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CloudComp Commission Anything™ Admin Guide - Summer 2025

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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 Specific Profiles and then accept the default of System Administrator Only. 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.

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- 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

- Navigate to the CloudComp Revenue Types Tab and click "New".
- You may accept the defaults for Opportunity object with Amount, Close Date and OwnerId, 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.


REVENUE TYPE
Quick Save Save Cancel

Opportunity Amount by CloseDate

EDIT REVENUE TYPE

Name	Opportunity Amount by CloseDate
Object	Opportunity
Data Type	Revenue
Revenue Field	Amount
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

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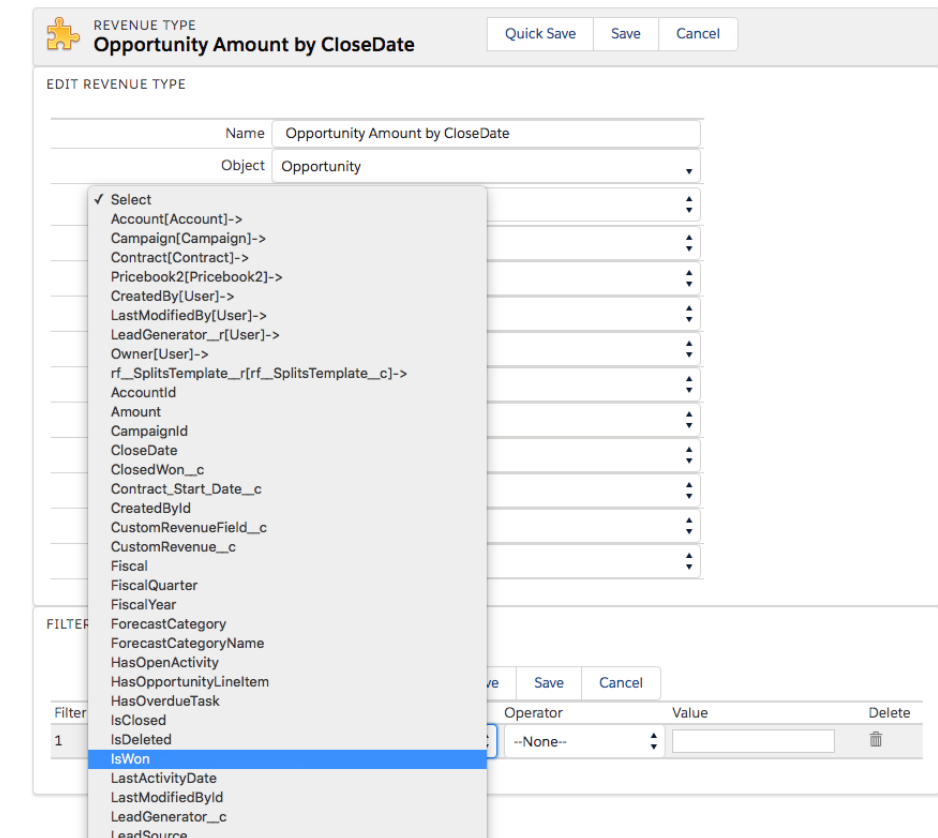
Setup Step 1: Add Revenue Type Filters

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”.



REVENUE TYPE
Opportunity Amount by CloseDate [Quick Save] [Save] [Cancel]

EDIT REVENUE TYPE

Name: Opportunity Amount by CloseDate

Object: Opportunity

Filter List:

Filter	Field	Operator	Value	Delete
1	IsWon	=	True	[X]

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

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

REVENUE TYPE
Opportunity Product QTY - Family = Su... Quick Save Save Cancel

EDIT REVENUE TYPE

Name	Opportunity Product QTY - Family = Subscriptions
Object	OpportunityLineItem
Data Type	Quantity
Quantity Type	Field
Quantity Field	Quantity
Date Field	Opportunity.CloseDate
Identifier	User Id (default)
User Id Field	Opportunity.OwnerId
Deal Object	Opportunity
Deal Name Field	Opportunity.Name
Deal Sequence Field	Opportunity.CloseDate
Deal Id Field	Opportunity.Id
Expense Date Field	ServiceDate
Release Date Field	ServiceDate

FILTERS

Filter	Field	Operator	Value	Delete
1	Opportunity.IsWon	equals	True	
2	Product2.Family	equals	Services Subscriptions Support	

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Revenue Type Fields Reference	
Name	Name of Revenue Type
Object	Object (Salesforce standard or custom object)
Data Type	<ul style="list-style-type: none"> 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 style="list-style-type: none"> User Id (default): Assign record according to User Id Sales Team Id: For special cases where Sales Team Id is assigned to data records (not to be confused with team-based quotas)
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
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.

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Revenue Type Filters: Select single or multiple picklist options
Picklist entries are presented as multi picklists 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.

REVENUE TYPE
Opportunity Amt by Owner and CloseDate Quick Save Save Cancel

EDIT REVENUE TYPE

Name	Opportunity New Logo / Upsell ARR by Owner and CloseDate
Object	Opportunity
Data Type	Revenue
Revenue Field	ARR__c
Date Field	CloseDate
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
Rate Type Field	

FILTERS

Use Filter Logic ☐

Add Filter Quick Save Save Cancel

Filter	Field	Operator	Value	Delete
1	IsWon	equals	TRUE	
2	Type	equals	<div> New Logo Renewal Upsell </div>	

Multiple options selected for a picklist are processed as “OR”. So these would query for Type = “New Logo” OR “Upsell”

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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.

REVENUE TYPE
Opportunity Amount by Owner and CloseDate

Quick Save
Save
Cancel

EDIT REVENUE TYPE

Name	Opportunity Amount by Owner and CloseDate	
Object	Opportunity	
Data Type	Revenue	
Revenue Field	Amount	
Date Field	CloseDate	
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	
Rate Type Field		

FILTERS

Use Filter Logic
☐

Add Filter
Quick Save

Filter	Field	Operator	Value	Delete
1	IsWon		TRUE	
2	Account.Name	starts with	Grant Cassin	

Name is a text (string) data type

Query multiple text (string) options by concatenating with double bar “||” to signify “OR”.

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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.

REVENUE TYPE
Opportunity Amount by Owner and CloseDate Quick Save Save Cancel

EDIT REVENUE TYPE

Name	Opportunity Amount by Owner and CloseDate
Object	Opportunity
Data Type	Revenue
Revenue Field	Amount
Date Field	CloseDate
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
Rate Type Field	

Click “Use Filter Logic”

Enter your filter logic

Use Filter Logic ☒ 1 AND (2 OR 3) Add Filter Quick Save Save Cancel

Filter	Field	Operator	Value	Delete
1	IsWon	equals	TRUE	
2	Account.Name	starts with	Grant Cassin	
3	Type	equals	New Logo	

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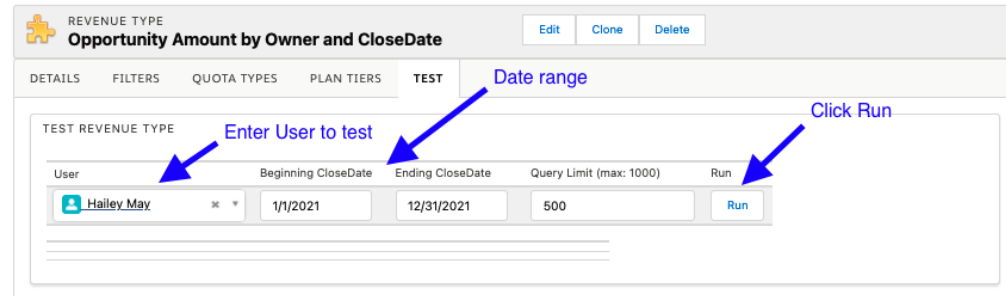
Revenue Type Test Panel

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.

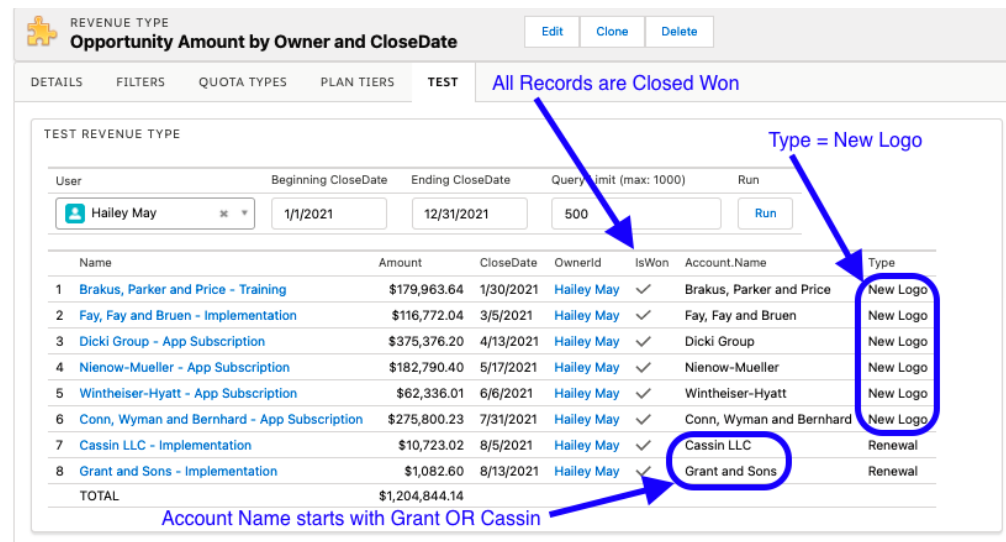


REVENUE TYPE
Opportunity Amount by Owner and CloseDate

DETAILS FILTERS QUOTA TYPES PLAN TIERS TEST

TEST REVENUE TYPE

User: Hailey May Beginning CloseDate: 1/1/2021 Ending CloseDate: 12/31/2021 Query Limit (max: 1000): 500 Run



REVENUE TYPE
Opportunity Amount by Owner and CloseDate

DETAILS FILTERS QUOTA TYPES PLAN TIERS TEST

TEST REVENUE TYPE

User: Hailey May Beginning CloseDate: 1/1/2021 Ending CloseDate: 12/31/2021 Query Limit (max: 1000): 500 Run

All Records are Closed Won

Name	Amount	CloseDate	OwnerId	IsWon	AccountName	Type
1 Brakus, Parker and Price - Training	\$179,963.64	1/30/2021	Hailey May	✓	Brakus, Parker and Price	New Logo
2 Fay, Fay and Bruen - Implementation	\$116,772.04	3/5/2021	Hailey May	✓	Fay, Fay and Bruen	New Logo
3 Dicki Group - App Subscription	\$375,376.20	4/13/2021	Hailey May	✓	Dicki Group	New Logo
4 Nienow-Mueller - App Subscription	\$182,790.40	5/17/2021	Hailey May	✓	Nienow-Mueller	New Logo
5 Wintheiser-Hyatt - App Subscription	\$62,336.01	6/6/2021	Hailey May	✓	Wintheiser-Hyatt	New Logo
6 Conn, Wyman and Bernhard - App Subscription	\$275,800.23	7/31/2021	Hailey May	✓	Conn, Wyman and Bernhard	New Logo
7 Cassin LLC - Implementation	\$10,723.02	8/5/2021	Hailey May	✓	Cassin LLC	Renewal
8 Grant and Sons - Implementation	\$1,082.60	8/13/2021	Hailey May	✓	Grant and Sons	Renewal
TOTAL	\$1,204,844.14					

Account Name starts with Grant OR Cassin

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CloudComp Quota Types™

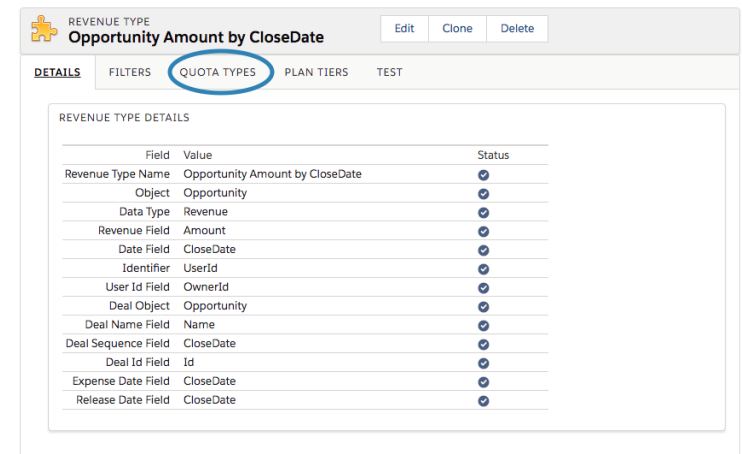
Quota Types enable CloudComp Quotas to be categorized according to Revenue Type, Fiscal Period (Month, Quarter, Year or Custom), and Individual or Team. CloudComp Compensation Plans enable you to configure your compensation rules according to Quota Types and Revenue Types for each Plan Tier (rather than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

Setup Step 2: Create a Quota Type

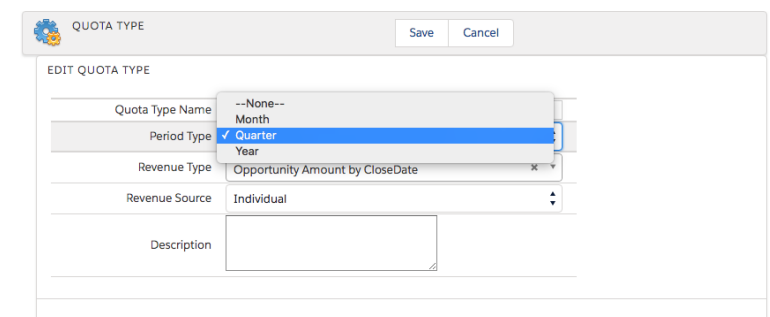
- Navigate to the Quota Types related list under your Revenue Type and click “New”.
- Choose the Fiscal Period Type that you want for the associated Quotas, choose Individual or Team and Click “Save”.
- Team Quota Type (Optional) if you would like to create Quotas for managers who will be compensated 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.



Field	Value	Status
Revenue Type Name	Opportunity Amount by CloseDate	✓
Object	Opportunity	✓
Data Type	Revenue	✓
Revenue Field	Amount	✓
Date Field	CloseDate	✓
Identifier	UserId	✓
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	✓



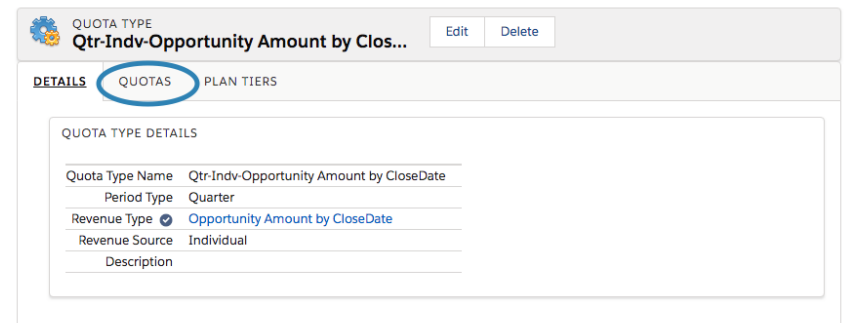
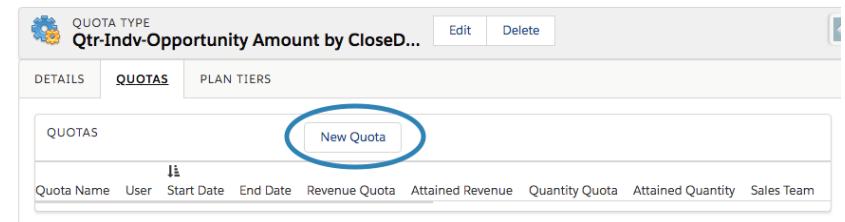
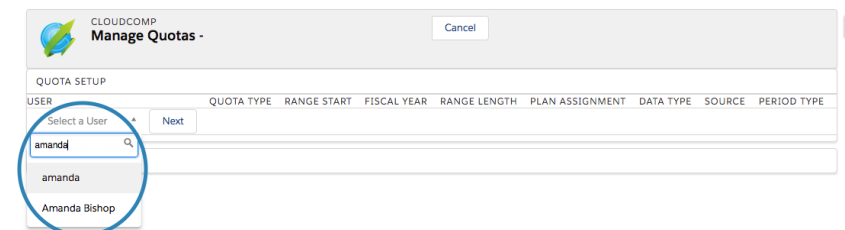
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CloudComp Quotas

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

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






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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”.



CLOUDCOMP

Manage Quotas - Amanda Bishop

Save Quotas

Cancel


QUOTA SETUP

USER	QUOTA TYPE	RANGE START	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	END DATE	REVENUE QUOTA	<input type="checkbox"/> USER SHARE	<input type="checkbox"/> MGR SHARE	THIS QUARTER
Q1 FY 2020 - Amanda Bishop - Qtr-Indv-Opportunity Amount by CloseDate	1/1/2020	3/31/2020	1.8M ▾	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$1,640,636.93
Q2 FY 2020 - Amanda Bishop - Qtr-Indv-Opportunity Amount by CloseDate	4/1/2020	6/30/2020	▾	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$1,642,216.29
Q3 FY 2020 - Amanda Bishop - Qtr-Indv-Opportunity Amount by CloseDate	7/1/2020	9/30/2020	▾	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$2,076,882.57
Q4 FY 2020 - Amanda Bishop - Qtr-Indv-Opportunity Amount by CloseDate	10/1/2020	12/31/2020	▾	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$1,952,758.40

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CLOUDCOMP
Manage Quotas - Amanda Bishop
Edit Quotas Cancel

QUOTA SETUP

USER	QUOTA TYPE	RANGE START	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	END 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	\$1,800,000.00	✓	✓	\$1,640,636.93
Q2 FY 2020 - Amanda Bishop - Qtr-Indv-Opportunity Amount by CloseDate	4/1/2020	6/30/2020	\$1,800,000.00	✓	✓	\$1,642,216.29
Q3 FY 2020 - Amanda Bishop - Qtr-Indv-Opportunity Amount by CloseDate	7/1/2020	9/30/2020	\$1,800,000.00	✓	✓	\$2,076,882.57
Q4 FY 2020 - Amanda Bishop - Qtr-Indv-Opportunity Amount by CloseDate	10/1/2020	12/31/2020	\$1,800,000.00	✓	✓	\$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.

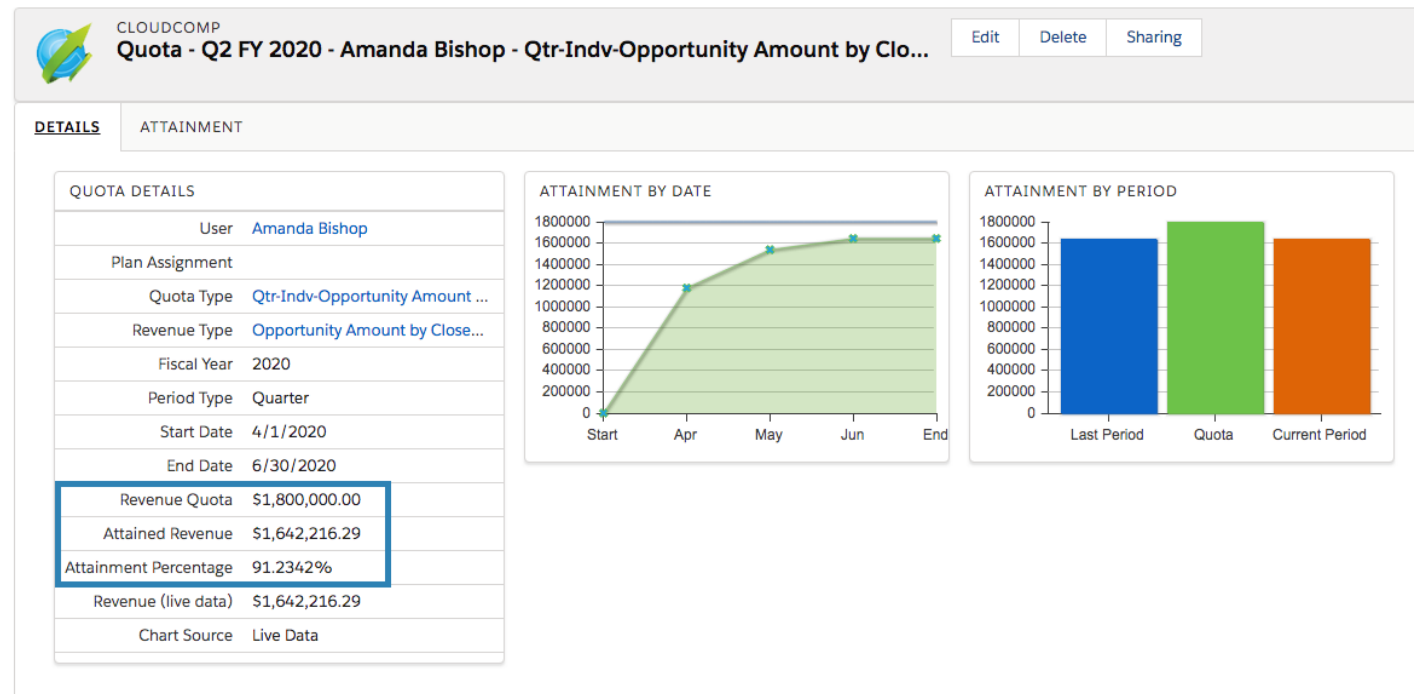
To return to the Quota Management Interface from the Quota View Page, Click "Edit".

To review the Read-Only Sharing rules that have been applied for Recipient and Manager, click on "Sharing".

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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.



