

Exensys Software Solutions Ltd.		AA/B/CCDD V x.y
White Paper		W. E. F. dd/mm/yy



**exensys**  
Business Performance Sustained

Motivate the customers to maximize the sales and productivity. Improve customer satisfaction and customer retention.

**Best Practice**  
**eXensys – Customer Quotas**

Exensys Software Solutions Ltd.		AA/B/CCDD V x.y
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## Table of Contents

**Introduction:** ..... 3

**Overview:**..... 3

**Benefits:**.....5

**Conclusion:** ..... 6



Exensys Software Solutions Ltd.		AA/B/CCDD V x.y
White Paper		W. E. F. dd/mm/yy

## Introduction:

eXensys Sales and distribution offers flexibility to define customer quotas on various entities. It also facilitates the rebates definition, generation, and disbursement for a specific period of time. Improving the customer's strength is a key process in an organization. When the number of customers increases, the organization's sales also improve. Customer quota improves business performance of the organizations and customer motivation in terms of sales. When quotas are designed and managed correctly, then these quotas helps the organization to increase sales volume, increase organization growth and improve profits.



eXensys sales and distribution provides an unique option to define the customer quotas Item wise, Invoice wise and Product group wise for a specific period of time. The user can choose any of the above options. For any combination of the quotas settings, the user can go-ahead and define rebates both in absolute and percentage figures for different levels of achievements of the quota figures.

## Overview:

eXensys Sales and distribution offers flexibility to define customer quotas on various entities. It also facilitates the rebates definition, generation, and disbursement for a specific period of time. The quotas and rebates processes are used for calculating rebates against customer quotas. When the rebates for customers are approved, the system should automatically post credit notes for each customer based on the rebate value. These credit notes can be later adjusted against the future customer invoices or payments. Quotas provide an unique option to define the Quotas against Item, Invoice and Product group in a specific period of time. The user can choose any of the above options. For any combination of the quotas settings, the user can go-ahead and define rebates both in absolute and percentage figures for different levels of achievements of the quota figures.

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Exensys sales and distribution supports the customer quotas against the following

1. Item 
2. Product Group 
3. Sales Invoice and

The users can generate and adjust the quotas in the sales incentives transaction. The system processes the rebates according to the Quota definition and automatically generates a credit note for the customer. Credit note can be later adjusted against the customer invoices. Earned commissions are automatically calculated based on the quota definition on item-wise sales, invoice (revenue), or product group wise. All the defined quotas will be executed through sales invoices. The system will consider all the executed customer wise sales invoices with in the quota period. Rebates adjustment systems consider all the rejected invoices of the customer, reversal invoices and sales return from the customer. Based on this the rebate amount will be adjusted in the customer account.

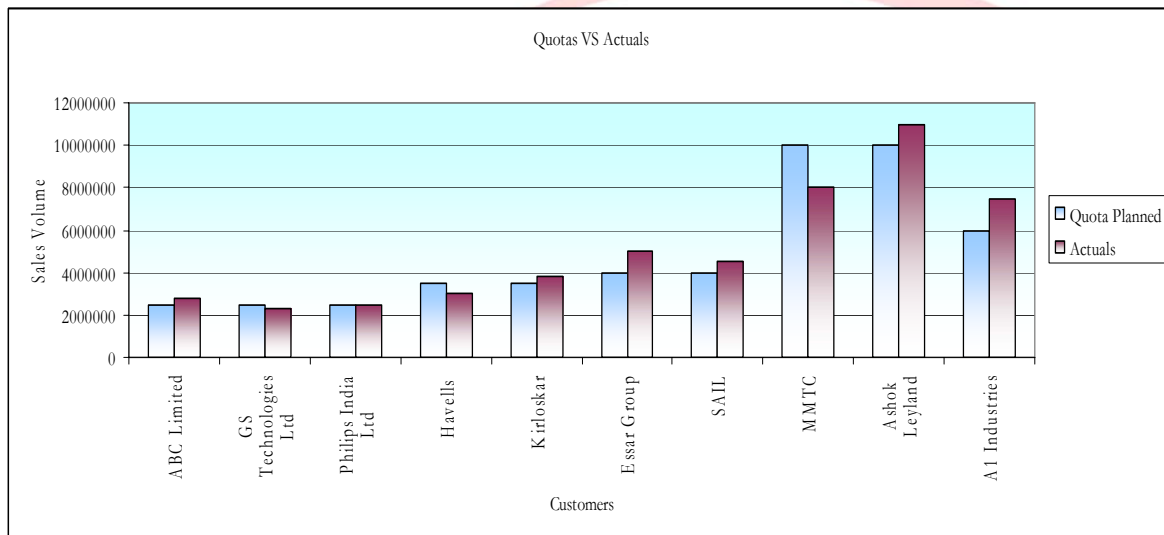
Exensys sales and distribution supports the customer quotas against the Items, Invoices and Product group for a specified time period. The achievement against the quotas for the customers (with reference to Items, Invoice Value and product groups) can be monitored from the approved Sales Invoices. In the sales invoices, we can capture the customer information. The rebates definition for the customer against the Items will have a provision to define rebates for different quantity slabs, for different level of achievement of the quotas with the aspect of absolute and percentage figures. Rebates for customers against Invoice Amount should also be processed with the aspect of absolute and percentage figures. If multiple customers are attached when we define customer quotas, then the same will be processed with an option for assigning different rebates to different customers.

If the customer quotas are defined on items or product group, then the system captures the required items along with the quantity slabs for a defined time period. These quotas will be executed through sales invoice. Once the sales invoice is approved with the defined quota customer, then the commission will be reflected in the incentive transaction.

Rebates will be executed through incentives transaction. Once it is completed, then the rebates will be adjusted to the customer.

If quotas are defined on sales invoice value, then the system will calculate the sum of total invoice based on the customer wise value for the defined quota period. Against the quota settings, the system will calculate customer performance and adjust the rebate values. If the same quota is defined to multiple customers, then the system adjusts the rebates based on the performance and percentage of achievements of each customer. Each customer gets the rebate amount against actual achievements with in the defined time period.

**The below examples explains the customer wise performance on quotas against actual.**



**Benefits:**

- Provides a variety (simple to complex) of customer quota and rebates from the.
- Monitor actual results vs. planned customer quotas.
- Analyze performance results
- Exensys facilitates to easily make adjustments of customer rebates after the quota settings and achievements.
- Improves sales volume.

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White Paper		W. E. F. dd/mm/yy

- Improve organization growth and profits.
- Improves customer satisfaction.
- Improves customer retain
- Improves customer wise turnover.

**Conclusion:**

Exensys sales and distribution provides flexibility of customer rebates against quota settings to the organizations in terms of improving customer satisfaction, customer turnover, profits and organization growth.

- Improving profits is not easy for the organizations as they need to analyze all the historical data of customer performance. Exensys provides the best quota settings for improving customer satisfaction and customer retention.
- Exensys provides reliable customer rebates against quota setting.
- Integration with other modules.
- Exensys provides analytical reports on contract.

