



QCommission Integration with Salesforce.com's AppExchange

Overview

The calculation of commissions is a very complex problem, yet the majority of companies use highly manual processes to do the work. With the QCommission for AppExchange application, that is no longer a problem.

For sales people, nothing is more important than the commission check they get on a regular basis. Sales people work hard to close their sales and expect to get their sales commissions correctly and on a timely basis. They expect the calculations to be accurate based upon the agreed upon compensation plans. They need clear and detailed statements that explain the basis of every calculation.

The majority of sales people would agree they do not get a clear and correct commission statement. Compensation plans are by their nature complex. The data needed to calculate the plans is not always available, the plans change on a regular basis and there are exceptions to the exceptions. Sales people get their sales commissions typically weeks after the period is over. Frequently the crediting and calculations are incorrect. As a result, the commission statements are not clear and obvious. They have no idea how they are getting paid, or waste time trying to figure out what they should get paid.

With the advent of CRM systems, companies are attempting to automate the sales process and customer interactions. More and more sales people access CRM systems to get their job done. But there have been challenges in CRM adoption as sales people resist the solutions. If salespeople have to access the CRM system to get access to their commission statements, they are more likely to use the CRM system for its intended purpose. If a salesperson knows they can help get paid accurately, they will make sure to keep the systems accurate and thus help keep the system up to date.

A commission solution that can accurately establish and calculate commissions and can seamlessly provide the commission statements for viewing by sales people can be a great advantage to firms. In addition to reducing commission errors, reducing time taken to administer and increasing sales people productivity, the solution can increase Salesforce.com adoptions.

QCommission is a powerful, flexible sales commission software tool. It calculates sales people's compensation, accurately, quickly and professionally. QCommission is integrated with Salesforce.com CRM systems as well as accounting systems such as QuickBooks and SAP Business One.

Salesforce.com is the worldwide leader in on-demand customer relationship management (CRM) services. More companies trust their vital customer and sales data to Salesforce.com than any other CRM company in the world. Currently more than 400,000 subscribers at more than 20,000 companies use Salesforce.com. Salesforce.com also offers AppForce/AppExchange, a hosted platform for 3rd party applications.

Technology

Salesforce.com, supplies AppForce, a services platform for building applications and integrating with Salesforce.com's offerings. The AppForce platform allows you to customize standard objects and build custom objects, tabs, and s-controls. The technology also includes a Web Services API that allows integration between apps on the platform and other applications. Use of the AppForce tools makes sure that the integration works well with the various versions and models of Salesforce.com. The platform also ensures that the third party product is properly authenticated prior to getting access to the Salesforce.com data. All access to Salesforce.com data is through the AppForce platform.

QCommission utilizes a technology called QXchange to integrate to other applications including Appforce. Specific data access plug-ins (DAP) for different systems can be added to QXchange to integrate with various different data sources. A special DAP for Salesforce.com allows QCommission to exchange data with Salesforce.com.

