

QCommission Integration with SugarCRM

Overview

The calculation of commissions is a very complex problem, yet the majority of companies use highly manual processes to do the work. With QCommission that is no longer a problem.

For sales people, nothing is more important than the commission check they get on a regular basis. Sales people work hard to close their sales and expect to get their sales commissions correctly and on a timely basis. They expect the calculations to be accurate based upon the agreed upon compensation plans. They need clear and detailed statements that explain the basis of every calculation.

The majority of sales people would agree they do not get a clear and correct commission statement. Compensation plans are by their nature complex. The data needed to calculate the plans is not always available, the plans change on a regular basis and there are exceptions to the exceptions. Sales people get their sales commissions typically weeks after the period is over. Frequently the crediting and calculations are incorrect. As a result, the commission statements are not clear and obvious. They have no idea how they are getting paid, or waste time trying to figure out what they should get paid.

With the advent of CRM systems, companies are attempting to automate the sales process and customer interactions. More and more sales people access CRM systems to get their job done. But there have been challenges in CRM adoption as sales people resist the solutions. If salespeople have to access the CRM system to get access to their commission statements, they are more likely to use the CRM system for its intended purpose. If a salesperson knows they can help get paid accurately, they will make sure to keep the systems accurate and thus help keep the system up to date.

A commission solution that can accurately establish and calculate commissions and can seamlessly provide the commission statements for viewing by sales people can be a great advantage to firms. In addition to reducing commission errors, reducing time taken to administer and increasing sales people productivity, the solution can increase SugarCRM adoptions.

QCommission is a powerful, flexible sales commission software tool. It calculates sales people's compensation, accurately, quickly and professionally. QCommission is integrated with the SugarCRM system as well as accounting systems such as MS Dynamics GP, MS Dynamics AX and QuickBooks.

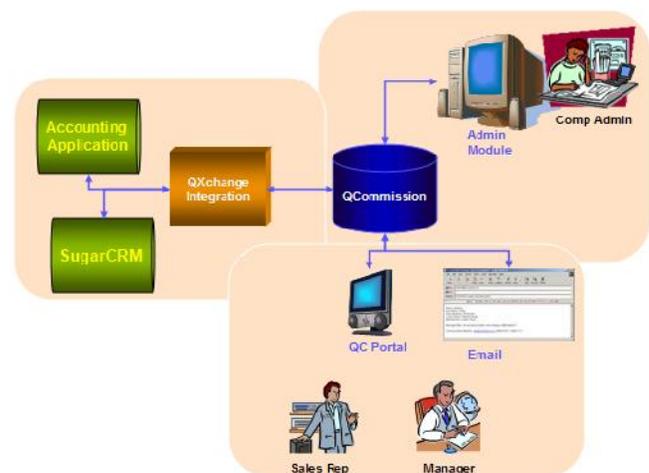
SugarCRM is a customer relationship management solution, used to manage global sales and marketing lifecycles and enhance the productivity of enterprise sales, marketing and service professionals. It has various editions such as Sugar Professional, Sugar Enterprise, Sugar Ultimate and SugarCRM Community Edition (installable version and open source). SugarCRM also supports 3rd party applications integration.



Technology

SugarCRM, supplies Web services, a pool of API calls for building applications and integrating with SugarCRM objects. This set of APIs allows you to create and retrieve data from Fusion accounts. The platform also ensures that the third party product is properly authenticated prior to getting access to the SugarCRM data. The SugarCRM platform allows you to customize standard objects, build custom objects and fields. Use of the web service API calls along with SOAP information makes sure that the integration works well with the SugarCRM. The CRM also ensures that the third party product is properly authenticated prior to getting access to the data. All access to SugarCRM is through the Web service API requests.

QCommission utilizes a technology called QXchange to integrate to other applications including SugarCRM. Specific data access plug-ins (DAP) for different systems can be added to QXchange to integrate with various different data sources. A special DAP for SugarCRM allows QCommission to exchange data with SugarCRM.



Integration Architecture

QCommission is a composite application. It has two components: an administrative module that calculates commissions and a presentation module that presents commission results to the sales

force.

The administrative module is the system used to establish sales compensation plans for the sales force. The responsibility for this function typically lies with sales operations but can also be shared by finance or human resources. Commission plans can be unique by sales people or common across groups of people. Data for commission calculations can come from various sources, but is primarily invoices from the corporation's accounting systems. Commissions are primarily calculated on Revenue. Revenues are mostly based on invoices entered into the accounting system. This is the primary data that is imported into QCommission. Opportunities within SugarCRM can also be imported into QCommission and treated as transactions against which commissions should be calculated.

Various attributes of transactions can be used in the calculation of commissions. In many situations, sales reps are directly associated with transactions. This can be used in properly crediting the transaction to the sales rep prior to calculating commissions. Other data attributes useful in commission calculations include Quantity, Amount, Customer, Product, etc.

Calculations are done on a periodic basis. The calculation process in the administrative module produces commission results for each individual sales person in the system. The most effective way of getting the commission results to the sales people is to present the results through a CRM system such as SugarCRM. The presentation module in QCommission essentially presents the commission results directly to the sales force individually.

Data Objects

The QXchange layer loads data from the administrative module into the presentation module.

Customers: This object shows the customer information of the company

Products: This object shows which products of the company.

Opportunities: This object shows which source transactions were credited to which sales person.

The data is specific to each sales person and the sales people can access their data in detail. Queries can be executed and reports can be generated against these data objects.

Conclusion

QCommission does a tremendous job calculating individual commissions for the sales person. With the SugarCRM, it brings the calculated data to the salesperson. With this integration it ties the two systems in such a manner that the complexity to the customer is reduced to a minimal level.

