

Solution Features



General Features

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 Editions. Not all listed features are available in all editions.

QCommission can handle most commission needs for companies. It is a very flexible system, designed intuitively around the commission plan document. It is designed to provide low Total Cost of Ownership and good Return on Investment.

Functionality	Feature	Description	Response
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.	
	Compensation year	Compensation year can match calendar year. It can also start and end on any date.	
	User definable processing schedule	User can define a calendar with any start and date for any period. Variations include, 4/4/5 week type calendars, 13 month calendars.	
	Multiple periods	Different incentives can be calculated at different frequencies, even for the same payee's plan. E.g. Monthly and Quarterly.	
	Multiple years	Commission calculations can cross over multiple years. E.g. Calculate commissions in November and pay it out in February of next year after the sales revenue is received.	
	Multiple calendars	Maintain multiple calendars in the system to be used for different compensation plans.	
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.	
	Payees Demographic Information	Payee demographic address information can be maintained	
	Payee email id can be stored	Payee email can be used to email commission statements	
	Payee salary can be stored	Salary can stored to 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 with security.	

	Payee can have Notes	Payees can have unlimited notes logged against them with dates.	
	Payee can store all their certificate information	Payee can add all their certifications with their effective date	
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. Any number of levels can be configured.	
	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 many different Lines of Business/Business Units and Channels.	Sales organizations business units can be of any type: Retail, Web, Print, Direct, Indirect, VAR, Referral, 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.	
	Sales organization based crediting	Sales organization can be used in credit rules. A particular territory related transactions can be credited to a particular Rep. E.g. Sales in "Northern California" should be credited to "Andy Rep"	
	Sales organization effective-dating	Sales organization entity relationships can be tagged with effective start and end dates, so that the history of the relationship can be maintained and used in crediting and calculations.	
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's sales can be credited to a particular payee. E.g. crediting strategic accounts to a rep.	
	Customer group crediting	A group of customer's sales can be credited to a particular payee. E.g. crediting strategic accounts to a rep.	
	Customer crediting for multiple reps.	Customer's sales can be credited more than one rep at differing credit rates. E.g. For customer XYZ credit 70% to Rep A and 30% to Rep B.	
	Unique commissions by customer	Customer information can be used in commission calculations. Different customers can have different commission rates.	
	Customer address info	Customer contact information such as billing/shipping address can be maintained.	
	Customer demographics	Customer specific information such as date of birth, anniversary etc can be maintained.	
	Customer groups	Customer can be grouped in a hierarchical manner. Groupings can be regions or industry segments, for example.	
	Customer Multiple Payees Split	Up to eleven payees can be directly associated with each customer and commissions can be split. Additionally higher level sales organization members can be associated.	
	Customer Change Primary and other payees	Change payees on Customers individually. Change payees on policy in bulk.	
	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.	
	Customer Jobs	Multiple jobs/projects for customer can be maintained in the system.	
	Customer Amounts	Customer fields such as Commission_Rate, Flexi_Amts can be used in commission calculations.	
	Customers can have Notes	Customers can have unlimited notes logged against them with dates. This will allow sales people/ administrators to keep notes against customers if they don't have a CRM system.	
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 contact info	Product contact information can be maintained.	
	Product groups	Product can be grouped in a hierarchical manner. Groupings can regions or industry segments, for example. Sales can be credited by product group.	
	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 Plan Components	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.	
	Plan modification complexity	Plans can be created by commissions administrator, depending on complexity of plan and level of knowledge of user.	
	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.	
	Auto Plan Creation	Plans can be automatically assigned to Payees, based on Payee criteria rules. E.g. Payee with Job = "Acct Mgr" should get the "Account Manager Commission Plan".	
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 frequencies	Different Commissions and bonuses can be paid on different frequencies. E.g One can be monthly and another can be quarterly.	
	Multiple frequencies with incomplete overlap	Different Commissions and bonuses can be paid on different incomplete overlap frequencies. For example, weeks are completely overlapped by months. But the system can still check and understand weeks versus' months' dates.	
	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.	
	Multiple calculation runs	Commissions can actually be calculated multiple times within a period, even daily.	
	Preliminary and final processing schedule	Commissions can be processed and results distributed on a preliminary basis. Upon feedback and issue resolution, the commissions can be recalculated and distributed as a final run.	
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. A generic transaction type can be used in the calculations.	
	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 automatically summarized as a single summary transaction.	
	New Customer/Account	Transactions indicating the acquisition of a customer/account can be used to trigger payments.	
	Non-commissionable Transactions	Transactions can be made non-commissionable individually.	
	On hold transactions	Transactions can be put on hold and activated later.	
	MBO Incentives	Transactions can be performance against MBOs	
	Non-Amount Transactions	Transactions can represent anything. Examples include Calls, Appointments, Customer Satisfaction, KPI, etc.	
	Rule Set Ability	Rule Set Ability allows the incoming transactions to be modified and processed based on any given business criteria (e.g: Can increase the cost in the transaction based on the other expenses incurred that are outside the source system.)	
	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 happen.	
