Commissions for Agents

User Manual

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About This Document

Purpose

As part of the Commissions module, an Agent with appropriate permissions has the ability to see commissions they have accrued on the sales of the products and services made on behalf of a Service Provider.

In order for commissions to be calculated for an Agent, a parent Service Provider must have set up commission plans (referred to as Tiers) for each product or service in Emersion. Please refer to the *Systems Administration –Commissions Management User Guide* for detailed instructions on how to set up and management of commissions plans if you are a Service Provider.

This document describes how an Agent in Emersion can see their own commissions attributed to orders they make after the order has been submitted to the Service Provider.

Other Emersion user manuals describe the use and operation of other system modules, such as Customer Management and Package Management, which may be mentioned or referred to within this manual.

Intended Audience

The intended audience for this user manual are Agencies or staff of Agencies representing the Service Provider.

Document Control

Version	Date	Description	Author
0.1	15/04/2014	Initial version	Sharon Carpenter
0.2	09/07/2014	Minor updates	Sharon Carpenter

Introduction

On behalf of the team at Emersion, we would like to take this opportunity to welcome you to Emersion. Emersion may update the system to improve your experience. Enhancement and new features and changes may be implemented beyond the date of the creation of this document. Therefore, some information or screens in this version of the manual may become slightly out of date.

ⓘ Note that other Emersion modules referred to in this manual are not described in detail in this document. Please refer the specific Emersion system manual for further information about each module if required.

Document Conventions

The following conventions are used throughout this manual to describe information and procedures:

Italics	Indicates the name of a screen, field or setting. The capitalisation and punctuation are the same as displayed on the screen. For example: Complete the *Address* field.
Bold text	Bold text indicates either the name of a command, button or other interactive element. For example: Type the user's name in the *Customer Name* field, and then click **Search**.
BOLD CAPITALS	Text in bold capitals indicates the name of a key on a keyboard. For example: Type your password, and then press **ENTER**.
Navigation >	Menu options or navigation paths are described in shorthand using the following convention: **Module > Functional Area > Option** For example, selecting the Account Profile area can be described as: Select **Admin > Settings > Account Profiles** from the Menu**.**
`Monospace text`	Used to represent the text you may type in a field. For example Type `abc` in the *Search* field.
ⓘ	The ⓘ symbol indicates some useful information or a handy tip.

Where possible all images are taken directly from the Cumulus User Interface.

Assumptions Made

As this manual cannot hope to cover more than the operation of the Emersion Order and Service Management functions, the following assumptions have been made:

- You are familiar with the Emersion Customer Management System and you can competently use it.
- You have a computer that you can competently operate.
- You have an Internet connection, and are capable of establishing a connection.
- A Web Browser capable of supporting Web 2.0 functionality is installed on your computer.
- Acrobat® Reader version 6.00 or higher is installed on your computer.
- You have a basic understanding of computer and Internet terminology.
- You have a basic understanding of the day-to-day business operations of a Service Provider.
- You have an agreement with an Agency who will sell products and services on behalf of a service provider

