

The background features a large, abstract geometric shape composed of various shades of green triangles and polygons, extending from the top-left corner towards the bottom-left corner.

QCommission

Pay People Properly

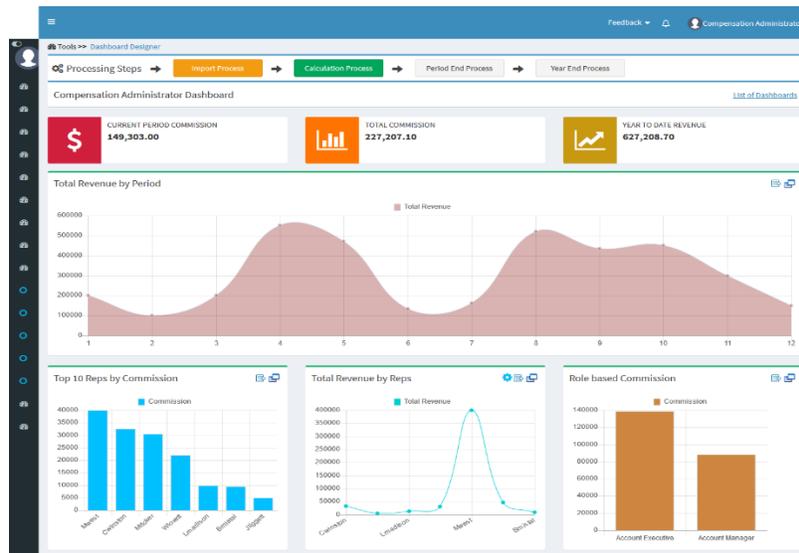
www.qcommission.com

QCommission enables you to quickly calculate commission, draw and bonuses, verify results and distribute this information to your account executives, recruiters, consultants and managers. Present the commission information in such a way that your staff clearly understands what they are being paid and why they are being paid at a very detailed level. Excel and manual calculations can introduce a lot of errors into your calculations and cause your staff to lose trust in you. QCommission can help avoid that by calculating all commissions systematically and reliably.

Calculate Accurately with Flexible Rules

QCommission provides a lot of flexibility to set up commission plans that are unique to your company and your payees.

- Import incoming commissions from carrier files
- Pay commissions on New policies written
- Pay commissions against policy renewals
- Pay commissions against premiums
- Process multiple carrier files and credit sales people
- Split commissions with payees
- Split commissions between multiple payees for a policy
- Provide override commissions to agencies
- Provide override commissions to internal staff
- Vary commissions by carrier, type of insurance product, year written, etc.
- Pay residual commissions forever
- Pay different commission rates based on year of premium
- Deduct various fees such as marketing and desk fees
- Deduct commissions for cancelled policies
- Pay weekly, bi-weekly, twice-monthly, monthly
- Pay overrides to sales managers
- Pay draws or guaranteed payouts.



QCommission is designed to integrate with Salesforce.com, Sage Peachtree, Sage Intacct, MS Dynamics GP, MS Dynamics Axapta, QuickBooks, SugarCRM, Xero, NetSuite and many others. QCommission can also accept Excel, fixed file and delimited format files. QCommission can process some PDF format files too.

QCommission can also operate stand-alone.

- Import data from accounting system including Invoices, Expenses, Payees, Customers, and Products.
- Import from Carrier data from Excel, PDF, and fixed or text-delimited files
- Import files of different formats and layouts
- Ability to automatically download multiple insurance carrier files and process them
- Ability to process commissions for the same agent with multiple carriers having different agent codes and combine the data
- Ability to validate and reprocess the insurance carrier files coming in
- Ability to set workflow rules to intimate in discrepancies
- Reconciliation against payments
- Restrict Transaction import using a date range
- Export Commissions payouts for accounts payable and payroll
- Export data to Excel, and fixed or text-delimited file formats
- Receive notifications via workflow or email whenever files are imported
- Download files automatically
- Reconcile imported files against bank deposits

Reporting

QCommission stores all data entered and all payout calculations.

