$0.00	\$1,193.46	\$500.00	\$1,500.00	\$2,693.46	\$0.00		
7 PMT - 12/29/2019 - 1/11/2020 - Hailey May	1/16/2020	Hailey May	\$0.00	\$6,913.99	\$500.00	\$1,500.00	\$8,413.99	\$0.00		
8 PMT - 12/29/2019 - 1/11/2020 - Joseph Armstead	1/16/2020	Joseph Armstead	\$0.00	\$7,139.31	\$500.00	\$1,500.00	\$8,639.31	\$0.00		
9 PMT - 12/29/2019 - 1/11/2020 - Liam Jarret	1/16/2020	Liam Jarret	\$0.00	\$8,390.99	\$500.00	\$1,500.00	\$9,890.99	\$0.00		
10 PMT - 12/29/2019 - 1/11/2020 - Luke Page	1/16/2020	Luke Page	\$0.00	\$5,172.55	\$500.00	\$1,500.00	\$6,672.55	\$0.00		
11 PMT - 12/29/2019 - 1/11/2020 - Natalie Price	1/16/2020	Natalie Price	\$0.00	\$5,302.69	\$500.00	\$1,500.00	\$6,802.69	\$0.00		
12 PMT - 12/29/2019 - 1/11/2020 - Priscilla Niles	1/16/2020	Priscilla Niles	\$0.00	\$0.00	\$500.00	\$1,500.00	\$2,000.00	(\$500.00)		
13 PMT - 12/29/2019 - 1/11/2020 - Ramon Wilson	1/16/2020	Ramon Wilson	\$0.00	\$0.00	\$500.00	\$1,500.00	\$2,000.00	(\$500.00)		
14 PMT - 12/29/2019 - 1/11/2020 - Rihanna Farmer	1/16/2020	Rihanna Farmer	\$0.00	\$10,958.01	\$1,500.00	\$2,500.00	\$13,458.01	\$0.00		
15 PMT - 12/29/2019 - 1/11/2020 - Seth Gerard	1/16/2020	Seth Gerard	\$0.00	\$4,410.67	\$500.00	\$1,500.00	\$5,910.67	\$0.00		
16 PMT - 12/29/2019 - 1/11/2020 - Stacy Owen	1/16/2020	Stacy Owen	\$0.00	\$9,701.86	\$1,500.00	\$2,500.00	\$12,201.86	\$0.00		
17 PMT - 12/29/2019 - 1/11/2020 - Stephen Matthews	1/16/2020	Stephen Matthews	\$0.00	\$10,443.96	\$10,000.00	\$0.00	\$10,443.96	\$0.00		
18 PMT - 12/29/2019 - 1/11/2020 - Susan Rogers	1/16/2020	Susan Rogers	\$0.00	\$9,812.67	\$500.00	\$1,500.00	\$11,312.67	\$0.00		
19 PMT - 12/29/2019 - 1/11/2020 - Sylvia Yarlett	1/16/2020	Sylvia Yarlett	\$0.00	\$0.00	\$500.00	\$1,500.00	\$2,000.00	(\$500.00)		





By reporting on CloudComp Payments and Lines by Deal Name, we can easily drill down to the exact amounts that were paid out for this one deal (McLaughlin LLC – App Subscription) to Andy, Stephen, Carter, and Amanda during Pay Period 12/29/2019 – 1/11/2010.

Report: Payn Payment	nents with Payment Lines and Qua <b>s by Rep - McLaughlin Ll</b>	lifying Record	
Amounts	paid for deal	Effective Date $\rightarrow$	January 2020
User 🕇 🛛 💌	Deal Name ↑ 🔍 💌	Pay Period $\rightarrow$	12/29/2019 - 1/11/2020
Amanda Bishop	McLaughlin LLC - App Subscription	Sum of Qualifying Revenue Sum of Commission	\$62,787.0000 \$282.54
Andy Kimura	McLaughlin LLC - App Subscription	Sum of Qualifying Revenue Sum of Commission	\$62,787.0000 \$219.75
Carter Khan	McLaughlin LLC - App Subscription	Sum of Qualifying Revenue Sum of Commission	\$62,787.0000 \$313.94
Stephen Matthews	McLaughlin LLC - App Subscription	Sum of Qualifying Revenue Sum of Commission	\$62,787.0000 \$188.36







In order to true-up the sales data for a 50% reduction of the App Subscription that was sold to McLaughlin LLC, a new Closed Won Opportunity is inserted by Sales Ops to represent the amount of the reduction.

Opportunity McLaughlin LLO	LC - App Subscription - Reduce by 75 Units	+ Follow Edit New Case New Note Delete Clone	•
$\langle \cdot \rangle$	$\sim$ $\rangle$ $\sim$ $\rangle$ $\sim$ $\rangle$ $\sim$ $\rangle$ $\sim$ $\rangle$	Closed Won Change Closed Stage	
Products (1)	🙄 Fulfillment (0) 👘 Opportunity Team (0) 📳 Notes & Attachments (0) 😁 Inser	ertion Orders (0) " Invoices (0)	
Details Activity	y Chatter		,*'((
Opportunity Owner	💽 Andy Kimura 👔 Close Date	1/6/2020	
Opportunity Name	McLaughlin LLC - App Subscription - Reduce by 75 Units 🛛 🖉 Stage	Closed Won	
Account Name	McLaughlin LLC Probability (%)	100%	
Туре	Renewal Amount	(\$31,393.50)	
Lead Generator	contract Start Dat	ate	
RevenueCloud Splits Tem plate 🕦	Opportunity inserted with 50% reduction Override Splits Te	emplate 0	
> RevenueCloud			
> Additional Informatio	ion		
> System Information			
Products		C Add Products Edit Products Choose Price Book	•
1 item • Sorted by Sort Order	ler • Updated a few seconds ago		
Product	$\checkmark$ Date $\checkmark$ End Date $\checkmark$ Quantity $\checkmark$ List Price	$\checkmark$ Sales Price $\checkmark$ Total Price $\checkmark$ Line Descri $\checkmark$ Sale Type $\checkmark$	
1 App Subscription	n 1/6/2020 75.00 \$1,200.00	(\$418.58) (\$31,393.50)	•
	View All		







When CloudComp Sync runs during its next scheduled run (or is run by a Compensation Administrator from the UI), the **Compensation of all Users who benefitted from the deal according to their own specific CloudComp Quotas and Compensation Plan Tiers is reduced in precisely the same way that it was increased by the amount of the McLaughlin LLC – App Subscription Opportunity.** 

Report: Comp wi Comp with Custom Report Type	th Comp Tiers & Qual Recs CUSTOM Comp Tiers and Qual Recs CFY		
Total Commission \$502.29	CloudComp data reflects negative	e commissions	
User: Full Name 🕇 💌	Compensation Plan Tier: Plan Tier Name 🕇 💌	Deal Name ↑ 💌	Sum of Commission
Amanda Bishop	All Sales - 0% - 100%	McLaughlin LLC - App Subscription	\$282.54
		McLaughlin LLC - App Subscription - Reduce by 75 Units	(\$141.27)
Andy Kimura	App Subscriptions - All	McLaughlin LLC - App Subscription	\$219.75
		McLaughlin LLC - App Subscription - Reduce by 75 Units	(\$109.88)
Carter Khan	App Subscriptions - 0% - 100%	McLaughlin LLC - App Subscription	\$313.94
		McLaughlin LLC - App Subscription - Reduce by 75 Units	(\$156.97)
Stephen Matthews	App Subscriptions - 0% - 100%	McLaughlin LLC - App Subscription	\$188.36
		McLaughlin LLC - App Subscription - Reduce by 75 Units	(\$94.18)
Total			\$502.29





Now we can navigate to the Pay Period 12/29/2019 – 1/11/2020 and create a new Payment Run with Payment Type: Adjustment, to claw back the difference between what was paid out to the Users and what they now actually earned for the Pay Period with the 50% reduction in the McLaughlin LLC – App Subscription Opportunity.

