Sales Rep User Guide

Step-by-step guide to earning commissions on SalesExchange

Step 1 — Create Your Account

- Download the SalesExchange app from the App Store or Google Play
- Create your account
- Complete your profile (photo, bio, industries, LinkedIn)
- Wait for account approval

Step 2 — Browse Opportunities

Go to **Browse Opportunities** in the app.

Review each opportunity for:

- Commission structure
- Estimated deal size
- Industry and product type
- Company information and reputation

Step 3 — Claim an Opportunity

When you claim an opportunity:

- The opportunity is assigned to you
- Other reps cannot claim it
- You are now responsible for working it

Important: Only claim opportunities you intend to work.

Step 4 — Create a Deal

After claiming an opportunity:

1. Open the opportunity
2. Tap **Create Deal**
3. Enter Deal Name, Estimated Deal Value, Estimated Commission, and Notes

Step 5 — Move Deal Through Stages

Stage	What It Means
Lead	Initial contact made
Discovery	Qualifying the opportunity
Demo	Demo or presentation complete
Proposal	Pricing sent to prospect

Stage	What It Means
Closed Won	Deal closed — commission generated
Closed Lost	Deal did not close

Keep deal stages updated so companies can track progress.

Step 6 — Closed Won = Commission Earned

When the company marks the deal **Closed Won**, a commission record is created and added to your **My Commissions** section automatically.

Step 7 — Track Your Commission Payments

Navigate to: **My Commissions** → **Upcoming Payments**

This section shows:

- Commission amount
- Payment schedule
- Payment status

Rep Best Practices

- Only claim opportunities you will work actively
- Communicate with companies — respond promptly
- Update deal stages regularly
- Be professional in all interactions
- Close deals and earn commissions