OPPORTUNITY ESTIMATOR

The Opportunity Estimator is a tool provided within the context of Salesforce that enables sales reps to estimate their potential commission for a given Opportunity record in Salesforce. By clicking on the "Calculate Estimate" button, the opportunity will run through the plans defined in Express and return an estimated commission in real-time to the sales rep.

REQUIREMENTS

In order to calculate using the Estimator:

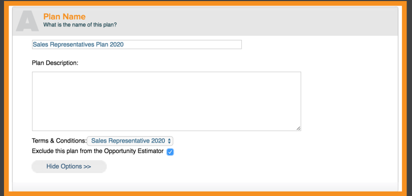
1. Your company stores and uses live sales data in Salesforce. Companies that use CSV mappings will need to create a mapping using data from Salesforce in order to utilize the Opportunity Estimator.
2. Calculations for the current period need to have been run at least once.
3. The estimator is based on who is logged in. If an admin is logged in and looks at an opportunity, clicks "Calculate Estimate" the Estimator will show results for the Admin, not the Opportunity Owner. If you want the results for the Opportunity Owner, the Admin will need to impersonate the Opportunity Owner
4. Whoever you are logged in as to view the Opportunity Estimator - either the admin or the Opportunity Owner - they have to be active in Express AND on a plan.
5. The opportunity's Deal Date (according to your Define Deal Attributes mapping in Express) must be in the current Express period or future date.

MEETING THE CRITERIA

The Estimator's functionality is to process the opportunity or opportunities as if they are imported into Express and runs the deal against the current user's plan configuration and latest calculated results.

The tool by-passes the import filter, but not the credit rule filters. If the deal passes successfully through a credit and payment (i.e. meets all the criteria in the credit and payment rules), the estimator will reflect the correct payment. This Payout will include the user's current period payout + the opportunity estimated payout.

Overall, the more accurate the system, the more accurate the estimator will be. This means that the more you keep the system updated in terms of importing deals and calculating, the more up-to-date and accurate the Payout will be.



The Opportunity Estimator does not need to run through every plan. To exclude plans:

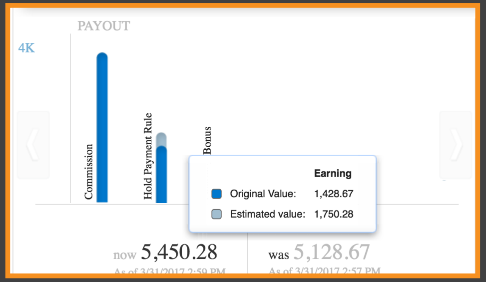
1. Go to Express > Plans > Edit Plan > 1. Define Plan
2. In Section A: Plan Name, click on the button: View Options
3. Check off the box in the line item: "Exclude this plan from the Opportunity Estimator"