	Event based delayed payment	Commissions can be calculated on Invoice but paid when the invoice is paid by the customer. One product category can be paid on one event, whereas a different category can be paid based on a different event.	
	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 Annual Contract value and Total Contract Value.	
	Recurring Value	Commissions can be based on recurring amounts such as subscriptions and Monthly Recurring Revenue (MRR).	
	Double-time/Over-time	Commissions can be calculated on additional hours as double-time and over-time.	
	Other Amounts	Commissions can be calculated based on almost ANY amount that is available on transactions. Individual Payees can be paid based on different performance measures. Even the same person can be paid on multiple elements. There is no limit on the number of measures supported.	
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. Unlimited number of payees can receive credit splits. The multiple payees can be available right on the transaction, or the rules can determine which payee the transaction credit should go to (aka Overlay credits). The credit can be split to multiple payees, or fully credited to multiple payees. Total split proportion can add up to 100% or more as necessary.	
	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. E.g. An agency can credit for all the reps in the agency.	
	Credit by effective dating	Sales credit can be provided by effective date of transaction and reporting relationship between payees and sales organization entities including managers. E.g. A rep can report to two different managers in the same period and the different managers will get credit only for the period the sales rep reported to them.	
	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 Bonus	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.		
	Payment value type	Payment value type can be flat amt, percent, basis points.	
	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 80% and < 100% then pay 7%; if attainment percent is above 100% pay 10% commission.	
	Quota frequency	Quota can be monthly, quarterly, annual, year-to-date, etc. and attainment against quota can be different frequencies.	
	Quota Assignment	Quota can be set uniquely for each Payee and for each incentive within a plan. It can be also created as a common Quota and re-used by multiple payees.	
	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. The 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.	
	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.	
	SPIFF	Special promotional incentive programs can be set in the system and executed. Products, Date ranges and periods can be used to limit the applicability of the SPIFF.	
	Bonus	Bonuses are governed by similar rules to commissions. They are just as flexible and can be set up in all the same ways.	
	Referral Fee	Referral fees can be calculated to external and internal payees.	
	Royalties	Royalties can be calculated for any external entity	
	Customer/Distributor Rebates	Payment to Distributors based on sell-through revenue is possible. Credits can be assigned by accounts, territories, etc.	
	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 executed 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.	
	Pooled amount based commissions	Credit can be pooled by team or territory. Commissions can be calculated as even amounts for team members or based on proportion of contribution.	
	Pay on net of other commissions	Commissions can be paid for the current payee, after deducting other commissions due on the base amount.	
	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. Payouts can be capped at an individual transaction level .	
	Minimum Pay Threshold	A pay threshold can be set to avoid very small checks being cut. If the commission due amount is less than that pay threshold then the payment is simply rolled over to subsequent periods until the threshold is exceeded.	
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.	
	Advance payments and settlements	Payees can be provided advances and treated as draws. Future earnings can settle these advances.	
	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. It can be taken back in the same period or in subsequent periods.	
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.	
	Customize commission statements	Commission statements can be customized for company needs.	
	Create new commission statements	Specific Commission statements can be created for company needs.	
Payment Processing	Commission payouts have to be transmitted to Payees. Various mechanisms can be used.		
	Export file for Accounts Payable	Accounts Payable is used to make payouts to third parties. Export file for Accounts Payable update can be created or directly updated in accounting systems.	
	Export file for Payroll	Accounts Payable is used to make payouts to employees. Export file for Payroll update can be created or directly updated in accounting systems.	
	Export file for ADP	Automated Data Processing (ADP) is the largest payroll processor in the USA. Export file for ADP can be created in their require format.	
	Export file for Paychex	PayChex is a key payroll processor in the USA. Export file for PayChex can be created in their required format.	
	Export payout file for ACH	Automated Clearing House (ACH) is a USA banking standard to transmit funds electronically to banks. Payout can be output in this specific format which is forwarded to banks.	
	Check Processing	Payouts can be loaded into a payment processing system and checks generated on customer's behalf. Paid check numbers can be updated back into the system.	
	1099 Processing	1099 Forms are USA government requirement for third party payments. 1099 forms can be printed on customer's behalf or electronically filed.	
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 of commissions	Accrual of commission liability to GL Accounts	
	Accrual of commissions by cost center	Accrual of commission liability to GL Cost Center or Class	
	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	
Validation Reports	Miscellaneous reports		
	Open Transactions with Blank Payee ID	Transactions without a payee.	
	Open Transactions with Blank Territory ID	Transactions without a territory	
	Open Transactions with Negative Sales Amount	Transactions with a negative amount	
	Open Transactions with Zero Quantity	Transactions without a quantity	
	Calculated Transaction with Zero Commission Rate	Transactions that does not have a valid commission rate	
	Missing Payee in Payee Master	Transactions missing a payee in payee master	
	Missing Payee in Transaction	Transactions missing a payee.	
	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	
	Outstanding draw balance Report	Report of current outstanding draw balances.	
	List of Accounts	List of Accounts	
	List of Payees	List of Payees	
	Print Customer Address Labels	Customer addresses can be printed on labels for envelopes	

