

IncentViz Updates (Q2 2026)



AREA	DESCRIPTION
Clawbacks	• NEW Now companies can recover or “claw back” monies that have been paid to a salesperson or other payee. This typically occurs when the company has a policy of making the initial incentive payment (commission, rebate, royalty) at the time of booking or invoicing but has the right to recover these funds if the order is cancelled, a return on the order is made, or if an invoice is not paid in full.
Credits	• Ability to utilize custom fields in Credit Filter & calculations • Advanced Filter scripting on Credit Filter form
Dashboard	• Display Total Ready to Pay on Salesperson and Accounting Dashboards
Interface	• ERP custom field placeholders on Customers, Items, Invoices and Order forms • Synchronize Service Order Project Fixed Operations (CSI only)
Invoices	• Added Margin Total and Margin % fields on Invoice form • Add Due Date and Paid Date fields to Invoice form (CSD, CSI, ISM only)
Orders	• Ability to perform commission splits at Order Line level
Payment Calculations	• NEW Period Total (month, quarter, year) payment type based on Margin %, Revenue %, Flat %, or Quota % attainment • NEW Commission Rate Lookup based on user defined field(s) • NEW Import Commission Rate Lookup from Excel spreadsheet • Ability to select commission rate and calculate payments by customer “age”
Payroll	• Ability to generate payroll monthly, quarterly, annually



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Plans	• Ability to define custom reporting periods by company • Display only “active” Sales Plans on Plan list
Recalculate	• Option to clear commission splits prior to a recalculation
Reporting	• NEW Quota Credits Report • Filter by Payroll batch on Commission Report • Label changes to provide clarity on Payments Report
User Interface	• Access Help User Guides and Video from main menu • User interface changes on practically every form
Various	• Bug fixes • Performance enhancements

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