Prerequisites

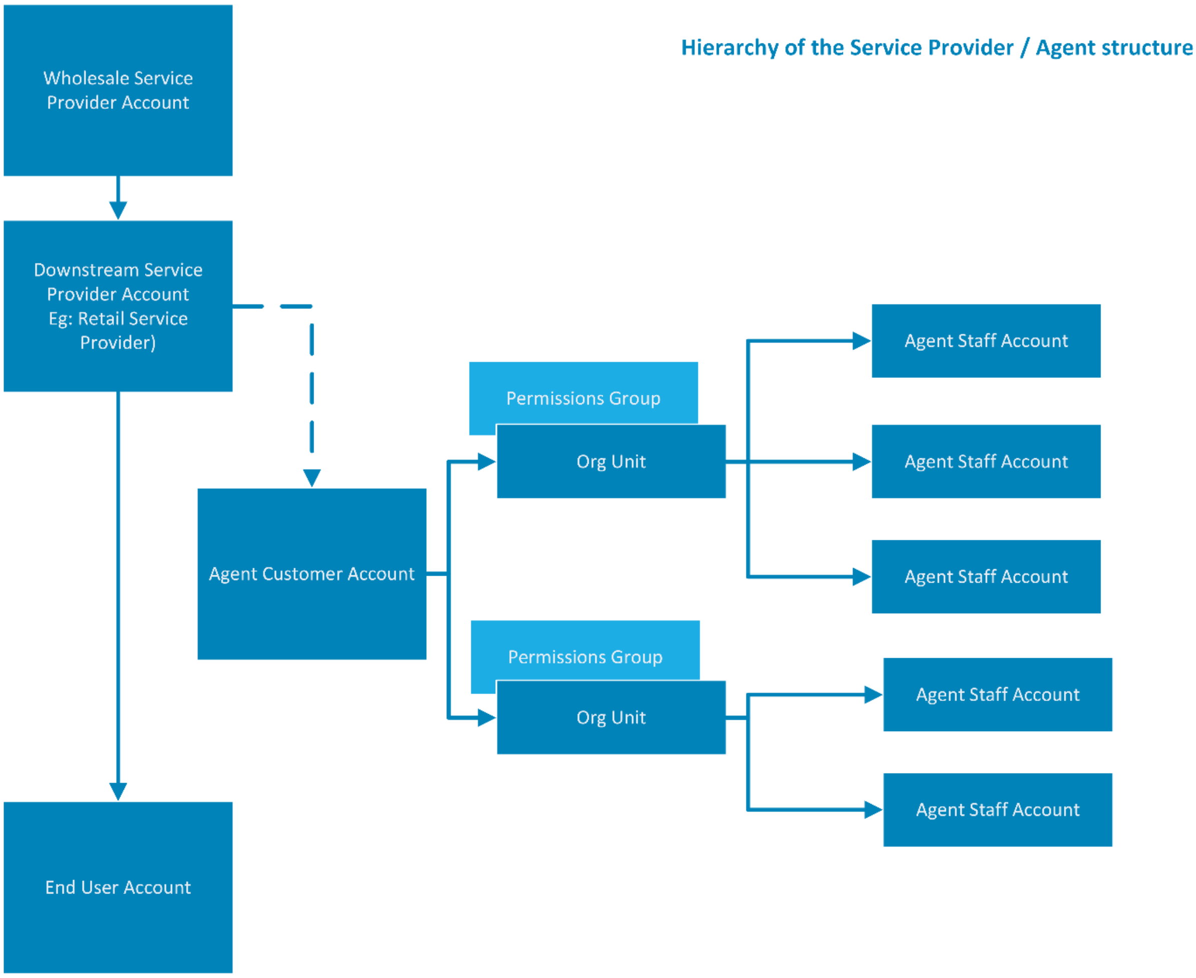
This document requires the following configuration to be completed in advance.

1. An Emersion role exists that contains the correct Base Powers (Permissions & access rights) that define what the Agent can see and do when logged into the Cumulus interface.
2. Commission plans are set up and applied to service subscriptions & products.

Agent & Commissions Overview

Agents, or staff of agencies, that undertake sales activities on behalf of a service provider are implemented through a specific set of accounts, org units and roles organised & configured in a way that allows information to be shared appropriately across Emersion's multi-tier hierarchy.

The structure of the set up can be represented in the following diagram.



Commissions plans are set up and maintained by a Wholesale Service Provider or Downstream Service Provider.

Commissions on sales to End Users are calculated and applied to Agents based on the Commissions plans set up by the Wholesale Service Provider or Downstream Service Provider.

End users are sold products and services for which commissions can be earned by Agents acting on behalf of the Service Provider.

Commissions Lifecycle

This section contains a high-level look at the commissions life cycle, including when Commissions are gathered, processed, and how Agents can ascertain how much they are due in commissions revenue.

Placing an Order – Gathering the Commissions

Each time an Agent places an order for a service or product that is included in the commission plan that has been set up by a Service Provider, Agents can then create and submit orders for their customers and the system will generate a record of the commissions.

There is nothing specific that an Agent needs to do in order to ensure commissions for their sales are calculated.

