Easy-Commission Feature Matrix.

This document lists most of the features found in the Easy-Commission product. It is segmented by functional areas. This is not an exhaustive list.
Easy-Commission is available in multiple Editions. Not all listed features are available in all Editions.
Easy-Commission can handle basic to moderate commission needs for any number of reps.

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.
Reps	Reps are entities that receive variable payouts. Reps can be employees, external individuals or external companies.	
	Reps can be employees	Payment recipients are commonly employees.
	Reps can be non-employees	Reps can be outside agents.
	Reps can be companies	Reps can be individuals or firms.
	Reps can have different roles	Reps can be many different roles. E.g. Sales Rep, Sales Manager.
	Reps can be associated with organizational units	Reps can be associated with different organization units such as territories/depts/business units/teams.
	Reps can report to specific Managers	Rep can have a reporting relationship to a manager
	Rep contact information is available	Complete contact information is available for a Rep.
	Rep email id can be stored	Rep email can be used to email commission statements
	Reps can be added online	Reps can be directly added to the system online.
	Rep can have a unique commission plan	Each Rep can have their own unique commission plan.
	Rep can access the system	Rep can be provided access to the system through the web. Or not.
	Reps can be made inactive	Terminated/inactive rep data can still be maintained in the system.
	Reps can be unlimited	Any number of reps can be maintained in the system, depending on edition license limitations.
Sales Organization	Territory stores the sales territories in the organization.	
	Sales Organization can be any sort of organizational entity.	Territories can be organized as postal codes, states, regions, countries, business units, departments, etc.
	Sales organization based crediting	Sales organization can be used 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"
Customer	Customers are the firms and individuals to whom sales is made.	
	Customer Leads	Leads about prospective customers can be entered in the system. Lead souces, status and interaction can be tracked.
	Customer Lead conversion	Qualified leads can converted to a customer record and an opportunity record.
	Customer Opportunity	Opportunity for a deal with a customer can be tracked. Multiple opportunities can be tracked. Deal amount, likelihood of close, etc, can be tracked. Closed opportunity can be converted to a commissionable transaction.

	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 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 contact info	Customer contact information such as address can be maintained.
	Customer can have multiple contacts	Multiple contacts for an individual customer can be maintained.
	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 Notes	Unlimited notes related to customer interactions can be maintained in the system.
	Customer ownership	Customer records can be owned by specific reps so only they can have direct access.
	Customer Jobs	Multiple jobs/projects for customer can be maintained in the system.
	Customer Amounts	Customer field Commission_Rate can be used in commission calculations.
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 Rep. 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. E.g "Paper" is paid at 5% and "Pencil" is paid at 6%.
	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 field Commission_Rate can be used in commission calculations.
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 Reps. The plan specifies the rules for awarding commissions and incentives to the Rep. A plan is made up of many incentives.	
	Individual and Unique Plans	Every Rep can have their own unique commission plan.
	Shared Commission Plan Components	Commission plan components can be shared by many Reps 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.
	Creation of plans	A plan can be created directly or can be copied from another Rep's plan.
	Unlimited Incentives	Unlimited number of commissions and bonuses can be set within a single 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.
	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 witin 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. Invoices can be entered into the system and converted into generic transactions
	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.
	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
Transaction Adjustments	Adjustments can be made to the transaction itself.	
	Adjust a Transaction	Transactions can be adjusted positively or negatively.
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.

	Paid Invoice event	Commissions can be paid when invoices are paid.
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. Profit is difference between sales amount and cost fields. E.g. Pay commission on Profit.
	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 Rep. 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 Rep	Incoming transactions can be credited to Reps, based on Rep values available on the transactions.
	Credit by Territory	Incoming transactions can be credited to Reps, based on Territory/sales organization values available on the transactions.
	Credit by Customers	Incoming transactions can be credited to Reps on Customer values available on the transactions.
	Credit by Products	Incoming transactions can be credited to Reps on Product values available on the transactions. Crediting can also be by product lines and families.
	Credit multiple Reps and splits	Incoming transactions can be credited to multiple Reps. The multiple Reps can be available right on the transaction, or the rules can determine which Rep the transaction credit should go to. The credit can be split to multiple Reps, or fully credited to multiple Reps.
	Credits for overrides	Credits can be provided to managers and other related Rep groups for override commissions purposes.
	Crediting rules by Reps	Each Rep 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 Reps by user definable Groups available on the transactions.
	Credit by combinations	Incoming transactions can be credited to Reps by combination of two 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.
	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 Reps at an individual line level.
Incentives: Commission and Bonuses	Incentives are any unique calculation formula used to calculate payouts for a Rep. A monthly commission for sales revenue is an incentive; an annual bonus based on quantity of items sold is also an incentive. A Rep's plan consist of multiple incentives.	