ADJ - Biweekly 2020 (12/29/20	19 - 1/11/2020)	Quick Save	Save	Cancel	]		
EDIT PAYMENT RUN							
Name	ADJ - Biweekly 2020 (12/29/2019 - 1/11/2020)						
Payment Schedule 👔	Biweekly 2020		\$		Run Date 👔	12/13/2019	
Pay Period 👔	12/29/2019 - 1/11/2020		\$		Effective Date i	1/16/2020	
Payment Type 🥫	Adjustment		\$	E	Existing Payments 👔	Void	\$
Users i	Specific Users		\$				
SEARCH USERS	Run Adjustment for Specific Users Search By First Name	iyments		Search Tex	.t		Go
AVAILABLE USERS		SELECTED USE	RS		Remove		
Name         Profile.Name         UserRole.Nam           Àiden Campbell         Standard User AE - Enterprise           Catherine Davidson         Standard User AE - Inside Sala           Chuck Roth         Standard User AE - Enterprise           Hailey May         Standard User AE - Enterprise           Joseph Armstead         Standard User AE - Enterprise	e Sales sales Sales Sales	<ul> <li>Name</li> <li>Amanda Bish</li> <li>Andy Kimura</li> <li>Carter Khan</li> <li>Stephen Matt</li> </ul>	Pro Sta Sta hews Sta	ofile.Name andard User andard User andard User andard User	UserRole.Name CEO Manager - Channel S SVP Sales VP Sales	Sales	







CloudComp Adjustments compare totals between existing Payments in a given Pay Period to current Compensation data in CloudComp Qualifying Records at the time of the creation of the Adjustment. If there is any negative difference (prior commissions totals paid exceed accruals) they will be recorded as a negative carryover on the Adjustment record. If there is a positive difference it will be reflected as positive amount in Payment Total of the Adjustment record.

Pay Per Paym	iods ien	> 12/29/2019 - 1/11/2020 S						Adji	ustments c	arry change	s forward from I	Pay Period		
23 item	s • So	rted by User • Updated a minute ago												
		Payment Name	$\sim$	Effectiv $\lor$	User 1	~	Bal 🗸	Commi 🗸	Draw (R 🗸	Salary T 🗸	Payment Total	🖌 Carry 🗸	Void $\checkmark$	
1		PMT - 12/29/2019 - 1/11/2020 - Aiden Campbell		1/16/2020	Aiden Campbell		\$0.00	\$13,255.43	\$500.00	\$1,500.00	\$14,755.43	\$0.00		•
2		PMT - 12/29/2019 - 1/11/2020 - Amanda Bishop		1/16/2020	Amanda Bishop		\$0.00	\$28,693.89	\$0.00	\$0.00	\$28,693.89	\$0.00		•
3		ADJ - 12/29/2019 - 1/11/2020 - Amanda Bishop		1/16/2020	Amanda Bishop		\$0.00	\$28,552.62	\$0.00	\$0.00	\$0.00	(\$141.27)		•
4		PMT - 12/29/2019 - 1/11/2020 - Andy Kimura		1/16/2020	Andy Kimura		\$0.00	\$4,177.93	\$1,500.00	\$2,500.00	\$6,677.93	\$0.00		•
5		ADJ - 12/29/2019 - 1/11/2020 - Andy Kimura		1/16/2020	Andy Kimura		\$0.00	\$4,068.06	\$1,500.00	\$2,500.00	\$0.00	(\$109.87)		•
6		PMT - 12/29/2019 - 1/11/2020 - Carter Khan		1/16/2020	Carter Khan		\$0.00	\$16,024.64	\$10,000.00	\$0.00	\$16,024.64	\$0.00		•
7		ADJ - 12/29/2019 - 1/11/2020 - Carter Khan		1/16/2020	Carter Khan		\$0.00	\$15,867.67	\$10,000.00	\$0.00	\$0.00	(\$156.97)		•
8		PMT - 12/29/2019 - 1/11/2020 - Catherine Davids	on	1/16/2020	Catherine Davidson	1	\$0.00	\$6,386.18	\$500.00	\$1,500.00	\$7,886.18	\$0.00		•
9		PMT - 12/29/2019 - 1/11/2020 - Chuck Roth		1/16/2020	Chuck Roth		\$0.00	\$1,193.46	\$500.00	\$1,500.00	\$2,693.46	\$0.00		•
10		PMT - 12/29/2019 - 1/11/2020 - Hailey May		1/16/2020	Hailey May		\$0.00	\$6,913.99	\$500.00	\$1,500.00	\$8,413.99	\$0.00		•
11		PMT - 12/29/2019 - 1/11/2020 - Joseph Armstead		1/16/2020	Joseph Armstead		\$0.00	\$7,139.31	\$500.00	\$1,500.00	\$8,639.31	\$0.00		•
12		PMT - 12/29/2019 - 1/11/2020 - Liam Jarret		1/16/2020	Liam Jarret		\$0.00	\$8,390.99	\$500.00	\$1,500.00	\$9,890.99	\$0.00		•
13		PMT - 12/29/2019 - 1/11/2020 - Luke Page		1/16/2020	Luke Page		\$0.00	\$5,172.55	\$500.00	\$1,500.00	\$6,672.55	\$0.00		•
14		PMT - 12/29/2019 - 1/11/2020 - Natalie Price		1/16/2020	Natalie Price		\$0.00	\$5,302.69	\$500.00	\$1,500.00	\$6,802.69	\$0.00		•
15		PMT - 12/29/2019 - 1/11/2020 - Priscilla Niles		1/16/2020	Priscilla Niles		\$0.00	\$0.00	\$500.00	\$1,500.00	\$2,000.00	(\$500.00)		•
16		PMT - 12/29/2019 - 1/11/2020 - Ramon Wilson		1/16/2020	Ramon Wilson		\$0.00	\$0.00	\$500.00	\$1,500.00	\$2,000.00	(\$500.00)		•
17		PMT - 12/29/2019 - 1/11/2020 - Rihanna Farmer		1/16/2020	Rihanna Farmer		\$0.00	\$10,958.01	\$1,500.00	\$2,500.00	\$13,458.01	\$0.00		•
18		PMT - 12/29/2019 - 1/11/2020 - Seth Gerard		1/16/2020	Seth Gerard		\$0.00	\$4,410.67	\$500.00	\$1,500.00	\$5,910.67	\$0.00		•
19		PMT - 12/29/2019 - 1/11/2020 - Stacy Owen		1/16/2020	Stacy Owen		\$0.00	\$9,701.86	\$1,500.00	\$2,500.00	\$12,201.86	\$0.00		•
20		PMT - 12/29/2019 - 1/11/2020 - Stephen Matthew	s	1/16/2020	Stephen Matthews		\$0.00	\$10,443.96	\$10,000.00	\$0.00	\$10,443.96	\$0.00		•
21		ADJ - 12/29/2019 - 1/11/2020 - Stephen Matthew	5	1/16/2020	Stephen Matthews		\$0.00	\$10,349.78	\$10,000.00	\$0.00	\$0.00	(\$94.18)		•
22		PMT - 12/29/2019 - 1/11/2020 - Susan Rogers		1/16/2020	Susan Rogers		\$0.00	\$9,812.67	\$500.00	\$1,500.00	\$11,312.67	\$0.00		•
23		PMT - 12/29/2019 - 1/11/2020 - Sylvia Yarlett		1/16/2020	Sylvia Yarlett		\$0.00	\$0.00	\$500.00	\$1,500.00	\$2,000.00	(\$500.00)		





Any negative carryover amounts from the Adjustment records become Balance Forward values for new Payments generated in the next Pay Period, thereby enabling the Sales Reps to cover the clawback amounts from their new commissions.