- Produce Carrier commission reconciliation reports
- Produce detailed commission statements by payee
- Reproduce commission statements for prior periods
- Report on split credits and uncredited transactions
- Analyze historical transaction and payment. information
- Email commission statements to payees
- View commission statements through the web.

The Sterling Group Selects QCommission for their Sales Commission

Customer Profile

The Sterling Group provides support to Automotive Dealerships throughout the United States. This includes Finance and Insurance products offered by Dealerships, including: Appearance Protection, Credit Insurance, Disability, Gap Coverage, Limited Warranties, Planned Maintenance, Tire & Wheel, Vehicle Service Contracts, and Theft Protection. Currently The Sterling Group supports over 300 Auto Dealerships, and has strategic partnerships with over 40 Carriers, representing over 100 products. They have 220 payees, comprised of Dealership Payees, Sterling Group Sales Reps, and Managers.



The Problem

Prior to QCommission, The Sterling Group was calculating commissions manually using spreadsheets and an internal database tool, for counting and reporting against manually entered transaction data from Carrier files. Debbie Kerley, Director of Business Operations, and staff spent numerous hours in manually transferring data into the database and spreadsheets, from multiple carrier spreadsheets, word files, and pdf documents. They then assigned the data for proper crediting, applying individually negotiated rates for Dealerships, Payees, and Products. This manual process was very time consuming, taking up to 3 weeks each month, to meet a monthly payroll.

The Project

The QCommission implementation team started the project by doing in-depth discovery meetings and reviews of all the Carrier files (which vary greatly in format, making product identification, counts, and sales, gross and net, initially challenging.) Another challenge was properly crediting transactions to Dealerships, because of the absence of a unique identifier (e.g. Dealership #) to link on (i.e. each Carrier could have its own version, text, of a Dealership Name. With 25-30 Carrier files being automated, and 300 Dealerships, it was exponential.) Mapping and grouping was used to resolve this complex issue, which was key to proper crediting and payment.

QCommission provided various templates, including ones to interface and import the monthly Carrier files; and, also ones to import details for Dealerships, for Products (product rates, by Carrier, individually negotiated with multiple payees within each Dealership), and for Payees. There were 3 different commission plan incentives configured in QCommission (Dealership Rep payments, Sales Rep commission, and 3 levels of Manager override commission). The commission statement was laid out in a clean and readable manner for the sales rep and managers. The project was very complex and got completed within the estimated budget cost. Additional projects for custom reports, and added incentive plans have also since been entrusted and completed, as well as an integration with Salesforce.com.

Quote

“The customer support team was superb!! Trying to analyze the multiple plans we currently had grown into. Massive work to get thousands of product lines, from over 40 carriers, into an automated system. It was such a challenge, due to our complexity of accounts, products, numerous sales rep commission rates.

I have worked with many software companies and converted lots of manual accounting systems to more automated systems. QCommission has proven to be the best, efficient, and professional I have ever worked with. The manual system of calculating commissions by excel numerous ways was a 3-week process for a once a month payroll. Now it's a one-day process, importing, calculating, and running statements. IT IS SUPERB. If anyone wants a recommendation, I'll be glad to represent our company for you.”

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Zenith Insurance Advisors, Inc - Sales Commission Statement

QCommission

Payee ID : Dawn Mgr	Plan ID : Manager Comm Plan	Gross Payout Amt : 130.00	Balance
Payee Name : Dawn Mgr	Period : 1 [1/1/2017 - 1/31/2017]	Draw/Adv Adjustment : 0.00	0.00
Territory ID : Western Region	Position : Manager	Cap Adjustment : 0.00	0.00
Currency : USD	Fiscal Year : 2017	Minimum Pay Adjustment : 0.00	
		Other Adjustment : 0.00	
		Adjustment To Payout : 0.00	
		Recovery From Payout : 0.00	Net Payout Amt: <input type="text" value="130.00"/>

Txn	Date	Type	Group	Customer	Policy ID	Product ID	Sales Amount	Credit Amount	Comm Rate	Paid Amount
Comments										
Incentive ID : Manager Override										
AA001 - 1	1/31/2017	Premium		John Gooden	W0001	Allianz - Term Life	1,000.00	900.00	5.00	45.00
AA002 - 1	1/31/2017	Premium		Mark Counter	W0002	Healthnet - Health	2,000.00	1,700.00	5.00	85.00
Total :							3,000.00	2,600.00		130.00

