

QCommission Feature Matrix.



This document lists most of the features found in the QCommission product. It is segmented by functional areas. This is not an exhaustive list. QCommission is available in multiple models. Not all listed features are available in all models. QCommission can handle most commission needs for companies.

Functionality	Feature	Description
Calendar	Calendar specifies the commission processing schedule for the company.	
	Monthly, Quarterly, Half Yearly, Annual	Commission processing can be based on these standard frequencies.
	Weekly, Bi-Weekly, Twice-Monthly	Commission processing can be based on these more unusual frequencies.
	User definable processing schedule	User can define a calendar with any start and date for any period.
	Multiple periods	Different incentives can be calculated at different frequencies. E.g. Monthly and Quarterly.
	Multiple years	Commission calculations can cross over multiple years.
Payees	Payees are entities that receive variable payouts. Payees can be employees, external individuals or external companies.	
	Payees can be employees	Payment recipients are commonly employees.
	Payees can be non-employees	Payees can be outside agents.
	Payees can be companies	Payees can be individuals or firms.
	Payees can have different roles	Payees can be many different roles. E.g. Sales Rep, Sales Manager.
	Payees can be associated with organizational units	Payees can be associated with different organization units such as territories/depts/business units/teams.
	Payees can report to specific Managers	Payee can have a reporting relationship to a manager
	Payee contact information is available	Complete contact information is available for a payee.
	Payee email id can be stored	Payee email can be used to email commission statements
	Payee salary can be stored	Salary can stored be used in calculations.
	Payee can have hire and termination dates	Payee hire and termination dates can be stored and used in calculations.
	Payee can be made ineligible for calculations	Payees can be made ineligible for commissions quickly.
	Payees can be added online	Payees can be directly added to the system online.
	Payees can be imported into the system	Payees can be imported into the system.
	Payees can use their own currency for payouts	Payees can have be paid out in their own local currency.
	Payee can have a unique commission plan	Each Payee can have their own unique commission plan.
	Payee can be associated with unique commission statement formats	Each Payee can have their own unique statement formats.
	Payee can have a unique and current message	Each Payee can have a current message that can be updated and shown on their commission statements. E.g. "Congratulations on reaching Sales Rep of the Year".
	Payee can keep track of job changes	Payees job changes such as roles and reporting organizations can be stored in the system.
	Payee can have work hours data	Each Payee can store work hour history for calculations of hour based incentives.
	Payee can have unique General Ledger accounts	Each Payee can be associated with unique General Ledger and Cost centers for accounting purposes.
	Payee can access the system	Payee can be provided access to the system either through the web or client system with security.

Sales Organization	Sales organization stores the reporting relationship between entities in the organization.	
	Sales organization can have a hierarchical relationship	Sales organization entities can report into each other. It can be in a hierarchical manner. Sales Territory "Maine" reports into "North East" Region.
	Sales organization relationship levels	Sales organizations can have unlimited levels. Different editions may have different limits.
	Sales organization can be made up of any sort of organizational entity.	Sales organizations can be organized as postal codes, states, regions, countries, business units, departments, etc.
	Sales Organization can be associated with unique commission statement formats	A sales organization can have a unique commission statement associated with it. All payees reporting to this organization would default to this commission statement format.
Customer	Customers are the firms and individuals to whom sales is made.	
	Customer based crediting	Customer information can be used in credit rules. A particular customer or group of customer's sales can be credited to a particular payee. E.g. crediting strategic accounts to a rep.
	Unique commissions by customer	Customer information can be used in commission calculations. Different customers can have different commission rates.
	Customer contact info	Customer contact information can be maintained.
	Customer groups	Customer can be grouped in a hierarchical manner. Groupings can be regions or industry segments, for example.
	Customer relationship dates	Customer start and end dates can be maintained. This can be used to direct commissions. For example: pay a higher commission rate for the first year of customer relationship.
Products	Products and Services are what the company sells.	
	Product based crediting	Product information can be used in credit rules. A particular Product or group of product's sales can be credited to a particular payee. E.g. crediting 'Hardware' sales to a rep.
	Unique commissions by product	Product information can be used in commission calculations. Different Products can have different commission rates.
	Product groups	Product can be grouped in a hierarchical manner. Groupings can be regions or industry segments, for example.
	Product Amounts	Product fields such as List Price, Unit Cost can be used in commission calculations. For example, commission on markups can be calculated by finding the difference between actual price and list price.
Commission and Bonus Calculations	Any kind of variable payouts can be calculated by the system. Calculations can include, commissions, bonuses, referrals and royalties.	
Plan	Commission plans are the agreements that the company has with its Payees. The plan specifies the rules for awarding commissions and incentives to the payee. A plan is made up of many incentives.	
	Individual and Unique Plans	Every payee can have their own unique commission plan.
	Shared Commission Plans	Commission plan components can be shared by many Payees if need be. This allows changes in one place to affect a group of people.
	Commission plan duration	Commission plans are typically for one fiscal year. But can be used to calculate commissions for multiple years as well.

