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QCommission

Pay People Properly

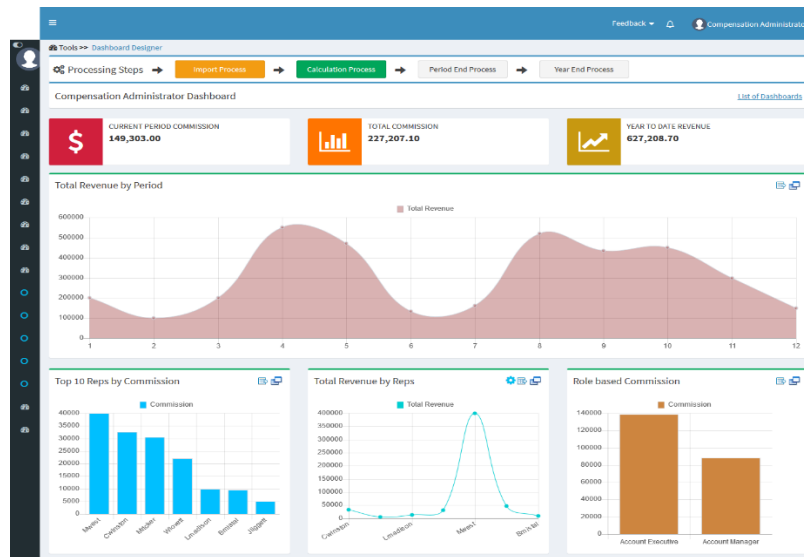
www.qcommission.com

QCommission enables you to quickly calculate commission, draw and bonuses, verify results and distribute this information to your account executives, recruiters, consultants and managers. Present the commission information in such a way that your staff clearly understands what they are being paid and why they are being paid at a very detailed level. Excel and manual calculations can introduce a lot of errors into your calculations and cause your staff to lose trust in you. QCommission can help avoid that by calculating all commissions systematically and reliably.

Calculate Accurately with Flexible Rules

QCommission provides a lot of flexibility to set up commission plans that are unique to your company and your payees.

- Import incoming multiple fees data files from providers/portfolio systems (e.g. Black Diamond).
- Process XLS, CSV and PDF files as imports.
- Handle commissions for investment securities, annuities and insurance.
- Handle other services such as Tax Planning.
- Allow addition of investment accounts.
- Calculate fees from accounts if necessary.
- Pay flat % of collected fees. Pay flat amount.
- Pay differently by payee.
- Split commissions between payees.
- Pay overrides to managers at multiple higher levels.
- Pay override to Broker/Dealer if not already one.
- Provide override commissions to internal staff.
- Pay tranches of investments at different rates for differing time periods.
- Pay residual commissions forever.
- Pay different commission rates based on year of fees.
- Deduct various fees such as marketing and desk fees.
- Pay weekly, bi-weekly, twice-monthly, monthly.
- Pay draws or guaranteed payouts.



QCommission is designed to integrate with Salesforce.com, Sage Peachtree, Sage Intacct, MS Dynamics GP, MS Dynamics Axapta, QuickBooks, SugarCRM, Xero, NetSuite and many others. QCommission can also accept Excel, fixed file and delimited format files. QCommission can process some PDF format files too.

QCommission can also operate stand-alone.

- Import data from accounting system including Invoices, Expenses, Payees, Customers and Products.
- Import from Excel, PDF and fixed or text-delimited files
- Restrict Transaction import using a date range.
- Export Commissions payouts for accounts payable and payroll
- Export data to Excel, and fixed or text-delimited file formats.
- Eliminate shipping, tax charges from calculations.

Reporting

QCommission stores all data entered and all payout calculations.

- Produce detailed commission statements by payee.
- Reproduce commission statements for prior periods.
- Report on split credits and uncredited transactions
- Analyze historical transaction and payment information
- Email commission statements to payees.
- View commission statements through the web.

