

Commission Conductor for Acumatica - By SymFinTek

Manage Sales Commissions and Compensation Plans. Increase the effectiveness of your sales team with strategic commissions and incentive compensations.

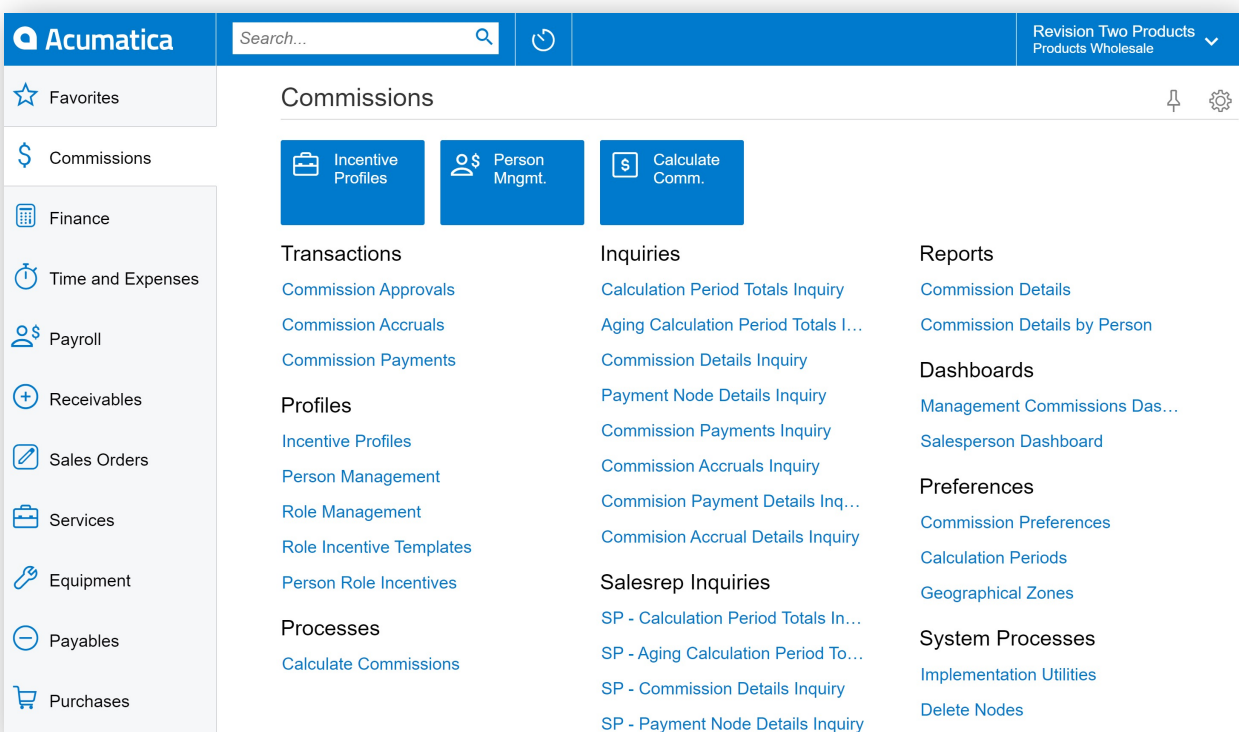
Commission Conductor is a completely configurable and automated commission management system built natively within the Acumatica framework. Ready for Acumatica 2020R2. End-to-End Commission Management, from complex calculations, transparent output, historic tracking of rules, accruals, payments thru AP or Payroll, all the way thru Dashboards, and automatic reports.