	Multiple Plans	Payees can complete one plan and start another plan.
	Creation of plans	A plan can be created directly or can be copied from another payee's plan.
	Unlimited Incentives	Unlimited number of commissions and bonuses can be set within a single plan.
	Calculate plans in order	Plan calculation order can be defined so that pre-requisite plans are executed first.
	Plan Document	A descriptive plan document created in MS Word, PDF and other formats can be attached to the plan in the system and viewed.
Processing Schedule	The period of calculating commissions can vary significantly. The calendar specifies the periods and dates for the calendar.	
	Monthly	Commissions are typically paid out monthly.
	Other standard frequencies	Commissions and bonuses can be paid as Weekly, Bi-Weekly, Monthly, Twice-monthly, Quarterly, Half yearly and Annual.
	Other unique frequencies	Commissions and bonuses can be paid on any period with a unique user defined start and end date.
	Multiple years	Commissions can be calculated across multiple years.
	Transaction dates in period	Transactions have an effective date that allows them to be calculated in the correct period.
	Future dated transactions	Transactions have an effective date that allows them to be future dates and defers processing until that time.
Transactions	Commissions can be calculated on almost ANY kind of transactions. Transactions can be imported from external sources. Transactions can also be entered/modified in the system. Some examples of other transactions that can be handled are: "Customer Satisfaction" scores, or "Appointments Made"	
	Any transaction	Commissions can be calculated on any kind of transactions
	Invoices	Commissions can be calculated based on Invoices.
	Receipts	Commissions can be calculated based on money received
	Expenses	Commissions can be deducted for expenses. E.g. Deduct \$100 every month for Insurance Premium.
	Bills	Commissions can be deducted for Bills
	Payments	Commissions can be deducted for Payments
	Credit Memo	Commissions can be calculated for credit memos
	Quotes/Estimates	Commissions can be calculated based on Quotes/Estimates.
	Sales Order	Commissions can be calculated based on Sales Orders
	Recognized Revenue	Commissions can be calculated based on recognized revenue.
	Purchase Orders	Commissions can be calculated based on Purchase Orders
	Contracts and projects	Commissions can be calculated based on contracts and projects
	Recurring Transactions	Commissions can be calculated based on recurring transactions such as Premiums.
	Summary level transactions	Transactions can be calculated at a detailed level (e.g. product level for invoices) or as a single summary transaction.
	New Customer/Account	Transactions indicating the acquisition of a customer/account can be used to trigger payments.
Transaction Adjustments	Adjustments can be made to the transaction itself.	
	Cancel Transaction	Cancellation can create an offsetting transaction.
	Adjust a Transaction	Transactions can be adjusted positively or negatively.
	Protected Transaction	Transactions cannot be modified once the corresponding calculation period is closed, to keep the audit trail clean.