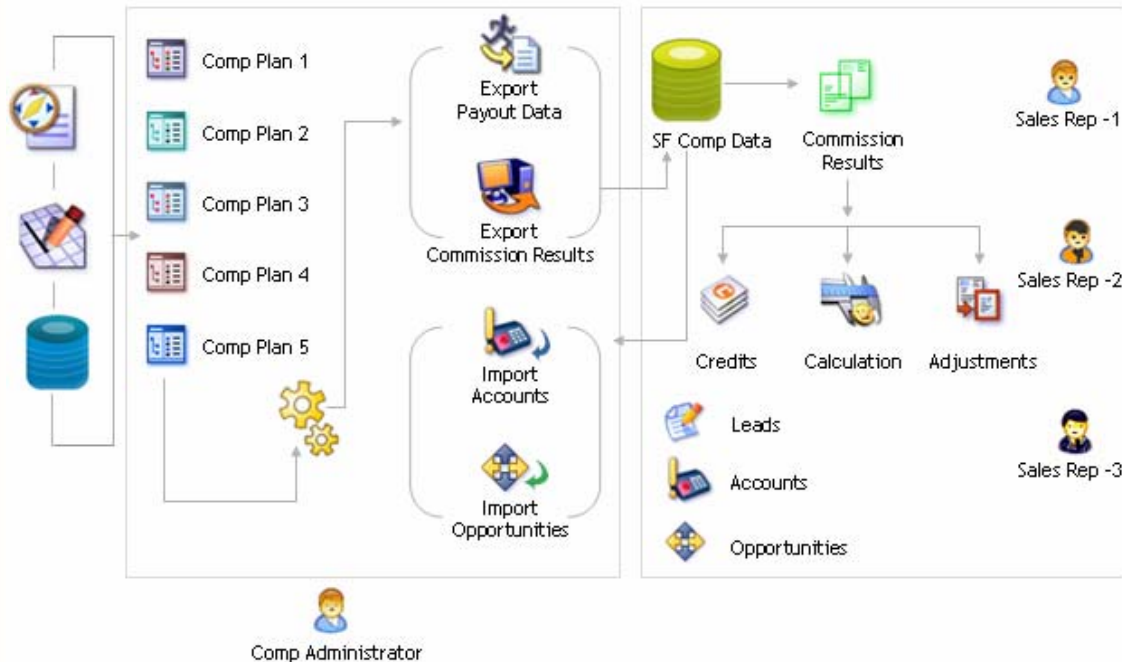
Integration

Architecture

QCommission is a composite application. It has two components: an administrative module that calculates commissions and a presentation module that presents commissions results to the sales force.

The administrative module is the system used to establish sales compensation plans for the sales force. The responsibility for this function typically lies with sales operations but can also be shared by finance or human resources. Commission plans can be unique by sales people or common across groups of people. Data for commissions calculations can come from various sources, but is primarily invoices from the corporation's accounting systems. Commissions are primarily calculated on Revenue. Revenues are mostly based on invoices entered into the accounting system. This is the primary data that is imported into QCommission. Opportunities within Salesforce.com can also be imported into QCommission and treated as transactions against which commissions should be calculated.

Various attributes of transactions can be used in the calculation of commissions. In many situations, sales reps are directly associated with transactions. This can be used in properly crediting the transaction to the sales rep prior to calculating commissions. Other data attributes useful in commission calculations include Quantity, Amount, Customer, Product, etc.



Calculations are done on a periodic basis. The calculation process in the administrative module produces commission results for each individual sales person in the system. The most effective way of getting the commission results to the sales people is to present the results through a CRM system such as Salesforce.com. The presentation module in QCommission essentially presents the commission results directly to the sales force individually.

Data Objects

The QXchange layer loads data from the administrative module into the presentation module within Appforce. The data is loaded into specific objects that conform to all standards for Appforce. The following data objects are provided as part of the presentation module.

Credits: This object shows which source transactions were credited to which sales person.

Payout Calculations: Actual detailed commission calculation for each transaction for each sales person is held in this object.

Payout Adjustments: Any adjustments made to the payout calculations are held in this object.

Payout Summary: Final summary information for each period for each person is held in this object. The data is specific to each sales person and the sales people can access their data in detail. Queries can be executed and reports can be generated against these data objects.

Reporting Objects

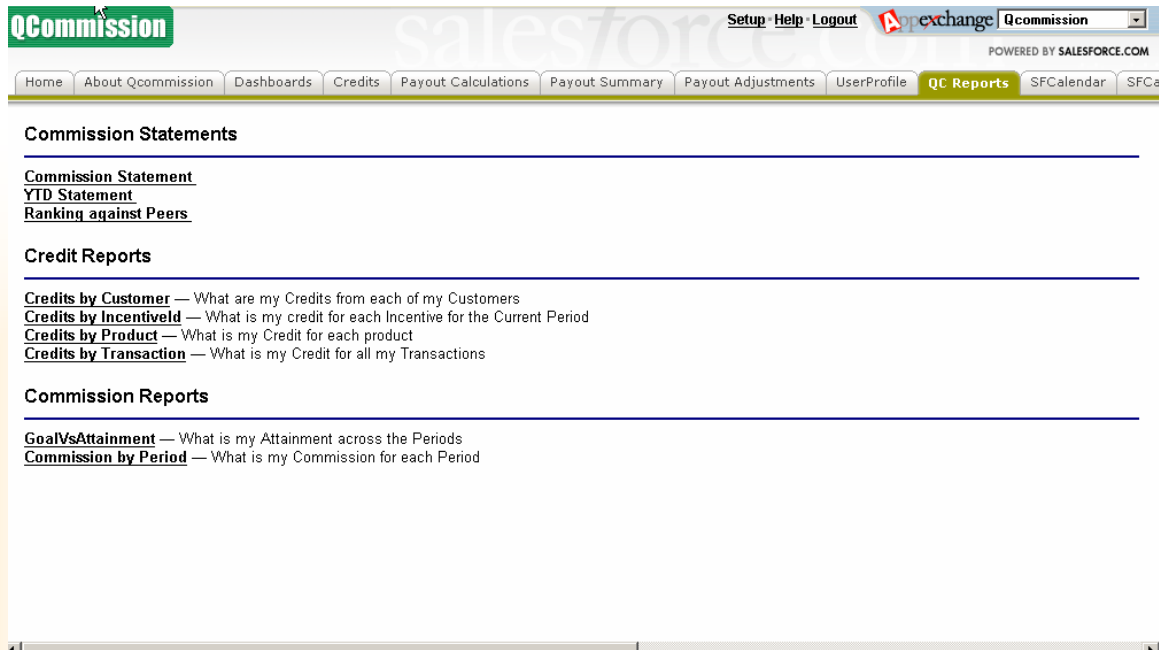
In addition to objects storing the commissions results data, the presentation module also provides some standard screen tabs, dashboards and reports. This allows the sales person to be able to easily and clearly review their calculated results.

