



EthoTech Commission Plan Transition

EthoTech Commission Plan has been successfully implemented in thousands of companies spanning hundreds of industries around the world. So, we understand how each company is unique in their approach to variable compensation management, and how each measures sales success. Consequently, Commission Plan has evolved into a family of products, giving our customers the ability to implement precisely the features and functionality needed to streamline administrative processes, improve sales performance, and drive company productivity.

▶ **The Commission Plan Product Family** _____

COMMISSION PLAN KEYSTONE • COMMISSION PLAN APEX

Commission Plan is now offered as a Site Licensed product, so EthoTech will no longer adjust the software price or registration keys based upon your number of Microsoft Dynamics GP users. Existing Commission Plan customers currently have access to ALL Commission Plan APEX functionality for their **existing number** of concurrent Dynamics GP users. Commission Plan customers who maintain their current Dynamics GP user count are not required to transition to Site Licensing; and thus, their software will continue to function as it does today.

▶ **Why should my company transition to EthoTech Site Licensing?** _____

As a Commission Plan customer, you might choose to transition to Site Licensing for two reasons:

1. You've increased your Dynamics GP user count causing EthoTech to issue new registration keys.
2. You'd like to avoid the need to perform a user count upgrade for Commission Plan in the future.

▶ **Which Commission Plan product should my company transition to?** _____

This document was created to help existing Commission Plan customers determine if they should choose **Commission Plan KEYSTONE** or **Commission Plan APEX** when they transition to EthoTech Site Licensing.

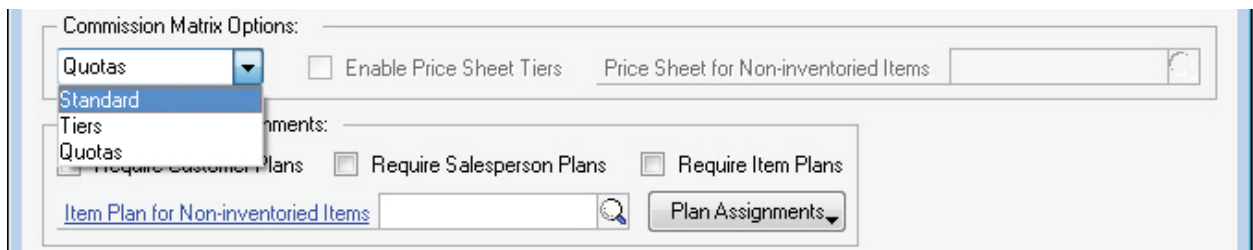
Please contact EthoTech or your Microsoft Dynamics GP Partner for special transition pricing.

How do I determine which Commission Plan features my company uses?

Each of our Commission Plan solutions provides a solid foundation for processing commissions. However, if you answer YES to any of these questions, **Commission Plan APEX** is the product that your company needs.

▶ 1. Does your company use Tiers or Quotas?

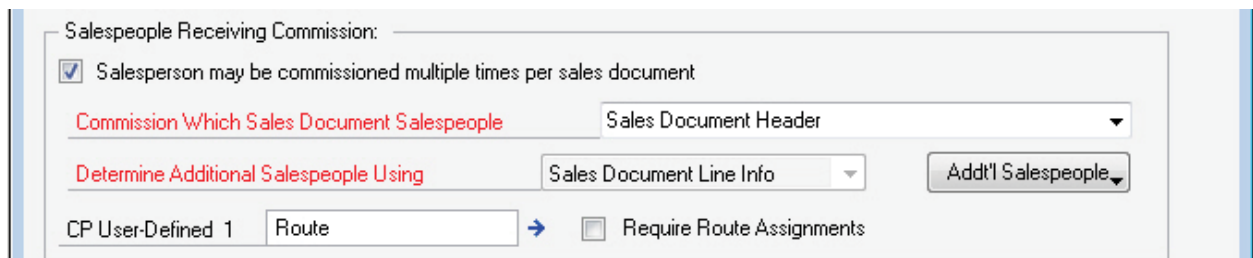
- Microsoft Dynamics GP >> Tools >> Setup >> Sales >> Commission Plan >> Commission Plan Setup
- Alternate Path: Sales Area Page >> Setup >> Commission Plan >> Commission Plan Setup



If you have selected Tiers or Quotas from the Commission Matrix Options drop-down list, then you need **Commission Plan APEX**.

▶ 2. Does your company need to pay a single salesperson multiple times on one sales document?

- Microsoft Dynamics GP >> Tools >> Setup >> Sales >> Commission Plan >> Commission Plan Setup
- Alternate Path: Sales Area Page >> Setup >> Commission Plan >> Commission Plan Setup



If the 'Salesperson may be commissioned multiple times per sales document' option is marked in the Salespeople Receiving Commission section of the Commission Plan Setup window, then you need **Commission Plan APEX**.