Advanced Features

This document lists the advanced features found in the QCommission product. This is not an exhaustive list.

Functionality	Feature	Description	Response
Reporting	Reports are standard reports for the data available. There are a lot of standard reports available in the system.		
Report Designer	Web based report designer tool		
	Browser based	Report Designer can be used directly in the browser.	
	Report on any table	Any table available through security can be used to create a report against.	
	Report on any query	Any query available in the query designer can be used to create a report.	
	Specific fields	Specific fields can be selected and reported on	
	Formatted fields	Fields can be formatted with bolding	
	Change captions	Field captions can be changed.	
	Sort fields	Report can be sorted by specific fields	
	Group fields	Detail lines can be grouped by field values and group header and footer can be produced.	
	Sub-total fields	Numeric fields can be sub-totalled.	
	Selected records	Specific records can be selected by fields values	
	Export records	Report output can be exported as excel or text files	
	Save and rerun	Reports can be saved and re-executed.	
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.	
	VSVIEW	VSVIEW report writer can be used to access the data.	
	New Reports	Ability to design brand new reports	
	Copy reports	Ability to copy existing reports, modify, save and execute it	
	Ability to report on tables	Ability to access existing tables in the system to report on.	
	Ability to report on queries/SQL	Ability to access existing queries or SQL and report on the data	
	Ability to filter data	Ability to access filter and select data and report	
	Ability to sort and group data	Ability to sort and group data and report	
	Ability to provide sub headings and sub totals	Ability to provide headings and totals by groups	
	Ability to export data from report	Ability to export output of reports to excel/PDF	
	Ability to secure reports	Ability to specify roles or users that have access to a report	
	Ability to email reports	Ability to specify multiple email ids and send reports as emails	
	Ability to schedule reports execution	Reports can be scheduled to execute at specified times unattended. Reports can also be emailed on schedule.	
Analytics	Data can be analyzed using drag and drop analysis		
	Pivot table/Cube 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.	
	Analytics output to Excel	Analytics data can be output to Excel for further management.	
	Query based Analytics	Analytics can be based on query statements. More than 50 queries are included in the system.	
Dashboard	Dashboard presents data in a graphical easy-to-use way.		
	Graphic View	Commission data can be presented as Graphs and charts organized in a single page. Dashboard can be configured to be the home page.	

	Dashboard Configurable	Dashboards can be configured specific to roles such as sales rep or manager.	
	Dashboard output to Excel	Dashboard data can be output to Excel for further management.	
	Standard Dashboards	A number of standard Dashboard widgets are included in the system. Payout by Period Performance by Incentive Product Sales by Period Top 3 products Top 3 Customers Quota Vs Attainment Payout Summary Performance by Payee Performance by Region Top 3 Sales rep by Incentive	
	Query based Analytics	Dashboard can be based on query statements. More than 50 queries are included in the system.	
Query	Data can be extracted using standard SQL statements		
	SQL	SQL statements can be coded to extract any data in the system and stored online. The SQL can be used in Analytics and Report Designer.	
	SQL out put to Excel	SQL data can be output to Excel for further management.	
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.	
	Application Program Interface (API)	An API architecture available for alternate ways of integrating with the application	
	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. Entire schema of the database with all fields are accessible. SQL can be executed against any tables.	
	MS Dynamic CRM	Integrate using My Dynamic CRM.	
	MySQL integration	Integrate using MySQL driver. Entire schema of the database with all fields are accessible. SQL can be executed against any tables.	