	Flat Rate	Commissions can be calculated as a flat rate. The flat rate can be unique by Rep, Product, Customer, and other 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.
	Varying commission rates by Products	Commission rates can change by products or product families
	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.
	Quota frequency	Quota can be monthly, quarterly, annual, year-to-date, etc. and attainment against quota can be different frequencies.
	Profit based commissions	Commissions can be calculated based on Profit. 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%.
	Multiple Incentives	A Rep can have many commissions and bonuses in the same plan. E.g. Monthly sales commission and Quarterly Unit Bonus
	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.
	Differing Frequencies	Each incentive can be calculated at a different frequency. E.g. Monthly sales commission and Quarterly Unit Bonus
	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.
	Referral Fee	Referral fees can be calculated to external and internal Reps.
	Royalties	Royalties can be calculated for any external entity
	Flexible user defined calculations	Different kinds of commissions can be calculated using an excel like formula.

Rep 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 Rep. 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 Rep. A draw of certain amount can be set and the system will automatically loan guarantee amount as necessary.
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.
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.
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 Reps indicating the commission payout and the detail that made up that commission payout.	
	Standard commission format	There is a standard commission statement format that is used for all reps.
	Historical commission statement	Commission statement can be reviewed for prior periods.
	Show unique comments	Commission statements can show unique comments by Rep.
	Export to PDF	Commission statements can be exported as PDF files..
	Export to XLS	Commission statements can be exported Excel files. They can also be exported as raw data without report formatting, etc.
	Web based commission statements	Commission statements are available through the web
	Email Commission statements	A link to Commission statements can be emailed to reps.
	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.	
	Payment by Transaction	Payment by Transaction
	Commission Crosstab by Rep and Period	Commission Crosstab by Rep and Period
	Commission Crosstab by Group and Period	Commission Crosstab by Group and Period
	Commission Crosstab by Product and Period	Commission Crosstab by Product and Period
	Commission Report by Rep and Period	Commission Report by Rep and Period
	Commission Report by Group and Period	Commission Report by Group and Period
	Commission report by Product and Period	Commission report by Product and Period
	Commissions paid per rep per period for all reps	Commissions paid per rep per period for all reps
	Year to Date Summary for Rep	Year to Date Summary for Rep
	Summary Rep by Period	Summary Rep by Period
	Year to Date Payout Summary for all Reps	Year to Date Payout Summary for all Reps
	Rep Ranking by Attainment	Rep Ranking by Attainment
	Rep Ranking by Attainment Percentage	Rep Ranking by Attainment Percentage
	Rep attainment against Goal	Rep attainment against Goal
	Rep Quota Report	Rep Quota Report
Transaction Reports	Transaction reports are based on the source transactions imported/entered into the system.	
	Imported Transactions	Imported Transactions
	Transaction List	Transaction List
	Transactions by Rep by Product	Transactions by Rep by Product
	Transactions by Rep by Customer	Transactions by Rep by Customer
	Transactions by Rep by Group	Transactions by Rep by Group
	Paid Transactions	Paid Transactions
	Unpaid Transactions	Unpaid Transactions
	Production Crosstab by Rep and Period	Production Crosstab by Rep and Period
	Production Crosstab by Group and Period	Production Crosstab by Group and Period
	Production Crosstab by Product and Period	Production Crosstab by Product and Period
	Production Report by Rep and Period	Production Report by Rep and Period
	Production Report by Group and Period	Production Report by Group and Period
	Production Report by Product and Period	Production Report by Product and Period
Other Reports	Miscellaneous reports	
	Calendar year payouts for Independent Reps (1099)	Reports values stored in buckets across all periods.
	Customer List	Tax related commission payouts for full year
Reporting Tools	Built-in report designer tool can be used to create reports	
	Report Designer	All objects in the system can be accessed.
	VSView	VSView 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.
	Extract from any table	Data can be extracted out from any table.
	Integrate all master data such as Customer, Products, Reps	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.
	Intuit QuickBooks	Integrate to Intuit QuickBooks application
	Text file	integrate to text files with delimited or fixed length formats. This includes CSV format.
	Excel	integrate to Excel files.
	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.
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.
	Password expiration period	Password expiration days can be set to force reset of password
Technology and Architecture	The software is built on Microsoft technology for easy fit with most organization's technology stack.	
	Multi-tenant SaaS application	Application is hosted on the cloud and accessed individually by each customer and user.
	Internet Browser Compatibility	Internet Explorer 7.0 or later. Mozilla Firefox