Transaction Events	Transactions can go through various events , such as shipping and payments for an invoice.	
	Invoice event commissions	Commissions can be paid based on an invoice event such as bookings, ordering, shipping, revenue recognition, etc
	Bookings or order event	Commissions can be paid on bookings or order.
	Shipping/Invoicing event	Commissions can be paid when invoices are shipped.
	Paid Invoice event	Commissions can be paid when invoices are paid.
	Additional events	Commissions can be paid when other events such as Revenue Recognition happens.
	Event based delayed payment	Commissions can be calculated on Invoice but paid when the invoice is paid by the customer
	Event based split payment	Commissions can be split between multiple events, E.g. Pay 70% of commission on invoice event and 30% on customer payments.
Transaction Amounts	Amounts available on transactions can be used in the commission calculations.	
	Sales	Commissions can be calculated based on sales/revenue amounts.
	Quantity	Commissions can be calculated based on quantity/units.
	Cost	Commissions can be calculated based on Cost
	Profit/Margin	Commissions can be calculated based on Profit/Margin. E.g. Pay commission on Profit. E.g. Use different commission rates for different margin levels.
	Total Value	Commissions can be based on total values such as Contract value.
	Other Amounts	Commissions can be calculated based on almost ANY amount that is available on transactions.
Crediting Transactions	Crediting is the process of allocating a transaction (sales or other) to the right payee. Mostly a single person gets the credit for a transaction, but sometimes multiple people may get credit for the same transaction. The credit rules are applied against all the transactions entered/imported into the system.	
	Crediting Rules	Crediting rules can be pre-established and applied against all transactions entering the system.
	Credit by Payee	Incoming transactions can be credited to Payees, based on Payee values available on the transactions.
	Credit by Territory	Incoming transactions can be credited to Payees, based on Territory/sales organization values available on the transactions.
	Credit by Customers	Incoming transactions can be credited to Payees on Customer values available on the transactions. Crediting can also be by groups of customers.
	Credit by Customer Jobs/Projects	Incoming transactions can be credited to Payees on Customer Job/Project values available on the transactions. Crediting can also be by groups of customers.
	Credit by Products	Incoming transactions can be credited to Payees on Product values available on the transactions. Crediting can also be by product lines and families.
	Crediting rules by Product Type	Incoming transactions can be credited to Payees based on Product Types associated with the products.
	Credit multiple payees and splits	Incoming transactions can be credited to multiple payees. The multiple payees can be available right on the transaction, or the rules can determine which payee the transaction credit should go to. The credit can be split to multiple payees, or fully credited to multiple payees.

	Credits for overrides	Credits can be provided to managers and other related payee groups for override commissions purposes.
	Crediting rules by Payees	Each Payee could have their own set of crediting rules.
	Crediting rules for an incentive	Credit rules can be unique for each incentive. There can be multiple credit rules that make up the credits for a single incentive.
	Credit by user definable criteria	Incoming transactions can be credited to Payees by user definable Groups and Categories available on the transactions.
	Credit by combinations	Incoming transactions can be credited to Payees by any combination of the above criteria.
	Credit to managers	Managers can be set up to automatically get credit for all their subordinates' sales and get override commissions.
	Avoid duplicate crediting	A transaction that has been credited to a person, can be set up to not credit again, after the period is closed.
	Credit at line level	Transactions can be credited to payees at an individual line level.
	Credit at summary level	Transactions can be credited to payees at an transaction summary level. Transaction can also be summarized as a single credit per period per payee.
	Incentives: Commission and Bonuses	Incentives are any unique calculation formula used to calculate payouts for a Payee. A monthly commission for sales revenue is an incentive; an annual bonus based on quantity of items sold is also an incentive. A Payee's plan consist of multiple incentives.
	Flat Rate	Commissions can be calculated as a flat rate. The flat rate can be unique by Payee, Product, Customer, and other criteria. It can also be based on a combination of these criteria. E.g. For "Widget" products, Sales rep "A" will get 5%.
	Flat Amt	Commissions can be paid as a flat amt. This can be based on quantity or an event being satisfied. E.g. Pay \$100 for every Loan processed. E.g. Pay \$1000 on Customer satisfaction score over 90%.
	Varying commission rates by Customer	Commission rates can change by customer or customer groups
	Varying commission rates by Jobs	Commission rates can change by customer jobs
	Varying commission rates by Products	Commission rates can change by products or product families
	Varying commission rates by Age	Commission rates can change by timing of revenue as compared events such as when the customer was acquired. (e.g. Pay 5% for first year revenue, 3% for second year revenue).
	Varying commission rates by other criteria	Commission rates can change by almost any criteria available for a transaction.
	Threshold attainment	Commissions can be paid only if a certain performance threshold is achieved. E.g. Every month, accumulate all sales for a rep. If sales are < \$50,000 pay 0% commissions, if sales are >\$50,000 pay 10% commission.
	Tiered Attainment	Commissions can be paid based on tiers of attainment for a period. E.g. Every month, accumulate all sales for a rep. If sales are < \$50,000 pay 5% commissions, if sales are >\$50,000 and < \$100,000 then pay 7%; if sales are above \$100,000 pay 10% commission.
	Quota Tiered Attainment Percent	Commissions can be paid based on tiers of attainment percent calculated against a specified quota. E.g. Every month, accumulate all sales for a rep. Compare to a quota of \$100,000. If attainment percent is < 80% pay 5% commissions; if attainment percent is between are 80% and < 100% then pay 7%; if attainment percent is above 100% pay 10% commission.

