

Telecom and Cloud Services Agency Management (TCAM)

How Commission records relate to other objects in TCAM

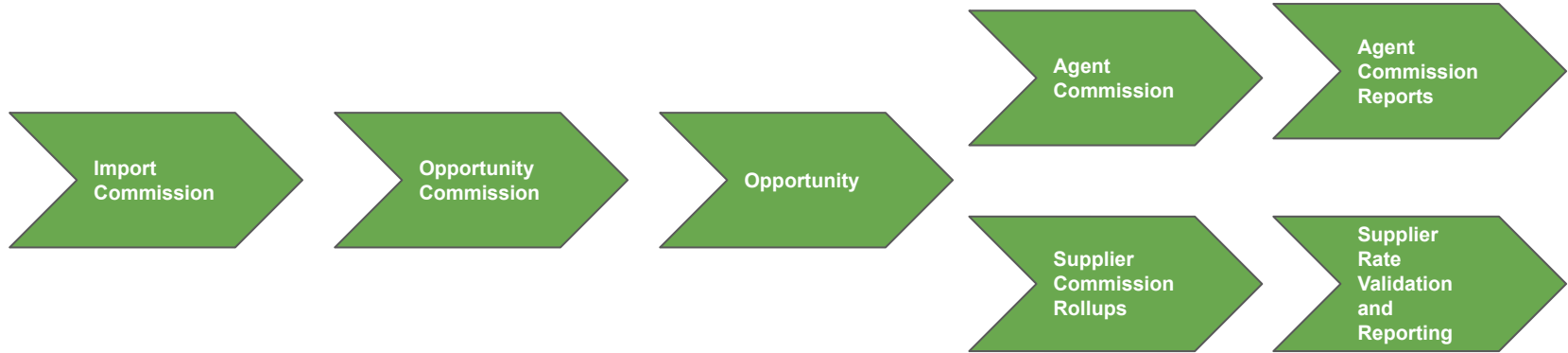
Telecom and Cloud Services Agency Management (TCAM) How Commission records relate to other Objects

- TCAM relates all the following together with the Opportunity as the central object in the relationships.
 - Opportunity to Account records for relationship to
 - Customer Account record
 - Supplier Account record
 - Agent or Rep Company Account record
 - Other Company 1 & 2 Account records
 - Channel Manager Account record
 - Various other “referred by” account records
 - Opportunity to Contact records for relationship to
 - Opportunity Contact
 - Supplier Contact
 - Agent or Rep 1, 2 & 3 Contacts

Telecom and Cloud Services Agency Management (TCAM) How Commission records relate to other Objects

- TCAM relates all the following together with the Opportunity as the central object in the relationships.
 - Commission Related lists up to Opportunity
 - Opportunity Commissions
 - Other TCAM not commission-related Opportunity Related Lists
 - Quote Locations, Request, Result, Opportunity Products, Quotes
 - Assets
 - This is used for Install/Implementation process and post sale inventory management.

Import Commission Process Data Path



Import Commission Process Data Path Details



Import Commissions
Imported Commission records from Supplier Commission reports.

Opportunity Commissions come from Imported Commissions or are manually created from Opportunity Commissions related list on the Opportunity. Imported Supplier Name and Supplier ID fields MUST exactly match the related fields on the Opportunity

All Imported Commissions fields not used for commissions.

Optional: Custom Process, Flow or Apex to create and/or update records into standard or custom objects.

TCAM Object Relationships

Opportunity Supplier and Supplier ID fields MUST exactly match the Opp Comm fields AND are unique. Uniqueness enforced by TCAM code.

Data Flow

Standard Object such as Assets

or

Custom object relating to any other object or objects.

Customer Account record
By Lookup

Opportunity Contact
By Contact Lookup

Supplier Account record
By Lookup

Agent or Rep Company
By Account Lookup

Agent or Rep 1, 2 & 3 Contact
By Lookups

Other Company Split 1 & 2
By Account Lookups

Channel Manager Split
By Account Lookup