Commission Plan Transition (continued)

3. Does your company assign multiple salespeople to customer user defined values?
- Microsoft Dynamics GP >> Tools >> Setup >> Sales >> Commission Plan >> Commission Plan Setup
 - Alternate Path: Sales Area Page >> Setup >> Commission Plan >> Commission Plan Setup

Salespeople Receiving Commission:

Salesperson may be commissioned multiple times per sales document

Commission Which Sales Document Salespeople: Sales Document Header

Determine Additional Salespeople Using: Sales Document Line Info

CP User-Defined 1: Trade Show

Require Trade Show Assignments

If the 'CP User-Defined 1' field contains a value in the Salespeople Receiving Commission section of the Commission Plan Setup window, then you need **Commission Plan APEX**.

4. Does your company need to reduce commissions for overdue invoices?

Commission Reductions:

Reduce Commissions For: Posted Sales Documents

Reduce Commissions How: Reduce Comm Sale

Terms Discounts Taken Trade Discounts Writeoffs

Salespeople Receiving Commission:

Salesperson may be commissioned multiple times per sales document

Commission Which Sales Document Salespeople: Sales Document Header

Up To Days Overdue	Discount %
60	0.00%
90	50.00%
120	100.00%
0	0.00%

- Microsoft Dynamics GP >> Tools >> Setup >> Sales >> Commission Plan >> Commission Plan Setup
- Alternate Path: Sales Area Page >> Setup >> Commission Plan >> Commission Plan Setup
- This window is accessible from the Commission Reductions section of the Commission Plan Setup window; choose Addt'l Reductions >> Overdue Invoice Setup

If the 'Commission Plan Overdue Setup' window has been configured, then you need **Commission Plan APEX**.

5. Does your company use the EthoTech integration tables to override the commissions that Commission Plan normally calculates? If you are populating tables ETI28305 and/or ETI28316 in your company database, then you need **Commission Plan APEX**.

If you have answered NO to ALL 5 Questions, then your company is NOT currently utilizing features that are available only in **Commission Plan APEX**. Please inform EthoTech and your Microsoft Dynamics GP Partner that you would like to transition to **Commission Plan KEYSTONE**.



Meet the Commission Plan Product Family

Now you can implement precisely the features and functionality you need by personalizing the **Commission Plan** solution of your choice.

Commission Plan KEYSTONE will automate your commission calculations, payouts, and distribution of personalized commission reports. You'll easily be able to create and modify commission plans, giving you maximum flexibility in managing your sales force and controlling your compensation program.

Commission Plan APEX automates the most complex commission structures, such as those using outside sources to collect sales data (Microsoft CRM, Salesforce.com, etc.) and even commission calculations based on quotas and tier-based sliding scales. APEX delivers the integration and scalability required to meet your highest demands.

COMMISSION PLAN FEATURES	KEYSTONE	APEX
Use a flexible, multi-step calculation model based on salesperson, customer, and item	✓	✓
Assign multiple salespeople to individual customers, sales territories, and inventory items	✓	✓
Assign multiple salespeople to combinations of customer, ship to address, and inventory item	✓	✓
Automatically split commissions between two or more salespeople	✓	✓
Pay commissions only on sales documents that are fully relieved (i.e. paid)	✓	✓
Create commission transactions in the Dynamics GP G/L, Payables, and U.S. Payroll modules	✓	✓
Create commission accrual transactions to record the commission liability	✓	✓
Adjust commissions for scenarios such as bonuses, commission draws, chargebacks, or correcting commissions paid incorrectly in a previous period	✓	✓
Reduce commissions using Markdowns, Trade/Terms Discounts, Write-offs, Payment Terms, Credit Card types	✓	✓
Place commissions On Hold for individual sales documents or for all sales documents for a salesperson	✓	✓
E-MAIL individual commission statements to your sales team	✓	✓
Mass Update Utilities	✓	✓
Flexible Reporting Tools including Customizable Reports, SmartList Objects, SQL Views, Inquiry windows with drill-back capabilities	✓	✓
Standard Matrix Option: Performs commission calculations at the sales document line item level, based on % of Sales, % of Margin, Flat Amount, Per Selling Unit, or Per Base Unit	✓	✓
Tiers Matrix Option: Determine the Commission rate based on a Sliding Scale which captures information from the sales document line item (i.e. Tier Types: Margin %, Unit Price, Price Level, etc.)		✓
Quotas Matrix Option: Calculate commissions based on a sliding scale of sale amounts or margin amounts over a time period (also referred to as accelerators, milestones, thresholds, and tiers over time)		✓
Pay a single salesperson multiple times for a single sales document (i.e. once as the sales rep and again as the sales manager)		✓
Assign multiple salespeople to groups of customers based on user defined values		✓
Reduce commissions for overdue invoices		✓
Integration Engine: Override normally calculated commissions by supplying summary or line item data		✓
Import Commission Adjustments from sources outside of Microsoft Dynamics GP		✓