Zenith Insurance Advisors, Inc - Sales Commission Statement

QCommission

Payee ID : Andy Rep	Plan ID : Commission Plan	Gross Payout Amt : 794.74	Balance
Payee Name : Andy Rep	Period : 1 [1/1/2017 - 1/31/2017]	Draw/Adv Adjustment : 0.00	0.00
Territory ID : Western Region	Position : Agent	Cap Adjustment : 0.00	0.00
Currency : USD	Fiscal Year : 2017	Minimum Pay Adjustment : 0.00	
		Other Adjustment : 500.00	
		Adjustment To Payout : 0.00	
		Recovery From Payout : 0.00	Net Payout Amt: <input type="text" value="1,294.74"/>

Txn	Date	Type	Group	Customer	Policy ID	Product ID	Sales Amount	Credit Amount	Comm Rate	Paid Amount
Comments										
Incentive ID : Carrier Adjustments										
AA003 - 1	1/31/2017	Adjustment		John Gooden	W0001	Allianz - Term Life	16.87	16.87	100.00	16.87
AA003 - 2	1/31/2017	Adjustment		John Gooden	W0001	Allianz - Term Life	48.61	48.61	100.00	48.61
AA003 - 3	1/31/2017	Adjustment		John Gooden	W0001	Allianz - Term Life	-31.74	-31.74	100.00	-31.74
Total :							33.74	33.74		33.74
Incentive ID : Premium Commission										
AA001 - 1	1/31/2017	Premium		John Gooden	W0001	Allianz - Term Life	1,000.00	900.00	50.00	450.00
AA002 - 1	1/31/2017	Premium		Mark Counter	W0002	Healthnet - Health	2,000.00	850.00	80.00	510.00
Total :							3,000.00	1,750.00		960.00

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Zenith Insurance Advisors, Inc Payee Ranking by Credit Amount for Product

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Transaction Eff-Date Between :		Fiscal Year :			
Payee	Payee Name	Credit Amount	Ranking	Job Category	Territory ID
Product : Allianz - Term Life					
Andy Rep	Andy Rep	900	1.00	Agent	Zenith Insurance Advisors, Inc
Product : Allianz - Whole Life					
Cindy Rep	Cindy Rep	3,400	1.00	Agent	Zenith Insurance Advisors, Inc
Andy Rep	Andy Rep	-99	2.00	Agent	Zenith Insurance Advisors, Inc
Product : BeneGlobe - Benefits					
Eddie Rep	Eddie Rep	400	1.00	Sales Rep	Zenith Insurance Advisors, Inc
Product : Healthnet - Health					
Andy Rep	Andy Rep	850	1.00	Agent	Zenith Insurance Advisors, Inc
Product : Medicare Supplemental					
Frank Rep	Frank Rep	3,000	1.00	Agent	Zenith Insurance Advisors, Inc
Product : Zenith Medical Group					
Frank Rep	Frank Rep	1,000	1.00	Agent	Zenith Insurance Advisors, Inc

Zenith Insurance Advisors, Inc Carrier Commission Reconciliation Report

QCommission

Payee ID	: Zenith Company		Plan ID	: Zenith Incoming Comm Plan						
Payee Name	: Zenith Company		Period	: 2017-1						
Txn	Product	Customer	Agent I	Agent II	Amount	Carrier Calc Comm	Comm Rate	Company Comm Calc	Diff	Currency
Stage Allianz										
AA001-1	Allianz - Term Life	John Gooden	Andy Rep		1,000	900	90	900		
AB001-1	Allianz - Whole Life	Laurentz, Inc.	Cindy Rep		4,000	3,400	80	3,200	200	
Total:						4,300		4,100	200	
Stage Healthnet										
AA002-1	Healthnet - Health	Mark Counter	Andy Rep	Erady Rep	2,000	1,700	90	1,800	-100	
Total:						1,700		1,800	-100	