	Job Profitability based commissions	Commissions can be paid based on job profitability. Commissions can be due on certain stages of a job. Commission can be 'trued-up' across multiple payouts.
	Profit based commissions	Commissions can be calculated based on Gross/Net Profit/Margin. Profit can at line level or total order/invoice level. E.g. Pay 10% of commission on Profit.
	Profit level based commissions	Commissions can be calculated based on Profit level. Profit can at line level or total order/invoice level. E.g. For 35% and above profit commission rate is 10%; if profit level is below 35% then commission rate is 5%.
	Discount based commissions	Commissions can be paid based on varying discount levels. E.g. Standard commission rate is 10%, if sales is discounted by 10%, commission rate is 5%. If the discount is greater than 10% then no commission is to be paid.
	AR Aging based commissions	Commissions can be paid at different rates based on the delay between order/invoice and customer payments. E.g. If customer payment is received 90 days after invoice, reduce comm rate by 25%.
	Time based commissions	Commissions can be paid at different rates based on the transaction date compared to a start date. E.g. Commission rates for the 1st year after a new customer acquisition can be at a higher rate. E.g. Commissions are paid at different rates for the first, 2nd and 3rd years of a contract.
	First Dollar calculation	For tiered commissions attainment in each tier can be paid at the appropriate percent, or when a threshold is crossed all past attainment can be paid at the newest rate.
	Unique calculations	All the listed commission calculations can be common for a set of reps, or can be unique for each rep.
	Multiple Incentives	A payee can have many commissions and bonuses in the same plan. E.g. Monthly sales commission and Quarterly Unit Bonus
	Differing Frequencies	Each incentive can be calculated at a different frequency. E.g. Monthly sales commission and Quarterly Unit Bonus
	Cross period calculations	Quotas and attainment can cross multiple periods. They system can cumulate and provide totaled values across any period length. E.g. Half Yearly Total Sales. These values can be used in commission and Bonus calculations.
	Negative Commissions	System can calculate negative commissions. Negative balances can be retained and applied against future periods.
	SPIFF	Special promotional incentive programs can be set in the system and executed.
	Bonus	Bonuses are governed by similar rules to commissions. They are just as flexible and can be set up in all the same ways.
	Recurring Commissions	Commissions can be automatically generated on a recurring basis. E.g. pay recurring commissions for a contract on a prorated basis for the next 12 months.
	Referral Fee	Referral fees can be calculated to external and internal payees.
	Royalties	Royalties can be calculated for any external entity
	Dependent Commissions	Commissions can be calculated dependent on the result of other calculations. (e.g. Pay commissions on sale only if customer satisfaction is above 95%).
	Calculated but don't pay	Commissions can be calculated and shown on statements, but not actually paid out. (e.g. calculated and show commissions for house accounts).