The screenshot shows the QCommission web application interface. At the top, there's a navigation bar with 'Home', 'About QCommission', 'How It Works', 'Demo Inquiry', 'Statements and Reports', 'Dashboards', 'Credits', 'Payout Calculations', 'Payout Adjustments', and 'Payout Summary'. The 'Credits' tab is active. Below the navigation bar, there's a search bar and a 'Create' section. The main content area displays a table titled 'My Credits' with the following columns: Transaction Eff. Date, Transaction ID, Incentive, Credit Amount, Customer, Product, and Payee. The table contains 15 rows of data, including transactions for materials and services with various credit amounts and products like 'Exterior Paint', 'Building Valuation', and 'EIR Reports'. The footer of the page includes a navigation bar with 'Home', 'About QCommission', 'How It Works', 'Demo Inquiry', 'Statements and Reports', 'Dashboards', 'Credits', 'Payout Calculations', 'Payout Adjustments', 'Payout Summary', 'Reports', and 'All Tabs'.

The sales person's commissions results are presented in a detailed and comprehensive manner.

Invoice	Date	Type	Group	Customer	Product ID	Sales Amount	Credit Amount	Comm Rate	Paid Amount
Cellarstone - Sales Commission Statement									
Payee ID	: Wlovet	Plan Id	: PLO3	Gross Payout Amt	: \$30,495.60				
Payee Name	: Ward Lovett	Period	: 3	Net Payout Amt	: \$30,495.60				
Territory Id	: WEST	Position	: Sales Representative						
		Fiscal Year	: 2006						
<hr/>									
Incentive Id : Materials						Goal Amt : \$100,000.00			
CC05-1	5/15/2006	Invoice		Majors Remodeling	Interior Paint	\$80,000.00	\$80,000.00	2.00	\$1,601.00
CC05-2	5/15/2006	Invoice		Majors Remodeling	Exterior Paint	\$65,000.00	\$65,000.00	3.69	\$2,400.10
CC05-3	5/15/2006	Invoice		Majors Remodeling	Paint Thinner	\$42,000.00	\$42,000.00	4.88	\$2,050.10
CC06-1	5/15/2006	Invoice		Towers Construction	Exterior Paint	\$40,000.00	\$40,000.00	5.00	\$2,000.00
CC06-2	5/15/2006	Invoice		Towers Construction	Interior Paint	\$30,000.00	\$30,000.00	5.00	\$1,500.00
Total :						\$257,000.00	\$257,000.00		\$9,551.20
<hr/>									
Incentive Id : Services						Goal Amt : \$100,000.00			
CC04-1	5/15/2006	Invoice		Majors Remodeling	Building Valuation	\$100,000.00	\$100,000.00	3.40	\$3,404.20
CC04-2	5/15/2006	Invoice		Majors Remodeling	EIR Reports	\$100,000.00	\$100,000.00	8.00	\$8,000.20
CC07-1	5/15/2006	Invoice		Towers Construction	Building Valuation	\$80,000.00	\$80,000.00	9.00	\$7,200.00
CC07-2	5/15/2006	Invoice		Towers Construction	EIR Reports	\$26,000.00	\$26,000.00	9.00	\$2,340.00
Total :						\$306,000.00	\$306,000.00		\$20,944.40

The list of reports and dashboards present information unique to each sales rep. Sales rep can also create their own reports, dashboards and views into the data.



Access

Sales people are already familiar with Salesforce.com user interface. We leverage that knowledge so they do not have to learn a new tool. Sales people already have access privileges to the Salesforce system, authenticated by the base Appforce system. QCommission utilizes the same access to allow access to its functionality. The QCommission presentation module fully conforms to the standards of Appforce objects such that the Salesforce.com administrator can set access privileges to QCommission using the same functionality used in the underlying Appforce system.

Conclusion

QCommission does a tremendous job calculating individual commissions for the sales person. With the Appforce presentation module, it brings that calculated data to the salesperson directly within the Salesforce system. With this integration it ties the two systems in such a manner that the complexity to the customer is reduced to a minimal level.