Pay Period 1/12/2020 - 1/25/2020						New Contact	New Opportunity	Edit	New Case N	Vew Lead 🔻
Details Activity										
Pay Period Name 1/12/2020 - 1/25/2020			J.	Payment Schedule	Biweekly 202	D				
Start Date 1/12/2020			/	Closed 🚯						1
End Date  1/25/2020			1							
Payment Runs     I item - Sorted by Effective Date - Updated a minute ago	Carry-over	from prior Peri	od becomes Ba	alance Forw	ard in Current Per	iod	(	尊 • C'	New Cha	ange Owner
Payment Run Name	✓ Payment So	:hedule 🗸 Payr	ment Type	<ul> <li>Existing Paym</li> </ul>	ients 🗸 Status	~	Users	∨ Effe	ctive Date 🕇	~
1 PMT - Biweekly 2020 (1/12/2020 - 1/25/2020)	Biweekly 20	20 Payr	nent	Delete	Completed	1	All Assigned	1/30	0/2020	
			View	All						
Payments 10+ items - Sorted by User - Updated a minute ago								\$	• C <sup>i</sup> Cha	ange Owner
Payment Name	$\checkmark$ Effectiv $\checkmark$	User 1 🗸 🗸	Balance Forward	✓ Commi ∨	Draw (Recover 🗸 Sa	ilary Total 🛛 🗸	Payment Total 🛛 🗸	<ul> <li>Carry Over</li> </ul>	r 🗸 Void y	~
1 PMT - 1/12/2020 - 1/25/2020 - Aiden Campbell	1/30/2020	Aiden Campbell	\$0.00	\$11,427.83	\$500.00 \$3	1,500.00	\$12,927.83	\$0.00		
2 PMT - 1/12/2020 - 1/25/2020 - Amanda Bishop	1/30/2020	Amanda Bishop	(\$141.27)	\$21,253.95	\$0.00 \$0	0.00	\$21,112.68	\$0.00		
3 PMT - 1/12/2020 - 1/25/2020 - Andy Kimura	1/30/2020	Andy Kimura	(\$109.87)	\$24,345.98	\$1,500.00 \$2	2,500.00	\$26,736.11	\$0.00		
4 PMT - 1/12/2020 - 1/25/2020 - Carter Khan	1/30/2020	Carter Khan	(\$156.97)	\$14,679.64	\$10,000.00 \$0	0.00	\$14,522.67	\$0.00		•
5 PMT - 1/12/2020 - 1/25/2020 - Catherine Davidso	n 1/30/2020	Catherine Davidson	\$0.00	\$0.00	\$500.00 \$3	1,500.00	\$2,000.00	(\$500.00)		
6 PMT - 1/12/2020 - 1/25/2020 - Chuck Roth	1/30/2020	Chuck Roth	\$0.00	\$26,337.55	\$500.00 \$3	1,500.00	\$27,837.55	\$0.00		<b>V</b>
7 PMT - 1/12/2020 - 1/25/2020 - Hailey May	1/30/2020	Hailey May	\$0.00	\$0.00	\$500.00 \$3	1,500.00	\$2,000.00	(\$500.00)		
8 PMT - 1/12/2020 - 1/25/2020 - Joseph Armstead	1/30/2020	Joseph Armstead	\$0.00	\$9,006.42	\$500.00 \$3	1,500.00	\$10,506.42	\$0.00		
9 PMT - 1/12/2020 - 1/25/2020 - Liam Jarret	1/30/2020	Liam Jarret	\$0.00	\$2,187.65	\$500.00 \$3	L,500.00	\$3,687.65	\$0.00		
10 PMT - 1/12/2020 - 1/25/2020 - Luke Page	1/30/2020	Luke Page	\$0.00	\$26,678.04	\$500.00 \$3	L,500.00	\$28,178.04	\$0.00		
			View	All						





#### **Scheduled Payment Runs - Overview**

CloudComp Payment Run Scheduled Jobs enable automatically running CloudComp Payments on the Effective Date (Pay Period End Date + Days to Payment Run) of each Pay Period for all Users who are assigned to Active Payment Schedules.

#### **Scheduled Payment Runs - Setup**

Payment Run Scheduled Jobs can be easily configured from within the Salesforce UI. Payment Run scheduled jobs should be configured to run once every day of the week (7 X 365) as shown in the screen shot.

- a. Navigate to Setup->Apex Classes
- b. Click "Schedule Apex"
- c. Enter a descriptive name in "Job Name"
- d. Select Apex Class "RcRunPaymentsBatch"
- e. Select Frequency = "Weekly"
- f. Check all 7 days of the week
- g. Enter Start Date and End Date for job
- h. Click "Save"









## **Run Payments – Review Scheduled Jobs**

You can review your CloudComp Payment Run Scheduled Jobs (and all of your scheduled jobs) by Navigating to Scheduled Jobs in Setup as shown in screenshot.

	heduled Jobs	View status of	Scheduled Jobs	
All				Help for this Page 🕜
The All Schedu can delete sche View: All s	led Jobs page lists all of eduled jobs if you have th	the jobs scheduled by your use the permission to do so.	ers. Multiple job types may disp	lay on this page. You
	A   B   C	D   E   F   G   H   I   J   K   L   N	N   O   P   Q   R   S   T   U   V	W X Y Z Other All
Action	Job Name 🛧	Submitted By	Started Next Scheduled Run	Туре
Manage   Del	Run Payments Daily	Administrator, CloudComp	1/1/2020 5:00 AM	Scheduled Apex
	A   B   C	D   E   F   G   H   I   J   K   L   N	I   N   O   P   Q   R   S   T   U   V	W X Y Z Other All





### **Compensation Paid - Overview**

The Compensation Paid Object is a child of the CloudComp Compensation Object. When "Generate Compensation Paid" is set to true on a Payment Schedule the **Compensation Paid Object** is automatically populated by CloudComp Payments with only those portions of **CloudComp Payments** (Payment Lines) which align with the Compensation Records in which the commissions being paid in the Pay Period were accrued.

In most Sales Organizations, Targets, Goals, Quotas and their associated Tiers and Accelerators are organized around Fiscal Periods, which in Salesforce are Months, Quarters, Years and Custom Periods. In many cases however, **Pay** 

**Periods** such as weekly, biweekly and semimonthly do not actually align with Fiscal Periods. The CloudComp **Compensation Paid** feature solves this problem by enabling a running balance of Compensation Paid from Payment records organized by the Fiscal Periods in which the commissions were accrued (earned).

Compensation Paid is a child of the **CloudComp Compensation Object** which represents a grouping of Compensation data by User, Fiscal Period and Tier.