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Viewing CloudComp Quota Attainment

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

CLOUDCOMP Quota - Q2 FY 2020 - Amanda Bishop - Qtr-Indv-Opportunity Amount by CloseDate												
<div> <div>DETAILS</div> <div>ATTAINMENT</div> </div>												
QUOTA ATTAINMENT												
Attainment Name	User	Deal DateTime	Date	Expense Date	Release Date	Record Name	Deal Name	Quantity	Revenue	Subtotal (Quantity)	Subtotal (Revenue)	Attainment Percentage
A-28279	Amanda 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	Amanda 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	Amanda 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	Amanda 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	Amanda 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	Amanda 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	Amanda 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	Amanda 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	Amanda 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	Amanda 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	Amanda 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%
<div> <div>Records Per Page: 20</div> <div>Records: 11 of 11</div> </div>												

CloudComp Sales Teams

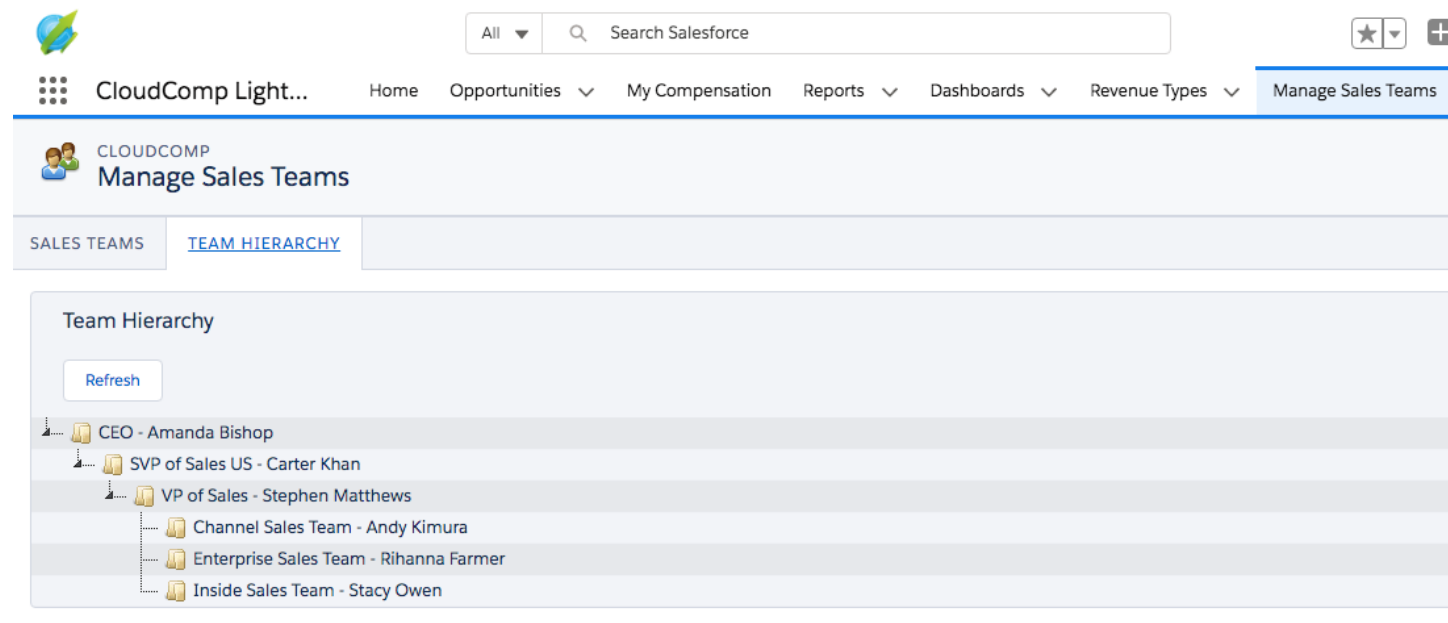
CloudComp Sales Teams enable you to measure and reward the performance of your managers according to the performance of Sales Teams comprised of any CloudComp-Licensed, active Users in your Org. You can make as many Sales Teams as you wish. Sales Teams are assigned to Quotas when the Revenue Source of 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

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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.

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.



The screenshot shows the Salesforce 'Manage Sales Teams' page. The top navigation bar includes 'CloudComp Light...', 'Home', 'Opportunities', 'My Compensation', 'Reports', 'Dashboards', 'Revenue Types', and 'Manage Sales Teams'. The 'Manage Sales Teams' tab is active. Below the navigation bar, the page title is 'Manage Sales Teams'. There are two tabs: 'SALES TEAMS' and 'TEAM HIERARCHY', with 'TEAM HIERARCHY' selected. The 'Team Hierarchy' section has a 'Refresh' button. The hierarchy is displayed as follows:

- CEO - Amanda Bishop
 - SVP of Sales US - Carter Khan
 - VP of Sales - Stephen Matthews
 - Channel Sales Team - Andy Kimura
 - Enterprise Sales Team - Rihanna Farmer
 - Inside Sales Team - Stacy Owen

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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.

Edit Enterprise Sales Team - Rihanna Farmer

Step 4 (Optional): Create CloudComp Sales Teams

- Navigate to the CloudComp Manage Sales Teams Tab and click "New".
- Enter a descriptive name for your new Sales Team and click "Save".
- Navigate to the "Sales Team Members" related list underneath your new Sales Team and click "New". Enter a User and accept the defaults.
- 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.

Sales Team Name

Enterprise Sales Team - Rihanna Farmer

Parent Team

VP of Sales - Stephen Matthews

Description

Inactive

☐

Cancel

Save & New

Save

Team Member Name

tm12

Sales Team

Enterprise Sales Team - Rihanna Farmer

User

Priscilla Niles

Description

Start Date

End Date

Contribution Rate

100.0000%

Cancel

Save & New

Save

(Optional) Date to begin accruing attainment for this team member

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

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

QUOTA TYPE
Mo-Team-Amount by Product Date

DETAILS | QUOTAS | PLAN TIERS

QUOTA TYPE DETAILS

Quota Type Name	Mo-Team-Amount by Product Date
Period Type	Month
Revenue Type	Amount by Product Date
Revenue Source	Team
Description	

CLOUDCOMP
Manage Quotas - Andy Kimura

Save Quotas Cancel

QUOTA SETUP

USER	QUOTA TYPE	RANGE START	FISCAL YEAR	RANGE LENGTH	PLAN ASSIGNMENT	DATA TYPE	SOURCE
Andy Kimura [change]	Mo-Team-Amount by Product Date	Jan	2020	Auto	Auto	Revenue	Team

QUOTAS

QUOTA NAME	START DATE	END DATE	REVENUE QUOTA	SALES TEAM	<input type="checkbox"/> USER SHARE	<input type="checkbox"/> MGR SHARE
Jan FY 2020 - Andy Kimura - Mo-Team-Amount by Product Date	1/1/2020	1/31/2020	4,000,000.00	Channel Sales...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Feb FY 2020 - Andy Kimura - Mo-Team-Amount by Product Date	2/1/2020	2/29/2020	4,000,000.00	Channel Sales...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mar FY 2020 - Andy Kimura - Mo-Team-Amount by Product Date	3/1/2020	3/31/2020	4,000,000.00	Channel Sales...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Apr FY 2020 - Andy Kimura - Mo-Team-Amount by Product Date	4/1/2020	4/30/2020	4,000,000.00	Channel Sales...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
May FY 2020 - Andy Kimura - Mo-Team-Amount by Product Date	5/1/2020	5/31/2020	4,000,000.00	Channel Sales...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Jun FY 2020 - Andy Kimura - Mo-Team-Amount by Product Date	6/1/2020	6/30/2020	4,000,000.00	Channel Sales...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Jul FY 2020 - Andy Kimura - Mo-Team-Amount by Product Date	7/1/2020	7/31/2020	4,000,000.00	Channel Sales...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Aug FY 2020 - Andy Kimura - Mo-Team-Amount by Product Date	8/1/2020	8/31/2020	4,000,000.00	Channel Sales...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sep FY 2020 - Andy Kimura - Mo-Team-Amount by Product Date	9/1/2020	9/30/2020	4,000,000.00	Channel Sales...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Oct FY 2020 - Andy Kimura - Mo-Team-Amount by Product Date	10/1/2020	10/31/2020	4,000,000.00	Channel Sales...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Nov FY 2020 - Andy Kimura - Mo-Team-Amount by Product Date	11/1/2020	11/30/2020	4,000,000.00	Channel Sales...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Dec FY 2020 - Andy Kimura - Mo-Team-Amount by Product Date	12/1/2020	12/31/2020	4,000,000.00	Channel Sales...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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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).

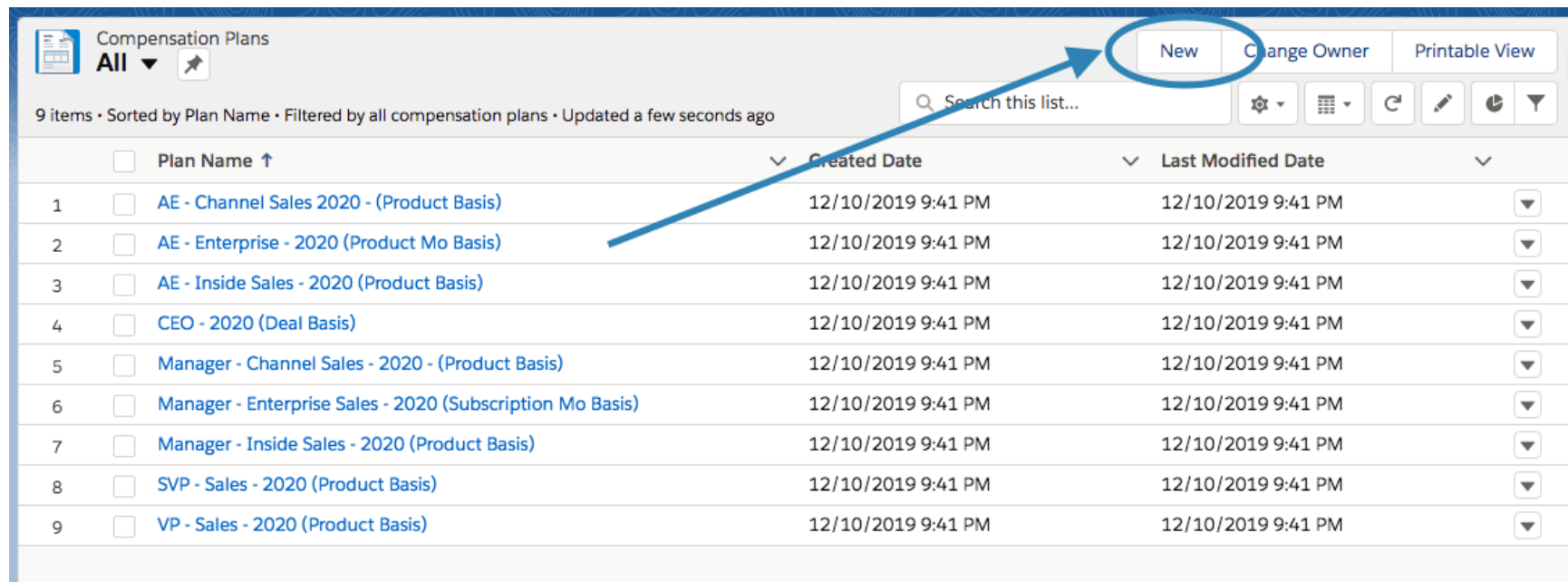
Users are assigned to Compensation Plans via Plan Assignments which can cover any date range and are not required to align with the boundaries of Fiscal Periods.

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.

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Compensation Plans

All ▾

9 items • Sorted by Plan Name • Filtered by all compensation plans • Updated a few seconds ago

Search this list...

New Change Owner Printable View

	<input type="checkbox"/> Plan Name ↑	<input type="checkbox"/> Created Date	<input type="checkbox"/> Last Modified Date	
1	<input type="checkbox"/> AE - Channel Sales 2020 - (Product Basis)	12/10/2019 9:41 PM	12/10/2019 9:41 PM	▾
2	<input type="checkbox"/> AE - Enterprise - 2020 (Product Mo Basis)	12/10/2019 9:41 PM	12/10/2019 9:41 PM	▾
3	<input type="checkbox"/> AE - Inside Sales - 2020 (Product Basis)	12/10/2019 9:41 PM	12/10/2019 9:41 PM	▾
4	<input type="checkbox"/> CEO - 2020 (Deal Basis)	12/10/2019 9:41 PM	12/10/2019 9:41 PM	▾
5	<input type="checkbox"/> Manager - Channel Sales - 2020 - (Product Basis)	12/10/2019 9:41 PM	12/10/2019 9:41 PM	▾
6	<input type="checkbox"/> Manager - Enterprise Sales - 2020 (Subscription Mo Basis)	12/10/2019 9:41 PM	12/10/2019 9:41 PM	▾
7	<input type="checkbox"/> Manager - Inside Sales - 2020 (Product Basis)	12/10/2019 9:41 PM	12/10/2019 9:41 PM	▾
8	<input type="checkbox"/> SVP - Sales - 2020 (Product Basis)	12/10/2019 9:41 PM	12/10/2019 9:41 PM	▾
9	<input type="checkbox"/> VP - Sales - 2020 (Product Basis)	12/10/2019 9:41 PM	12/10/2019 9:41 PM	▾

Setup Step 6: Create a Compensation Plan

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

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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

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- a. **Incremental** 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. **All** (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

Sequence: Commissionable amounts are applied to tiers according to attainment percentages calculated by date-time sequencing of deals ("Deal Sequence Field" on Revenue Type).

Period: 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).

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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**

Same Revenue Type (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.

Different Revenue Type: 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

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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

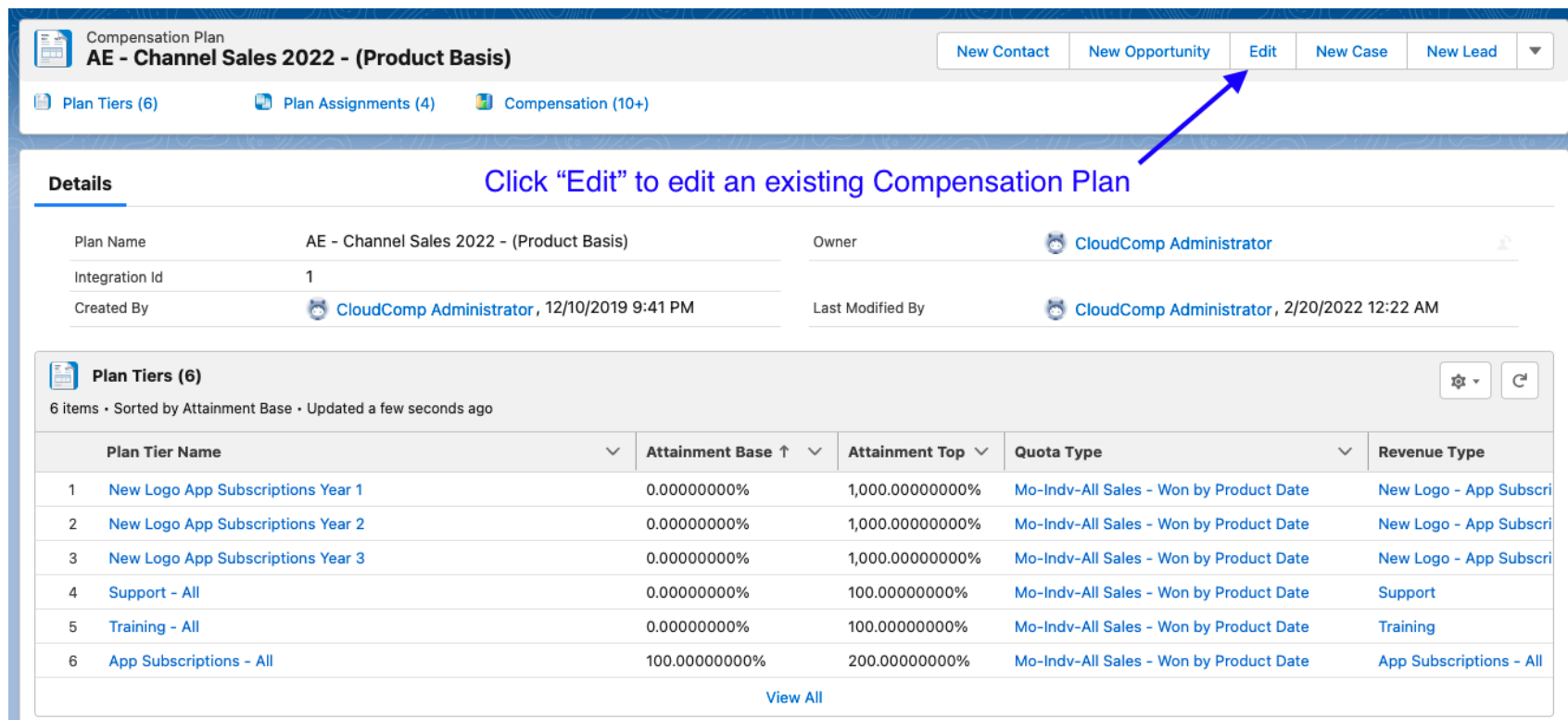
CloudComp Rate Tables support multiple entries (Rate Table Lines) containing Commission Rates for Field Values in your sales data such as Insurance plan codes, product skus, product codes, product families, opportunity types, custom field values, etc. Rate Tables are perfect for situations where you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

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Open a Compensation Plan for editing
Navigate to the Plan and Click “Edit”



Compensation Plan
AE - Channel Sales 2022 - (Product Basis)

New Contact New Opportunity **Edit** New Case New Lead

Plan Tiers (6) Plan Assignments (4) Compensation (10+)

Details Click “Edit” to edit an existing Compensation Plan

Plan Name AE - Channel Sales 2022 - (Product Basis) Owner CloudComp Administrator

Integration Id 1

Created By CloudComp Administrator, 12/10/2019 9:41 PM Last Modified By CloudComp Administrator, 2/20/2022 12:22 AM

Plan Tiers (6)

6 items • Sorted by Attainment Base • Updated a few seconds ago

Plan Tier Name	Attainment Base	Attainment Top	Quota Type	Revenue Type
1 New Logo App Subscriptions Year 1	0.00000000%	1,000.00000000%	Mo-Indv-All Sales - Won by Product Date	New Logo - App Subscri
2 New Logo App Subscriptions Year 2	0.00000000%	1,000.00000000%	Mo-Indv-All Sales - Won by Product Date	New Logo - App Subscri
3 New Logo App Subscriptions Year 3	0.00000000%	1,000.00000000%	Mo-Indv-All Sales - Won by Product Date	New Logo - App Subscri
4 Support - All	0.00000000%	100.00000000%	Mo-Indv-All Sales - Won by Product Date	Support
5 Training - All	0.00000000%	100.00000000%	Mo-Indv-All Sales - Won by Product Date	Training
6 App Subscriptions - All	100.00000000%	200.00000000%	Mo-Indv-All Sales - Won by Product Date	App Subscriptions - All

[View All](#)

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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 - (
Owner ID CloudComp Administratc

New Plan Tier Save Quick Save Delete Selected Undo Sort Tiers Cancel

PLAN TIERS

<input type="checkbox"/>	Plan Tier Name	Calculation Method	Attainment Method	Attainment Base	Attainment Top	Quota Type
<input type="checkbox"/>	New Logo App Subscription:	Incremental	Sequence	0.00000000	1,000.000000C	Mo-Indv-All Sales - Won by Product Date
<input type="checkbox"/>	New Logo App Subscription:	Incremental	Sequence	0.00000000	1,000.000000C	Mo-Indv-All Sales - Won by Product Date
<input type="checkbox"/>	New Logo App Subscription:	Incremental	Sequence	0.00000000	1,000.000000C	Mo-Indv-All Sales - Won by Product Date
<input type="checkbox"/>	App Subscriptions - All	Incremental	Sequence	100.00000000	200.00000000	Mo-Indv-All Sales - Won by Product Date
<input type="checkbox"/>	Training - All	All	Sequence	0.00000000	100.00000000	Mo-Indv-All Sales - Won by Product Date
<input type="checkbox"/>	Support - All	All	Sequence	0.00000000	100.00000000	Mo-Indv-All Sales - Won by Product Date

New Plan Tier Save Quick Save Delete Selected Undo Sort Tiers Cancel

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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)

COMPENSATION PLAN DETAILS


Plan Name
AE - Channel Sales 2022 - (

Owner ID *
CloudComp Administratc

New Plan Tier
Save
Quick Save
Delete Selected
Undo
Sort Tiers
Cancel

PLAN TIERS

<input type="checkbox"/>	Plan Tier Name	Calculation Method	Attainment Method	A
<input type="checkbox"/>	New Logo App Subscription:	Incremental	Sequence	


COMPENSATION PLAN
AE - Channel Sales 2022 - (Product Basis)

PLAN TIERS

New Logo App Subscriptions Year 1
New Logo App Subscriptions Year 2
New Logo App Subscriptions Year 3
App Subscriptions - All
Training - All
Support - All

Done

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Setup Step 8: Create Compensation Plan Assignments

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

Edit Manager - Enterprise Sales 2020 - Rihanna Farmer

* Plan Assignment	Enterprise Sales 2020 - Rihanna Farmer	Owner	Jotham Fisher Smith
* User	Rihanna Farmer	* Compensation Plan	Manager - Enterprise Sales - 2...
* Start Date ⓘ	12/29/2019	Recipient Share (Read-Only) ⓘ	<input checked="" type="checkbox"/>
* End Date ⓘ	12/31/2020	Recipient Manager Share (Read-Only) ⓘ	<input checked="" type="checkbox"/>
Payment Schedule ⓘ	Biweekly 2020		
Payment Setup ⓘ	Manager - Enterprise Sales - 2...		

Notes

Notes


Cancel Save & New Save

CloudComp Commission AnythingTM Admin Guide - Summer 2025

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. This will be configured during implementation and your team will be able to control and modify the schedule in Salesforce as needed

 **CLOUDCOMP 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

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To run CloudComp Sync:

- Navigate to the CloudComp Sync Tab.
- Select Start and End dates which encompass the Quotas and Compensation Plans you wish to Sync.
- Select an Object from the Object pick list which references the Object that Quotas are based on.
- On the “Users” picklist, accept the default “All Assigned”, or select “Specific Users” to run sync for particular users.
- 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 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.