	MS SQL Server integration	Integrate using MS SQL Server driver. Entire schema of the database with all fields are accessible. SQL can be executed against any tables.	
	Text file	Integrate to text files with delimited or fixed length formats. This includes CSV format.	
	Flat/CSV	Integrate to Flat/CSV files.	
	Excel	Integrate to Excel files.	
	PDF	Integrate to PDF files.	
	XML	Integrate to XML files	
	MS Access	Integrate to MS Access databases. Entire schema of the database with all fields are accessible. SQL can be executed against Access tables.	
	Salesforce.com	Integrate to Salesforce.com application. Integration with Salesforce.com is very flexible. Integration can be bi-directional. Typically Account, Opportunity data are imported from Salesforce.com to use in sales crediting. Opportunity can be imported by stages. Complete access to all salesforce.com objects and fields including custom objects and fields is available. Sales people can access QCommission as part of their salesforce.com access using Single Sign-on.	
	Sage MAS500	Integrate to Sage MAS500 application	
	Sage 50	Integrate to Sage 50 application	
	Sage Intacct	Integrate to Sage Intacct application	
	Tally	Integrate to Tally application	
	Intuit QuickBooks	Integrated with Intuit's QuickBooks application. Integration with QuickBooks uses Intuit supplied SDK technology. Almost all editions of QuickBooks supported: QuickBooks Desktop Pro, Premier, Enterprise, QuickBooks Online Multi-country QuickBooks are supported. Typically Customer, Invoices data are imported from QuickBooks to use in sales crediting. Flexible access to most tables of QuickBooks is supported. Invoice stages including created, shipped and paid are processed and used in calculations. Bills, PO, Time tracking, Paychecks and other data can be imported and used in calculations. Job profitability related transactions can be processed and handled for commissions.	
	QuickBooks Online	Integrated with Intuit's QuickBooks Online application.	
	SAP BusinessOne	Integrate to SAP BusinessOne application	
	MS Dynamics GP	Integrated with MS Dynamics Great Plains application	
	MS Dynamics AX	Integrated with MS Dynamics Axapta application	
	SugarCRM	Integrated with SugarCRM application	
	SuiteCRM	Integrated with SuiteCRM application	
	Oracle Fusion CRM	Integrate to Oracle Fusion CRM	
	Peachtree	Integrate to Peachtree application	
	Byte	Integrated with Byte application	
	Calyx Point	Integrated with Calyx Point application	
	Xero	Integrated with Xero application. Integration with Xero uses, Xero API technology and can connect to Private, Public & Partner applications. Integrated with Early, Growth & Established Editions of Xero. Xero's latest edition is supported Typically Contacts, Items, Invoices, credit notes, payments data are imported from Xero to use in sales crediting.	
	Netchex	Integrated with Netchex application.	
	NetSuite	Integrated with Netsuite application.	
	ConnectWise	Integrated with ConnectWise 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.	
	Export file for ADP	Export file for ADP	
	Export file for Paychex	Export file for Paychex	
	Export payout file for ACH	Export payout file in ACH format for bank payments.	
	Magento	Integrated with Magento application.	
	EFIRadius	Integrated with EFIRadius application.	
	CCCOne	Integrated with CCCOne application.	
	ACORD	Integrated with ACORD application.	
	PayPal	Integrated with PayPal application.	
	Mannatec	Integrated with Mannatec application.	
	SharePoint	Integrated with SharePoint application.	
	Accounting Seed	Integrated with Accounting Seed application.	
	Mantis-BT	Integrated with Mantis-BT application.	
	WebKPI	Integrated with webKPI application.	
Modeling and Forecasting	This Software helps companies estimate future impact of changes and predictions.		
Modeling	Modeling allows the execution of What-if scenarios.		
	Future transaction modeling	System allows the entry of future performance estimates and the potential sales commissions and payouts. This can be done for a single period or multiple periods through the end of the year.	
	Commission modeling with past year data	System allows the ability to model commissions using data from the past year.	
	Commission modeling with current year data	System allows the ability to model commissions using current year data and forecast for the rest of the year.	
	Future commission plan change modeling	System allows the ability to change commission rates and other plan components and estimate the potential sales commissions and payouts.	
	Future payee changes	System allows the ability to change payees, new hires, terminations and roles and model future payments.	
	Future organization changes.	System allows the ability to change reporting relationships, restructures and org structures and estimate the potential sales commissions and payouts.	
	Future plan changes	System allows the ability to change plans, quotas, credit rules and payment rates to determine future commission expectations.	
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.	
	Date formats	Local date formats are supported.	
Issue/Case Management	Workflow allows this system to track changes in the system and submit them for approval to specific roles and payees.		
	Issue submission/Incident Management	Allow payees to submit issues/cases for resolution inside the system. Typically issues with sales credits or calculations. Assign case numbers.	
	Case logging	Assign case numbers. Log the case. Inform comp administrator about case.	
	Case conversation	Allow continuing conversation related to case. Log the conversation. Notify both parties.	
	Case Resolution	Close cases. Provide reports on open cases.	