The Compensation Tier Object (child of Compensation Object) represents execution of each Compensation Plan Tier for a User and Fiscal Period. If the User's Compensation Plan contains a combination of Monthly, Quarterly and Annual Quota Types, then there will be Compensation Records generated for each of the Fiscal Periods (Months, Quarters, and Year), containing Compensation Tiers for each associated Compensation Plan Tier.

	ensat	ion - Jan FY 2020 - Rihanna Farmer			Sharing Submit fo	or Approval Delete	
DETAILS <u>T</u>	IERS	PAID	sions Accrued by	Fiscal Period and Tie	ar		
COMPENSAT	TION TH	ERS					
FISCAL PERIO	OD CO	OMP TIER NAME	REVENUE QUOTA	ACCRUED REVENUE	ATTAINMENT PERCENTAGE	QUALIFYING REVENUE	COMMISSION
Jan FY 2020	Ap	pp Subscriptions - 0% - 100% - Jan FY 2020 - Rihanna Farmer	\$2,500,000.00	\$1,075,935.28	121.5183%	\$795,142.15	\$11,927.13
Jan FY 2020	Ap	pp Subscriptions - 100% - 200% - Jan FY 2020 - Rihanna Farmer	\$2,500,000.00	\$1,075,935.28	121.5183%	\$280,793.13	\$5,615.86
Jan FY 2020	Tra	aining - 0% - 100% - Jan FY 2020 - Rihanna Farmer	\$2,500,000.00	\$543,903.13	121.5183%	\$483,811.57	\$3,628.59
Jan FY 2020	Tra	aining - 100% - 200% - Jan FY 2020 - Rihanna Farmer	\$2,500,000.00	\$543,903.13	121.5183%	\$60,091.56	\$600.92
Jan FY 2020	Su	upport - 0% - 100% - Jan FY 2020 - Rihanna Farmer	\$2,500,000.00	\$391,997.84	121.5183%	\$288,489.38	\$2,884.89
Jan FY 2020	Su	upport - 100% - 200% - Jan FY 2020 - Rihanna Farmer	\$2,500,000.00	\$391,997.84	121.5183%	\$103,508.46	\$1,552.63

The Compensation Paid Object (child of Compensation) represents an automated running balance of amounts paid from Payment records as they relate to commissions the User has accrued in the Fiscal Period.







For example, if Biweekly Pay Periods are used with Monthly, Quarterly or Annual Quotas, then some Biweekly Pay Periods will naturally contain amounts accrued from multiple Fiscal Periods. The Compensation Paid feature of CloudComp automatically associates the individual granular payment lines from Payments to Compensation Records thereby organizing amounts paid with the Fiscal Periods where they were accrued.

	L CL	oudcomp ompensat	ion - Jan	FY 2020 ·	Rihanna Farmer Compensation	Paid by	Fiscal Period
I	DETAILS	TIERS	PAID		from Payments	ру Рау	Period
	СОМР	ENSATION PA	ND		New Compensation Paid		
	Name	<b>↓</b> Date	Туре	Amount	Payment	Notes	Last Modified By ID
	P132	1/16/2020	Payment	\$10,958.01	PMT - 12/29/2019 - 1/11/2020 - Rihanna Farmer		CloudComp Administrator
	P184	1/30/2020	Payment	\$11,237.89	PMT - 1/12/2020 - 1/25/2020 - Rihanna Farmer		CloudComp Administrator
	P159	2/13/2020	Payment	\$4,014.12	PMT - 1/26/2020 - 2/8/2020 - Rihanna Farmer		CloudComp Administrator
	Records	s Per Page:	10	Records:	3 of 3		





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# **CloudComp Commission Anything™ Admin Guide - Spring 2025**

۶	Payment PMT - 1/26/202	20 - 2/8/2020	- Rihanna Farr	mer		New Contact	New Opportunity	Edit N	lew Case	New Lead 🛛 👻
۶	Payment Lines									Ś - C
10+	items • Sorted by Release	Date • Updated 2 mir	nutes ago							
	Payment Li 🗸	Туре 🗸	Deal Name 🗸 🗸	Date	✓ Release D	↑ ∨ Compensat ∨	Commission $\lor$	Salary	✓ Draw (Re	eco ∨
1	rfs-34598	Qualifying Rec	Johnson, Lock	1/30/2020	1/30/2020	Support - 100	\$119.43	\$0.00	\$0.00	
2	rfs-34597	Qualifying Rec	Johnson, Lock	1/30/2020	1/30/2020	Support - 100	\$119.43	\$0.00	\$0.00	
3	rfs-34596	Qualifying Rec	Johnson, Lock	1/30/2020	1/30/2020	Support - 100	\$119.43	\$0.00	\$0.00	
4	rfs-34595	Qualif	nastian Daid a		(20/2020	Support - 100	\$119.43	\$0.00	\$0.00	•
5	rfs-34594	for Jan	and Feb Com	ecords generation	ated	Support - 100	\$119.43	\$0.00	\$0.00	•
6	rfs-34593	Record	s from Biweekl	y Pay Period	20	Support - 100	\$119.43	\$0.00	\$0.00	•
7	rfs-34592	Qualifying			1/30/2020	Support - 100	\$119.43	\$0.00	\$0.00	
8	rfs-34591	Qualifying Rec	Johnson, Lock		1/30/2020	Support - 100	\$119.43	\$0.00	\$0.00	
9	rfs-34590	Qualifying Rec	Johnson, Lock	1/30	1/30/2020	Support - 100	\$119.43	\$0.00	\$0.00	•
10	) rfs-34589	Qualifying Rec	Johnson, Lock	1/30/202	1/30/2020	Support - 100	\$119.43	\$0.00	\$0.00	
					View All		_			
						-				
b	Compensation Paid									\$\$ • C'
2 ite	ms • Sorted by Date • Upd	ated 2 minutes ago			Y	Compensation				
	Name	∨ Amo	ount	∨ Date ↑		Jan FY 2020 - Rih	anna Farmer	∨ Туре		$\sim$
1	P159	\$4,0	14.12	2/13/20	20			Payment	í.	
2	P160	\$6,9	38.52	2/13/20	20	Feb FY 2020 - Rit	nanna Farmer	Payment	t.	
					Viev					
							/	/		