CLOUDCOMP Sync

DETAILS

Quota Start Dates Greater Than or Equal To *

Quota End Dates Less Than or Equal To *

Batch Size (max batch size: 5)

Object

Users

[Run CloudComp Sync](#)

STATUS

Sync Jobs Completed

Status	Job	Total Batches	Total Processed	Errors
Completed	Quotas	12	12	0
Completed	Compensation Tiers	24	24	0

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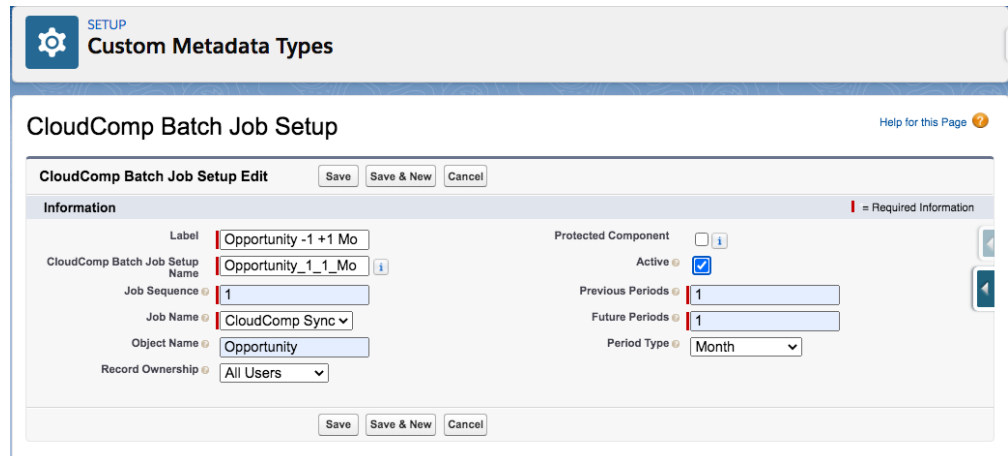
Schedule CloudComp Sync - Overview

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.

Schedule CloudComp Sync – Batch Job Setup

- Navigate to Setup->Custom Metadata Types->CloudComp Batch Job Setup
- Click “Manage”
- Click “New”
- Enter a descriptive name in “Label”
- Object: Enter the full API Name of the Object
- 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”)
- Previous and Future Periods: Set Previous and Future Periods (if you set both to zero, then the current fiscal period will be synced)



The screenshot shows the Salesforce 'Custom Metadata Types' setup page for 'CloudComp Batch Job Setup'. The 'Information' section contains the following fields:

- Label:** Opportunity -1 +1 Mo
- CloudComp Batch Job Setup Name:** Opportunity__1__Mo
- Job Sequence:** 1
- Job Name:** CloudComp Sync
- Object Name:** Opportunity
- Record Ownership:** All Users
- Protected Component:** ☐
- Active:** ☒
- Previous Periods:** 1
- Future Periods:** 1
- Period Type:** Month

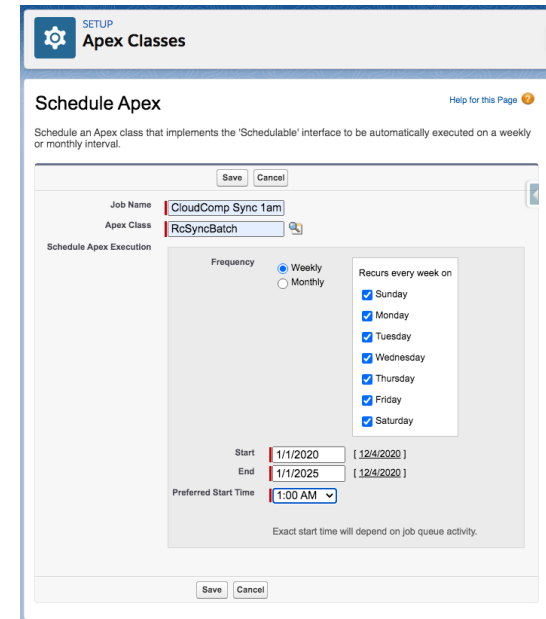
Buttons at the bottom include 'Save', 'Save & New', and 'Cancel'.

CloudComp Commission Anything™ Admin Guide - Summer 2025

- h. Job Sequence: Enter a number 0 or greater to establish the sequence for jobs (batch jobs are chained by sequence)
- i. Click “Active” (only active records will be run)
- j. Click “Save”

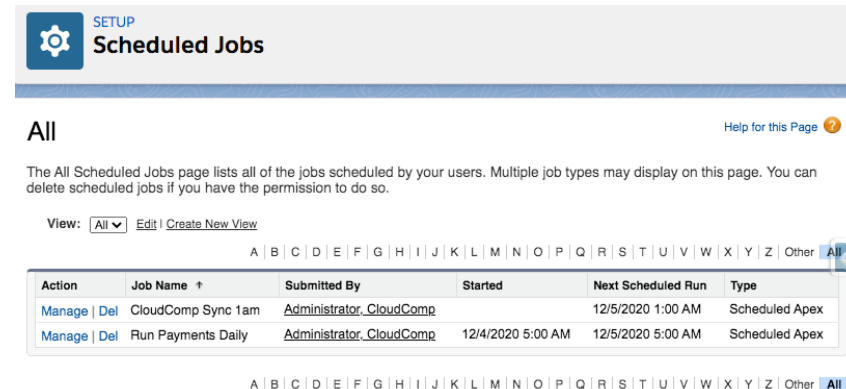
Schedule CloudComp Sync – Schedule Apex

- 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.



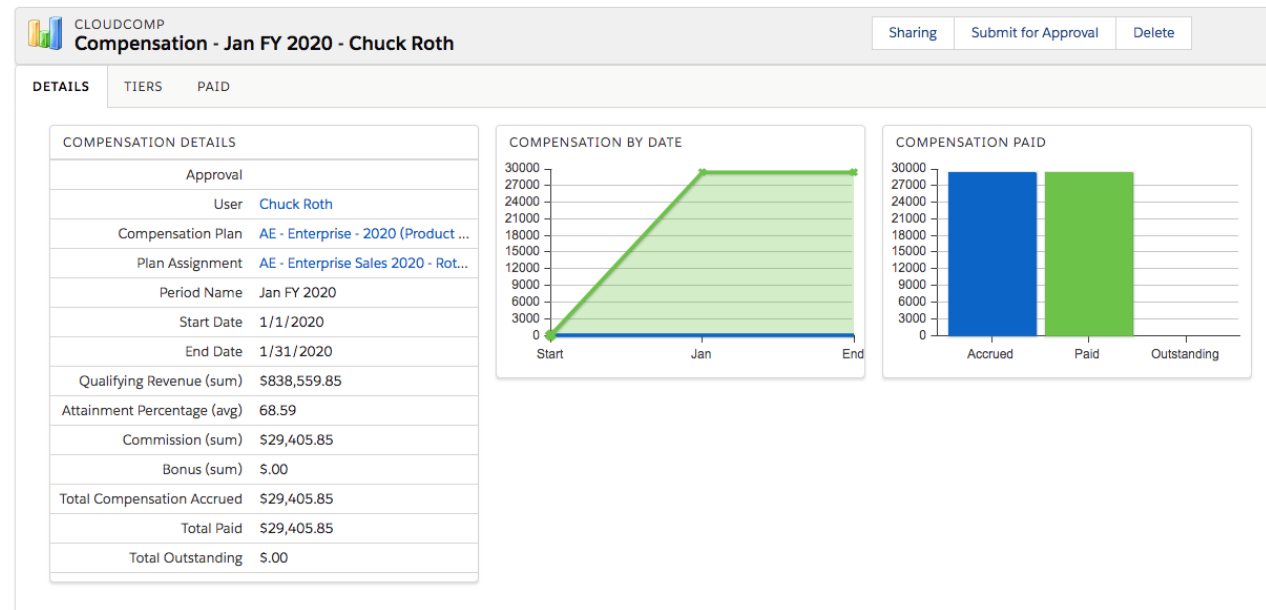
Action	Job Name ↑	Submitted By	Started	Next Scheduled Run	Type
Manage Del	CloudComp Sync 1am	Administrator.CloudComp		12/5/2020 1:00 AM	Scheduled Apex
Manage Del	Run Payments Daily	Administrator.CloudComp	12/4/2020 5:00 AM	12/5/2020 5:00 AM	Scheduled Apex

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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).



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Compensation Tiers™

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

CLOUDCOMP

Compensation - Jan FY 2020 - Chuck Roth

Sharing

Submit for Approval

Delete

DETAILS

TIERS

PAID

COMPENSATION TIERS

FISCAL PERIOD	COMP TIER NAME	REVENUE QUOTA	ACCRUED REVENUE	ATTAINMENT PERCENTAGE	QUALIFYING REVENUE	COMMISSION
Jan FY 2020	New Logo App Subscriptions Year 1 - Jan FY 2020 - Chuck Roth	\$1,000,000.00	\$139,030.04	68.5896%	\$139,030.04	\$11,122.40
Jan FY 2020	New Logo App Subscriptions Year 2 - Jan FY 2020 - Chuck Roth	\$1,000,000.00	\$139,030.04	68.5896%	\$139,030.04	\$8,341.80
Jan FY 2020	New Logo App Subscriptions Year 3 - Jan FY 2020 - Chuck Roth	\$1,000,000.00	\$0.00	68.5896%	\$0.00	\$0.00
Jan FY 2020	App Subscriptions - All - Jan FY 2020 - Chuck Roth	\$1,000,000.00	\$458,223.05	68.5896%	\$458,223.05	\$6,873.35
Jan FY 2020	Training - All - Jan FY 2020 - Chuck Roth	\$1,000,000.00	\$0.00	68.5896%	\$0.00	\$0.00
Jan FY 2020	Support - All - Jan FY 2020 - Chuck Roth	\$1,000,000.00	\$102,276.73	68.5896%	\$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 Subscriptions Year 1 - Jan FY 2020 - Chuck Roth

[New Contact](#)
[New Oppo](#)

[Qualifying Records \(10+\)](#)
[To-Date Quotas \(0\)](#)

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 Tier

Quota RevenueType ⓘ	Amount by Product Date	Data Type ⓘ	Revenue
Tier Base (Revenue) ⓘ	\$0.00000000	Tier Base (Quantity) ⓘ	0.00000000
Tier Top (Revenue) ⓘ	\$10,000,000.00000000	Tier Top (Quantity) ⓘ	0.00000000

Quota Attainment

Quota ⓘ	Jan FY 2020 - Chuck Roth - Mo-Indy-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 ⓘ	<input type="checkbox"/>
Accrued Revenue ⓘ	\$139,030.0350	Accrued Quantity ⓘ	0.0000
Qualifying Revenue ⓘ	\$139,030.0350	Qualifying Quantity ⓘ	0.0000

Compensation

Commission ⓘ	\$11,122.4028	Commission (Per Unit) ⓘ	\$0.0000
Bonus ⓘ	\$0.00	Performance Award ⓘ	

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Qualifying Records™

CloudComp Qualifying Records are children of Compensation Tiers and are the granular detail level of CloudComp Compensation data. Qualifying Records are generated for every instance of any source record being qualified for any Compensation Plan Tier for any User / Fiscal Period combination.

Compensation Tier

New Logo App Subscriptions Year 1 - Jan FY 2020 - Chuck Roth

New Contact

New Opportunity

New Case

New Lead

Delete

Compensation

Commission ⓘ

\$11,122.4028

Bonus ⓘ

\$0.00

Commission (Per Unit) ⓘ

\$0.0000

Performance Award ⓘ

To Date Quotas

System Information

Qualifying Records

10+ items

Sorted by Deal DateTime

Updated a few seconds ago


⚙

🔄

	Qualifying Re...	Deal DateTime ↑	Date	Expense Date	Percentage Q...	Qualifying Re...	Commission	Qualifying Qu...	Commission (...)	Bonus	
1	rfs-20202	1/20/2020 12:00 AM	1/20/2020	1/20/2020	100.000000%	\$11,585.8363	\$926.8669	0.0000	\$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	0.0000	\$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	0.0000	\$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	0.0000	\$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	0.0000	\$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	0.0000	\$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	0.0000	\$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	0.0000	\$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	0.0000	\$0.0000	\$0.00	▼
10	rfs-38243	1/20/2020 12:00 AM	1/20/2020	10/20/2020	100.000000%	\$11,585.8363	\$926.8669	0.0000	\$0.0000	\$0.00	▼
View All											

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Each Qualifying record 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.


Qualifying Record
rfs-20202

New Contact
New Opportunity
New Case
New Lead
Printable View

Payment Lines (1)

Details

Compensation Tier ⓘ	New Logo App Subscriptions Year 1 - Jan FY 2020 - Chuck Roth	Qualifying Record Name	rfs-20202
Date ⓘ	1/20/2020	Attainment ⓘ	
Release Date ⓘ	1/20/2020	Accrued Revenue ⓘ	AR-1327
Expense Date ⓘ	1/20/2020		
User ⓘ			

Deal Info

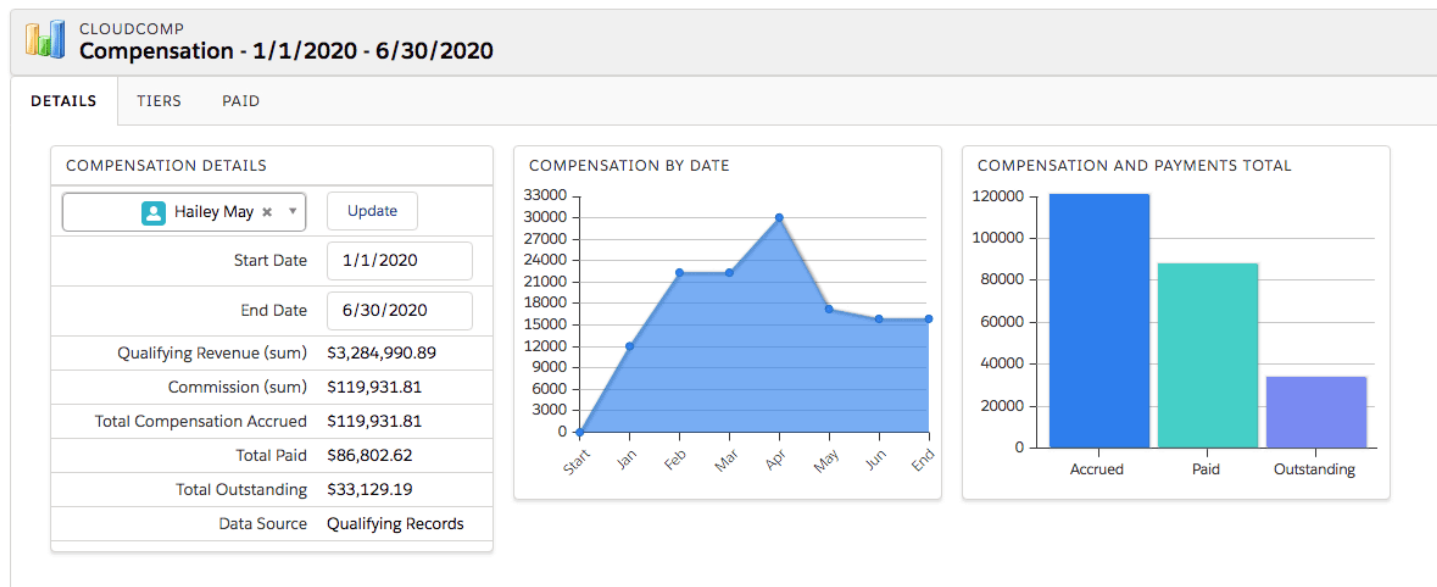
Deal Object ⓘ	Opportunity	Deal Name ⓘ	Eichmann-Turner - App Subscription
Deal DateTime ⓘ	1/20/2020 12:00 AM	Deal Id ⓘ	0060H00000pwF5bQAE

Commissions

Object ⓘ	rf__OpportunityLineItemSchedule__c	Percentage Qualified ⓘ	100.000000%
Attainment Percentage ⓘ	62.340123%	Qualifying Revenue ⓘ	\$11,585.8363
Revenue ⓘ	\$11,585.84	Qualifying Quantity ⓘ	0.0000
Quantity ⓘ	0.00	Commission ⓘ	\$926.8669
Commission % ⓘ	8.0000%	Commission (Per Unit) ⓘ	\$0.0000
Amount Per Unit ⓘ	\$0.0000	Bonus ⓘ	\$0.00

CloudComp Commission Anything™ Admin Guide - Summer 2025

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.

CloudComp Commission Anything™ Admin Guide - Summer 2025

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

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.

Report: Compensation with Comp Tiers & Qualifying Records Comp by User, Tier, Date & Record								
User Name	Compensation Plan Tier: Plan Tier Name	Date	Q1 CY2020	Q2 CY2020	Q3 CY2020	Q4 CY2020	Total	
<input type="checkbox"/> 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	
	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	
<input type="checkbox"/> 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	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	
<input type="checkbox"/> Hailey May	App Subscriptions - All	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 1	Sum of Qualifying Revenue Sum of Commission	\$0.0000 \$0.0000	\$223,746.1800 \$0.0000	\$54,255.7830 \$0.0000	\$0.0000 \$0.0000	\$278,001.9630 \$0.0000	
	New Logo App Subscriptions Year 2	Sum of Qualifying Revenue Sum of Commission	\$0.0000 \$0.0000	\$223,746.1800 \$0.0000	\$54,255.7830 \$0.0000	\$0.0000 \$0.0000	\$278,001.9630 \$0.0000	

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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.

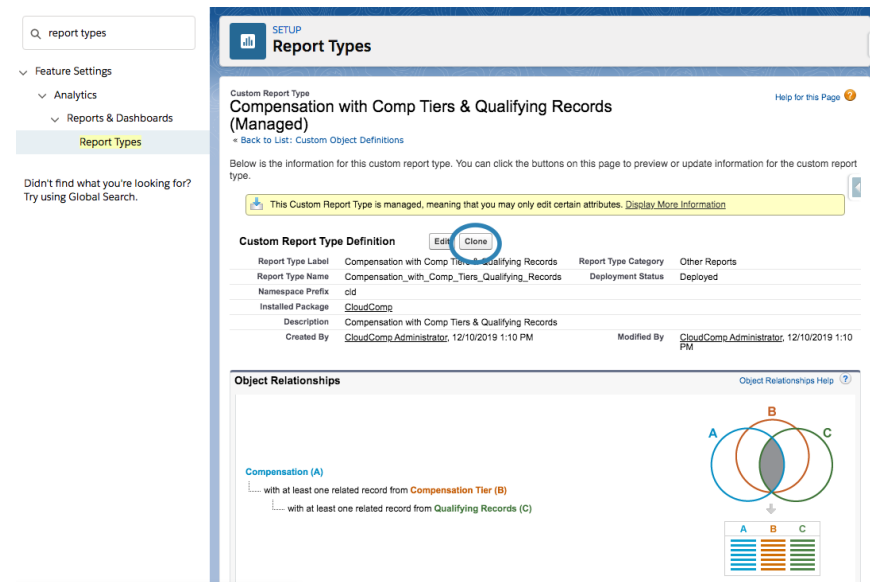
Create Customizable Report Types

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 managed objects, 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 customizable report types. 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](#)



CloudComp Commission Anything™ Admin Guide - Summer 2025

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.

- Feature Settings
- Analytics
- Reports & Dashboards
- Report Types**

Didn't find what you're looking for? Try using Global Search.

Report Types

Edit Custom Report Type

Comp with Comp Tiers & Qual Recs CUSTOM

Help for this Page

Define the Custom Report Type

Report Type Focus

Primary Object: Compensation

Identification

Report Type Label: Comp with Comp Tiers & Qual Recs CUSTOM

Report Type Name: Compensation_with_Cor

Description: Compensation with Comp Tiers & Qualifying Records CUSTOM

Report Type Category: Other Reports

Deployment

Deployment Status: ☒ Deployed


CloudComp Commission Anything™ Admin Guide - Summer 2025

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.


Performance Award
Apple iPad Air

[New Contact](#)
[New Opportunity](#)
[Edit](#)
[New Case](#)
[New Lead](#)

Details

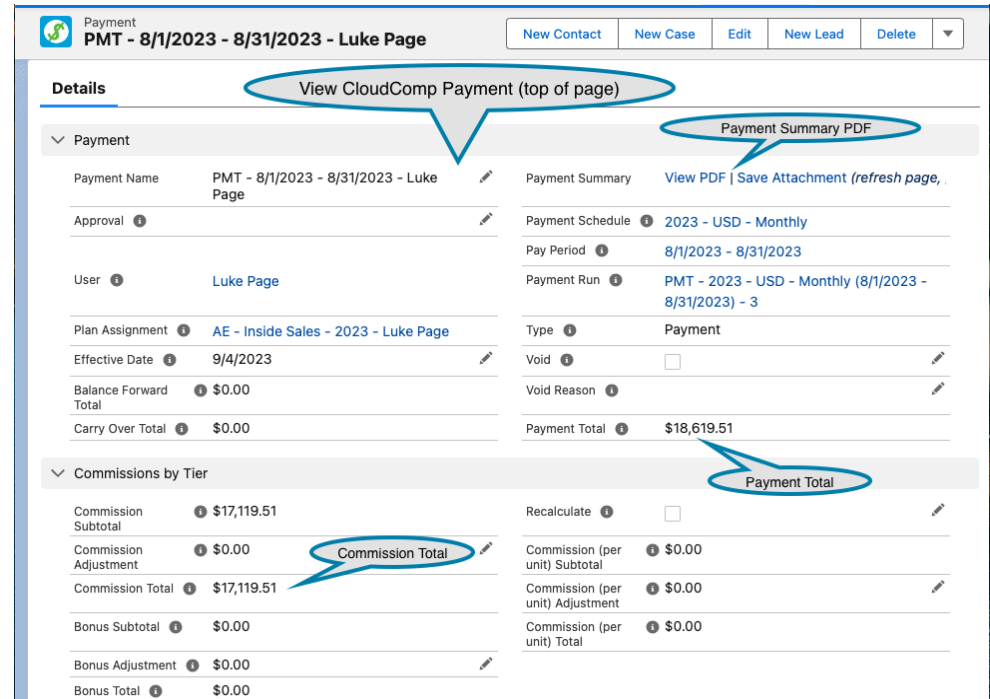
Reward Name	Apple iPad Air
Title	Apple iPad Air
Description	 <ul style="list-style-type: none"> • 10.5-inch Retina Display with True Tone and wide Color • A12 Bionic chip • Touch ID fingerprint sensor and Apple Pay • 8MP back camera, 7MP FaceTime HD Front camera • Stereo speakers • 802.11ac Wi-Fi • Up to 10 hours of battery life
Image URL	https://images-na.ssl-images-amazon.com/images/I/61z85f1XsgL._AC_SL1500_.jpg
Link	https://www.amazon.com/Apple-iPad-Air-10-5-inch-Wi-Fi-256GB/dp/B07PTW1Z1W/

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CloudComp Payments™

CloudComp Payments™ 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 - 8/1/2023 - 8/31/2023 - Luke Page

[New Contact](#) [New Case](#) [Edit](#) [New Lead](#) [Delete](#)

Details

Payment

Payment Name: PMT - 8/1/2023 - 8/31/2023 - Luke Page

Approval: [icon]

User: Luke Page

Plan Assignment: AE - Inside Sales - 2023 - Luke Page

Effective Date: 9/4/2023

Balance Forward Total: \$0.00

Carry Over Total: \$0.00

Payment Summary: [View PDF](#) | [Save Attachment \(refresh page\)](#)

Payment Schedule: 2023 - USD - Monthly

Pay Period: 8/1/2023 - 8/31/2023

Payment Run: PMT - 2023 - USD - Monthly (8/1/2023 - 8/31/2023) - 3

Type: Payment

Void: ☐

Void Reason: [icon]

Payment Total: \$18,619.51

Commissions by Tier

Commission Subtotal: \$17,119.51

Commission Adjustment: \$0.00

Commission Total: \$17,119.51

Bonus Subtotal: \$0.00

Bonus Adjustment: \$0.00

Bonus Total: \$0.00

Recalculate: ☐

Commission (per unit) Subtotal: \$0.00


Commission (per unit) Adjustment: \$0.00

Commission (per unit) Total: \$0.00

CloudComp Commission AnythingTM Admin Guide - Summer 2025


Payments Configuration Step 1 – Create Payment Schedules

- 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).
- Click “Generate Pay Periods”.
- Save Payment Schedule.