	Flexible user defined calculations	Any kind of commissions can be calculated using an excel like formula. Multiple formulas can be execute in sequence.
	Flexible calculations based on table fields.	Any kind of commissions can be calculated using values from tables in the system,
	Cumulate/store values and re-use calculations	Buckets are available to store values for any criteria and frequency. Values can be cumulated. These buckets can be used later in other plans/other periods to create specific commission calculations.
Payee Summary Calculations	Some calculations are done at the summary level after all the commissions are calculated.	
	Draws - Recoverable	Recoverable draws can be set by individual payee. A draw of certain amount can be set and the system will automatically loan draws as necessary, keep the balance and recover the loans when possible.
	Guarantees	Guarantees are essentially Non-recoverable draws. Guarantees can be set by individual payee. A draw of certain amount can be set and the system will automatically loan guarantee amount as necessary.
	Draw and recovery periods	Draw can be set to run for only a specific set of periods. Recovery can be done during the same periods or a different set of periods. Draw recovery amount can be limited to a particular amount.
	Caps	Payouts for a period can be capped. It can be a fixed cap, or a carry-forward cap to smooth out payouts over a set of periods.
Adjustments	Adjustments to commissions	
	Payout Adjustments	Can adjust the total payout amount positively or negatively
	Adjustment Comments	All adjustments can be created with an audit trail with comments.
	Draw/Cap adjustments	The draw or cap balance can also be adjusted.
	Transaction adjustments	Transactions that are used to pay commissions can have their values adjusted and used to affect commissions appropriately.
	Chargebacks and clawbacks	Commissions can be taken back from payees, on transactions such as credit memos, cancelled orders, returns, etc.
Other Data	There are other master data, that can also be used in commission calculations.	
Vendor	Vendors are firms that the company pays funds to. They may be suppliers of products or services. For insurance companies they can be Carriers; for manufacturing rep firms, they can be Manufacturers.	
	Vendor	Vendor master records can be maintained.
	Vendor on Transaction	Individual Transactions can be associated with vendors so commissions can be varied.
	Vendor based Crediting	Transactions for a particular vendor can all be credited to a one or more reps.
	Vendor based Commission	Individual Transactions can be associated with vendors so commissions can be varied. For example, if company is reselling products, they may want to pay different commission rate for products from different vendors.
Group	User definable grouping of transactions. Company need to classify transactions in an unique way.	
	Group on Transaction	Transactions can be grouped with unique values so commissions can be varied. For example, some transactions may be considered "New Business" and others "Repeat Business".

	Group based Crediting	Transactions for a particular group can be credited to one or more reps. For example, transactions with Group "Strategic Products" can be assigned to a Business Development Rep.
	Group based Commission	Transactions for a particular group can have a different commission rate than other groups.
Commission Statements	Commission statements are the special, periodic reports provided to payees indicating the commission payout and the detail that made up that commission payout.	
	Multiple Commission Statement Formats	There are many different commission statement formats available
	Summary Statement	Commission statement summarized by incentive
	Detail Statement	Commission statement providing detail for every incentive
	Profitability Statement	Commission statement geared around profitability
	Sorted Commission Statement	Commission statement sorted by various data, such as Customer or product
	Pending and Due Commission Statement	Commission statement show current payouts and future pending commissions.
	Quota and Attainment Statement	Commission statement showing quota and cumulated attainment.
	Event based Commission Statement	Commission statement broken up events such as invoiced, paid, etc.
	Don't report certain incentives	Commission statement can omit showing certain incentives.
	Suppress zero value payouts	If a transaction created zero payouts, that can be suppressed.
	Manager Commission Statement	Show statement for manager with information on subordinate payees.
	Show unique comments	Commission statements can show unique comments by payee.
	Export to PDF	Commission statements can be exported as PDF files..
	Export to HTML	Commission statements can be exported as HTML files. These can be linked within the firm's intranet.
	Export to XLS	Commission statements can be exported Excel files. They can also be exported as raw data without report formatting, etc.
	Export to Other data formats	Commission statements can be exported as other data formats as well..
	Web based commission statements	Commission statements are available through the web
	Email Commission statements	Commission statements can be emailed to payee and cc'ed to managers.
	Commission statements through Internet	Commission statements can be available through web access.
	Customize commission statements	Commission statements can be customized for company needs.
	Create new commission statements	Commission statements can be created for company needs.
Reporting	Reports are standard reports for the data available. There are a lot of standard reports available in the system.	
Payout Reports	Payout reports are based on the results generated from commission plan execution.	
	Credits for Transaction and Line	Report the sales credits for a specific transaction and line.
	Credits for a Payee	Report all the sales credits generated for a payee in a period.
	Payment by Transaction and Line	Report the commissions for a specific transaction and line.
	Payout Summary - Payees by Period	Payout Summary for payees by period
	Payee YTD Incentive Summary	Year to date incentive summary for Payee
	Year to Date Commission Payout	Year to date commission payouts