h	Compensation Paid					New Contact	New Opportunity	Edit New	Case	New Lead 🔻
$\sim$	Payment Lines by Fis	cal Period								
	Commission Adjustmen	t 🚯 \$0.00			Payment	0	PMT - 1/26/2020	) - 2/8/2020 - Riha	anna Farm	er
	Commission Total 🚯	\$6,938.52			Commis	sion Subtotal 📵	\$6,938.52			
	Bonus Adjustment 🕦	\$0.00			Bonus Si	ubtotal 🕕	\$0.00			
	Bonus Total 🐧	\$0.00			Commis Subtotal	sion (Per Unit) 🧃 🕤	\$0.00			
	Commission (Per Unit) Adjustment	\$0.00								
	Commission (Per Unit) Total	\$0.00	Corr	pensation Pa	id Lines by Fisca	I Period				
>	System Information			7/						
	Compensation Pa	id Lines								\$\$ ▼ CI
10+	Compensation Pa	id Lines								¢.
104	Compensation Pa + items • Sorted by Date • Name	id Lines · Updated a minute ago · Payment Line · ·	Date ↑	✓ Attainment	. ∨ Percentage ∨	Qualifying 🗸	Commissio 🗸	Commission 🗸	Bonus	\$\$ • C
10+	Compensation Pa + items + Sorted by Date + Name rfs-37971	id Lines Updated a minute ago Payment Line  fts-37971	Date ↑ 2/2/2020	<ul> <li>Attainment</li> <li>11.116001%</li> </ul>	. V Percentage V 100.00%	Qualifying > \$277,900.0200	Commissio ∨ 0.7500%	Commission ~ \$2,084.25	Bonus \$0.00	\$ • C
10+ 10+	Compensation Pa + items - Sorted by Date - Name - rfs-37971 - rfs-38092	id Lines Updated a minute ago Payment Line ~ rfs-37971 rfs-38092	Date ↑ 2/2/2020 2/3/2020	<ul> <li>Attainment</li> <li>11.116001%</li> <li>26.502113%</li> </ul>	<ul> <li>Percentage &gt;</li> <li>100.00%</li> <li>100.00%</li> </ul>	Qualifying V \$277,900.0200 \$384,652.8000	Commissio ∨ 0.7500% 0.7500%	Commission ∨ \$2,084.25 \$2,884.90	Bonus \$0.00 \$0.00	\$ • C
10+ 10+ 1 2 3	Compensation Pa           • items • Sorted by Date           Name           rfs-37971           rfs-38092           rfs-36799	id Lines Updated a minute ago Payment Line ~ rfs-37971 rfs-38092 rfs-36799	Date ↑ 2/2/2020 2/3/2020 2/6/2020	<ul> <li>Attainment</li> <li>11.116001%</li> <li>26.502113%</li> <li>37.926558%</li> </ul>	<ul> <li>Percentage &gt;</li> <li>100.00%</li> <li>100.00%</li> <li>100.00%</li> </ul>	Qualifying > \$277,900.0200 \$384,652.8000 \$5,470.4731	Commissio ∨ 0.7500% 0.7500% 1.0000%	Commission ~ \$2,084.25 \$2,884.90 \$54.70	Bonus \$0.00 \$0.00 \$0.00	\$
10- 10- 1 2 3 4	Compensation Pa           + items - Sorted by Date           Name           rfs-37971           rfs-38092           rfs-36799           rfs-36800	Updated a minute ago Payment Line V rfs-37971 rfs-38092 rfs-36799 rfs-36800	Date↑ 2/2/2020 2/3/2020 2/6/2020 2/6/2020	<ul> <li>Attainment</li> <li>11.116001%</li> <li>26.502113%</li> <li>37.926558%</li> <li>37.926558%</li> </ul>	<ul> <li>Percentage &gt;</li> <li>100.00%</li> <li>100.00%</li> <li>100.00%</li> <li>100.00%</li> </ul>	Qualifying > \$277,900.0200 \$384,652.8000 \$5,470.4731 \$5,470.4731	Commissio > 0.7500% 0.7500% 1.0000% 1.0000%	Commission         ~           \$2,084.25         5           \$2,884.90         5           \$54.70         5	Bonus 50.00 50.00 50.00 50.00	* C
10+ 10+ 1 2 3 4 5	Compensation Pa           • items • Sorted by Date           Name           rfs-37971           rfs-38092           rfs-36799           rfs-36800           rfs-36801	Vpdated a minute ago Payment Line V rfs-37971 rfs-38092 rfs-36799 rfs-36800 rfs-36801	Date ↑ 2/2/2020 2/3/2020 2/6/2020 2/6/2020 2/6/2020	<ul> <li>Attainment</li> <li>11.116001%</li> <li>26.502113%</li> <li>37.926558%</li> <li>37.926558%</li> <li>37.926558%</li> </ul>	<ul> <li>Percentage &gt;</li> <li>100.00%</li> <li>100.00%</li> <li>100.00%</li> <li>100.00%</li> <li>100.00%</li> </ul>	Qualifying ~ \$277,900.0200 \$384,652.8000 \$5,470.4731 \$5,470.4731	Commissio > 0.7500% 0.7500% 1.0000% 1.0000% 1.0000%	Commission ~ 52,084.25 52,884.90 554.70 554.70 554.70	Bonus \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	\$\$ * C'
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## **CloudComp Forecasting and Modeling**

CloudComp Forecasting and Modeling enables you to perform powerful Commissions and Sales Revenue Forecasting and Modeling using your existing or new CloudComp Compensation Plans.

CloudComp Forecasting and Modeling is not just for Commissions Administrators! CloudComp Forecasting and Modeling

has been specifically designed to equip resources at all levels within your Sales and Finance Organizations to collaborate on forecasts or model their own private scenarios, at the Deal, Individual, Team or Organization levels.

You can create an unlimited number of CloudComp Forecast<sup>™</sup> Records and each one can contain an unlimited number of CloudComp Plan Forecast<sup>™</sup> records.

# CloudComp Forecasting – Create a new Forecast

- a. Navigate to the CloudComp Forecasts Tab
- **b.** Click New
- c. Enter a Name
- d. Click Save

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Quantity 🕐 USD 0.00	Commission (per unit)  USD 0.00
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Created By CloudComp Administrator, 7/13/2021, 5:29 PM	Last Modified By
🚼 Plan Forecasts (0)	





## **CloudComp Forecasting – Plan Forecasts**

Plan Forecasts are children of CloudComp Forecast Records. You can create one or many Plan Forecasts under each CloudComp Forecast record. A Plan Forecast can represent the outcome of anything from one sales deal to the total sales of an individual or a team who share a compensation plan. Additional Plan Forecasts can be created to represent the production of other individuals or teams who are on different compensation plans within your organization. The aggregate of all Plan Forecasts roll up under their parent CloudComp Forecast, thereby giving you ultimate flexibility in your forecasting and modeling.

Plan Forecast records enable you to use any of your CloudComp Multi-Tier Compensation Plans as a template for a forecast.

## CloudComp Forecasting – Create a new Plan Forecast

- **a.** Navigate to your new Forecast Record and locate the Plan Forecasts related list.
- b. Click New.
- c. Enter a Name.
- d. Choose a Compensation Plan.
- e. Enter a Start Date.
- **f.** Enter a User (if the forecast is for a team, you can enter the manager of the team).
- g. Enter a currency (multi-currency orgs only).
- h. Click Quick Save.
- i. Click "Load Plan Tiers".

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## CloudComp Forecasting – Model by Commissions or Performance

Your new Plan Forecast will now contain 1 child row called a "Tier Forecast" for each instance of a Compensation Plan Tier from the Compensation Plan that you've chosen for the Plan Forecast. Also note that the Tier Forecasts allow you to experiment with different commission rates in the Plan Tiers without making any changes to the referenced Compensation Plan.

The Calculation Mode picklist enables you to pivot between Calculation Mode:

"Commissions" where you can enter total Sales amounts and calculate Commissions (as shown in screenshot) and Calculation Mode: "Performance" where you can enter Commissions amounts to calculate the total Sales.

Click "Calculate" to update your forecast totals in the Forecast Tiers and the aggregate Sales and Commissions totals in the Forecast Summary at the top of the page.

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#### CloudComp Forecasting – **Expand Plan Forecasts across Fiscal Periods**

Every Plan Forecast can be automatically expanded to become a Daily, Weekly, Quarterly or Annual **Revenue and Commissions Forecast** with just a few clicks.

- a. Select checkboxes of the Tier Forecasts that you want to establish.
- **b.** Click Establish.
- **c.** Set the Start Date.
- **d.** Choose Schedule Type (Repeat or Divide).
- e. Select Installment Period.
- **f.** Enter number of installments or accept the default (example: default for monthly is 12, guarterly is 4).
- **a.** Click Generate Forecast.

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You can now perform additional edits on your Tier Forecast rows to model seasonal or other changes in values or save it as it is.

The Tier Forecast Rows will now all roll up to totals in the parent CloudComp Forecast Record and will also report out granularly in CloudComp Forecast reports to give you a real-life view of projected Sales and Commissions by User, Team, Month, Quarter, Year and more.

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## **CloudComp Forecasting – Override Plan Forecasts**

Every Plan Forecast can be overridden to enable using alternate values to roll up to the parent CloudComp Forecast.

To override a Plan Forecast:

- a. Click Edit.
- **b.** Click Forecast Override checkbox.
- **c.** Enter your amount and commission values.
- **d.** Click "Quick Save" or "Save and Close"

4				All	▼ Q Searc	ch						* -		\$?\$	1
	CloudComp Lightni	Home	Opportunities	√ M;	y Compensation	Reports	∨ Dashl	ooards 🗸	Revenue Types 🗸 🗸	Quota Types 🗸 🗸	Quota	as 🗸 Compens	ation Plans	∽ More	
		AN FORECAST cutive 2022													
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## CloudComp Rate Tables™

CloudComp Rate Tables support multiple entries (Rate Table Lines) containing Commission Rates for Field Values in your sales data such as Insurance plan codes, product skus, product codes, product families, opportunity types, custom field values, etc.