PAYMENT SCHEDULE
Biweekly 2020

PAYMENT SCHEDULE DETAILS

Generate Pay Periods
Save
Quick Save
Delete Selected
Cancel

Active	<input checked="" type="checkbox"/>
Payment Schedule Name	Biweekly 2020
Owner ID	Jotham Fisher Smith 
Start Date	12/29/2019
End Date	1/9/2021
Frequency	Biweekly
Days to Payment Run	5
Run As	All
Generate Compensation Paid	<input checked="" type="checkbox"/>
Recipient Share (Read-Only)	<input checked="" type="checkbox"/>
Manager Share (Read Only)	<input checked="" type="checkbox"/>

Generate Pay Periods
Save
Quick Save
Delete Selected
Cancel

CloudComp Commission AnythingTM Admin Guide - Summer 2025

PAYMENT SCHEDULE
Biweekly 2020

PAYMENT SCHEDULE DETAILS

Generate Pay Periods Save Quick Save Delete Selected Cancel

Active ☒

Payment Schedule Name: Biweekly 2020

Owner ID: Jotham Fisher Smith

Start Date: 12/29/2019

End Date: 1/9/2021

Frequency: Biweekly

Days to Payment Run: 5

Run As: All

Generate Compensation Paid: ☒

Recipient Share (Read-Only): ☒

Manager Share (Read-Only): ☒

Generate Pay Periods Save Quick Save Delete Selected Cancel

Biweekly pay periods generated between start and end dates

PAYMENT SCHEDULE

<input type="checkbox"/>	Pay Period Name	Start Date	End Date
<input type="checkbox"/>	12/29/2019 - 1/11/2020	12/29/2019	1/11/2020
<input type="checkbox"/>	1/12/2020 - 1/25/2020	1/12/2020	1/25/2020
<input type="checkbox"/>	1/26/2020 - 2/8/2020	1/26/2020	2/8/2020
<input type="checkbox"/>	2/9/2020 - 2/22/2020	2/9/2020	2/22/2020
<input type="checkbox"/>	2/23/2020 - 3/7/2020	2/23/2020	3/7/2020
<input type="checkbox"/>	3/8/2020 - 3/21/2020	3/8/2020	3/21/2020
<input type="checkbox"/>	3/22/2020 - 4/4/2020	3/22/2020	4/4/2020
<input type="checkbox"/>	4/5/2020 - 4/18/2020	4/5/2020	4/18/2020
<input type="checkbox"/>	4/19/2020 - 5/2/2020	4/19/2020	5/2/2020

CloudComp Commission Anything™ Admin Guide - Summer 2025

Payment Schedule
Biweekly 2020

New Contact New Opportunity Edit New Case New Lead

Pay Periods (10+) Payment Runs (4) Plan Assignments (10+) Payments (10+)

Details Activity

Payment Schedule Name Biweekly 2020

Start Date 12/29/2019

End Date 1/9/2021

Frequency Biweekly

Generate Compensation Paid ☒

Recipient Share (Read-Only) ☒

Manager Share (Read-Only) ☒

Run As All

Active ☒

Days to Payment Run 5

Payment Schedule with Pay Periods

Pay Periods

10+ items • Sorted by Start Date • Updated a minute ago

	Pay Period Name	Start Date	End Date	Created Date	Last Modified Date	
1	12/29/2019 - 1/11/2020	12/29/2019	1/11/2020	12/10/2019 9:51 PM	12/12/2019 4:01 PM	
2	1/12/2020 - 1/25/2020	1/12/2020	1/25/2020	12/10/2019 9:51 PM	12/12/2019 4:01 PM	
3	1/26/2020 - 2/8/2020	1/26/2020	2/8/2020	12/10/2019 9:51 PM	12/12/2019 4:01 PM	
4	2/9/2020 - 2/22/2020	2/9/2020	2/22/2020	12/10/2019 9:51 PM	12/12/2019 4:01 PM	
5	2/23/2020 - 3/7/2020	2/23/2020	3/7/2020	12/10/2019 9:51 PM	12/12/2019 4:01 PM	
6	3/8/2020 - 3/21/2020	3/8/2020	3/21/2020	12/10/2019 9:51 PM	12/12/2019 4:01 PM	
7	3/22/2020 - 4/4/2020	3/22/2020	4/4/2020	12/10/2019 9:51 PM	12/12/2019 4:01 PM	
8	4/5/2020 - 4/18/2020	4/5/2020	4/18/2020	12/10/2019 9:51 PM	12/12/2019 4:01 PM	
9	4/19/2020 - 5/2/2020	4/19/2020	5/2/2020	12/10/2019 9:51 PM	12/12/2019 4:01 PM	
10	5/3/2020 - 5/16/2020	5/3/2020	5/16/2020	12/10/2019 9:51 PM	12/12/2019 4:01 PM	

View All

CloudComp Commission Anything™ Admin Guide - Summer 2025

Payment Schedule Fields Reference	
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 st or 16 th).
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	<ul style="list-style-type: none"> “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.
Manager Share (Read-Only)	Sets read-only sharing for Manager of Recipient (Manager Field in User setup) on all Payments generated from Payment Schedule.

CloudComp Commission AnythingTM Admin Guide - Summer 2025

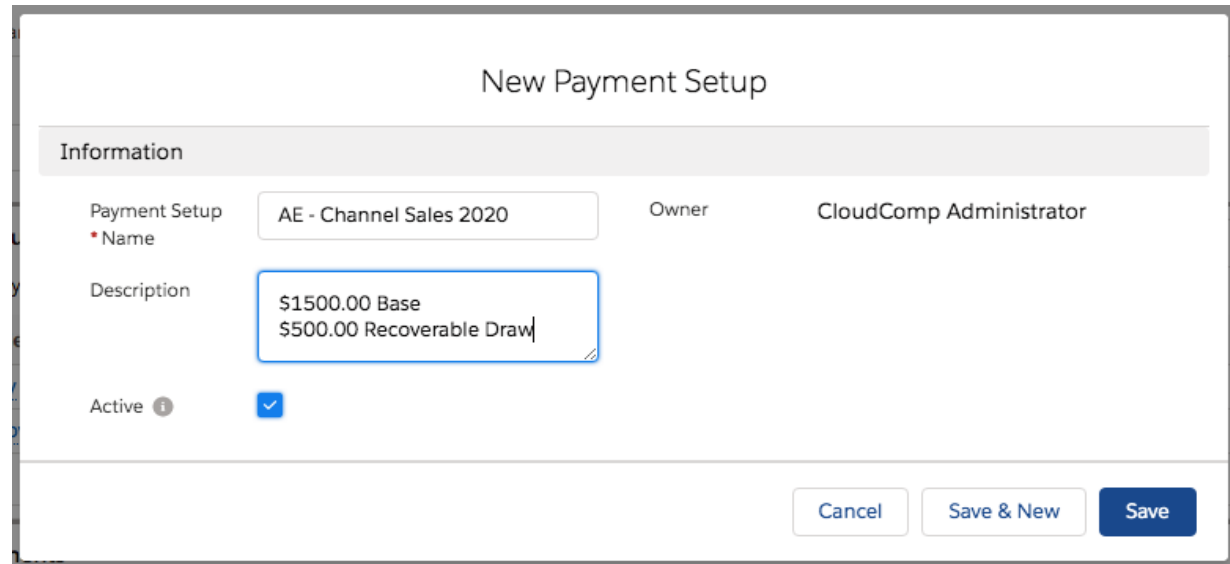
Configure Draws and Salary with CloudComp Payment SetupsTM

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

- Navigate to the Payment Setups tab and click “New”.
- Enter Name, Set Active = true.
- Save Payment Setup.



The screenshot shows the 'New Payment Setup' form. The title 'New Payment Setup' is centered at the top. Below it is a section titled 'Information'. Inside this section, there are three rows of fields. The first row has 'Payment Setup' (with a red asterisk) and 'Name' as labels, followed by a text input field containing 'AE - Channel Sales 2020'. To the right of this is the 'Owner' label followed by the text 'CloudComp Administrator'. The second row has the label 'Description' followed by a text area containing '\$1500.00 Base' and '\$500.00 Recoverable Draw'. The third row has the label 'Active' followed by a blue checkmark icon. At the bottom right of the form are three buttons: 'Cancel', 'Save & New', and 'Save'.

CloudComp Commission AnythingTM Admin Guide - Summer 2025

Payments Configuration Step 2 – Create Payment Setup Lines

- Navigate to the Payment Setup Lines related list and click “New”.
- Enter Name (to be displayed in Payments).
- Enter Amount.
- Enter Start Date and End Date (optional) for phasing payment rules in or out.
- Save Payment Setup Line.

New Payment Setup Line

Information


Payment Setup

• Line Name


Type

• Amount ⓘ


Start Date ⓘ




End Date ⓘ



Payment Setup ⓘ

 AE - Channel Sales - 2... ×

CloudComp Commission AnythingTM Admin Guide - Summer 2025


Payment Setup
AE - Channel Sales - 2020

[New Contact](#)
[New Opportunity](#)
[Edit](#)
[New Case](#)
[New Lead](#)

[Payment Setup Lines \(2\)](#)
[Plan Assignments \(4\)](#)


Details
Activity



Payment Setup Name
AE - Channel Sales - 2020

Description
\$1500.00 Base
\$500.00 Recoverable Draw

Active
☒

Payment Setup with Payment Setup Lines


Payment Setup Lines



[New](#)

2 items • Sorted by Payment Setup Line Name • Updated a few seconds ago

	Payment Setup Line N... ↑ ↓	Type	Amount	Start Date	End Date
1	Base Salary	Salary	\$1,500.00		
2	Draw (Recoverable)	Draw (Recoverable)	\$500.00		

[View All](#)

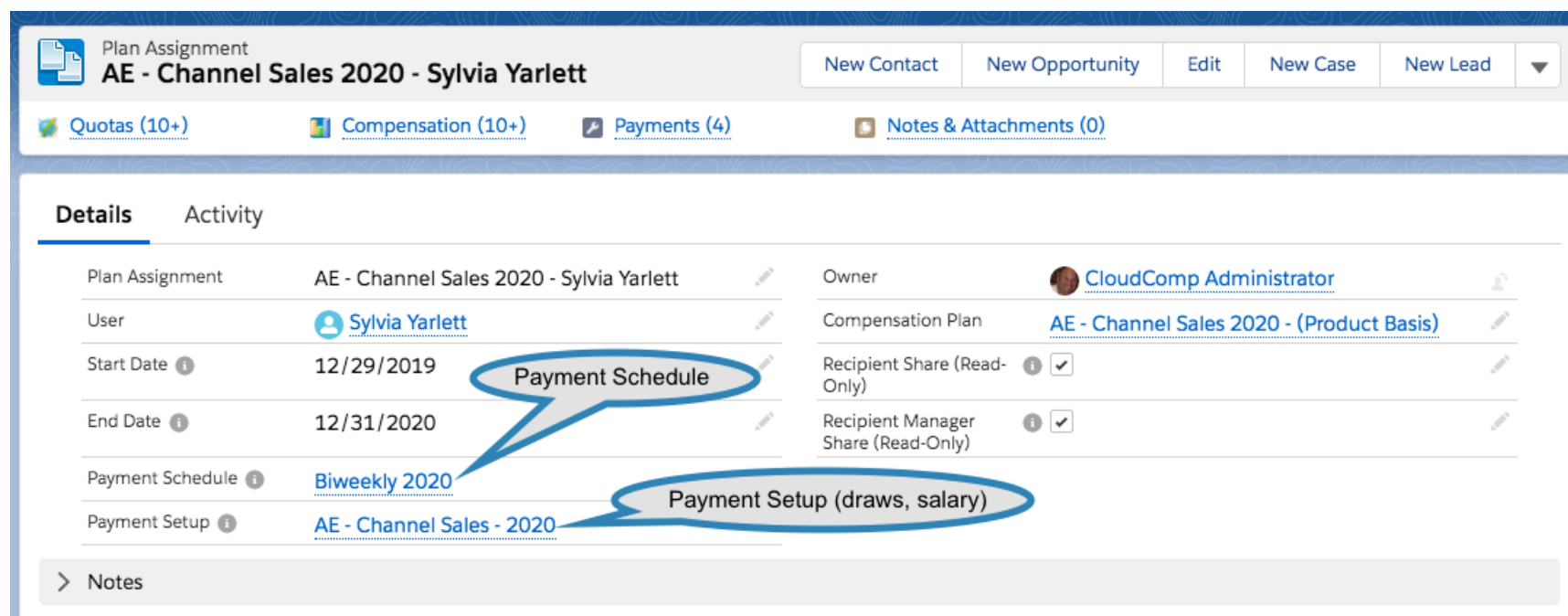
CloudComp Commission Anything™ Admin Guide - Summer 2025

Payment Setup Line Fields Reference	
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".
Type	<p>Type of payment line.</p> <ul style="list-style-type: none"> • Salary: Amount of base pay or salary to assign to user for each pay period. • 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 > total commissions, remainder of recoverable draw is assigned to carry-over which becomes balance forward in next pay period. • 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. • Deduction: Negative amount to be deducted from salary total for each pay period. • Other: Other payment amount.
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.

CloudComp Commission Anything™ Admin Guide - Summer 2025

Payments Configuration Step 3 – Add Payment Schedules to Plan Assignments

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



Plan Assignment: AE - Channel Sales 2020 - Sylvia Yarlett

Quotas (10+) | Compensation (10+) | Payments (4) | Notes & Attachments (0)

Details | Activity

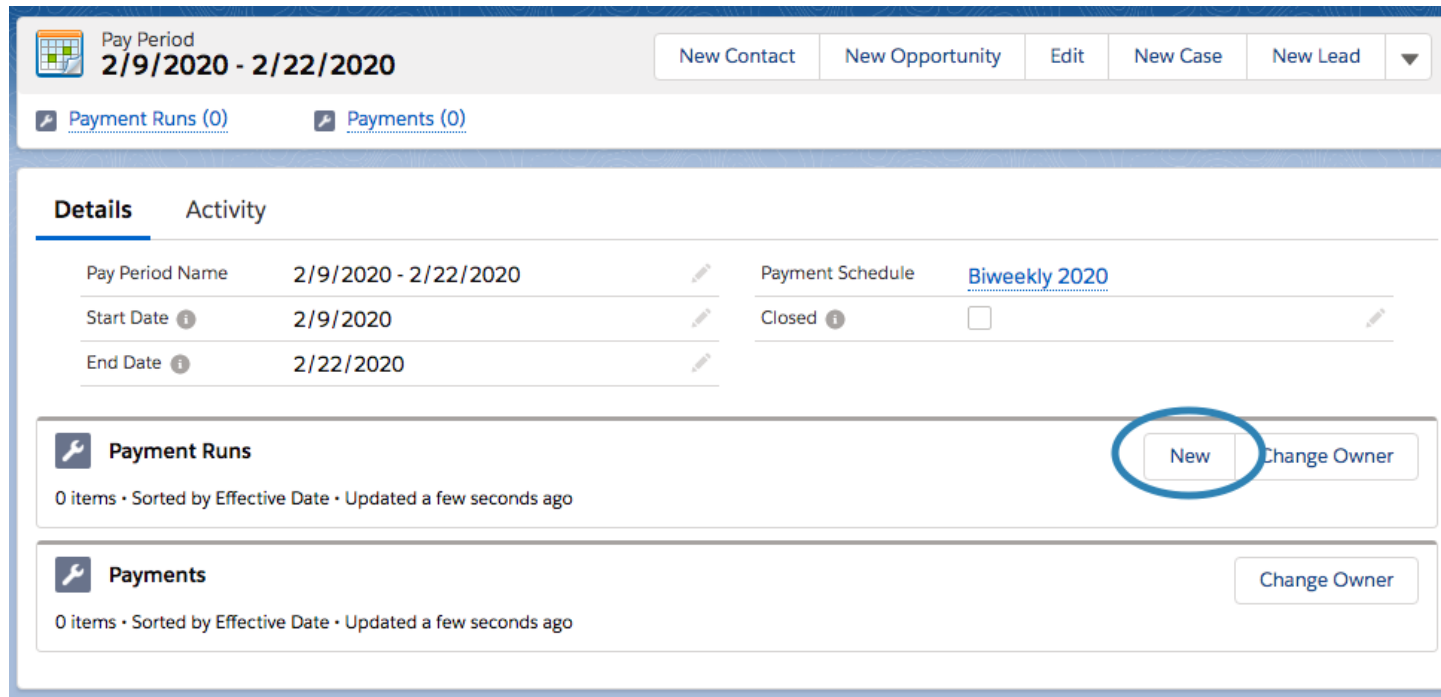
Plan Assignment	AE - Channel Sales 2020 - Sylvia Yarlett	Owner	CloudComp Administrator
User	Sylvia Yarlett	Compensation Plan	AE - Channel Sales 2020 - (Product Basis)
Start Date	12/29/2019	Recipient Share (Read-Only)	<input checked="" type="checkbox"/>
End Date	12/31/2020	Recipient Manager Share (Read-Only)	<input checked="" type="checkbox"/>
Payment Schedule	Biweekly 2020		
Payment Setup	AE - Channel Sales - 2020		

> Notes

CloudComp Commission AnythingTM Admin Guide - Summer 2025

Run Payments – New Payment Run

- Navigate to your Payment Schedule and select a Pay Period
- Navigate to the Payment Runs related list and click “New”



The screenshot shows the CloudComp Admin interface. At the top, there's a header with the 'Pay Period' set to '2/9/2020 - 2/22/2020'. Below this, there are tabs for 'Payment Runs (0)' and 'Payments (0)'. The 'Details' tab is selected, showing fields for 'Pay Period Name', 'Start Date', 'End Date', 'Payment Schedule', and 'Closed'. The 'Payment Schedule' is set to 'Biweekly 2020'. Below the details, there are two sections: 'Payment Runs' and 'Payments'. The 'Payment Runs' section has a 'New' button circled in blue, and the 'Payments' section has a 'Change Owner' button.

Pay Period	
2/9/2020 - 2/22/2020	

New Contact New Opportunity Edit New Case New Lead

Payment Runs (0) Payments (0)

Details Activity

Pay Period Name	2/9/2020 - 2/22/2020	Payment Schedule	Biweekly 2020
Start Date	2/9/2020	Closed	<input type="checkbox"/>
End Date	2/22/2020		

Payment Runs

0 items • Sorted by Effective Date • Updated a few seconds ago

New Change Owner

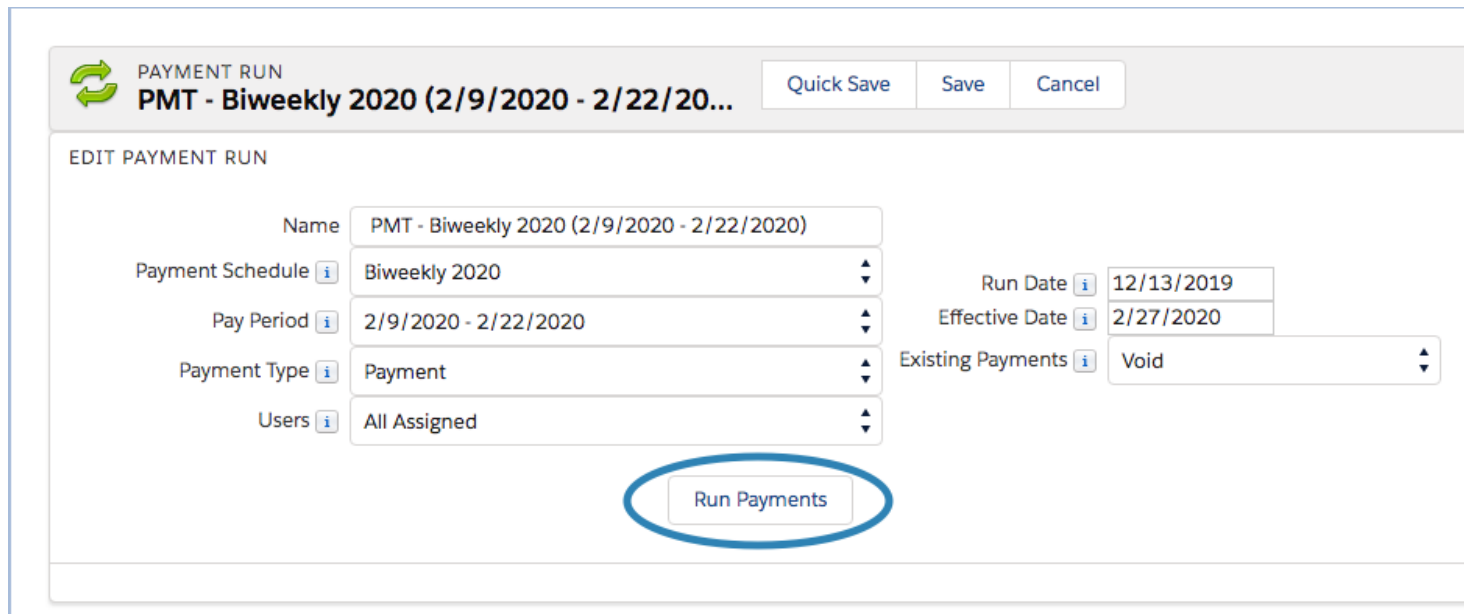
Payments

0 items • Sorted by Effective Date • Updated a few seconds ago

Change Owner

CloudComp Commission AnythingTM Admin Guide - Summer 2025

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



PAYMENT RUN
PMT - Biweekly 2020 (2/9/2020 - 2/22/20...) Quick Save Save Cancel

EDIT PAYMENT RUN

Name PMT - Biweekly 2020 (2/9/2020 - 2/22/2020)

Payment Schedule *i* Biweekly 2020

Pay Period *i* 2/9/2020 - 2/22/2020

Payment Type *i* Payment

Users *i* All Assigned

Run Date *i* 12/13/2019


Effective Date *i* 2/27/2020

Existing Payments *i* Void

Run Payments

CloudComp Commission AnythingTM Admin Guide - Summer 2025


- 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.