	Adjustments for a payee	Adjustments for a payee for current period or year.
	Payee Attainment against Goal	Payee attainment against Quotas
	Payee Ranking By Attainment Percent	Payee ranking by attainment percent
	Payee Ranking By Attainment	Payee ranking by attainment
	Payee Ranking by Credit Amount For Products	Payee ranking by credit amount for products
	Payees Commissions Report by Territory	Payee commissions report by territory
	Payees Commissions Report to Manager	Payee commissions report by manager
	Payee Commissions for Period by Job	Payee commissions report by period by job
	All Payee Commissions for Period by Job	All Payee commissions report by period by job
	Payees Incentive Commissions Report by Dates	Payee commissions by incentive report by dates
	Payees Incentive Commissions Report by Manager	Payee commissions by incentive report by manager
	Payees Incentive Commissions Report by Period	Payee commissions by incentive report by period
	Payees Incentive Commissions Report by Territory	Payee commissions by incentive report by territory
	Sorted Commission Statement	Commission statement sorted by different fields
	Commission Due Statement	Commissions due report
	Unpaid Commissions Report	Commissions yet to be paid report.
	Zero Payout	Transactions with zero commissions
Financial Reports	Financial reports are used to affect General Ledger entries.	
	Accrual reports detail and summary	GL Accrued commission amounts calculated but not yet paid for current period.
	Payout Report Detail and Summary	GL commission amounts calculated for current period.
Transaction Reports	Transaction reports are based on the source transactions imported/entered into the system.	
	Future Transactions Report	Transactions with future dates.
	Sales by Customer by Payee	Transactions sorted by customer and payee
	Sales by Group by Payee	Transactions sorted by user definable group and payee
	Sales by Payee	Transactions by payee
	Sales by Payee by Customer	Transactions sorted by payee and customer
	Sales by Payee by Group	Transactions sorted by payee and user definable group
	Sales by Payee by Manager	Transactions sorted by payee and manager
	Sales by Payee by Product	Transactions sorted by payee and product
	Sales by Payee by Territory	Transactions sorted by payee and territory
	Sales by Payee by Vendor	Transactions sorted by payee and vendor
	Sales by Product	Transactions by product
	Sales by Product by Payee	Transactions by product and payee
	Sales by Product Group	Transactions by product group
	Sales by Vendor by Payee	Transactions sorted by vendor and payee
	Transaction By Gross Profit	Transactions sorted by declining gross profit
	Transaction Reports	Transactions selected by dates and various criteria
	Transaction Presentation Report	Transactions viewable in document format
	Uncredited Transactions	Transactions that were not credited to payees
	Unpaid Transaction	Credited transactions for which commission was not paid
Other Reports	Miscellaneous reports	
	Quota Report	Reports all the quotas for a payee in a year.
	Bucket values Report	Reports values stored in buckets across all periods.
	Reportable Amounts By Year	Tax related commission payouts for full year
	Job Profitability	Job profitability report
	Carrier Commission Reconciliation Report	Carrier commission reconciliation
	List of Accounts	List of Accounts
Reporting Tools	External reporting tools can be used to access the data.	
	Excel access	Excel application can be used to access the data.
	MS Query	System accommodates the use MS Query and can produce the output as an Excel file.
	MS Access	MS Access can be used to create reports against the database.
	Crystal Reports	Crystal Reports and any other reporting tool that can access MS SQL Server and MS Access databases can be used.

