



FAQ

IncentViz, from Single Source Systems, is a modern Commission Management Solution designed especially for Infor CloudSuite Industrial (Syteline), Infor CloudSuite Distribution, and Acumatica ERP. We have collected some of the questions we most often hear from prospects and provided the answers. We hope this helps you see the value of IncentViz and how it can help your organization.

Compatibility and Integration

Q. Is IncentViz compatible with Infor CloudSuite Industrial?

A. Yes. IncentViz easily integrates to Infor CloudSuite Industrial (Syteline) multitenant. It also integrates to on-premises or third-party hosted version 9.00.20 and later (but not on-prem/third party hosted v8.03 or earlier).

Q. Is IncentViz compatible with Infor CloudSuite Distribution?

A. Yes. IncentViz easily integrates to Infor CloudSuite Distribution, Infor multitenant. IncentViz sources data from the Infor DataLake for Infor CloudSuite Distribution (CSD), so the DataLake must be enabled and synchronized with CSD.

Q. Is IncentViz compatible with Acumatica ERP?

A. Yes. IncentViz easily integrates to all Acumatica Cloud ERP editions. Version support may vary so make sure to check in on if the API is already built for your version.

Q. Is IncentViz compatible with Infor Distribution SX.e (on-premise or 3P hosted)?

A. No. Distribution SX.e (on-premises or third-party hosted) are not supported at this time.

Q. Is IncentViz compatible with other ERP solutions or can it stand alone?

A. Sorry, no.

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, specific product lines, or promotional products for a limited time. Our customers tell us they are impressed with the ability to tailor plans.



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FAQ



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, customer base, or competitive situation. 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. You can define when commissions are calculated. We recommend setting commissions to calculate based on invoice created. This is typically the most accurate, reliable information.

Q. Are Commission 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.

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. Many users opt to pay commissions when the payment is received so that payroll checks align with cashflow. This also avoids “clawbacks” 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 customer satisfaction.

Q. Can the period salary or some other burden amount be removed from the calculated commission amount?

A. Yes, a commission “burden” can be specified and removed from each pay period. This can be used to cover costs such as a salary or other threshold value. You can define this based on your formula or set amounts. Proactively providing visibility and explanation around this amount helps salespeople understand their payroll totals and prevents common sources of disputes.

FAQ

Managing Commission programs

Q. Are Sales Plans based on effective date?

A. Sales Plans can be created in advance of the actual effective dates to facilitate advanced planning and collaboration between sales leaders and executives. Once the time window of the effective date is active, the respective Sales Plan becomes active.

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

A. Yes, reporting is available to managers, 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. 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.

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

A. Yes, this is managed for each individual and formulas can be specified.

Q. What if we are in the midst of a commission cycle, how do we migrate current achievement levels to the new system?

A. This isn't a problem. We have worked with many companies on transitioning their programs. We have proven workflows for the process, making it a smooth transition for everyone, from sales to accounting.

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 set-up, aligning your legacy commission management system with the new process. After that, the system is easy to use and you likely will be able to create, tailor, and execute programs without further assistance from Single Source.

FAQ



Q. Do you provide training or ongoing support?

A. Yes. The monthly subscription fee include all configuration, training and on-going support. We always stand behind our products.

Q. How secure is IncentViz?

A. IncentViz is hosted using Microsoft Azure and uses encryption for all data that is communicated on the platform.

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 paid, due, and pending—and the related accounts and invoices. Detailed explanations, real-time data, and the ability to drill into details or ask questions help keep communication timely and organized, preventing the long chains of communication that can become confusing.