PAYMENT RUN
Close


PMT - Biweekly 2020 (2/9/2020 - 2/22/20...


EDIT PAYMENT RUN


Name PMT - Biweekly 2020 (2/9/2020 - 2/22/2020)


Payment Schedule  Biweekly 2020


Pay Period  2/9/2020 - 2/22/2020

Payment Type  Payment

Users  All Assigned

Run Date  12/13/2019

Effective Date  2/27/2020

Existing Payments  Void

STATUS
Jobs Completed

CloudComp Commission Anything™ Admin Guide - Summer 2025

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 will not change in spite of changes to sales data and subsequent CloudComp Sync jobs even if the QR referenced by Payment Lines are updated or deleted.

Pay Period

2/9/2020 - 2/22/2020

New Contact

New Opportunity

Edit

New Case

New Lead

Payment Runs (1)

Payments (10+)

Details

Activity

Pay Period Name

2/9/2020 - 2/22/2020

Payment Schedule

Biweekly 2020

Start Date

2/9/2020

Closed

End Date

2/22/2020

Payment Runs

New

Change Owner

1 item • Sorted by Effective Date • Updated a few seconds ago

Payment Ru...

Payment Sc...

Payment Ty...

Existing Pay...

Status

Users

Effective ...

1

PMT - Biweekly...

Biweekly 2020

Payment

Void

Completed

All Assigned

2/27/2020

View All

Payments

Change Owner

10+ items • Sorted by Effective Date • Updated a few seconds ago

Payment N...

Effective ...

User

Balance For...

Commissio...

Draw (Reco...

Salary Total

1

PMT - 2/9/202...

2/27/2020

Andy Kimura

\$0.00

\$46,287.18

\$1,500.00

\$2,500.00

2

PMT - 2/9/202...

2/27/2020

Rihanna Farmer

\$0.00

\$4,361.11

\$1,500.00

\$2,500.00

3

PMT - 2/9/202...

2/27/2020

Stacy Owen

\$0.00

\$5,352.43

\$1,500.00

\$2,500.00

4

PMT - 2/9/202...

2/27/2020

Carter Khan

\$0.00

\$13,895.63

\$10,000.00

\$0.00

5

PMT - 2/9/202...

2/27/2020

Stephen Matth...

\$0.00

\$13,246.59

\$10,000.00

\$0.00

6

PMT - 2/9/202...

2/27/2020

Natalie Price

(\$500.00)

\$6,783.08

\$500.00

\$1,500.00

7

PMT - 2/9/202...

2/27/2020

Luke Page

\$0.00

\$3,296.77

\$500.00

\$1,500.00

8

PMT - 2/9/202...

2/27/2020

Susan Rogers

\$0.00

\$4,898.86

\$500.00

\$1,500.00

9

PMT - 2/9/202...

2/27/2020

Seth Gerard

(\$500.00)

\$1,137.82

\$500.00

\$1,500.00

10

PMT - 2/9/202...

2/27/2020

Liam Jarret

\$0.00

\$10,552.09


\$500.00

\$1,500.00

View All

CloudComp Commission AnythingTM Admin Guide - Summer 2025

View CloudComp Payment (top of page)


Payment
PMT - 8/1/2023 - 8/31/2023 - Luke Page

[New Contact](#)
[New Case](#)
[Edit](#)
[New Lead](#)
[Delete](#)

Details

View CloudComp Payment (top of page)

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
User Luke Page	Pay Period 8/1/2023 - 8/31/2023
Plan Assignment AE - Inside Sales - 2023 - Luke Page	Payment Run PMT - 2023 - USD - Monthly (8/1/2023 - 8/31/2023) - 3
Effective Date 9/4/2023	Type Payment
Balance Forward Total \$0.00	Void
Carry Over Total \$0.00	Void Reason
	Payment Total \$18,619.51

Commissions by Tier

Commission Subtotal \$17,119.51	Recalculate
Commission Adjustment \$0.00	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 \$0.00
Bonus Adjustment \$0.00	
Bonus Total \$0.00	

CloudComp Commission Anything™ Admin Guide - Summer 2025

View CloudComp Payment (bottom of page)


Payment
PMT - 8/1/2023 - 8/31/2023 - Luke Page

[New Contact](#)
[New Case](#)
[Edit](#)
[New Lead](#)
[Delete](#)

Commissions by Rate Type (rt)

View CloudComp Payment (bottom of page)

Commission rt Subtotal	\$0.0000	Commission (per unit) rt Subtotal	\$0.00
Commission rt Adjustment	\$0.00	Commission (per unit) rt Adjustment	\$0.00
Commission rt Total	\$0.00	Commission (per unit) rt Total	\$0.00

Draws

Recoverable Draw

Draw (Recoverable) Subtotal	\$500.00	Draw (Non-Recoverable) Subtotal	\$0.00
Draw (Recoverable) Adjustment	\$0.00	Draw (Non-Recoverable) Adjustment	\$0.00
Draw (Recoverable) Total	\$500.00	Draw (Non-Recoverable) Total	\$0.00

Salary

Salary

Salary Subtotal	\$1,500.00	Deductions Subtotal	\$0.00
Salary Adjustment	\$0.00	Deductions Adjustment	\$0.00
Salary Total	\$1,500.00	Deductions Total	\$0.00

Sharing

Recipient Share (Read-Only)	<input checked="" type="checkbox"/>	Manager Share (Read Only)	<input checked="" type="checkbox"/>
-----------------------------	-------------------------------------	---------------------------	-------------------------------------

CloudComp Commission Anything™ Admin Guide - Summer 2025

View CloudComp Payment (related lists)

Payment
PMT - 8/1/2023 - 8/31/2023 - Luke Page

New Contact New Case Edit New Lead Delete

Payment Lines (10+)
10+ items • Sorted by Deal Name • Updated

View CloudComp Payment (related lists)

<input type="checkbox"/>	Payment Line Name	Deal Name	Commissi...	Commission	Release D...
1	<input type="checkbox"/> Base Salary - 8/31/2023 - Page		0.0000%	\$0.00	8/31/2023
2	<input type="checkbox"/> Draw (Recoverable) - 8/31/2023 - Page		0.0000%	\$0.00	8/31/2023
3	<input type="checkbox"/> rfs-141618	Brown, Kessler and Jerde - Training	3.0000%	\$8,748.24	8/28/2023
4	<input type="checkbox"/> rfs-137680	Labadie, Leannon and Morar - Support...	3.0000%	\$232.54	8/10/2023
5	<input type="checkbox"/> rfs-137647	Labadie, Leannon and Morar - Support...	3.0000%	\$232.54	8/10/2023
6	<input type="checkbox"/> rfs-137682	Labadie, Leannon and Morar - Support...	3.0000%	\$232.54	8/10/2023
7	<input type="checkbox"/> rfs-137681	Labadie, Leannon and Morar - Support...	3.0000%	\$232.54	8/10/2023
8	<input type="checkbox"/> rfs-137679	Labadie, Leannon and Morar - Support...	3.0000%	\$232.54	8/10/2023
9	<input type="checkbox"/> rfs-137678	Labadie, Leannon and Morar - Support...	3.0000%	\$232.54	8/10/2023
10	<input type="checkbox"/> rfs-137677	Labadie, Leannon and Morar - Support...	3.0000%	\$232.54	8/10/2023

View All

Payment Lines contain the granular details of how every penny of compensation was calculated by date, tier, deal and more.

Compensation Paid (1)
1 item • Sorted by Date • Updated a minute ago

Compensation Paid records relate all granular commissions paid to the fiscal periods in which they were earned.

<input type="checkbox"/>	Name	Amount	Date	Compensation	Type
1	<input type="checkbox"/> P1307	\$17,119.51	9/4/2023	Aug FY 2023 - Luke Page	Payment

View All

Payment History maintains an automatic audit trail of every change to payment records.

Payment History (2)
2 items • Sorted by Date • Updated a minute ago

	Date	Field	User	Original Value	New Value
1	9/19/2023 8:20 AM	Payment Amount (Calculated)	CloudComp Administrator	\$0	\$18,619.51
2	9/19/2023 8:17 AM	Created.	CloudComp Administrator		

View All

CloudComp Commission AnythingTM Admin Guide - Summer 2025

View CloudComp Payment Summary PDF (top of page)



Surfwriter, Inc. Demo Org Payment

For	Luke Page	Date	9/4/2023	Type	Payment
Title	AE - Inside Sales	Period	8/1/2023 - 8/31/2023	Void	false

COMMISSIONS

Commission Total	\$17,119.51
Commission (per unit) Total	\$0.00
Bonus Total	\$0.00
Commission rt Total	\$0.00
Commission (per unit) rt Total	\$0.00
Total	\$17,119.51

Commission Deductions

Draw (Recoverable) Total	\$500.00
Draw (Non-Recoverable) Total	\$0.00
Total	\$500.00

COMMISSIONS PAID	\$16,619.51	\$16,619.51
-------------------------	--------------------	--------------------

DRAWS

Draw (Recoverable) Total	\$500.00
Draw (Non-Recoverable) Total	\$0.00
Total	\$500.00

DRAWS PAID	\$500.00	\$17,119.51
-------------------	-----------------	--------------------

CloudComp Commission Anything™ Admin Guide - Summer 2025

View CloudComp Payment Summary PDF (bottom of page)

COMMISSIONS PAID		\$16,619.51	\$16,619.51
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		\$0.00	
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			
TO NEXT PAYMENT		\$0.00	


PMT - 8/1/2023 - 8/31/2023 - Luke Page
 Last Processed Date: 9/19/2023 8:20 AM
 Generated by: CloudComp Administrator, 11/18/2023 11:52 AM

Page 1 of 1

CloudComp Commission AnythingTM Admin Guide - Summer 2025

Run Payments – Run Payments for Specific Users

- Navigate to your Payment Schedule and select a Pay Period
- Navigate to the Payment Runs related list and click “New”


 **PAYMENT RUN**
PMT - Biweekly 2020 (2/9/2020 - 2/22/20...

[Quick Save](#) [Save](#) [Cancel](#)


EDIT PAYMENT RUN

Name


PMT - Biweekly 2020 (2/9/2020 - 2/22/2020)

Payment Schedule 


Biweekly 2020

Pay Period 

2/9/2020 - 2/22/2020


Payment Type 

Payment


Users 

☒ All Assigned


☐ Specific Users

Run Date 

12/13/2019

Effective Date 


2/27/2020

Existing Payments 

Void

[Run Payments](#)

CloudComp Commission AnythingTM Admin Guide - Summer 2025


PAYMENT RUN
PMT - Biweekly 2020 (2/9/2020 - 2/22/2020) - 2

EDIT PAYMENT RUN

Name
PMT - Biweekly 2020 (2/9/2020 - 2/22/2020) - 2

Payment Schedule
Biweekly 2020

Pay Period
2/9/2020 - 2/22/2020

Payment Type
Payment

Users
Specific Users

Run Date
12/16/2019

Effective Date
2/27/2020

Existing Payments
Void

1: Add Users from Available to Selected

2: Run Payments

SEARCH USERS

Search By
First Name
Search Text
Go

AVAILABLE USERS

<input type="checkbox"/> Name	Profile.Name	UserRole.Name
<input type="checkbox"/> Aiden Campbell	Standard User	AE - Enterprise Sales
<input type="checkbox"/> Amanda Bishop	Standard User	CEO
<input type="checkbox"/> Andy Kimura	Standard User	Manager - Channel Sales
<input type="checkbox"/> Carter Khan	Standard User	SVP Sales
<input type="checkbox"/> Catherine Davidson	Standard User	AF - Inside Sales

SELECTED USERS

<input type="checkbox"/> Name	Profile.Name	UserRole.Name
<input type="checkbox"/> Rihanna Farmer	Standard User	Manager - Enterprise Sales

CloudComp Commission Anything™ Admin Guide - Summer 2025

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

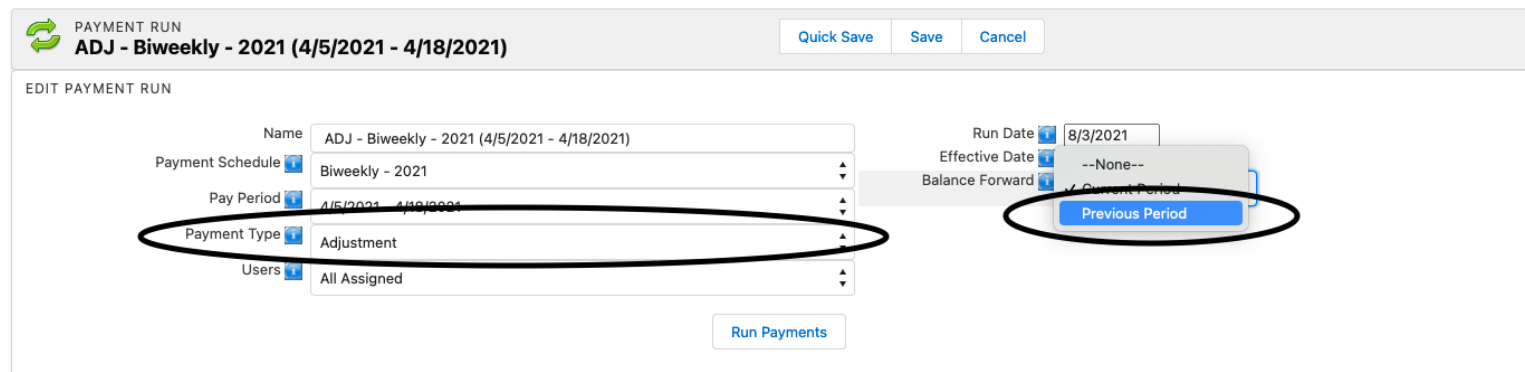
CloudComp Commission Anything™ Admin Guide - Summer 2025

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"**.



PAYMENT RUN
ADJ - Biweekly - 2021 (4/5/2021 - 4/18/2021)

Quick Save Save Cancel

EDIT PAYMENT RUN

Name: ADJ - Biweekly - 2021 (4/5/2021 - 4/18/2021)

Payment Schedule: Biweekly - 2021

Pay Period: 4/5/2021 - 4/18/2021

Payment Type: Adjustment

Users: All Assigned

Run Date: 8/3/2021

Effective Date: --None--

Balance Forward: ☒ Current Period ☐ Previous Period

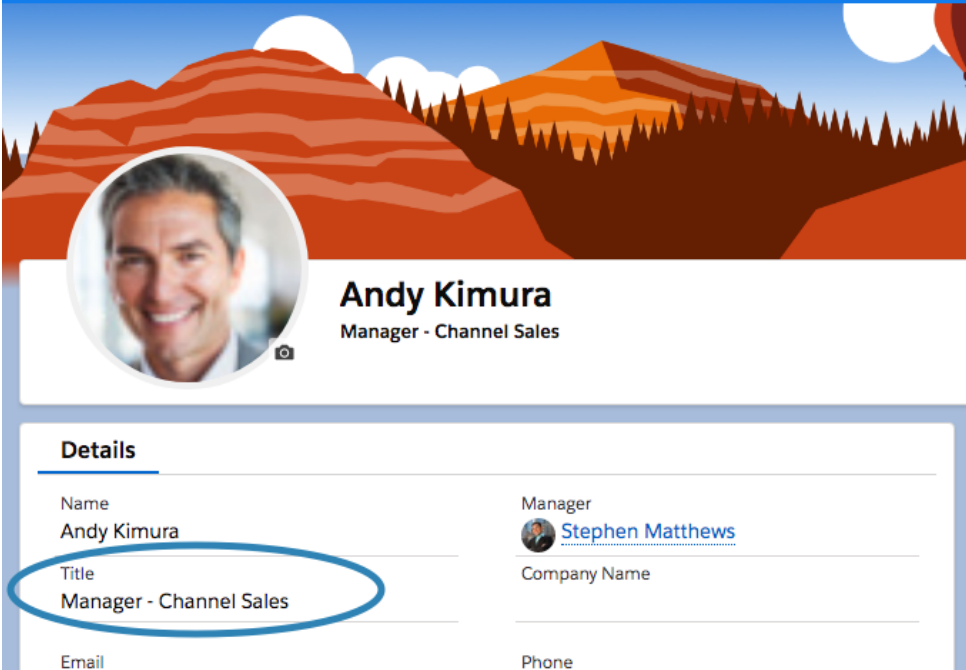
Run Payments

CloudComp Commission Anything™ Admin Guide - Summer 2025


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**.



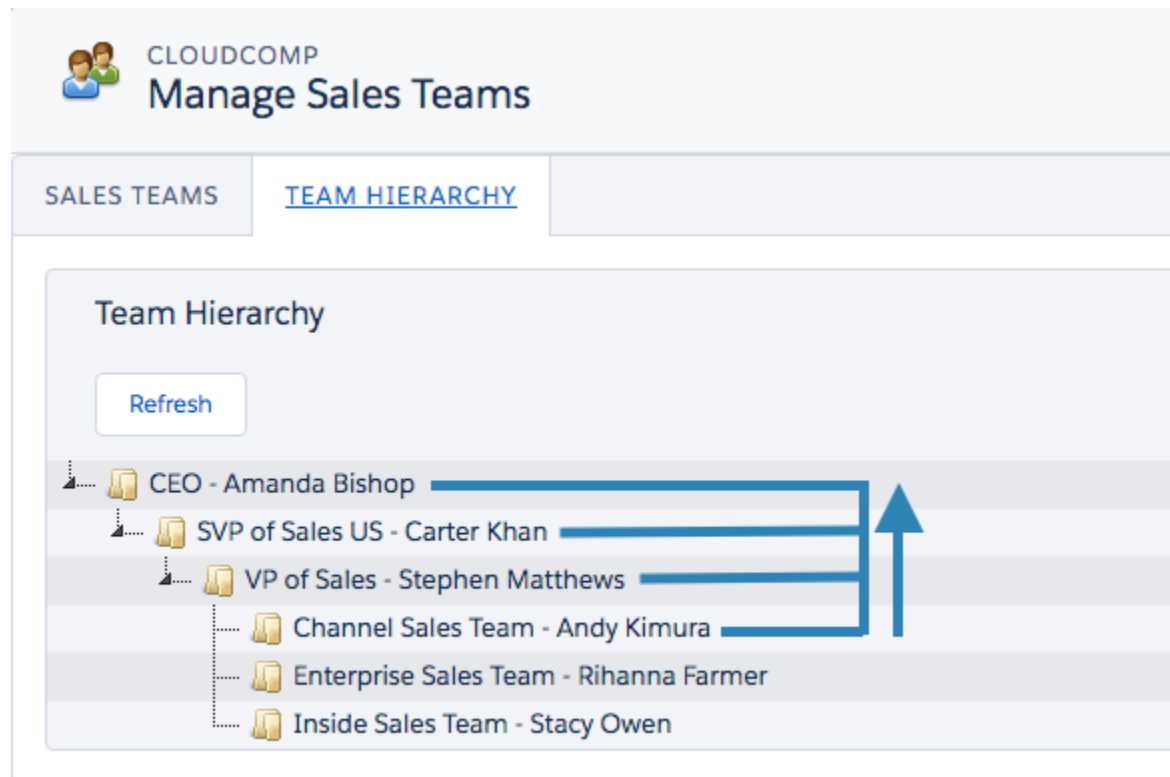
A user profile card for Andy Kimura. The header features a circular profile picture of a smiling man with grey hair, set against a background of stylized orange and red mountains under a blue sky with a white sun. To the right of the picture, the name 'Andy Kimura' is displayed in bold, with 'Manager - Channel Sales' below it. Below the header is a 'Details' section with a blue underline. It contains two columns of information: 'Name' (Andy Kimura), 'Title' (Manager - Channel Sales, which is circled in blue), 'Email', 'Manager' (Stephen Matthews, with a small profile picture and a blue link), 'Company Name', and 'Phone'.