Rate Tables are perfect for situations where you have a detailed matrix of different commission rates which would otherwise result in a great number of Compensation Plan Tiers.

		, 100							
Rate	Table Lines (4)	Plan Tiers	(1)						
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## CloudComp Rate Tables – Enable a Rate Table

- a. Confirm that "Rate Type Field" is exposed on your Revenue Type page. If not, navigate to the "Revenue Type Fields" field set on the Revenue Type object and add the field to the field set.
- b. Set the Rate Type Field for the field that will contain the values that you wish to include in your Rate Table
- c. Navigate to the Rate Tables Tab; create a new Rate Table containing the Commission Rates by Field Value that you wish to use for 1 or more Users. Be sure to set the currency of your Rate Table and Rate Table Lines to match the currency of the Compensation Plan.
- **d.** Confirm that the "Rate Table" field is exposed on Compensation Plan Tiers in the CloudComp Compensation Plan Management Interface. If not, add the field to the "Plan Tier Management Fields" field set on Compensation Plan Tier object).
- e. Enter the Rate Table in the Rate Table field on a Compensation Plan Tier (with the correct Revenue Type).

ILS	FILTERS	QL	IOTA TYPES PLAN TIERS	TEST
EVEN	UE TYPE DET	AILS		
	F	ield	Value	Status
Re	venue Type Na	me	Opportunity Products by Family	0
	Object	0	OpportunityLineItem	0
	Data Type	0	Revenue	0
R	evenue Field	0	TotalPrice	0
	Date Field	0	Opportunity.CloseDate	0
	User Id Field	0	Opportunity.OwnerId	0
	Deal Object	0	Opportunity	0
De	al Name Field	0	Opportunity.Name	0
Deal S	equence Field	0	Opportunity.CloseDate	0
	Deal Id Field	0	Opportunity.Id	0
Expe	nse Date Field	0	ServiceDate	0
Rele	ase Date Field	0	ServiceDate	0
R	ate Type Field	0	Product2.Family	0







## **CloudComp Rate Tables – Use Multiple Rate Tables**

You can create and unlimited number of Rate Tables for your Compensation Needs.Different Rate Tables may be used in conjunction with Attainment-Based Tiers and Accelerators as shown in the screen shot. Be sure to match your Rate Table Currencies with your Compensation Plan Currencies.

	mpensation Plan MEA Account E	xecutive - 202	20						Edit	Delete	Clone	Change Owner	Printable Vi	ïew
📔 <u>Plan Ti</u>	iers (3)	Plan Assignment	nts 🚺 Com	pensation										
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	Plan Tier N 🗸	Order ↑ ∨	Attainment $\lor$	Attainment $\vee$	Quota Type 🛛 🗸	Revenue Type 🗸 🗸	Bonus 🗸	Commissio 🗸	Commission (Pe	er 🗸 🛛	Rate Table			~
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						View All								







## CloudComp Plan Tier Relationships<sup>™</sup> (Dependent and Controlling Tiers)

Would you like to use blended Quota Attainment targets for your Sales Reps?

For example, would you like to run a Commission Accelerator or Spiff on Sales Performance that is dependent upon the achievement of one or more other sales targets? You can configure this in CloudComp using Plan Tier Relationships!

### There are many advantages to Plan Tier Relationships (PTR) Including:

- **a.** The targets can be different Fiscal Periods of same or greater length. For example, an Accelerator could be paid against monthly sales with Controlling Comp Tiers based on Quarterly or Annual Quota Attainment.
- **b.** The Controlling Tiers can be based upon data from different Objects. For example, an Accelerator for a BDR on Leads qualified could have a dependency on Amounts Paid by New Customers.
- **c.** Controlling Tier Targets can be blended at different Attainment Percentages, such as 50%, 75%, 90% for 3 controlling Tiers.
- **d.** Existing Plan Tiers can be used as Controlling Tiers for new Dependent Tiers
- e. There is no effect on the Commission calculations of existing Plan Tiers when they are used as Controlling Tiers.
- f. The Quota Attainment Percentage requirements (Base% and Top%) do not need to be adjusted when using them as Controlling Tiers.
- **g.** When you clone your CloudComp Compensation Plans, all PTR are also cloned along with the Plan and Plan Tiers.

## CloudComp Plan Tier Relationships Example

In this example we have configured a Monthly Accelerator of 10% Commission on All Sales that has three Controlling Tiers with blended Quota Attainment Targets of 75%, 75%, and 75%. This Accelerator enables our Sales Rep to earn an

Page 104 of 117







extra 10% Commission on her total sales for any Month where she has already achieved all three of the separate Annual Quota Targets: App Subscriptions, Support and Training.

### Plan Tier Relationships – Create a Plan Tier Relationship

Navigate to the Plan Tier that is going to be the Dependent Tier and create new Plan Tier Relationship from the Plan Tier Relationships (Dependent) Related list as shown.

Compensation Plan Tier MO - Accelerator - All Sales (Blended Targets 75 / 75 / 75)					New Opportunity	Edit	New Case	New Lead	•				
	🗎 Plan Tier Relationships 🗎 Plan Tier Relationships 🚺 Compensation Tiers (1												
D	etails	도에나스 그렇게 제주지지도에가스 그렇게	ر، ( ارہ چا) ( کے کا ال	7 2541	م) الرحب المالية ما		57777	ا ( <i>لـــــ)</i> الر	(5 o))				
	Plan Tier Name	MO - Accelerator - All Sales (Blended Targets 75 / 75 / 75)	Compensation Plan	AE 2022 -	Blended Targets Acce	elerator		/	2				
	Period Type 🚯	Month											
	Data Type	Revenue											
	Enable YTD Quotas   🕕												
	Order	4											
_	Integration Id												
>	Revenue Setup												
>	Quota Attainment Settings     Create New Tier Dependency												
>	> Compensation Settings												
Plan Tier Relationships (Dependent) (0)													
Plan Tier Relationships (controlling) (0)													
	Companyation Tiere	(10+)							~				







Enter a Descriptive Name; Enter the Controlling Tier, the Target for the Tier in Attainment Base as shown, then Save your new Plan Tier Relationship.







Here is the new Plan Tier Relationship we have created. It associates the Controlling Tier "YR – App Subscriptions – All" with the Dependent Tier "MO – Accelerator – All Sales (Blended Targets 75/75/75)".

Plan Tier Relationship YR - App Subsc	riptions - All - 75%			New Contact	New Opportunity	Edit New Case	New Lead
Comp Tier Relationshi							
etails	Accele	ator is Dependent Tier		57///	م الرحم الرجم الر	1172 - X72444	)][(~~)][(#
Relationship Name	YR - App Subscriptions - All - 75%		Plan Tier (dependent)	MO - Accelerator - All Sales (Blended Targets 75 / 75 / 75) YR - App Subscriptions - All			5)
Attainment Base 🕕	75.0000000%	Controlling Tier	Plan Tier (controlling) 🕕				1
Active 1		1	,				
	A clara Comp Administrator 6/2	2022 10:48 AM	Last Modified By	💍 CloudComp Administrator , 6/26/2022 10:48 AM			

Next, we can repeat this process for the additional two Controlling Tiers "YR – Support – All" and "YR – Training – All". One efficient way to do this is to just clone the first Plan Tier relationship, change the name and Controlling Tier, then repeat once more to create the third of three Controlling Plan Tier Relationships.

Now after running CloudComp Sync, we can review the execution of our new Blended Target Accelerator. It turned out that August was the magic Sales Month for our Sales Rep. Though she achieved 75% Quota Attainment of her Annual Training Sales Target in May, it took her until early in August to achieve 75% Quota Attainment on her Support Sales Target and then finally in late August she hit 75% Quota Attainment on her Annual App Subscriptions Sales Target,





thereby earning a \$7,429.70 Accelerator Commission on her August Sales. Do you think Natalie feels motivated to sell more in September? We think so!

