

FAQ



IncentViz, from Single Source Systems, is a modern Commission & Rebate Management Solution designed especially for Infor CloudSuite Industrial (Syteline), CloudSuite Distribution, Infor Visual and Infor Service Management.

Compatibility and Integration

Q. What ERP versions does IncentViz support?

A. IncentViz has native integrations with Infor CloudSuite Industrial (Syteline), on-premise and Infor Cloud, Infor CloudSuite Distribution, Infor VISUAL, on-premise only and Infor Service Management, on-premise only.

Q. Do we have to enter a library of eligible products and costs?

A. No. Because IncentViz is tightly integrated to your ERP solution, it automatically draws from information already in your system and it always reflects current SKUs, pricing, discounts, etc. This saves substantial time and supports accuracy. You can designate, though, if certain lines or products are not eligible.

Calculating Commissions

Q. Can IncentViz calculate commissions based on product category, a product line, or a specific unit code?

A. Yes. IncentViz is highly flexible, allowing you to be creative and specific in the way you calculate commissions, so you can emphasize entire categories, product lines, specific market segments, and even limited time spiffs. Our customers tell us they are impressed with the ability to tailor plans.

Q. Can a Sales/Commission Plan be defined once for the whole department but customized for an individual within the department?

A. Yes. IncentViz allows sales managers to define a master Sales Plan that includes general Quota/Target Assignments and Commission Payout formulas. These can then be customized for individual sales representatives, taking into account unique characteristics of a region, product line, or customer base. This ability to tailor plans helps keep salespeople from becoming disenfranchised from unrealistic goals and allows you to challenge top performers to stretch further.

Q. Are commissions calculated on the order or the invoice?

A. Commissions can be calculated when an order is “booked” (created) or when the invoice is generated. Commission calculations generally exclude freight, taxes, and miscellaneous charges but can be configured based on your requirements.



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Q. Are Commission calculated on sales/revenue or profit/margin?

A. Commissions can be calculated at the header or line level and can be based on revenue, margin, and even margin percentage. The commission payment amount is generally calculated by multiplying either the revenue or the margin times a commission percentage. The commission percentage can be dynamic based on rules defined in the sales plan.

COMMISSION PAYMENTS

Q. Are commissions paid when the invoice is paid or other actions?

A. You can define the timing of payments to match your policy. Some companies release the commission payment at time of order entry. Other companies release the payment at time of invoicing. The final option is to release the payment when the payment is received from the customer so that payroll checks align with cashflow. This option avoids “claw backs” if the customer ends up returning, canceling, or disputing the amount. This also encourages the salesperson to remain engaged with the customer after the purchase and tends to improve A/R collections.

Q. Our company recovers previously paid commissions if a customer does not pay in 90 days. Does IncentViz support this policy?

A. Yes, IncentViz refers to the recovery of commission payments as a “claw back.” The number of days is user-defined and IncentViz can help automate the review and recovery of unfunded commission payments.

Q. Are commissions calculated on sales/revenue or profit/margin?

A. Although the commission payment is driven by information from the invoice, the amount of the commission payment can be based on a formula defined by your business requirements. Again, flexibility is one of the distinguishing features of IncentViz.

MANAGING COMMISSION PROGRAMS

Q. Can I see a report of anticipated commissions for the month?

A. Yes, reporting is available to the sales force, managers, and accounting personnel providing real-time projections. Reports are easily generated and easy to read, allowing you to see a big-picture view or drill into details.

Q. Can IncentViz help manage advanced draws against expected future commissions?

A. Yes, IncentViz supports both recoverable and non-recoverable draws and is managed for each individual.

FAQ



DEPLOYMENT

Q. Can we install and set up IncentViz ourselves? Or do we need to budget for additional services to get the solution up and running ?

A. The cost of the IncentViz monthly subscription includes the initial configuration and setup, aligning your legacy commission management system with the new process. After that, the system is easy to use and you will be able to create, tailor, and execute programs without further assistance from Single Source.

COMMUNICATING WITH SALES AGENTS

Q. How can sales representatives access the status of their commission plan?

A. IncentViz includes a portal so salespeople can login with a secure password to view their commissions earned, due, paid, and pending—and the related accounts and order/invoice detail. Real-time data, and the ability to drill into details allow the salesperson to answer their own questions, preventing the long chains of communication that are a burden to sales managers, or accounting.

REBATES

Q. What features does IncentViz offer to manage rebates?

A. IncentViz can process customer rebate payments based on customer purchase levels and can even calculate the payments based on tier attainment as purchase volumes increase. Payments or credits can be processed monthly, quarterly, or annually based on your policy.

Q. Our rebate program includes buying groups. Can IncentViz process payments for the groups and its members?

A. Absolutely. IncentViz can accumulate member and buying group purchases then calculate and process payments in the same manner as it does for customer rebates.

Q. Can IncentViz manage vendor rebates our company receives based on our purchase volumes from a supplier?

A. Unfortunately, not at this time. IncentViz only provides management for customer rebates.