Details	
Name	Manager
Andy Kimura	 Stephen Matthews
Title	Company Name
Manager - Channel Sales	
Email	Phone


CloudComp Commission Anything™ Admin Guide - Summer 2025

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**



CloudComp Commission Anything™ Admin Guide - Summer 2025


Opportunity
McLaughlin LLC - App Subscription

[+ Follow](#)
[Edit](#)
[New Case](#)
[New Note](#)
[Delete](#)
[Clone](#)

✓

✓

✓

✓

✓

✓

✓

✓

✓


✓

Closed Won

[Change Closed Stage](#)

[Products \(1\)](#)
[Fulfillment \(0\)](#)
[Opportunity Team \(0\)](#)
[Notes & Attachments \(0\)](#)
[Insertion Orders \(0\)](#)
[Invoices \(0\)](#)


Details
Activity
Chatter

Opportunity Owner	 Andy Kimura	Close Date	1/6/2020
Opportunity Name	McLaughlin LLC - App Subscription	Stage	Closed Won
Account Name	McLaughlin LLC	Probability (%)	100%
Type	Renewal	Amount	\$62,787.00
Lead Generator		Contract Start Date	
RevenueCloud Splits Template		Override Splits Template	<input type="checkbox"/>
		Margin Amount	\$0.00
		Set Account Teams Splits	<input type="checkbox"/>

> RevenueCloud

> Additional Information

> System Information


Products

[Add Products](#)
[Edit Products](#)
[Choose Price Book](#)

1 item • Sorted by Sort Order • Updated an hour ago

Product	Date	End Date	Quantity	List Price	Sales Price	Total Price	Line Descri...	Sale Type
1 App Subscription	1/6/2020		150.00	\$1,200.00	\$418.58	\$62,787.00		

[View All](#)

CloudComp Commission Anything™ Admin Guide - Summer 2025

Pay Periods > 12/29/2019 - 1/11/2020

Payments

19 items • Sorted by User • Updated a few seconds ago

Payments for Pay Period Before Adjustment for Clawback

	<input type="checkbox"/> Payment Name	Effectiv...	User ↑	Bal...	Comm...	Draw (R...	Salary T...	Payment Total	Carry ...	Void
1	<input type="checkbox"/> 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	<input type="checkbox"/>
2	<input type="checkbox"/> 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	<input type="checkbox"/>
3	<input type="checkbox"/> 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	<input type="checkbox"/>
4	<input type="checkbox"/> 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	<input type="checkbox"/>
5	<input type="checkbox"/> 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	<input type="checkbox"/>
6	<input type="checkbox"/> 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	<input type="checkbox"/>
7	<input type="checkbox"/> 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	<input type="checkbox"/>
8	<input type="checkbox"/> 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	<input type="checkbox"/>
9	<input type="checkbox"/> 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	<input type="checkbox"/>
10	<input type="checkbox"/> 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	<input type="checkbox"/>
11	<input type="checkbox"/> 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	<input type="checkbox"/>
12	<input type="checkbox"/> 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)	<input type="checkbox"/>
13	<input type="checkbox"/> 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)	<input type="checkbox"/>
14	<input type="checkbox"/> 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	<input type="checkbox"/>
15	<input type="checkbox"/> 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	<input type="checkbox"/>
16	<input type="checkbox"/> 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	<input type="checkbox"/>
17	<input type="checkbox"/> 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	<input type="checkbox"/>
18	<input type="checkbox"/> 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	<input type="checkbox"/>
19	<input type="checkbox"/> PMT - 12/29/2019 - 1/11/2020 - Sylvia Yariett	1/16/2020	Sylvia Yariett	\$0.00	\$0.00	\$500.00	\$1,500.00	\$2,000.00	(\$500.00)	<input type="checkbox"/>

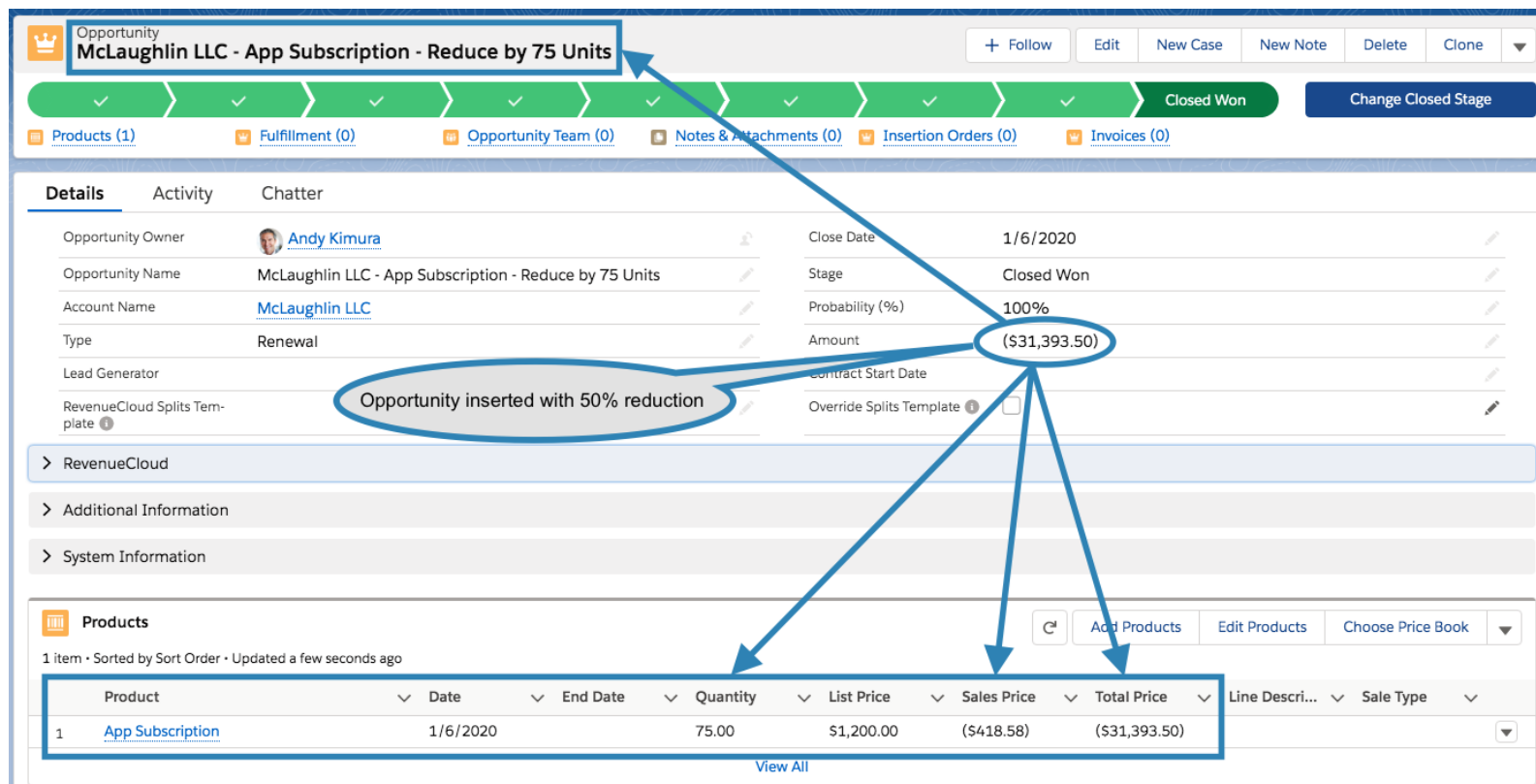
CloudComp Commission AnythingTM Admin Guide - Summer 2025

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 – 1/11/2020.

Report: Payments with Payment Lines and Qualifying Record			
Payments by Rep - McLaughlin LLC 1/2020			
Amounts paid for deal		Effective Date →	January 2020
User ↑	Deal Name ↑	Pay Period →	12/29/2019 - 1/11/2020
<input type="checkbox"/> Amanda Bishop	McLaughlin LLC - App Subscription	Sum of Qualifying Revenue Sum of Commission	\$62,787.0000 \$282.54
<input type="checkbox"/> Andy Kimura	McLaughlin LLC - App Subscription	Sum of Qualifying Revenue Sum of Commission	\$62,787.0000 \$219.75
<input type="checkbox"/> Carter Khan	McLaughlin LLC - App Subscription	Sum of Qualifying Revenue Sum of Commission	\$62,787.0000 \$313.94
<input type="checkbox"/> Stephen Matthews	McLaughlin LLC - App Subscription	Sum of Qualifying Revenue Sum of Commission	\$62,787.0000 \$188.36

CloudComp Commission Anything™ Admin Guide - Summer 2025

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 Details:

- Opportunity Name: McLaughlin LLC - App Subscription - Reduce by 75 Units
- Account Name: McLaughlin LLC
- Type: Renewal
- Close Date: 1/6/2020
- Stage: Closed Won
- Probability (%): 100%
- Amount: (\$31,393.50)
- Contract Start Date: [Blank]
- Override Splits Template: [Blank]

Products Table:

Product	Date	End Date	Quantity	List Price	Sales Price	Total Price
App Subscription	1/6/2020		75.00	\$1,200.00	(\$418.58)	(\$31,393.50)

Opportunity inserted with 50% reduction

CloudComp Commission Anything™ Admin Guide - Summer 2025

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 with Comp Tiers & Qual Recs CUSTOM

Comp with Comp Tiers and Qual Recs CFY

Custom Report Type

Total Commission

\$502.29

CloudComp data reflects negative commissions

<input type="checkbox"/> User: Full Name ↑ ▾	Compensation Plan Tier: Plan Tier Name ↑ ▾	Deal Name ↑ ▾	Sum of Commission
<input type="checkbox"/> Amanda Bishop	All Sales - 0% - 100%	McLaughlin LLC - App Subscription	\$282.54
		McLaughlin LLC - App Subscription - Reduce by 75 Units	(\$141.27)
<input type="checkbox"/> Andy Kimura	App Subscriptions - All	McLaughlin LLC - App Subscription	\$219.75
		McLaughlin LLC - App Subscription - Reduce by 75 Units	(\$109.88)
<input type="checkbox"/> Carter Khan	App Subscriptions - 0% - 100%	McLaughlin LLC - App Subscription	\$313.94
		McLaughlin LLC - App Subscription - Reduce by 75 Units	(\$156.97)
<input type="checkbox"/> 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

CloudComp Commission Anything™ Admin Guide - Summer 2025

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.

PAYMENT RUN
ADJ - Biweekly 2020 (12/29/2019 - 1/11/2020)

Quick Save Save Cancel

EDIT PAYMENT RUN

Name

ADJ - Biweekly 2020 (12/29/2019 - 1/11/2020)

Payment Schedule

Biweekly 2020

Pay Period

12/29/2019 - 1/11/2020

Payment Type

Adjustment

Users

Specific Users

Run Date

12/13/2019

Effective Date

1/16/2020

Existing Payments

Void

Run Payments

Run Adjustment for Specific Users

SEARCH USERS

Search By

First Name

Search Text

Go

AVAILABLE USERS

Add

<input type="checkbox"/> Name	Profile.Name	UserRole.Name
<input type="checkbox"/> Aiden Campbell	Standard User	AE - Enterprise Sales
<input type="checkbox"/> Catherine Davidson	Standard User	AE - Inside Sales
<input type="checkbox"/> Chuck Roth	Standard User	AE - Enterprise Sales
<input type="checkbox"/> Hailey May	Standard User	AE - Enterprise Sales
<input type="checkbox"/> Joseph Armstead	Standard User	AE - Enterprise Sales
<input type="checkbox"/> Liam Jarret	Standard User	AE - Channel Sales

SELECTED USERS

Remove

<input type="checkbox"/> Name	Profile.Name	UserRole.Name
<input type="checkbox"/> Amanda Bishop	Standard User	CEO
<input type="checkbox"/> Andy Kimura	Standard User	Manager - Channel Sales
<input type="checkbox"/> Carter Khan	Standard User	SVP Sales
<input type="checkbox"/> Stephen Matthews	Standard User	VP Sales

CloudComp Commission Anything™ Admin Guide - Summer 2025

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 Periods > 12/29/2019 - 1/11/2020

Payments

23 items • Sorted by User • Updated a minute ago

Adjustments carry changes forward from Pay Period

	Payment Name	Effectiv...	User ↑	Bal...	Commi...	Draw (R...	Salary T...	Payment Total	Carry ...	Void
1	<input type="checkbox"/> 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	<input type="checkbox"/>
2	<input type="checkbox"/> 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	<input type="checkbox"/>
3	<input type="checkbox"/> 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)	<input type="checkbox"/>
4	<input type="checkbox"/> 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	<input type="checkbox"/>
5	<input type="checkbox"/> 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)	<input type="checkbox"/>
6	<input type="checkbox"/> 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	<input type="checkbox"/>
7	<input type="checkbox"/> 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)	<input type="checkbox"/>
8	<input type="checkbox"/> 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	<input type="checkbox"/>
9	<input type="checkbox"/> 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	<input type="checkbox"/>
10	<input type="checkbox"/> 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	<input type="checkbox"/>
11	<input type="checkbox"/> 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	<input type="checkbox"/>
12	<input type="checkbox"/> 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	<input type="checkbox"/>
13	<input type="checkbox"/> 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	<input type="checkbox"/>
14	<input type="checkbox"/> 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	<input type="checkbox"/>
15	<input type="checkbox"/> 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)	<input type="checkbox"/>
16	<input type="checkbox"/> 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)	<input type="checkbox"/>
17	<input type="checkbox"/> 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	<input type="checkbox"/>
18	<input type="checkbox"/> 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	<input type="checkbox"/>
19	<input type="checkbox"/> 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	<input type="checkbox"/>
20	<input type="checkbox"/> 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	<input type="checkbox"/>
21	<input type="checkbox"/> ADJ - 12/29/2019 - 1/11/2020 - Stephen Matthews	1/16/2020	Stephen Matthews	\$0.00	\$10,349.78	\$10,000.00	\$0.00	\$0.00	(\$94.18)	<input type="checkbox"/>
22	<input type="checkbox"/> 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	<input type="checkbox"/>
23	<input type="checkbox"/> PMT - 12/29/2019 - 1/11/2020 - Sylvia Yariett	1/16/2020	Sylvia Yariett	\$0.00	\$0.00	\$500.00	\$1,500.00	\$2,000.00	(\$500.00)	<input type="checkbox"/>

CloudComp Commission Anything™ Admin Guide - Summer 2025

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

Details

Activity

Pay Period Name

1/12/2020 - 1/25/2020

Start Date

1/12/2020

End Date

1/25/2020

New Contact

New Opportunity

Edit

New Case

New Lead

Payment Schedule

Biweekly 2020

Closed

☐

Payment Runs

1 Item - Sorted by Effective Date - Updated a minute ago

Payment Run Name

Payment Schedule

Payment Type

Existing Payments

Status

Users

Effective Date

1

PMT - Biweekly 2020 (1/12/2020 - 1/25/2020)

Biweekly 2020

Payment

Delete

Completed

All Assigned

1/30/2020

View All

Payments

10+ Items - Sorted by User - Updated a minute ago

Payment Name

Effectiv...

User

Balance Forward

Comm...

Draw (Recover...

Salary Total

Payment Total

Carry Over

Void

1

PMT - 1/12/2020 - 1/25/2020 - Aiden Campbell

1/30/2020

Aiden Campbell

\$0.00

\$11,427.83

\$500.00

\$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

\$0.00

\$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

\$2,500.00

\$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

\$0.00

\$14,522.67

\$0.00

☐

5

PMT - 1/12/2020 - 1/25/2020 - Catherine Davidson

1/30/2020

Catherine Davidson

\$0.00

\$0.00

\$500.00

\$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

\$1,500.00

\$27,837.55

\$0.00

☐

7

PMT - 1/12/2020 - 1/25/2020 - Hailey May

1/30/2020

Hailey May

\$0.00

\$0.00

\$500.00

\$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

\$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

\$1,500.00

\$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

\$1,500.00

\$28,178.04

\$0.00

☐

View All

Carry-over from prior Period becomes Balance Forward in Current Period

CloudComp Commission Anything™ Admin Guide - Summer 2025

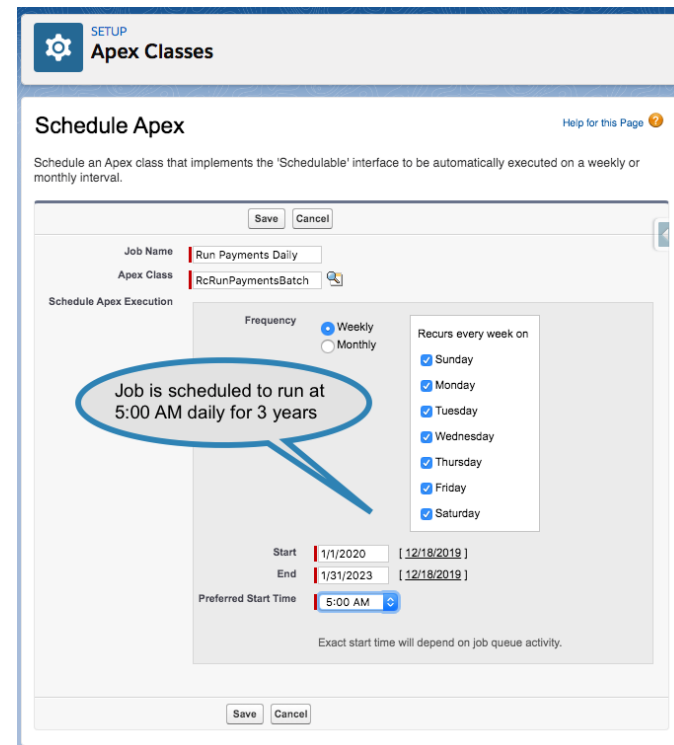
Scheduled Payment Runs - Overview

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.

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



SETUP Apex Classes

Schedule Apex

Help for this Page

Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on a weekly or monthly interval.

Save Cancel

Job Name Run Payments Daily

Apex Class RcRunPaymentsBatch

Schedule Apex Execution

Frequency ☒ Weekly ☐ Monthly

Recurs every week on

- ☒ Sunday
- ☒ Monday
- ☒ Tuesday
- ☒ Wednesday
- ☒ Thursday
- ☒ Friday
- ☒ Saturday

Start 1/1/2020 [12/18/2019]

End 1/31/2023 [12/18/2019]

Preferred Start Time 5:00 AM

Exact start time will depend on job queue activity.

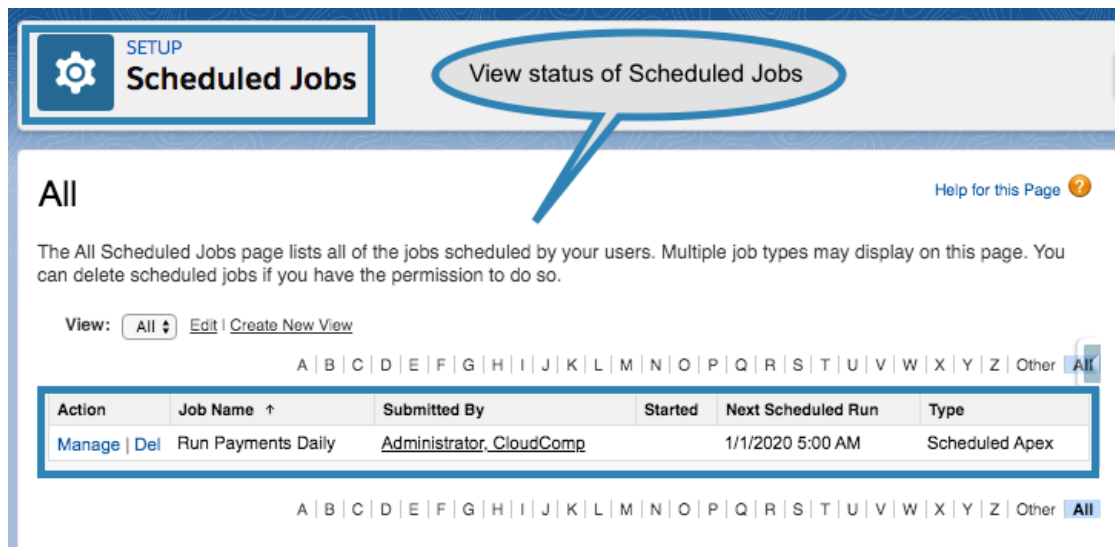
Save Cancel

Job is scheduled to run at 5:00 AM daily for 3 years

CloudComp Commission Anything™ Admin Guide - Summer 2025

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.



SETUP
Scheduled Jobs

View status of Scheduled Jobs

All [Help for this Page](#)

The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.

View: **All** [Edit](#) [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

Action	Job Name ↑	Submitted By	Started	Next Scheduled Run	Type
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 | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

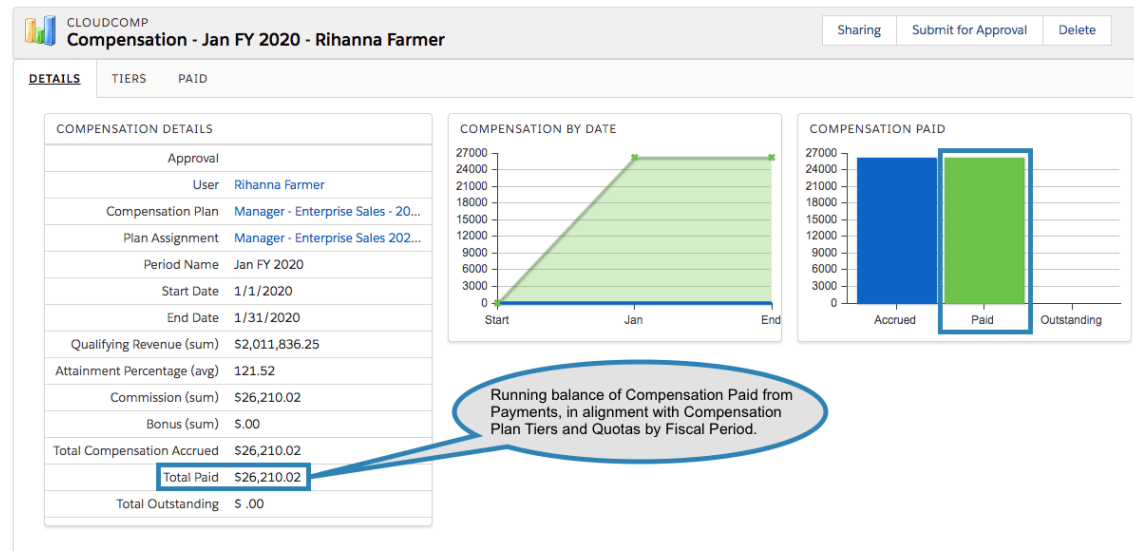
CloudComp Commission Anything™ Admin Guide - Summer 2025

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.



CloudComp Commission Anything™ Admin Guide - Summer 2025

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.



CLOUDCOMP

Compensation - Jan FY 2020 - Rihanna Farmer

Sharing

Submit for Approval

Delete

DETAILS

TIERS

PAID

Commissions Accrued by Fiscal Period and Tier


COMPENSATION TIERS

FISCAL PERIOD	COMP TIER NAME	REVENUE QUOTA	ACCRUED REVENUE	ATTAINMENT PERCENTAGE	QUALIFYING REVENUE	COMMISSION
Jan FY 2020	App 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	App 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	Training - 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	Training - 100% - 200% - Jan FY 2020 - Rihanna Farmer	\$2,500,000.00	\$543,903.13	121.5183%	\$60,091.56	\$600.92
Jan FY 2020	Support - 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	Support - 100% - 200% - Jan FY 2020 - Rihanna Farmer	\$2,500,000.00	\$391,997.84	121.5183%	\$103,508.46	\$1,552.63

CloudComp Commission Anything™ Admin Guide - Summer 2025

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.