Compensation Tier Controller All Sales (Blended Targets 75 / 75 / 75) - Aug FY 2022 - Nata Customize Page   Edit Layout   Printable View   Help for this Page ?											
Compen	Isation her Detail	Delete									
	Compensation 🥹 Aug FY	2022 - Natalie Price			Compensation Plan	AE 2022 - Blended Targets Accelerator					
	Comp Tier Name MO - Ac Nata	ccelerator - All Sales (Blended	Targets 75 / 75 / 75) - Aug FY 202	22 - Co	ompensation Plan Tier 🌝	MO - Accelerator - All Sales (Blended Targets 75 /	75/75)				
	User Name 🥥 Natalie	Price			Aug FY 2022	FY 2022					
	Start Date ⊘ 8/1/202	2			8/31/2022						
	Commission \$7,429.	70									
Attainm	ent Levels for Tier										
▶ Quota A	Attainment										
Amount	ts Accrued		3rd of 3 Controlling	Tiers was achieved	l on 8/22/22, the	reby firing Accelerator					
Control	ling Tiers olling Tiers Achieved Date Time 🍚 8/22/20	22 12:00 AM		c	ontrolling Tiers Count 깅	3					
▼ Comper	Commission 🥥 \$7,429. Bonus 🥥 \$0.00	7030 - Acce	elerator Commission		Commission (per unit) 🥝 Performance Award 🥝	\$0.0000					
To Date	Quotas										
▶ System	System Information     Dates that 75% Attainment of Controlling Tiers were Achieved										
Comp Tie (depende	er Relationships (Compensation T ent))	ïer				Comp Tiel Relationships (Compensatio	Tier (dependent)) Help				
Action	Relationship Name		Plan Tier Relationship	Active Tier Base (quantity)	Tier Base (revenue)	Compensation Tier (controlling)	Base Achieved Date Time				
Edit   Del	YR - App Subscriptions - All - 75% - MO - (Blended Targe	Accelerator - All Sales	YR - App Subscriptions - All - 75%	✓ 0.00000000	\$1,125,000.00000000	YR - App Subscriptions - All - FY 2022 Natalie Price	8/22/2022 12:00 AM				
Edit   Del	YR - Support - All - 75% - MO - Accelerate 75 / 75	or - All Sales (Blended Targets	YR - Support - All - 75%	✓ 0.0000000	\$1,125,000.0000000	YR - Support - All - FY 2022 - Natalie Price	8/5/2022 12:00 AM				
Edit   Del	YR - Training - All - 75% - MO - Accelerate Targets 75 / 7	or - All Sales (Blended	YR - Training - All - 75%	✓ 0.0000000	\$1,500,000.00000000	YR - Training - All - FY 2022 - Natalie Price	5/8/2022 12:00 AM				






# Plan Tier Relationships (PTR) Execution Rules

In order to maintain data integrity and support for change management in CloudComp, it is important for Plan Tier Relationships (PTR) to execute under a specific set of rules. Please familiarize yourself with the rules governing PTR so you can structure your PTR appropriately and achieve your desired commission results.

## Plan Tier Relationships (PTR) execution rules:

- **a. Plan Assignments must match**. PTR are not executed between Compensation Tiers in separate Plan Assignments.
- b. Must be within Plan Assignment date range. All Quota Attainment records affecting Comp Tier Relationships (CTR) must have dates between the Start and End Dates of the Plan Assignment. For example, Quota Attainment records from a Controlling Comp Tier that have dates outside of the Plan Assignment End Date cannot contribute to Attainment Percentage that affects a Dependent Comp Tier.
- c. Controlling Tier Fiscal Periods must be greater than or equal to Dependent Tier Fiscal Periods. Remember that each Compensation Plan Tier in CloudComp has a particular Fiscal Period type according to the Fiscal Period that is declared within the Quota Type on the Plan Tier. Controlling Plan Tiers must have Fiscal Period types that are the same or larger than their Dependent Plan Tier counterparts. Month can be controlled by Month, Quarter or Year, Quarter can be controlled by Quarter or Year and Year can be controlled by Year.
- d. Controlling Comp Tier Quota Attainment records must have dates that are earlier than or equal to Dependent Comp Tier End Date. For example, if an Annual Comp Tier is controlling a Monthly Comp Tier, the Controlling (Annual) Comp Tier Attainment Records must not be later than the End Date of the Monthly Comp Tier in order to contribute to the Controlling Attainment Percentage. For example, Quota Attainment Records from an Annual Comp Tier that has a Start Date of January 1<sup>st</sup>, can contribute to Controlling a Monthly Comp Tier for March of the same Fiscal Year, but only the Attainment Records between January 1<sup>st</sup> and March 31<sup>st</sup> may contribute to







controlling the March Comp Tier. This constraint prevents Controlling Comp Tiers of larger Fiscal Period types from having a retroactive effect on Dependent Comp Tiers of smaller Fiscal Period types.

## **CloudComp Fiscal Periods**

CloudComp automatically creates its own Fiscal Period records during CloudComp Sync jobs. CloudComp Fiscal Periods are based on your native Salesforce Fiscal Periods of types Month, Quarter and Year. CloudComp's automatically adopts your Salesforce Fiscal Period settings. For example if your Fiscal Year in Salesforce starts on July 1<sup>st</sup>, CloudComp Annual Quotas will begin on July 1<sup>st</sup> and Q1 in CloudComp will begin on July 1<sup>st</sup>. To view yours, navigate to the App Launcher in

Salesforce and search for "Fiscal Periods". Again, CloudComp creates them. Creating them yourself is not supported.

### **Closing and Reopening CloudComp Fiscal Periods**

To reopen one, you can uncheck the box and run CloudComp sync to refresh the data within the date range of the Fiscal Period. Please keep in mind that if either (A) your Sales Data in Salesforce (which CloudComp is consuming) has

Fiscal Period FY 2026			New Case	New Lead	Edit	Delete	Clone	-
<u>Compensation (0)</u> <u>B</u> Performance Periods (0)								
Details			7111(: : X — ),			27(((÷*		
Period Name FY 2026 Start Date 7/1/2 When Fiscal Period is closed, compensation and quota attainment records within Fiscal Period will Perior Year Closed Check "Closed" to close a CloudComp Fiscal Period	   	End Date					1	1
Compensation (0)						Ch	ange Owne	ər
Performance Periods (0)								

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changed or (B) your CloudComp configurations pertaining to the date range of that Fiscal Period have changed, then your preexisting CloudComp data will be updated to reflect those new changes. That can be good – but only when that was your plan to begin with!

### About Salesforce Fiscal Period Settings - Important!

Because CloudComp relies on the existence of Salesforce Fiscal Year and Period Settings to automatically create its CloudComp Fiscal Period records, it is essential to CloudComp to have access to Salesforce Period Records for data ranges where you wish to operate CloudComp. There are cases where Salesforce has not yet created Period records for date ranges. These include newer Salesforce orgs, some orgs where Salesforce Forecasting has not been enabled and orgs where Salesforce Fiscal Period settings have recently been changed.

If you are seeing error messages from CloudComp saying that it can't find Fiscal Periods, you can usually solve this by (A) enabling Forecasting in Salesforce, (B) Saving an opportunity in dates within the desired Fiscal Periods which makes Salesforce create its Fiscal Periods if not already in existence. You can also query Salesforce Fiscal Year Setting and Period records via SOQL queries in the Salesforce Developer Console to identify the Periods you have (or don't have).

If you need to change your Salesforce Fiscal Year or Period Settings to reflect the Fiscal Periods that you want to use with CloudComp, it is preferable to perform your changes before Configuring CloudComp for Quotas, Compensation and <u>Payments</u>.

