



Commission Plan Questionnaire

The following questions will assist EthoTech to evaluate and understand your company's personalized commission requirements. Please note: EthoTech Commission Plan works exclusively with the Microsoft Dynamics GP Sales Order Processing module.

Please tab between (or print out and write in) the following fields, filling in the appropriate areas with keyboard entries. Check boxes can be ticked via mouse or the space bar.

For the fastest response and assessment by one of our Product Specialists, e-mail the following documentation to sales@ethotech.com or fax to 678-384-7555.

- Commission Plan Questionnaire – completed in full
- Your Company's Sales Compensation Plan – document(s) you give to any person who receive commissions

Once reviewed, an EthoTech Team Member will e-mail back a response as to the "fit" of our solution to meet your company's commission requirements and then, a product demonstration can be scheduled.

To reach EthoTech, please use the following contact information.

EthoTech, Inc.
Tel: 678-384-7500 Ext. 1 Fax: 678-384-7555
E-mail sales@ethotech.com
Web: www.ethotech.com

Date: 8/8/2019

MICROSOFT PARTNER INFORMATION

Partner Company Name

Microsoft Partner Primary Contact

Contact Name (person handling this account)

Phone Number

E-mail Address

CUSTOMER INFORMATION

Company Name

Company Web Address

Address Information

	Mailing Address
Address Line 1	
Address Line 2	
City	
State	
Postal Code	
Phone Number	
Microsoft Account Number	

Customer Primary Contact

Name

Title

Phone Number

E-mail Address

Who are the decision maker(s) on this project?

Name

Title

What are your preferred dates and times for the Commission Plan demonstration?

Option	Date	Time	Time Zone
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CP Questionnaire: COMMISSION STRUCTURE

1	00:00
2	00:00
3	00:00

PURCHASE AND IMPLEMENTATION

Are you currently a Dynamics GP customer? Yes No If Yes, for how long?

What is your purchase time frame?

What is your "Go Live" date for using EthoTech Commission Plan to calculate and pay your commissions?

Which version of Microsoft Dynamics GP is currently installed or will be installed at your company?

Dynamics GP 2018 Service Pack?

Dynamics GP 2016 Service Pack?

Dynamics GP 2015 Service Pack?

Other. Please specify.

Does your company use the Dynamics GP Sales Order Processing module? Yes No

Please note: EthoTech Commission Plan works exclusively with the Microsoft Dynamics GP Sales Order Processing module.

Does your company use the Dynamics GP Inventory module? Yes No

If No, do you have items set up on the Dynamics GP Inventory Cards? Yes No

Please mark all methods being used to record sales transactions in Dynamics GP.

Data entry into the Sales Transaction Entry window

Import via Dynamics GP Integration Manager

Import via eConnect for Dynamics GP

Other method. Please describe.

COMMISSION STRUCTURE

General Information

Number of Salespeople:

Number of Customers:

Number of Inventory Items:

Salesperson Selection

What determines the salesperson receiving the commission? Mark all that apply.

- Customer
- Inventory Item
- Sales Territory
- Customer / Inventory Item combination
- Customer / Ship To Address combination
- Customer / Inventory Item / Ship To Address combination
- Sales Territory / Inventory Item combination
- Salesperson manually entered at time of SOP document creation
- Other.

Do you split commissions amongst multiple salespeople? Yes No
If Yes, please describe.

Calculating Commissions

Do you have quotas or milestones that a salesperson must meet to receive commissions? Yes No
If Yes, please describe.

Are commission rates calculated on a sliding scale for each line item? Yes No

For example, If the margin percentage of a line item on a SOP document is between 1% and 24%, the commission rate is 10%. If over 24%, the commission rate is 15%. This is just one example of a sliding scale type that may be utilized. Others may include commissionable sales amount, unit price, price level, etc.

If Yes, please describe.

Do your salespeople receive draws? Yes No

Do your salespeople receive bonuses? Yes No

Is there a "Team Compensation" component used in determining a salesperson's total commission? Yes No

What method(s) is used to calculate commissions?

- % of the margin amount
- % of the sale amount
- Flat amount
- Quantity on the SOP Document
- Quantity in the base unit of measure
- Other.

Are the sale and/or cost amounts entered on your SOP document used to calculate commissions? Yes No
If No, please describe how the commissionable sale and/or cost amounts are determined?.

Are there any circumstances where an entire invoice is not commissionable? Yes No
If Yes, please describe.

Should commissions be reduced using any of the following criteria?
Terms Discounts¹ Trade Discounts Write-offs¹
Credit Card Invoices Unpaid "X" Number of Days¹

Payment Terms ID

¹ Only applies to commissions paid when the invoice is paid

Do you apply adjustments to commissions? Yes No
If Yes, please describe.

Processing Commissions

When are commissions ready to be processed for payment?
When the invoice is posted
When the invoice is fully paid
Both
Based on Cash Receipts – Commissions are Paid on Partial Payments

How often do you pay commissions?
Weekly Bi-weekly Twice per month Monthly Quarterly Other

Which method are you using to pay your salespeople commissions?
Dynamics GP Payroll
Outsourced Payroll Service (i.e. ADP)
Dynamics GP Payables
Other. Please describe.

What is your current process for calculating, storing and paying commissions?

Describe your commission structure.

Please provide examples and commission calculation documentation, as you would give to your salespeople.

General Comments

Please feel free to address any comments, ideas, questions or concerns you may have.