CLOUDCOMP
Compensation - Jan FY 2020 - Rihanna Farmer

DETAILS
TIERS
PAID

COMPENSATION PAID

New Compensation Paid

Name	Date	Type	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 Per Page: 10
Records: 3 of 3

Compensation Paid by Fiscal Period
from Payments by Pay Period

CloudComp Commission Anything™ Admin Guide - Summer 2025

Payment
PMT - 1/26/2020 - 2/8/2020 - Rihanna Farmer

[New Contact](#)
[New Opportunity](#)
[Edit](#)
[New Case](#)
[New Lead](#)

Payment Lines

10+ items • Sorted by Release Date • Updated 2 minutes ago

	Payment Li...	Type	Deal Name	Date	Release D...	Compensat...	Commission	Salary	Draw (Reco...
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	Qualifying Rec...	Johnson, Lock...	1/30/2020	1/30/2020	Support - 100...	\$119.43	\$0.00	\$0.00
5	rfs-34594	Qualifying Rec...	Johnson, Lock...	1/30/2020	1/30/2020	Support - 100...	\$119.43	\$0.00	\$0.00
6	rfs-34593	Qualifying Rec...	Johnson, Lock...	1/30/2020	1/30/2020	Support - 100...	\$119.43	\$0.00	\$0.00
7	rfs-34592	Qualifying Rec...	Johnson, Lock...	1/30/2020	1/30/2020	Support - 100...	\$119.43	\$0.00	\$0.00
8	rfs-34591	Qualifying Rec...	Johnson, Lock...	1/30/2020	1/30/2020	Support - 100...	\$119.43	\$0.00	\$0.00
9	rfs-34590	Qualifying Rec...	Johnson, Lock...	1/30/2020	1/30/2020	Support - 100...	\$119.43	\$0.00	\$0.00
10	rfs-34589	Qualifying Rec...	Johnson, Lock...	1/30/2020	1/30/2020	Support - 100...	\$119.43	\$0.00	\$0.00

View All

Compensation Paid

2 items • Sorted by Date • Updated 2 minutes ago

	Name	Amount	Date	Type
1	P159	\$4,014.12	2/13/2020	Payment
2	P160	\$6,938.52	2/13/2020	Payment

View All

Compensation

[Jan FY 2020 - Rihanna Farmer](#)

[Feb FY 2020 - Rihanna Farmer](#)

Compensation Paid records generated for Jan and Feb Compensation Records from Biweekly Pay Period

Compensation

[Jan FY 2020 - Rihanna Farmer](#)

[Feb FY 2020 - Rihanna Farmer](#)

CloudComp Commission Anything™ Admin Guide - Summer 2025

Compensation Paid **P160**

New Contact New Opportunity Edit New Case New Lead

Payment Lines by Fiscal Period

Commission Adjustment	\$0.00	Payment	PMT - 1/26/2020 - 2/8/2020 - Rihanna Farmer
Commission Total	\$6,938.52	Commission Subtotal	\$6,938.52
Bonus Adjustment	\$0.00	Bonus Subtotal	\$0.00
Bonus Total	\$0.00	Commission (Per Unit) Subtotal	\$0.00
Commission (Per Unit) Adjustment	\$0.00		
Commission (Per Unit) Total	\$0.00		

Compensation Paid Lines by Fiscal Period

> System Information

Compensation Paid Lines

10+ items • Sorted by Date • Updated a minute ago

	Name	Payment Line	Date	Attainment	Percentage	Qualifying	Commissio	Commission	Bonus
1	rfs-37971	rfs-37971	2/2/2020	11.116001%	100.00%	\$277,900.0200	0.7500%	\$2,084.25	\$0.00
2	rfs-38092	rfs-38092	2/3/2020	26.502113%	100.00%	\$384,652.8000	0.7500%	\$2,884.90	\$0.00
3	rfs-36799	rfs-36799	2/6/2020	37.926558%	100.00%	\$5,470.4731	1.0000%	\$54.70	\$0.00
4	rfs-36800	rfs-36800	2/6/2020	37.926558%	100.00%	\$5,470.4731	1.0000%	\$54.70	\$0.00
5	rfs-36801	rfs-36801	2/6/2020	37.926558%	100.00%	\$5,470.4731	1.0000%	\$54.70	\$0.00
6	rfs-36802	rfs-36802	2/6/2020	37.926558%	100.00%	\$5,470.4731	1.0000%	\$54.70	\$0.00
7	rfs-36803	rfs-36803	2/6/2020	37.926558%	100.00%	\$5,470.4731	1.0000%	\$54.70	\$0.00
8	rfs-36804	rfs-36804	2/6/2020	37.926558%	100.00%	\$5,470.4731	1.0000%	\$54.70	\$0.00
9	rfs-36805	rfs-36805	2/6/2020	37.926558%	100.00%	\$5,470.4731	1.0000%	\$54.70	\$0.00
10	rfs-36806	rfs-36806	2/6/2020	37.926558%	100.00%	\$5,470.4731	1.0000%	\$54.70	\$0.00

View All

The Compensation Paid object is highly customizable and supports manual adjustments and new entries by CloudComp Administrators via the UI and API.

CloudComp Commission Anything™ Admin Guide - Summer 2025

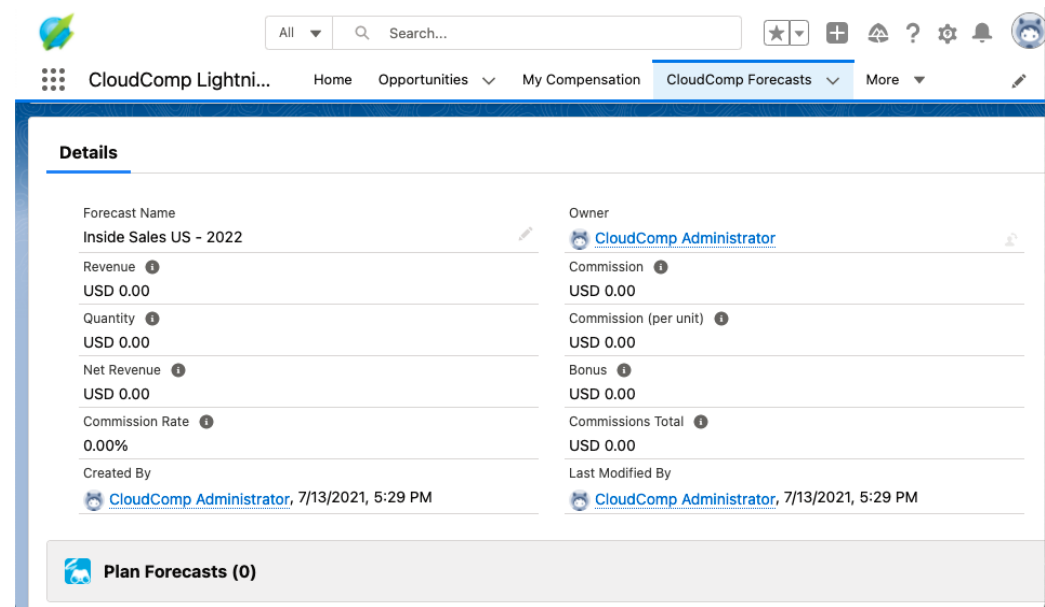
CloudComp Forecasting and Modeling

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™ Records and each one can contain an unlimited number of CloudComp Plan Forecast™ records.

CloudComp Forecasting – Create a new Forecast

- Navigate to the CloudComp Forecasts Tab
- Click New
- Enter a Name
- Click Save



The screenshot shows the 'CloudComp Lightning' interface with the 'CloudComp Forecasts' tab selected. The 'Details' tab is active, displaying the following information:

Details	
Forecast Name	Owner
Inside Sales US - 2022	CloudComp Administrator
Revenue	Commission
USD 0.00	USD 0.00
Quantity	Commission (per unit)
USD 0.00	USD 0.00
Net Revenue	Bonus
USD 0.00	USD 0.00
Commission Rate	Commissions Total
0.00%	USD 0.00
Created By	Last Modified By
CloudComp Administrator, 7/13/2021, 5:29 PM	CloudComp Administrator, 7/13/2021, 5:29 PM

At the bottom, there is a section for 'Plan Forecasts (0)'.

CloudComp Commission Anything™ Admin Guide - Summer 2025

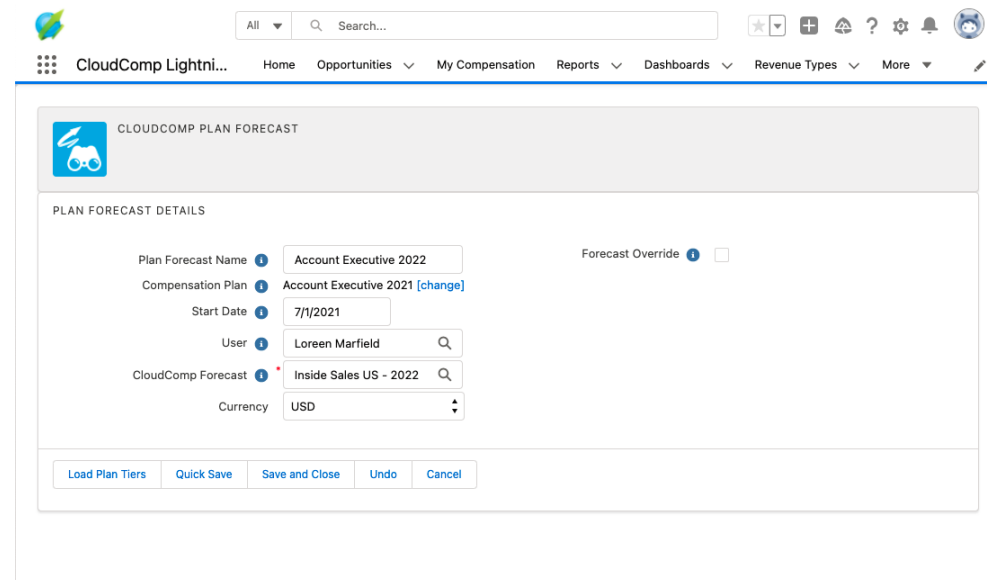
CloudComp Forecasting – Plan Forecasts

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

- Navigate to your new Forecast Record and locate the Plan Forecasts related list.
- Click New.
- Enter a Name.
- Choose a Compensation Plan.
- Enter a Start Date.
- Enter a User (if the forecast is for a team, you can enter the manager of the team).
- Enter a currency (multi-currency orgs only).
- Click Quick Save.
- Click “Load Plan Tiers”.



The screenshot shows the 'CLOUDCOMP PLAN FORECAST' form in the Salesforce Lightning interface. The form is titled 'CLOUDCOMP PLAN FORECAST' and contains the following fields:

- Plan Forecast Name:** Account Executive 2022
- Compensation Plan:** Account Executive 2021 [change]
- Start Date:** 7/1/2021
- User:** Loreen Marfield
- CloudComp Forecast:** Inside Sales US - 2022
- Currency:** USD
- Forecast Override:** (checkbox)

At the bottom of the form, there are five buttons: 'Load Plan Tiers', 'Quick Save', 'Save and Close', 'Undo', and 'Cancel'.

CloudComp Commission Anything™ Admin Guide - Summer 2025

CloudComp Forecasting – Model by Commissions or Performance

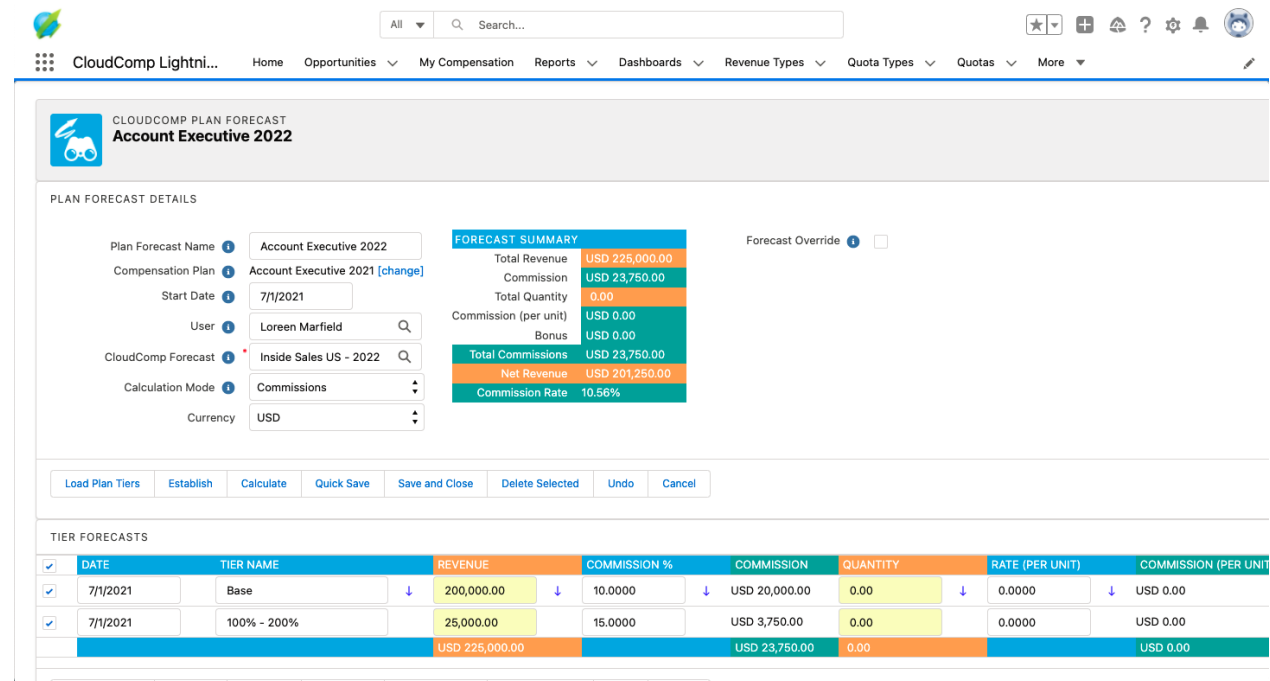
Your new Plan Forecast will now contain 1 child row called a “Tier Forecast” for each instance of a Compensation Plan Tier from the Compensation Plan that you’ve chosen for the Plan Forecast. Also note that the Tier Forecasts allow you to experiment with different commission rates in the Plan Tiers without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



PLAN FORECAST DETAILS

Plan Forecast Name: Account Executive 2022
 Compensation Plan: Account Executive 2021 [change]
 Start Date: 7/1/2021
 User: Loreen Marfield
 CloudComp Forecast: Inside Sales US - 2022
 Calculation Mode: Commissions
 Currency: USD

FORECAST SUMMARY

Total Revenue	USD 225,000.00
Commission	USD 23,750.00
Total Quantity	0.00
Commission (per unit)	USD 0.00
Bonus	USD 0.00
Total Commissions	USD 23,750.00
Net Revenue	USD 201,250.00
Commission Rate	10.56%

Forecast Override: ☐

Buttons: Load Plan Tiers, Establish, Calculate, Quick Save, Save and Close, Delete Selected, Undo, Cancel

TIER FORECASTS

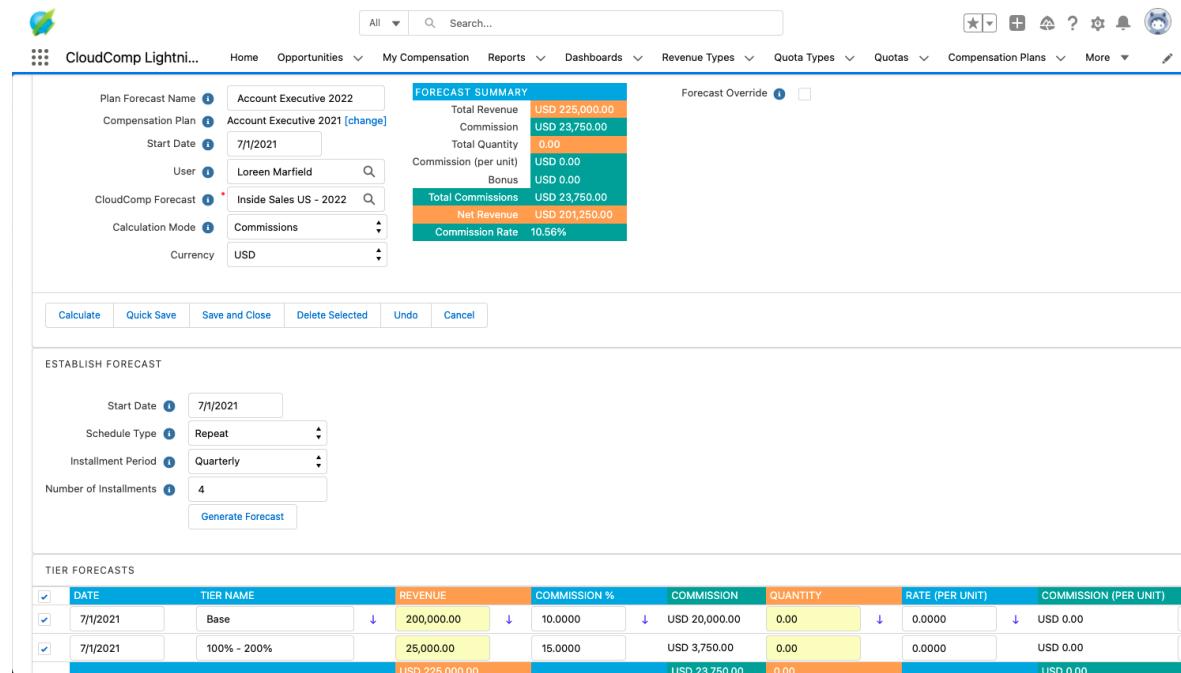
DATE	TIER NAME	REVENUE	COMMISSION %	COMMISSION	QUANTITY	RATE (PER UNIT)	COMMISSION (PER UNIT)
7/1/2021	Base	200,000.00	10.0000	USD 20,000.00	0.00	0.0000	USD 0.00
7/1/2021	100% - 200%	25,000.00	15.0000	USD 3,750.00	0.00	0.0000	USD 0.00
		USD 225,000.00		USD 23,750.00	0.00		USD 0.00

CloudComp Commission Anything™ Admin Guide - Summer 2025

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.

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



The screenshot shows the 'CloudComp Lightning' interface. The top navigation bar includes links for Home, Opportunities, My Compensation, Reports, Dashboards, Revenue Types, Quota Types, Quotas, Compensation Plans, and More. The main content area is titled 'CloudComp Lightning' and contains a 'Plan Forecast Name' dropdown set to 'Account Executive 2022'. Below this are fields for 'Compensation Plan' (Account Executive 2021), 'Start Date' (7/1/2021), 'User' (Loreen Marfield), 'CloudComp Forecast' (Inside Sales US - 2022), 'Calculation Mode' (Commissions), and 'Currency' (USD). A 'FORECAST SUMMARY' table is displayed, showing Total Revenue of USD 225,000.00, Commission of USD 23,750.00, Total Quantity of 0.00, Commission (per unit) of USD 0.00, Bonus of USD 0.00, Total Commissions of USD 23,750.00, Net Revenue of USD 201,250.00, and a Commission Rate of 10.56%. Below the summary are buttons for 'Calculate', 'Quick Save', 'Save and Close', 'Delete Selected', 'Undo', and 'Cancel'. The 'ESTABLISH FORECAST' section includes fields for 'Start Date' (7/1/2021), 'Schedule Type' (Repeat), 'Installment Period' (Quarterly), and 'Number of Installments' (4), with a 'Generate Forecast' button. The 'TIER FORECASTS' table at the bottom shows two tiers: 'Base' and '100% - 200%', with columns for DATE, TIER NAME, REVENUE, COMMISSION %, COMMISSION, QUANTITY, RATE (PER UNIT), and COMMISSION (PER UNIT).

DATE	TIER NAME	REVENUE	COMMISSION %	COMMISSION	QUANTITY	RATE (PER UNIT)	COMMISSION (PER UNIT)
7/1/2021	Base	200,000.00	10.0000	USD 20,000.00	0.00	0.0000	USD 0.00
7/1/2021	100% - 200%	25,000.00	15.0000	USD 3,750.00	0.00	0.0000	USD 0.00
		USD 225,000.00		USD 23,750.00	0.00		USD 0.00

CloudComp Commission Anything™ Admin Guide - Summer 2025

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.

CloudComp Lightni...