	VView	VView report writer can be used to access the data.
Analytics	Data can be analyzed using drag and drop analysis	
	Pivot table access	Commission data can be presented as pivot table like views. User can drag and drop criteria to create quick views of the data for analysis.
Integration	Sophisticated integration facility allows the direct integration of data with other data and application formats.	
	Stand alone execution	Integration to other systems is optional. System can completely execute stand alone.
	Integration on demand	Imports can be requested directly by the administrative user.
	Schedule imports/exports	Imports can be scheduled to run automatically at a particular time.
	Flexible integration to any table	Integration can be set up to update any table and extract data from any table.
	Extract from any table	Data can be extracted out from any table.
	Extract from Views and SQLs	Data can be extracted using views and SQL queries
	Integrate all master data such as Customer, Products, Payees	Integration can update any master data.
	Integrate transaction data	Integration can update any transaction data including sales orders, invoices, payments, credit memos, bills and purchase orders.
	Insert or Update of data	Ability to insert new records or update old records available.
	Upsert: Insert or Update, depending	Ability to insert a new record but if a record already exists to update the record automatically.
	Conditional Insert and Update based on master data	Update records only if associated master records exist.
	Convert data while integrating	Convert values from external table before posting into QC or vice versa.
	Log errors and review	Log all integration errors and allow review.
	Filter incoming records	Filter and take in only specific set of records. For example: filter out shipping and taxes.
	Follow security requirements	Follow security requirements for login/authentication needed by external system.
	ODBC integration	Integrate to any ODBC compatible database using an ODBC driver, including Oracle.
	MySQL integration	Integrate using MySQL driver
	MS SQL Server integration	Integrate using MS SQL Server driver
	Text file	Integrate to text files with delimited or fixed length formats. This includes CSV format.
	Excel	Integrate to Excel files.
	XML	Integrate to XML files
	MS Access	Integrate to MS Access databases
	Salesforce.com integration	Integrate to Salesforce.com application
	Sage MAS500	Integrate to Sage MAS500 application
	Intuit QuickBooks	Integrate to Intuit QuickBooks application
	SAP BusinessOne	Integrate to SAP BusinessOne application
	MS Dynamics Axapta	Integrate to MS Axapta application
	Byte	Integrate to Byte application
	Calyx Point	Integrate to Calyx Point application
	Custom application integration	Ability to connect to any application available.
	Export statements	Export statements and save them as HTML, PDF, Excel, Text and raw data.
	Export file for Accounts Payable	Export file for Accounts Payable update.
	Export file for Payroll	Export file for Payroll update.
	Export file for General Ledger	Export file for GL update.

Security and Auditing	This Software allows companies to introduce an automated process for defining and paying compensation that provides full auditing to meet US federal regulations. This Software also offers the ability to set the level of complexity within the companies password policies to their corporate standards.	
Security	Security controls the proper user access to the system functions.	
	Functional security	Set security for functions available in the system. E.g. administrators are allowed to execute commission plans.
	View/Update security	Set security to distinguish between view and update access.
	Role based security	Create a role that combines the various functions that the role should have access to.
	User based security	Associate user to a role. Ensure access to system via user id and password.
	Maximum sequential attempts at password	Can set the number of allowed sequential attempts.
	Password expiration period	Password expiration days can be set to force reset of password
	Minimum length of password	Can restrict the minimum length of the password
	Maximum length of password	Can set the maximum length of the password
	Minimum activation period	The period within which a password has to be activated.
	List of restricted passwords	Restricted list of passwords can be created in the software. These can be dynamic values such as user first name, last name, email id, month, etc
	Password reuse limit	The number of passwords that cannot be reused can be specified.
	Type of password	Can set the required password character combination. The password character combination are Alpha, Numeric, Alphanumeric, Alphanumeric and Special Characters. Default is set to "Alphanumeric"
	Sarbanes-Oxley compliant	Application is compliant with Sarbanes-Oxley rules.
Audit Setup	Software provides the ability to set different levels of auditing. Object level auditing also can be set. The logging happens based on the level that is defined for each object.	
	Log created/modified date and time	Log created date/time and modified date/time on all records.
	Log created/modified by user	Log created by user and modified by user on all records.
	Table specific logging	Logging can be specified at a table level. Each table can be set to a different level of logging.
	No Logging	Software does not log any information related to changes. Certain tables don't have to be logged since they don't impact the commissions.
	Basic Logging	Software logs information when any data is being added to the specified table.
	Advanced Logging	Software logs information when any data is added or edited in the specified table
	Full Logging	Software logs information when any data is added or deleted or edited in the specified table. This logging is at a field level.
	Audit Log Report	Audit log reports can be generated based on the logging data. They can be selectively executed for a user, a table or a date range.
	Preserve source records used in calculations	All source transactions used in commission calculations are retained.
	Preserve all intermediate calculations	All intermediate records created in commission calculations are retained.
	Close prior period processed transactions	Prior period transactions are closed for avoiding duplicated and for retention.
	Provide audit trail for commission results	Provide all source and intermediate result records for a commission calculation.