	Support Desk	Allows to submit tickets on open issues and manage them at one single place for efficient tracking until resolution.	
	Support Chat	Payees and compensation Administrators can engage in a conversation using this feature to communicate feedback and conclude cases quickly.	
Workflow	Workflow allows this system to track changes in the system and submit them for approval to specific roles and payees.		
	Workflow Objects	Workflow Designer allows the specification of workflow for any business object in the system. It can be applied against objects such as Plans, Commission Statements and Adjustments.	
	Workflow Triggers	Set up work flow processes for approval when records change or are created. Validation can be set on specific records in objects when certain criteria are met. E.g: If adjustment is more than \$1000, send for approval.	
	Workflow approval levels	Workflow can be passed through unlimited number of approvals. Workflow approval levels are based on roles.	
	Plan Approval	Execute plan after approval by the authorized user. Each plan can be completely unique by Payee. Plan documentation unique to each can be generated. Existing physical documents can be scanned and stored.	
	eSignatures	Approvals can be a simple button click. They can also accept eSignatures in the form of text being entered by the user.	
	Commission Statement pre-Approval	Present commission statements only after approval is completed by administrators and/or managers	
	Commission Statement review	Allow payees to review and approve their commission statements, before payment can be processed.	
Alerts and Notifications	System can generate alerts and notifications for specific configurable conditions.		
	Configurable alert	Specific conditions in the database can be checked and alerts can be created. Alert can be directed to specific users.	
	Notification icon and counter	Alerts are monitored and highlighted in a notification icon in the common area of the application. A count of alerts is also shown.	
Extendability	The application can be extended to solve unique customer needs.		
	Replace Logo	Replace primary logo present on pages and reports with customer-specific logo.	
	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.	
Sandbox Environments	Configuring the rules in the solution, verifying and implementing in production		
	Development Sandbox environment	Environment to allow modifications to data integrations, commission plans, payees, sales organization, quotas and draw rules. Modifications can be made to all Calculation processes can be executed. Modifications can be updated to other sandboxes or to production.	

	Quality Verification Sandbox environment	Environment to allow modifications to data integrations, commission plans, payees, sales organization, quotas and draw rules. Modifications can be made to all Calculation processes can be executed. Modifications can be updated to other sandboxes or to production.	
Technology and Architecture	The software is built on Microsoft technology for easy fit with most organizations' technology stack.		
	Hosted	Application available as a hosted solution. Multiple configurations available such as shared server, separate server, and even the ability to select their own hosting provider. This is useful for companies in some countries who need the data within their borders. (e.g. Canada).	
	On-premises	For companies with unique needs such as higher level of security: we offer on-premises installation.	
	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 Win 2000, Win Vista, Win XP, Windows 7 , Windows Server 2008, Windows Server 2008 R2, Windows Server 2012	
	Database compatibility	Software uses MS SQL Server database. It supports the following versions: MS SQL Server 2008 and MS SQL Server 2008 R2. , MS SQL Server 012	
	Environment	Microsoft Technology Stack	
	Internet Server	Software uses Microsoft IIS internet server.	
	Internet Browser Compatibility	Internet Explorer 8.0 or later. Firefox 50 or later. Google Chrome.	
	Language	Software uses the following programming languages. Microsoft VB, Microsoft Dot Net 4.0, C Sharp, HTML and ASP and Bootstrap 3.0	
	Data Integration	Software uses the associated QXchange ETL tool for data integration	
	Server Hardware	Standard hardware running windows server operating systems. This matters only when on-premises is considered. Based on software edition, number of plans, transaction volumes and data retention, specific configuration will be determined.	
	Single Sign On	Application integrates with Active Directory and allows single sign on to the application without having to re-logon.	
	Port	Uses the default port for web access. Customer can configure Ports for their individual situation.	
	URL	URL can be configured for web access to the application.	
Other	Other features		
	Plan document	Store plan documents in the system for review later.	
	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.	
	Scheduled Batch Processing for imports	Processes such as imports and exports can be scheduled and executed in batch.	
	Scheduled Batch Processing for calculations	Processes such as plan calculations can be scheduled and executed in batch.	
	Scheduled Batch Processing for reports	Processes such as reports can be scheduled and executed in batch.	