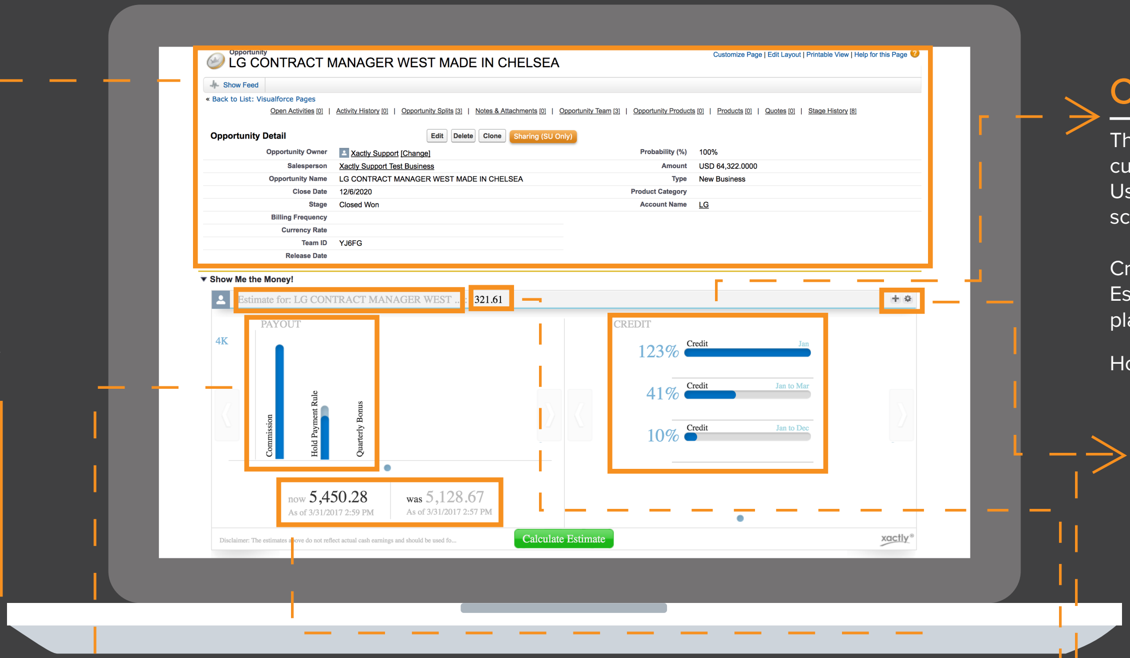
PAYOUT

Hover over each bar to show the specific amount per payment rule.

ORIGINAL VALUE: This is the payout amount that a user has already accumulated as of the last time the calculations have been run in Express.

ESTIMATED VALUE: This is the potential earnings for the period if Opportunity selected was to close within current period.





CALCULATE ESTIMATE

When adding the Estimator to the Opportunity in Salesforce, the tool needs to be on the same object the mapping in Express starts at. The start of the object can be found in Express > Setup > Define Deal Attributes > select the mapping > cog wheel > Edit Mapping > the object will be listed out next to the defined mapping name.

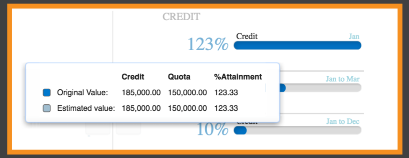
The only exception is if the mapping starts on the Opportunity Product object, the Opportunity Estimator can be placed on the Opportunity object instead.

If using a CSV import, a Salesforce mapping must be created.

NOTE: Changes to the mapping (i.e. adding additional fields or changing the original field API may cause an error.

CREDIT

This will show the percent to quota based on current period results + Estimated Opportunity. Using the arrow on the left and right you can scroll to view more credit rules.

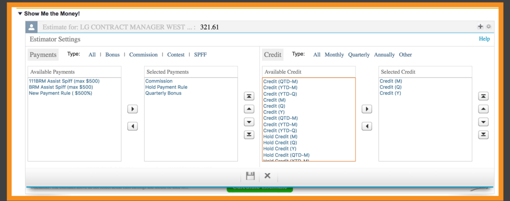


Credit Rules can show up multiple times in the Estimator when more than one credit rule in the plan.

Hovering over each bar will show the original calculated value vs. the estimated value.

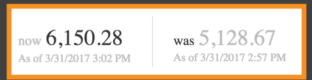
COG WHEEL

Clicking the cog wheel in the upper right corner, you can add and remove payment rules that are listed.



WAS VS. NOW

NOW: This indicates the estimated results as this moment in time vs. the last time "Calculate Estimate" was submitted. The amount is the estimated payout.



WAS: This indicates what the payout is estimated to be the last time "Calculate Estimate" was clicked vs. currently. The change in amounts can be due to additional actual payment in Express + estimated value.

AS OF: This will show the date and time of the last "Calculate Estimate" was submitted.

DELTA

The change in sum total of Original Value - Estimated Value. In other words "NOW" - "WAS".

MORE OPPORTUNITIES

You can add more than one Opportunity to help compare by clicking the "+" in the upper right corner.

You can add up to 20 Opportunities to be calculated on one estimator.