	Track Adjustments	Track all adjustments individually with mandatory comments.
Technology and Architecture	The software is built on Microsoft technology for easy fit with most organization's technology stack.	
	Single User Install	Application can be installed and used as a single user system.
	Multi-user install	Application can be installed and used as a multi-user system.
	Operating Systems Compatibility	Software runs on Windows operating systems including Windows 2000, Windows Vista, Windows XP, Windows Server 2003, Windows 7, Windows Server 2008 and Windows Server 2008 R2
	Database compatibility	Software uses MS SQL Server database. It supports all the latest versions of the MS SQL Server database. It also supports MS Access database.
	Environment	Installed and runnable from Server and Client desktops. Can be installed as a single user system or a multi-user system
	Internet Server	Software uses Microsoft IIS internet server.
	Internet Browser Compatibility	Internet Explorer 7.0 or later
	Language	Software uses the following programming languages. Microsoft VB, Microsoft Dot Net 2.0, C Sharp, HTML and ASP.
	Interoperability	Software uses the QXchange ETL tool for interoperability.
	Server Hardware	Server hardware required only for multi-user systems. Standard hardware running windows server operating systems. Based on software edition, number of plans, transaction volumes and data retention, specific configuration will be determined.
	MS Terminal Server/Citrix	Application can be executed through MS Terminal Server/Citrix and Remote Desktop.
Extendability	The application can be extended to solve unique customer needs.	
	Rename field captions	Field captions on forms and reports can be renamed for specific purposes.
	User definable fields	Tables come embedded with a minimum of 5 user definable fields called Flexi fields to allow re-use for user specific purposes.
	Add additional fields to table	Allow ability to add additional fields to existing tables.
	Queries	Add user defined SQL queries and schedule it along side other processes.
	Extend calculations	Commission calculations can be extended using VBScript.
General	Other features	
	Plan document	Store plan documents in the system for review later.
	Plan Approval	Execute plan after approval by the authorized user.
	Workflow	Set up work flow processes for approval when records change.
	Issue Resolution	Provide tools for sales people to submit issues for resolution.
	Backup/Restore	Database can be backed up as frequently as necessary and restored on demand.
	Purge	Prior years data can be purged as part of the year end process. The amount of data to be retained in the system can be specified.
	Batch Processing	Processes such as imports and calculation can be scheduled and executed in batch.

Internationalization	This Software handles multiple currency calculation for payout. The software utilizes currency rate tables for conversion which can be updated on-demand.	
Multi-currency		
	Currency Exchange	Currency exchange table for all currencies with effective dating is supported.
	Currency on the transaction	The transaction (invoice/order) holds fields for currency code and currency rate. Thru the use of these fields we are able to convert all transaction amounts into the relevant currency.
	Base Currency	The software has the ability to process based on a Company base currency. This allows for reporting and accumulation of amounts under a single currency.
	Payee Currency	Every payee can have their own currency for the calculation of their payout.
	Multi-Currency Statements	We provide a standard statement which shows the base currency, the currency that the transaction amount is in and the Payee's currency.
Localization		
	Language	Application supports English language only
	Currency formats	Local currency formats are supported in the web client.
	Date formats	Local date formats are supported in the web client.