Important! Changing your Salesforce Fiscal Year or Fiscal Period Settings with a live CloudComp configuration and data is <u>not supported</u>. If you're already running CloudComp and you've determined that you need to change your





Salesforce Fiscal Period Settings, you must first close all CloudComp Fiscal Periods in order to preserve your existing CloudComp data.

After closing all CloudComp Fiscal Periods, you can perform your changes to your Salesforce Fiscal Year or Fiscal Period settings. Next, confirm that your new Salesforce Period records have been generated, then create new CloudComp Quotas, Plan Assignments, Compensation Plans, Payment Schedules, etc. for your new Periods, run CloudComp Sync and confirm that your new CloudComp Fiscal Period Records have been created to reflect your new Salesforce Fiscal Periods and that your new CloudComp data is connected to the new CloudComp Fiscal Periods and in alignment with your new Salesforce Periods. Please note that the pre-existing CloudComp data related to your Closed Fiscal Periods and the new CloudComp Data related to your new Periods will be 2 separate data sets. CloudComp cannot integrate the old with the new, because the old data was related to Fiscal Period records that Salesforce has deleted when you changed your settings. This is why it's essential to close all CloudComp Fiscal Periods before you change your Fiscal Year or Period settings in Salesforce.

## **Additional Features and Configuration**

### Support for Salesforce Lightning

CloudComp is 100% Salesforce Lightning Ready and requires not additional configuration for Lightning.

## Support for Salesforce Mobile

CloudComp is fully enabled for Salesforce Mobile.





Compensation Recipients have full access to their compensation data in mobile in accordance with the Compensation Recipients Permission Set and your Mobile Administration settings.

Compensation Administrators have access to all CloudComp Objects and interfaces provided via the Compensation Administrator Permission Set.

#### Field sets – About field sets

Salesforce Field sets provide click-to-configure management of the fields that are displayed in the Quota Management interface and the Quota View Visualforce Page. The Field sets enable you to control which fields are displayed in the Interfaces, the order in which the fields are displayed and also enable you to add your own custom fields editable by Compensation Administrators and optionally viewable by Compensation Recipients according to your specific object and field-level configuration.

All of the CloudComp Screens and Interfaces are field set enabled. This means you can extend all CloudComp objects with your own custom fields.

#### Field sets - Configuring field sets

To configure the field sets for the CloudComp Quota Object, Navigate to Setup->Create-Objects-Quota and scroll down to field sets where you will find separate field sets for the Quota View and Quota Management interfaces. To edit a field set, click "Edit". You can adjust the order of the fields in the section called "In the Field Set", remove existing fields by dragging them out of the section or drag your own new custom fields in. Object and field-level security configurations for User Profiles will control User's access to the fields.





### **Support for Multiple Currencies**

CloudComp is fully enabled for Salesforce Orgs with Multiple Currencies Enabled.

To use CloudComp with Multiple Currencies, set the currencies of Quotas & Compensation Plans in the currencies that you intend to each of your Compensation Recipients. Example: If the Corporate Currency is USD and a Sales Rep (Compensation Recipient) is going to be paid in Euro, then assign Quotas and Compensation Plans to the Rep which have been set to Euro. CloudComp will convert the currency values of all transactional sales records that the Rep gets credit for according to the conversion rates you have entered into your Salesforce Org.

## Advanced Currency Management with Dated Exchange Rates

CloudComp is fully enabled for Salesforce Orgs with Advanced Currency Management and Dated Exchange Rates. Set the currency of Quotas & Compensation Plans according to the currency that you intend to pay each of your Compensation Recipients. CloudComp will convert the currency values of all transactional sales records according to the Dated Exchange Rates that you have entered into your Salesforce Org. The cross-currency Dated Exchange Rates will be selected according to the transaction dates specified by the date field selection in each CloudComp Revenue Type. For example, if a Quota for a Rep being paid in Euro is based on a Revenue Type that has the date field set to Opportunity Close Date, then cross currency conversions between transactional records in a variety of currencies which the Rep is credited for in the form of Quota Attainment records will be converted when written to the Quota Attainment records according to the Dated Exchange Rates which govern the date ranges of each individual Close Date.





## **Granting Access to Salesforce Users**

### Assign Licenses Important! (Production Orgs Only)

In Production and Developer Orgs, users must be provisioned with licenses in order to administer the App or view Compensation Data. There is no license management in Sandboxes. In Sandboxes all users are licensed.

Navigate to Setup->Installed Packages->CloudComp and click on "Manage Licenses". Assign licenses to Compensation Administrators and Compensation Recipients, Compensation Recipient Managers and others as needed.

#### **CloudComp Permission Sets**

User Roles in CloudComp are managed via Salesforce Permissions. Administration is made easy by the two CloudComp Permission Sets which install with the App. Compensation Administrator and Compensation Recipient. To enable access to CloudComp for Salesforce Users, simply assign the appropriate CloudComp Permission Set to each User.

## **Create Custom Fields Permission Sets for your Compensation Admins and Recipients**

CloudComp is designed to support extensive button-click customization of Salesforce objects, to supply custom inputs to CloudComp. We also occasionally create custom fields within the CloudComp managed objects to accommodate a wide array of customer requirements. When doing so, we create unmanaged custom field Permission Sets for Recipients and Administrator to support easy access control of any custom fields created during implementation or customization. This way you can assign the managed CloudComp permission sets to Administrators and Recipients and also assign the Custom Fields permission sets. This is the best way to go because the managed versions will be updated with any new fields as upgrades occur and you can update your unmanaged custom fields permission sets whenever you add new fields.





## User Requirements for CloudComp

- d. Active Salesforce, Platform or Community User with a CloudComp App License.
- e. CloudComp Plan Assignment to a CloudComp Compensation Plan with date range that overlaps at least 1 day of the fiscal period in which compensation is being generated.
- **f.** Has at least 1 CloudComp Quota for fiscal period in which compensation is being generated that matches the Quota Type referenced by at least 1 Compensation Plan Tier on the assigned Plan.

# Customizing and Extending CloudComp

### CloudComp Customization

One of the most exciting and revolutionary aspects of CloudComp is that Administrators, Consultants and SI's can extend and customize the App by adding their own custom fields and formulas anywhere within the CloudComp Data Model with only Button-Click Salesforce Admin Skills, a good understanding of the Customer's compensation requirements and a little bit of creativity.

CloudComp runs 100% natively within the Salesforce App Cloud and has been specifically designed to let you get "under the hood" and extend the model with your own custom fields and formulas.

In many cases, you can extend CloudComp to satisfy other custom rules by adding additional fields and formulas to the CloudComp objects to perform your additional calculations. These new fields will then be available for inclusion in CloudComp screens and interfaces with the pre-existing CloudComp field sets and will also be accessible via Salesforce Reports and the Salesforce API (remember to always use custom, not managed report types in production).







Typical customizations are performed by adding configuration fields to Quota, Compensation Plan or Plan Tier and then referencing them via new formula fields on Compensation Tier and Qualifying Record.

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For example, suppose you want to calculate commissions with some custom formulas which accrue commissions by date for your Reps as percentages of an "On Target Earnings" amount for the year.

A currency value would be added to the Compensation Plan Assignment Object to represent the On Target Earnings Amount and formulas on Qualifying Record and Compensation Tier would created to apply commission percentages on a record-by-record (Qualifying Records) according to your particular business rules, which can be as simple or as complex as you wish.

Usually, if there are any key customizations required to extend CloudComp for a customer's compensation needs, they will be addressed during CloudComp evaluation and / or implementation, however if you're working on rolling out some changes to your compensation rules and you want to explore how to go about it, please contact us so we can share some ideas and best practices with you!