If an Agent or representative of a service provider will not be placing the orders themselves in Cumulus (e.g. Orders are placed by the upstream service provider on behalf of the Agent), the system supports linking the Agent to the order to ensure that commission for that order is appropriately attributed. This also applies to service migrations.

Commissions Rules - Determine how and when commissions are applied and processed.

When an order is submitted by the Agent, the order is sent to the upstream service provider to be filled. At the same time, one or more commission record(s) are generated and held in a pending state until such time where they can be processed.

Whether a commission can be processed yet or not, is determined by the business rules for your commission plan as set up by the upstream service provider.

When the pending commission meets the business rules of your commission plan, the upstream service provider can then process the commission entries.

More information regarding the management of commissions by service providers can be found in the document *Systems Administration - Commissions Management User Guide v1.0*

Collecting Commissions – Viewing the Invoice

When commission entries are processed, they will move from a pending status to processed status and a pending credit cardline will be generated. This will remain as a pending cardline until it is processed onto an invoice. The system will do this automatically.

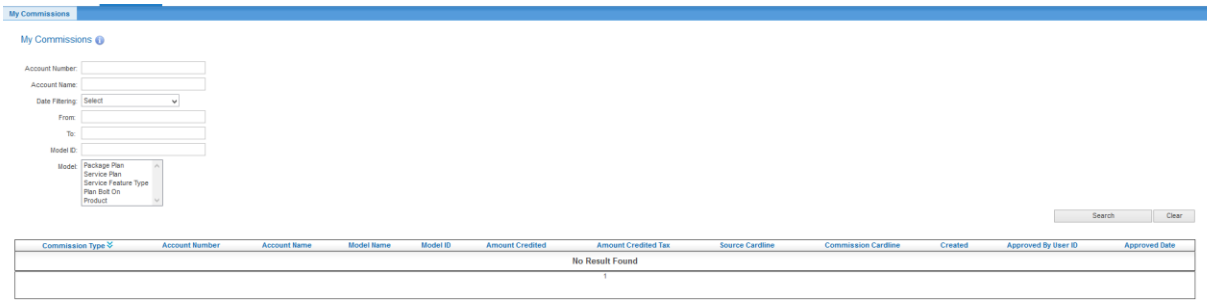
Like all Emersion invoices, Agents can use this invoice to bill their upstream service provider for their commissions that they are owed. An Agent can also access commissions attributed to their service subscriptions and product orders using the **My Commissions** section.

My Commissions

An Agent can access commissions attributed to their orders for service subscriptions and products by:

Logging into the Cumulus user interface
Commissions > My Commissions

Cumulus will display the **My Commissions** page.



Search Filters

Several search filters have been provided that gives Agents the ability to return only the commission entries that are of interest to them.

Agents can search and filter commissions based on:

- An account number – For finding commissions collected by the Agent for a given customer account
- Account name – For finding commissions collected by the Agent for a given customer by name
- Date based filters – For finding commissions based on the date created or date approved between a given timeframe.
- Model id – for finding commissions collected by the Agent for a given package plan, service plan, service feature type, bolt-on or product
- Model – for finding commissions generated for all package plans, service plans, service feature types, bolt-ons or products

List of Commissions

Below the search filters is a list of commissions generated for the Agent. The list will display the:

- Type of commission
- Account number & name – The customer for which the commission was generated for
- Model and Model id – showing the package plan, service plan, service feature type, bolt-on or product that was ordered
- Amount credited and tax amount credited
- The source card line that will show on the customer's invoice and the commissions card line (credit amounts) that will show on the Agent's invoice

- Who the commission was approved by and on what date (when approved manually by the Service Provider)

On this example, there are no commissions that have been generated by the Agent yet.

When commission entries are present, Agents will have the ability to export the list to CSV for use in a spreadsheet program or database like MS Excel®.

Further Information

For further information about Emersion's Ordering and Service Management functions, or other Emersion system modules, please contact Emersion.

If you are using Emersion on agreement from a supplier (i.e. in connection with the supply of a particular service or product), and have been provided a login for Emersion by your supplier, please contact your supplier directly for assistance.

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