



Meet the Commission Plan Product Family

Now you can implement precisely the features and functionality you need by personalizing the **Commission Plan** solution of your choice.

Commission Plan KEYSTONE will automate your commission calculations, payouts, and distribution of personalized commission reports. You'll easily be able to create and modify commission plans, giving you maximum flexibility in managing your sales force and controlling your compensation program.

Commission Plan APEX automates the most complex commission structures, such as those using outside sources to collect sales data (Microsoft CRM, Salesforce.com, etc.) and even commission calculations based on quotas and tier-based sliding scales. APEX delivers the integration and scalability required to meet your highest demands.

COMMISSION PLAN FEATURES	KEYSTONE	APEX
Use a flexible, multi-step calculation model based on salesperson, customer, and item	✓	✓
Assign multiple salespeople to individual customers, sales territories, and inventory items	✓	✓
Assign multiple salespeople to combinations of customer, ship to address, and inventory item	✓	✓
Automatically split commissions between two or more salespeople	✓	✓
Pay commissions only on sales documents that are fully relieved (i.e. paid)	✓	✓
Create commission transactions in the Dynamics GP G/L, Payables, and U.S. Payroll modules	✓	✓
Create commission accrual transactions to record the commission liability	✓	✓
Adjust commissions for scenarios such as bonuses, commission draws, chargebacks, or correcting commissions paid incorrectly in a previous period	✓	✓
Reduce commissions using Markdowns, Trade/Terms Discounts, Write-offs, Payment Terms, Credit Card types	✓	✓
Place commissions On Hold for individual sales documents or for all sales documents for a salesperson	✓	✓
E-MAIL individual commission statements to your sales team	✓	✓
Mass Update Utilities	✓	✓
Flexible Reporting Tools including Customizable Reports, SmartList Objects, SQL Views, Inquiry windows with drill-back capabilities	✓	✓
Standard Matrix Option: Performs commission calculations at the sales document line item level, based on % of Sales, % of Margin, Flat Amount, Per Selling Unit, or Per Base Unit	✓	✓
Tiers Matrix Option: Determine the Commission rate based on a Sliding Scale which captures information from the sales document line item (i.e. Tier Types: Margin %, Unit Price, Price Level, etc.)		✓
Quotas Matrix Option: Calculate commissions based on a sliding scale of sale amounts or margin amounts over a time period (also referred to as accelerators, milestones, thresholds, and tiers over time)		✓
Pay a single salesperson multiple times for a single sales document (i.e. once as the sales rep and again as the sales manager)		✓
Assign multiple salespeople to groups of customers based on user defined values		✓
Reduce commissions for overdue invoices		✓
Integration Engine: Override normally calculated commissions by supplying summary or line item data		✓
Import Commission Adjustments from sources outside of Microsoft Dynamics GP		✓