KEY FEATURES OF COMMISSION CONDUCTOR

- **Acumatica Native Module.** Seamlessly integrated, build inside Acumatica. The same Interface, deeply interconnected into many Acumatica screens like Sales Orders, Invoices, Opportunities, Customers, Projects, Inventory Items, and Classes, etc.
- **Dashboards for everyone.** Comprehensive pivot tables and dashboards to analyze commissions, from the management or the salesperson's perspective.
- **Multiple Sales Roles.** Sales involved Roles can be used for different functions like Salesperson, Telemarketer, Customer Liaison, Sales Engineer, Supervisor, Regional Manager, etc. The salesperson can act in different sales roles
- **Easy Filtering and Slicing.** Metrics for commission plans can be easily filtered on Inventory Items, Classes, Attributes, Segment Masks, Customers, Customer Classes, Geo-Zones, Country, Branches, Projects, Project Account Groups, and much more.
- **Multiple Data Sources.** Sources for commissions can be Invoicing AR/Distribution, CRM Opportunities, Project Accounting, General Ledger, or any other data source, including Generic Inquiries.

KEY BENEFITS

- **Confidence in Results.** Results are 100% consistent, always. Error rates drop from between 3% and 8% all the way down to 0.1%.
- **Sales force mobility.** Dedicated mobile apps allow sales reps to see real-time payouts and performance even when they are in the field.
- **Scalability.** Tested and proven ICM systems automatically scale to support your growing business across multiple business units, geographies, currencies, and languages.
- **Sarbanes-Oxley Act of 2002 compliance.** Piece of mind that your system is auditable and keeps history on all rules applied to each commission.



The screenshot shows the Acumatica web interface for the Commission Conductor module. The top navigation bar includes the Acumatica logo, a search bar, a refresh icon, and a dropdown menu for 'Revision Two Products' with 'Products Wholesale' selected. The left sidebar contains a navigation menu with icons for Favorites, Commissions, Finance, Time and Expenses, Payroll, Receivables, Sales Orders, Services, Equipment, Payables, and Purchases. The main content area is titled 'Commissions' and features three primary action buttons: 'Incentive Profiles', 'Person Mngmt.', and 'Calculate Comm.'. Below these are four columns of links: Transactions (Commission Approvals, Accruals, Payments), Profiles (Incentive Profiles, Person Management, Role Management, etc.), Processes (Calculate Commissions), Inquiries (Calculation Period Totals, Aging, Details, Payment Node, etc.), Reports (Commission Details, Details by Person), Dashboards (Management Commissions, Salesperson Dashboard), Preferences (Commission, Calculation Periods, Geographical Zones), and System Processes (Implementation Utilities, Delete Nodes).

ACCOUNTS RECEIVABLE FEATURES AND CAPABILITIES

- **Audit Trail.** Outstanding auditing and traceability thru versions for metrics and plans, so you always have a hyperlink to the set of rules that were in place for past commission transactions, affording easy tracking, auditing, and dispute resolution.
- **Flexible Reusable modular commission Plans.** Commission Plans are defined by Persons, Roles, and Incentives, allowing maximum flexibility and reusability.
- **Hierarchical Sales Commission.** Sales Managers can earn commissions from the people they supervise
- **Multiple salespeople supported in source documents** (Invoices, Sales Orders, Quotes, etc), with the same or multiple roles, and split based on percentages.
- **Extended Salesperson definition** includes linking with Vendor, Employee, Acumatica User, allows pay via AP, Payroll or External Payroll, and restricted user experience for salespeople.
- **Automatic adjustments.** When a commission is adjusted, changed, or is voided, the system will automatically reverse or adjust accruals and payments to Salespeople.
- **Flexible Calculations definition.** Calculations can be based on Revenue, Margin, Quantity, or Price Lists & Discounts, Tiers, Bonuses, and Quotas. Includes Season specific plans, Margin Caps, Recursive Incentives. Sales Discounts can impact commission percentages. Margins can be calculated on the fly in contrast with a master price list. Comprehensive bonuses handling, including from multiple incentives.
- **Comprehensive Credit Memo Handling.** The module handles credit memos with or without items, term discount adjustments, and write-off adjustments.
- **Payment Aging Impact.** The number of days that takes a payment to arrive can be set up to affect the commission percentages.

