

SymFinTech's INCENTIVE CONDUCTOR



SymFinTech

FOR  **Acumatica**

The Cloud ERP

SALES COMMISSION MANAGEMENT FOR ACUMATICA

OFFER YOUR NEW AND EXISTING CLIENTS A POWERFUL NEW MODULE TO INTEGRATE THEIR INCENTIVE PLANS INTO THEIR ERP

SymFinTech's **INCENTIVE CONDUCTOR** is a completely configurable and automated commission management system built natively within the Acumatica framework. It provides companies the flexibility and precision they need to translate their current commission plans, in all their peculiarity and complexity, into a transparent process that executes flawlessly in their ERP.

- **End-to-End Commission Management.** *Incentive Conductor* empowers sales management to design, track and pay multi-tier direct and indirect commission plans for all types of salespeople, multiple levels of management, and teams — including external contractors and organizations. It offers a sophisticated, comprehensive, and flexible rule management system that can be configured for the most advanced commission systems.
- **Pay Commissions On Almost Anything:** *Incentive Conductor* allows companies to use almost any source metric they desire to pay commissions. Clients can specify inventory items or classes, entries from general ledger, or actions from the CRM, Services, or Projects module. These metrics can be filtered by Branches, Territories, or even specific Accounts or Customers.
- **Detailed Commission Reports:** Automated or on-demand inquiries give the salesperson and management role-based daily access to up-to-date actual and projected earnings for every incentive down to the line item, including past payment periods. It allows management to monitor progress on all incentive metrics, including tracking performance against quotas and targets over time. Perfect for use with Acumatica dashboards to visualize momentum for motivation and optimal activity planning.

KEY CLIENT BENEFITS

NO MORE IMPORT/EXPORT

- Importing, organizing, and exporting data to external commission systems, especially spreadsheets, is time consuming and prone to mistakes. Businesses are at a much higher risk of overpaying and/or wasting resources.

FLEXIBLE AND AUTOMATED

- *Incentive Conductor* delivers the integration and scalability required to allow sales management to automate their entire commission process so they can focus on improving sales performance.

AVOID/RESOLVE DISPUTES

- Every commission is linked to the transactions associated with it down to the line-item level and can be drilled down quickly, making investigations a matter of a few clicks.

SOX - ASC606 COMPLIANT

- With more disclosure required for your sales commission accounting, traceability and full auditability is crucial. Keeping your sales commissions within Acumatica automates the entire process of accurate commission accounting.
- Both the manager and the salesperson have accurate, integrated, and detailed data to resolve disputes in minutes— or even before they happen.

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KEY FEATURES FOR IMPLEMENTATION AND USE

Fully Flexible Formulas

Pay commission or bonuses based on revenue, margin, or quantity on sales or actions (such as calls made, bookings, opportunity to close ratios, etc.) from internal or external CRM, Project modules, Customer Service, or other API service application.

Splitting and Assigning Commissions

Pay multiple people (i.e. salespeople, managers, distributors) and pay multiple incentives on a single sales document or sales line-item. Calculations can be triggered based on entering an invoice, percentage payment, or full payment.

Multiple Levels of Teams

Design creative team-based incentives by leveraging our infinite team system for each role in your company at all levels of the hierarchy.

Projections and Forecasting

Use *Incentive Conductor's* "Projections" mode to design and test your incentive plans before taking them live. You can explore variations of existing incentives (including tiers, bonuses, meta-incentives, etc.) or create new ones and test their impact using sales and financial data from past periods in your database.

FLEXIBLE AND PRECISE

MULTI-TIER SLIDING SCALES

- Set commission rules on multiple tiers for every source metric in the system, with different tier structures for every level of the payment hierarchy.

MULTI-LEVEL COMMISSIONS

- Easily design complex overrides up a management hierarchy. Calculate indirect commissions that are due to managers and executives from sales at the field level.

SET MULTIPLE TARGETS

- Create quotas, targets, and milestones for each incentive (or group of incentives) for each person in the system.
- Use success on one metric as a trigger to alter commission rates on another incentive.
- Set incentives on groups of metrics that impact the individual metrics that make them up.

MODIFY INDIVIDUAL RULES

- Adjust any commission and bonus rules for individual employees if desired.

SEASONAL ADJUSTMENTS

- Design incentives that automatically change based on seasonal factors, regular promotions, or different periods of the year.

SEND TO AP OR PAYROLL

- Send final commission due for each person to account payables or ready for the payroll system of your choice.