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Reporting

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Zenith Financial Advisors, Inc. - Sales Commission Statement

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Payee ID : Andy Rep	Plan ID : Commission Plan	Gross Payout Amt : 150.00	Balance
Payee Name : Andy Rep	Period : 1 [1/1/2016 - 1/31/2016]	Draw/Adv Adjustment : 0.00	0.00
Territory ID : Zenith Insurance	Position : Agent	Cap Adjustment : 0.00	0.00
Currency : USD	Fiscal Year : 2016	Minimum Pay Adjustment : 0.00	
		Other Adjustment : 0.00	
		Adjustment To Payout : 0.00	
		Recovery From Payout : 0.00	Net Payout Amt : 150.00

Txn	Date	Type	Group	Customer	Product ID	Sales Amount	Credit Amount	Comm Rate	Paid Amount
Comments									
Incentive ID : First Year Commission						Goal Amt : 0.00			
AA004 - 1	1/31/2016	Claim		Nick Moser	Metlife Life - Independent	1,000.00	1,000.00	10.00	100.00
Total :						1,000.00	1,000.00		100.00
Incentive ID : Special Addtl CCommission						Goal Amt : 0.00			
AA002 - 1	1/31/2016	Premium		Mark Counter	Metlife - Independent	1,000.00	1,000.00	5.00	50.00
Total :						1,000.00	1,000.00		50.00

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Payee Ranking by Attainment

Performance Category	Fiscal Year	Period	Payee ID	Payee Name	Territory ID	Attainment	Attainment Pct
Job_Category : Agent							
Manager Override	2016	1	Dawn Mgr	Dawn Mgr	Zenith Financial Advisors, Inc.	9000.00	
Financial Services Commission	2016	1	Brady Rep	Brady Rep	Zenith Financial Planning	4000.00	
Special Addtl CCommission	2016	1	Andy Rep	Andy Rep	Zenith Insurance	3000.00	
First Year Commission	2016	1	Andy Rep	Andy Rep	Zenith Insurance	1000.00	
Premium Commission	2016	1	Cindy Rep	Cindy Rep	Zenith Financial Advisors, Inc.	1000.00	
Job_Category : House							
Financial Services Commission	2016	1	Zenith Company	Zenith Company	Zenith Financial Advisors, Inc.	4000.00	
Insurance Commission	2016	1	Zenith Company	Zenith Company	Zenith Financial Advisors, Inc.	3000.00	
Insurance Bonus	2016	1	Zenith Company	Zenith Company	Zenith Financial Advisors, Inc.	2000.00	

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Zenith Financial Advisors, Inc.
Payees Commissions Report To Manager

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Manager : Dawn Mgr Fiscal Year : 2016

Payee	Position	Gross Pay Amt	Draw Adj	Cap Adj	Other Adj	Net Pay Amount	Currency
Period : 1							
Andy Rep	Agent	150				150 USD	
Brady Rep	Agent	3,400			150	3,550 USD	
Cindy Rep	Agent	600				600 USD	
Period Total :						4,300 USD	
Manager : Dawn Mgr						Grand Total :	4,300 USD

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QCommission **Payees Incentive Commissions Report by Manager**

Fiscal Year	Payee ID	Payee Name	Position	Incentive	Company	Period	Goal	Paid Amt	Attainme
Manager : Dawn Mgr									
2016	Andy Rep	Andy Rep	Agent	First Year Commission	Zenith Financial Advisors, Inc.	1	0.00	150.00	100
2016	Andy Rep	Andy Rep	Agent	Special Addtl Ccommission	Zenith Financial Advisors, Inc.	1	0.00	150.00	300
2016	Brady Rep	Brady Rep	Agent	Financial Services Commission	Zenith Financial Advisors, Inc.	1	0.00	3550.00	400
2016	Cindy Rep	Cindy Rep	Agent	Premium Commission	Zenith Financial Advisors, Inc.	1	0.00	600.00	100
								4450.00	900
								4450.00	900

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