Security Features

This document lists the security features found in the QCommission product. It is segmented by functional areas. This is not an exhaustive list.

QCommission is available in multiple Editions. Not all listed features are available in all editions.

Functionality	Feature	Description	Response
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.		
	Security is Configurable	Security is configurable at all levels	
	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. Roles can be full super access, limited view access or any access inbetween	
	User based security	Add a new user. 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.	
	Multi-factor Authenticaion	User authentication utilizes multi-factor method	
	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	
	Single Sign ON	Single Sign On is configurable to any system in addition to supporting certain systems as standard	
	Active Directory Sign-on	Application can be authenticated and signed-on via MS Active Directory.	
	SalesForce Sign-on	Application can be authenticated and signed-on via Salesforce.com	
	Google Sign-on	Application can be authenticated and signed-on via Google	
SSO	Single Sign-On		
	SAML Support	Security Assertion Markup Language (SAML) is a standard for logging users into applications based on their sessions in another context. This single sign-on (SSO) login standard has significant advantages over logging in using a username/password. QCommission SSO AD integration enables your organization to integrate QCommission with a corporate Intranet or website. Once set up, your Users can sign in to your corporate intranet or website, and then access Qcommission without the need to sign in a second time using their Qcommission login credentials. QCommission SSO also works with PingFederate for user authentication. Once the users are authenticated by PingFederate they will not be authenticated again by QCommission	

2FA	Two Factor Authentication		
	Two Factor Authentication (2FA)	Extra layer of security. Protects your account by making it more difficult for an attacker to access. This 2FA requires two pieces of evidence to confirm your identity. Protection against phishing, social engineering and password brute-force attacks and secures your data from attackers.	
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.	
	Log plan changes	Provide a changes to all plan components	
	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.	
GDPR	The General Data Protection Regulation is a regulation in EU law on data protection and privacy in the European Union and the European Economic Area. It also addresses the transfer of personal data outside the EU and EEA areas	QCommission is fully GDPR Compliant and it is also made sure that the compliance controls and extended all the way to the hosting provider services. GDPR compliance is required for, 1. Customers having sales reps in European Region 2. Businesses in European region.	
HIPAA Security Rule	The HIPAA Security Rule contains the standards that must be applied to safeguard and protect ePHI/PII when it is at rest and in transit. The rules apply to anybody or any system that has access to confidential patient data.	CellarStone engages with hosting services that has HIPAA compliance controls in place so that we can deliver services matching the compliance expectations of customers.	
SOC	SOC compliances are components of the American Institute of CPAs (AICPA)'s Service Organization Control reporting platform ensuring that systems are set up so they assure security, availability, processing integrity, confidentiality, and privacy of customer data. While SOC 1 addresses internal control relevant to a service organization's client's financial statements, SOC 2 addresses a service organization's controls that are relevant to its operations and compliance.	QCommission is SOC 2 Type II and SOC 1 Type II Compliant. The Trust Service Criteria (TSCs) Included are, 1. Security 2. Confidentiality 3. Processing Integrity. CellarStone also engages with hosting services that has SOC compliances controls in place so that we can deliver services matching the compliance expectations of customers.	
ASC606 Compliance	ASC 606 is the new revenue recognition standard that affects all businesses that enter into contracts with customers to transfer goods or services – public, private and non- profit entities	USA only	

Security	Security controls the proper user access to the system functions.		
	Capitalize commission related expenses for specific services.	Services and products immediately delivered without longer term contract obligations may need to be capitalized	
	Amortize commission related expenses for specific services.	Services and products delivered as longer term contract obligations may need to be amortized	
	Amortize commission related expenses across contract duration, regardless of revenue receipt timings		
	Amortize commission related expenses based on estimated commission amount for contract		
	Amortize commission related expenses based on actual commission amount		
	Amortize commission related expenses adjusting for modified contract terms during contract.		
	Produce amortization report for current period	Also save as export file.	
	Produce amortization chart by contrac		