Home Opportunities My Compensation Reports Dashboards Revenue Types Quota Types Quotas Compensation Plans More

Plan Forecast Name

Account Executive 2022

Compensation Plan

Account Executive 2021 [\[change\]](#)

Start Date

7/1/2021

User

Loreen Marfield

CloudComp Forecast

Inside Sales US - 2022

Calculation Mode

Commissions

Currency

USD

FORECAST SUMMARY

Total Revenue

USD 900,000.00

Commission

USD 95,000.00

Total Quantity

0.00

Commission (per unit)

USD 0.00

Bonus

USD 0.00

Total Commissions

USD 95,000.00

Net Revenue

USD 805,000.00

Commission Rate

10.56%

Forecast Override ☐

Load Plan Tiers Establish Calculate Quick Save Save and Close Delete Selected Undo Cancel

TIER FORECASTS

	DATE	TIER NAME	REVENUE	COMMISSION %	COMMISSION	QUANTITY	RATE (PER UNIT)	COMMISSION (PER UNIT)
<input type="checkbox"/>	7/1/2021	Base	200,000.00	10.0000	USD 20,000.00	0.00	0.0000	USD 0.00
<input type="checkbox"/>	7/1/2021	100% - 200%	25,000.00	15.0000	USD 3,750.00	0.00	0.0000	USD 0.00
<input type="checkbox"/>	10/1/2021	Base	200,000.00	10.0000	USD 20,000.00	0.00	0.0000	USD 0.00
<input type="checkbox"/>	10/1/2021	100% - 200%	25,000.00	15.0000	USD 3,750.00	0.00	0.0000	USD 0.00
<input type="checkbox"/>	1/1/2022	Base	200,000.00	10.0000	USD 20,000.00	0.00	0.0000	USD 0.00
<input type="checkbox"/>	1/1/2022	100% - 200%	25,000.00	15.0000	USD 3,750.00	0.00	0.0000	USD 0.00
<input type="checkbox"/>	4/1/2022	Base	200,000.00	10.0000	USD 20,000.00	0.00	0.0000	USD 0.00
<input type="checkbox"/>	4/1/2022	100% - 200%	25,000.00	15.0000	USD 3,750.00	0.00	0.0000	USD 0.00
			USD 900,000.00		USD 95,000.00	0.00		USD 0.00

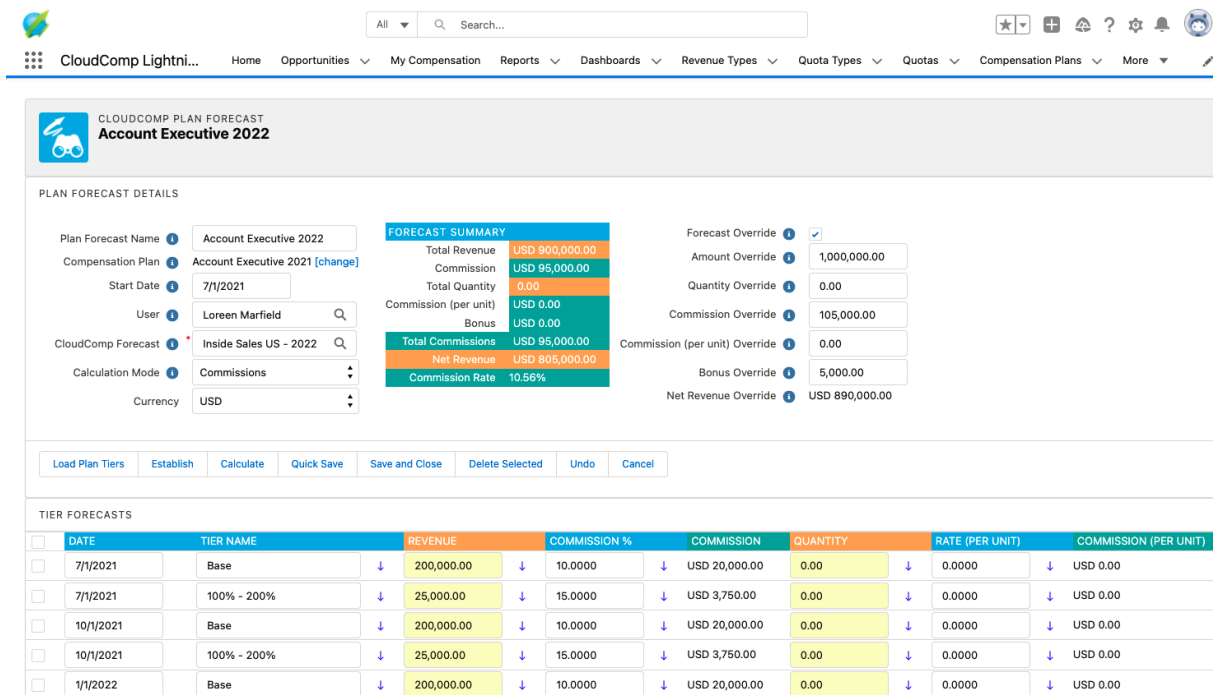
CloudComp Commission Anything™ Admin Guide - Summer 2025

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:

- Click Edit.
- Click Forecast Override checkbox.
- Enter your amount and commission values.
- Click “Quick Save” or “Save and Close”



CLOUDCOMP PLAN FORECAST
Account Executive 2022

PLAN FORECAST DETAILS

Plan Forecast Name: Account Executive 2022
 Compensation Plan: Account Executive 2021 [change]
 Start Date: 7/1/2021
 User: Loreen Marfield
 CloudComp Forecast: Inside Sales US - 2022
 Calculation Mode: Commissions
 Currency: USD

FORECAST SUMMARY

Total Revenue	USD 900,000.00
Commission	USD 95,000.00
Total Quantity	0.00
Commission (per unit)	USD 0.00
Bonus	USD 0.00
Total Commissions	USD 95,000.00
Net Revenue	USD 805,000.00
Commission Rate	10.56%

Forecast Override: ☒

Amount Override: 1,000,000.00
 Quantity Override: 0.00
 Commission Override: 105,000.00
 Commission (per unit) Override: 0.00
 Bonus Override: 5,000.00
 Net Revenue Override: USD 890,000.00

Buttons: Load Plan Tiers, Establish, Calculate, Quick Save, Save and Close, Delete Selected, Undo, Cancel

TIER FORECASTS

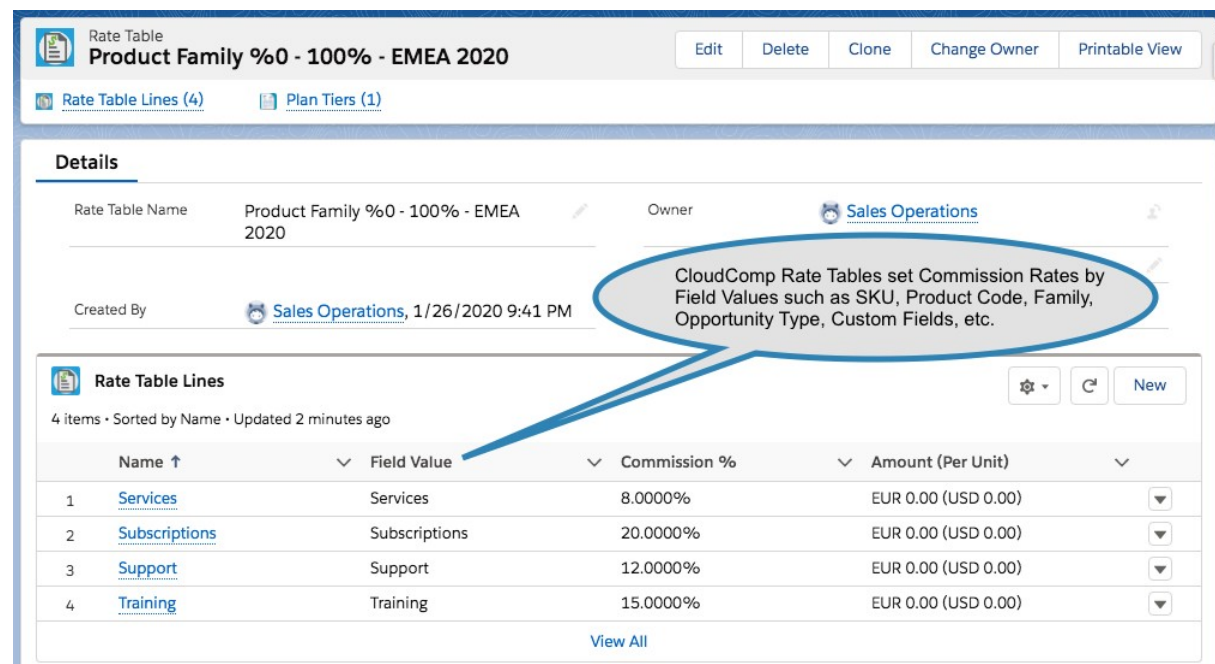
DATE	TIER NAME	REVENUE	COMMISSION %	COMMISSION	QUANTITY	RATE (PER UNIT)	COMMISSION (PER UNIT)
7/1/2021	Base	200,000.00	10.0000	USD 20,000.00	0.00	0.0000	USD 0.00
7/1/2021	100% - 200%	25,000.00	15.0000	USD 3,750.00	0.00	0.0000	USD 0.00
10/1/2021	Base	200,000.00	10.0000	USD 20,000.00	0.00	0.0000	USD 0.00
10/1/2021	100% - 200%	25,000.00	15.0000	USD 3,750.00	0.00	0.0000	USD 0.00
1/1/2022	Base	200,000.00	10.0000	USD 20,000.00	0.00	0.0000	USD 0.00

CloudComp Commission Anything™ Admin Guide - Summer 2025

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.



Rate Table
Product Family %0 - 100% - EMEA 2020

Rate Table Lines (4) | Plan Tiers (1)

Details

Rate Table Name: Product Family %0 - 100% - EMEA 2020 | Owner: Sales Operations

Created By: Sales Operations, 1/26/2020 9:41 PM

CloudComp Rate Tables set Commission Rates by Field Values such as SKU, Product Code, Family, Opportunity Type, Custom Fields, etc.

Rate Table Lines
4 items • Sorted by Name • Updated 2 minutes ago


Name ↑	Field Value	Commission %	Amount (Per Unit)
1 Services	Services	8.0000%	EUR 0.00 (USD 0.00)
2 Subscriptions	Subscriptions	20.0000%	EUR 0.00 (USD 0.00)
3 Support	Support	12.0000%	EUR 0.00 (USD 0.00)
4 Training	Training	15.0000%	EUR 0.00 (USD 0.00)

[View All](#)

CloudComp Commission Anything™ Admin Guide - Summer 2025

CloudComp Rate Tables – Enable a Rate Table

- 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.
- Set the Rate Type Field for the field that will contain the values that you wish to include in your Rate Table
- 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.
- 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).
- Enter the Rate Table in the Rate Table field on a Compensation Plan Tier (with the correct Revenue Type).


REVENUE TYPE
Opportunity Products by Family
Edit Clone Delete

DETAILS FILTERS QUOTA TYPES PLAN TIERS TEST

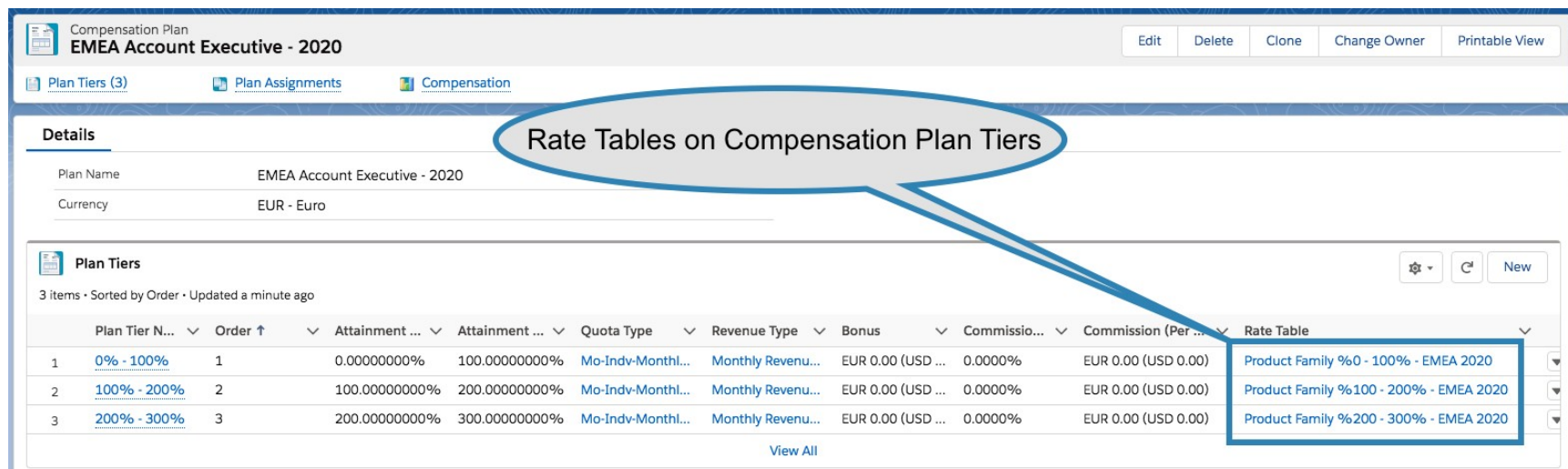
REVENUE TYPE DETAILS

Field	Value	Status
Revenue Type Name	Opportunity Products by Family	✓
Object	OpportunityLineItem	✓
Data Type	Revenue	✓
Revenue Field	TotalPrice	✓
Date Field	Opportunity.CloseDate	✓
User Id Field	Opportunity.OwnerId	✓
Deal Object	Opportunity	✓
Deal Name Field	Opportunity.Name	✓
Deal Sequence Field	Opportunity.CloseDate	✓
Deal Id Field	Opportunity.Id	✓
Expense Date Field	ServiceDate	✓
Release Date Field	ServiceDate	✓
Rate Type Field	Product2.Family	✓

CloudComp Commission Anything™ Admin Guide - Summer 2025

CloudComp Rate Tables – Use Multiple Rate Tables

You can create an 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.



Rate Tables on Compensation Plan Tiers

Plan Tier N...	Order ↑	Attainment ...	Attainment ...	Quota Type	Revenue Type	Bonus	Commissio...	Commission (Per ...)	Rate Table	
1	0% - 100%	1	0.00000000%	100.00000000%	Mo-Indv-Monthl...	Monthly Revenu...	EUR 0.00 (USD ...)	0.0000%	EUR 0.00 (USD 0.00)	Product Family %0 - 100% - EMEA 2020
2	100% - 200%	2	100.00000000%	200.00000000%	Mo-Indv-Monthl...	Monthly Revenu...	EUR 0.00 (USD ...)	0.0000%	EUR 0.00 (USD 0.00)	Product Family %100 - 200% - EMEA 2020
3	200% - 300%	3	200.00000000%	300.00000000%	Mo-Indv-Monthl...	Monthly Revenu...	EUR 0.00 (USD ...)	0.0000%	EUR 0.00 (USD 0.00)	Product Family %200 - 300% - EMEA 2020

View All

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CloudComp Plan Tier RelationshipsTM (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

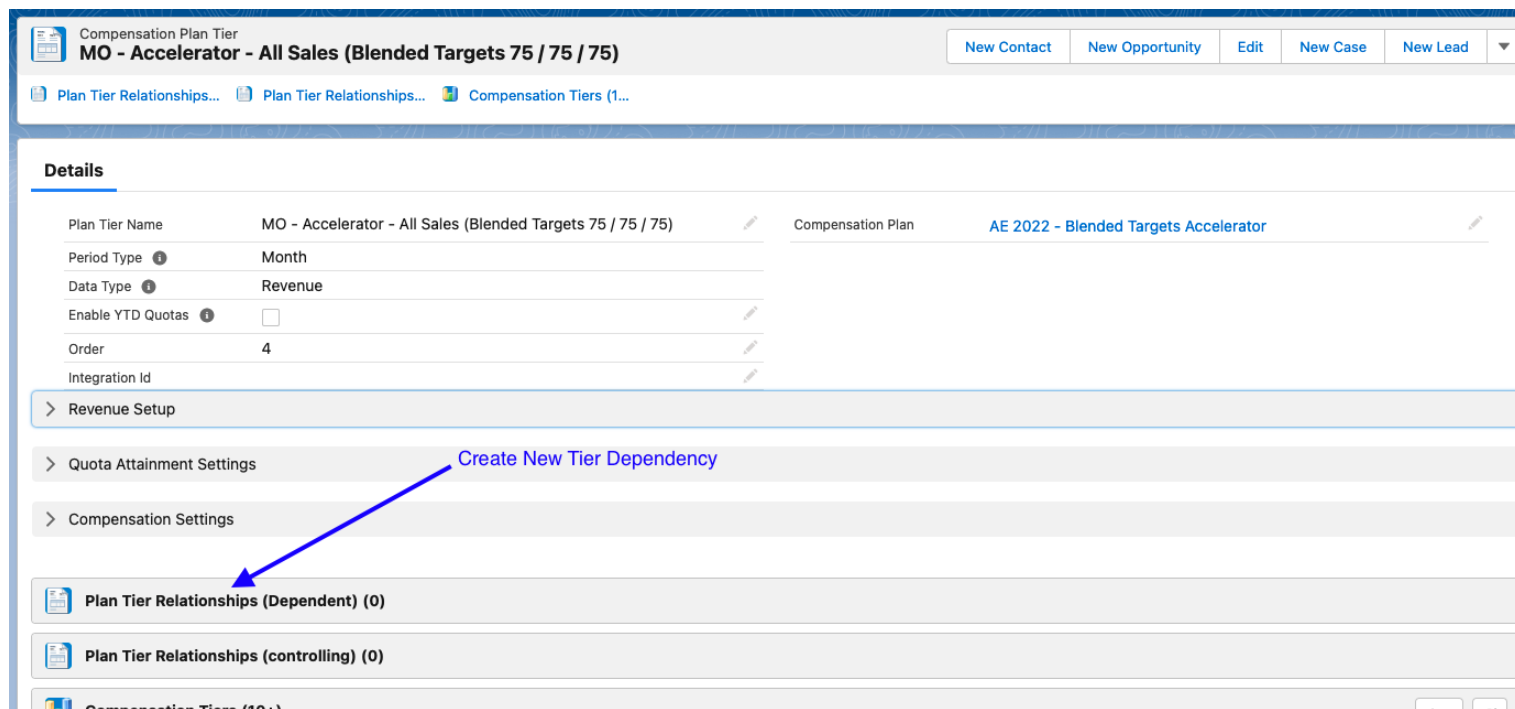
In this example we have configured a Monthly Accelerator of 10% Commission on All Sales that has three Controlling Tiers with blended Quota Attainment Targets of 75%, 75%, and 75%. This Accelerator enables our Sales Rep to earn an

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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)

Plan Tier Relationships... Plan Tier Relationships... Compensation Tiers (1...)

Details

Plan Tier Name	MO - Accelerator - All Sales (Blended Targets 75 / 75 / 75)	Compensation Plan	AE 2022 - Blended Targets Accelerator
Period Type	Month		
Data Type	Revenue		
Enable YTD Quotas	<input type="checkbox"/>		
Order	4		
Integration Id			

> Revenue Setup

> Quota Attainment Settings

> Compensation Settings

Plan Tier Relationships (Dependent) (0)

Plan Tier Relationships (controlling) (0)

Compensation Tiers (10+)

Create New Tier Dependency

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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.

New Plan Tier Relationship

Information

*** Relationship Name** ↶

YR - App Subscriptions - All - 75%

*** Attainment Base** ↶

75.00000000%

Active ↶

☒

*** Plan Tier (dependent)** ↶

MO - Accelerator - All Sales (Blend) X

Plan Tier (controlling) ↶

YR - App Subscriptions - All X

Enter Descriptive Name

Dependent Plan Tier

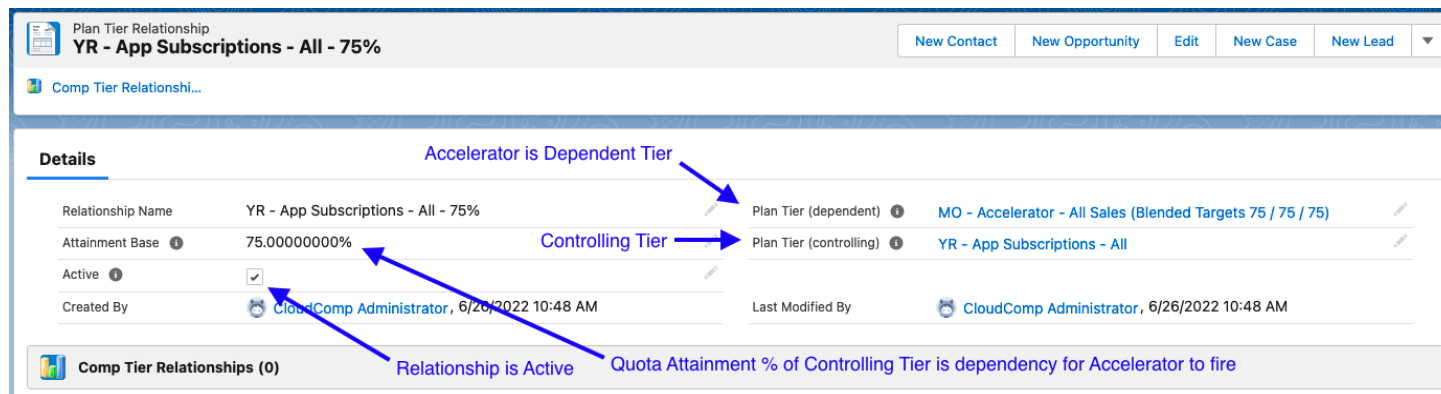
Enter Percentage Attainment Required for Tier

Enter Controlling Plan Tier

Cancel
Save & New
Save

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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 Subscriptions - All - 75%

Comp Tier Relationshi...

Details

Relationship Name: YR - App Subscriptions - All - 75%

Attainment Base: 75.00000000%

Active: ☒

Created By: CloudComp Administrator, 6/26/2022 10:48 AM

Last Modified By: CloudComp Administrator, 6/26/2022 10:48 AM

Plan Tier (dependent)	Plan Tier (controlling)
MO - Accelerator - All Sales (Blended Targets 75 / 75 / 75)	YR - App Subscriptions - All

Comp Tier Relationships (0)



Annotations:

- Accelerator is Dependent Tier
- Controlling Tier
- Relationship is Active
- Quota Attainment % of Controlling Tier is dependency for Accelerator to fire

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!








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Compensation Tier  **MO - Accelerator - All Sales (Blended Targets 75 / 75 / 75) - Aug FY 2022 - Nata** [Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#) 

[Back to List: Custom Report Types](#)

[Comp Tier Relationships \(Compensation Tier \(dependent\)\)](#) (3) | [Comp Tier Relationships \(Compensation Tier \(controlling\)\)](#) (0) | [Qualifying Records](#) (20+) | [To-Date Quotas](#) (0)

Compensation Tier Detail



Compensation  Aug FY 2022 - Natalie Price	Compensation Plan  AE 2022 - Blended Targets Accelerator
Comp Tier Name MO - Accelerator - All Sales (Blended Targets 75 / 75 / 75) - Aug FY 2022 - Nata	Compensation Plan Tier  MO - Accelerator - All Sales (Blended Targets 75 / 75 / 75)
User Name  Natalie Price	Fiscal Period  Aug FY 2022
Start Date  8/1/2022	End Date  8/31/2022
Commission \$7,429.70	


► Attainment Levels for Tier

► Quota Attainment



► Amounts Accrued


▼ Controlling Tiers


Controlling Tiers Achieved Date Time  8/22/2022 12:00 AM  3rd of 3 Controlling Tiers was achieved on 8/22/22, thereby firing Accelerator


Controlling Tiers Count  3

▼ Compensation


Commission  \$7,429.7030  Accelerator Commission

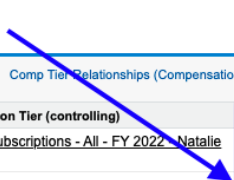
Bonus  \$0.00

Commission (per unit)  \$0.0000

Performance Award 

► To Date Quotas

► System Information 

Dates that 75% Attainment of Controlling Tiers were Achieved 

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 - Accelerator - All Sales (Blended Target)	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 - Accelerator - All Sales (Blended Targets 75 / 75)	YR - Support - All - 75%	✓	0.00000000	\$1,125,000.00000000	YR - Support - All - FY 2022 - Natalie Price	8/5/2022 12:00 AM
Edit Del	YR - Training - All - 75% - MO - Accelerator - All Sales (Blended Targets 75 / 75)	YR - Training - All - 75%	✓	0.00000000	\$1,500,000.00000000	YR - Training - All - FY 2022 - Natalie Price	5/8/2022 12:00 AM

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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 1st, can contribute to Controlling a Monthly Comp Tier for March of the same Fiscal Year, but only the Attainment Records between January 1st and March 31st 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.

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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,



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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.

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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.

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



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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.

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 be 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!