



CATS



ENTERPRISE INCENTIVE SOFTWARE, INC.

**CATS<sup>®</sup>2008 EIM**  
COMPENSATION ACTIVITY TRACKING SYSTEM

FEATURES

## **BUSINESS FEATURES**

### **COMPENSATION PLAN DESIGN**

- Interactive plan development
- Flexible formula structure
- Plan design wizards
- Create plans exclusively using click-and-point interface (no programming)
- Plan formulas are designed once and applied to multiple positions
- Component-based plan design
- Majority of plans can be defined using forms
- Object oriented programming language for defining complex plans
- System constants for quotas and targets
- High Degree of Flexibility to adjust to changes in plan and planning process-- limited need for customizing code (limited IT or Vendor Involvement)
- Plan component library
- Component modifier library
- User-defined library components with user notes and parameterized values
- Drag library components to the plan designer
- Interactive, visual plan design
- Share library components among multiple users

### **COMPENSATION PLAN MODELING**

- Plan design and modeling wizard steps you through the creation of compensation plans, setting up modeling assumptions, and analyzing results
- Plan design and modeling wizard has full drag & drop functionality for visual design of plans
- Design a plan component once and visually assign it to multiple plans
- View, and interactively modify, the plan hierarchy
- Create performance distribution assumptions by position or by measure
- Model using historical data
- Model using future projections
- Model using performance distribution
- Analysis of modeling results with user-defined metrics
- Side-by-side comparison of analysis runs
- Automatic charting of analysis
- Perform modeling and view results on a laptop PC
- Test plan changes inside the production instance
- Model the cost of new compensation plans based on predictions about revenue mix, organization, and plan "what-if" functionality to quickly analyze the cost of the plan under different circumstances
- Utilize previous years' information regarding revenue and organization to model future years costs

### **COMPENSATION PLAN ADMINISTRATION**

- Administrator is guided through compensation processing by a plan manager wizard
- Compensation processing is segmented into discrete steps to improve comprehension and increase flexibility
- CATS can be run from anywhere in the enterprise within a web browser
- Web browser based administration (requires deployment on a Citrix server to achieve a 'thin-client')
- Web browser based entry of performance achievement and performance goals from anywhere in the enterprise (requires the CATS Portal)
- Comprehensive help system
- Wizards for common functions
- Allows daily or weekly calculation to monitor performance (or any user-defined interval)
- Automates delivery of participant and management reports via email
- Automates distribution of participant and management reports via secure website
- Work off-line and upload changes
- Supports 10,000's of participants
- Supports millions of transaction records



- Supports an unlimited number of data tables
- User-defined tables
- User-defined interface with external data
- Automatic import of data from external sources
- Import from any ODBC data source, text file, or Excel worksheet
- Ability to summarize information in external table without importing
- Download individual goals via a spreadsheet
- Enter additional goals manually
- Allows manual entry of performance, credit, and compensation data (with audit log)
- View of data controlled and filtered by user name and password
- Purge/archiving facility
- Automatic archiving of all performance and compensation data
- View errors by transaction item or by process
- Automatic highlighting of transactions with errors
- Notes can be attached to any transaction and compensation item
- Automatic logging of manual changes to all data tables.
- Unlimited number of concurrent compensation plans
- Multiple incentive periods
- Various data sources can be used to calculate incentives
- Supports roll-ups
- Supports all types of credit allocation rules
- Customizable performance measure formulas
- Top-down quota setting
- Bottom-up quota setting
- Decentralized and integrated quota interface
- Supports import to and export from all system and plan tables
- Rollup revenue and other incentive compensation at each pay cycle
- Split compensation for a defined period following a territory change
- Compensate simultaneous overlapping multi-period segments (YTD, QTD, MTD, WTD) on a given pay period

## **PLAN TYPES SUPPORTED**

- Bonuses
- Bridges
- Caps
- Club awards
- Commission calculation
- Cost-of-sales
- Declining-rate commissions
- Discrete performance cycles
- Experience-based rates
- Flat-rate commissions
- Guarantees
- Hurdles
- Leverage
- MBO plans
- Modifiers
- Multiple comp plans
- Organizational rollups
- Payment triggers
- Payout frequency
- Profit calculation
- Progressive-rate commissions
- Quota-based commissions
- Recoverable and non-recoverable draw



- Rolling period commissions
- Spiffs
- Splitting commissions
- Step-rate commissions
- Target totals
- Thresholds
- Matrix commissions
- Binary bonus
- Step bonus
- Bonus formula
- Variable rate commission
- Individual commission rate
- Adjusted value commission
- Linked performance

## **GROUP AND TERRITORY MANAGEMENT**

- Hierarchies are created and managed with an outlining tool that provides common outlining features including drag and drop functionality
- Multiple hierarchy structures can be created that define such things as territory rollups, product categories, channel structures etc.
- Role-based hierarchy
- Rollups of performance and goals can be managed within the territory hierarchy
- Drag & Drop dynamic modification of organization hierarchy
- An interactive Online Analytic Processing server lets you quickly view summarized data – such as performance information – within the framework of a group hierarchy
- View sales results by any combination of time, geography, product family, sales channel, or any other attribute, with full drill-down capability
- View and edit data that exists anywhere within an organization (through ODBC), and categorize the data within a group hierarchy with drill-down functionality
- Model compensation plans using performance assumptions that are categorized by group and role

## **DOCUMENT AND REPORT GENERATION**

- Generation of compensation plan documents
- Ranking reports
- Commission statements
- Achievement reports
- Revenue reports
- Delivered with Seagate Crystal Reports Professional
- Compatible with all third party report writers
- Extensive support for ad-hoc reporting
- Interactive web-based report design and viewing
- Create reports with no involvement of IT
- Delivered with standard reports
- Delivered with the capability to provide specific data statistical reports
- Employee and manager can access payment information via Web

## **ADJUSTMENTS**

- Adjustment entry
- Adjustment correction
- Adjustment history viewing, auditing, and reporting
- Adjustment processing
- Chargebacks
- Adjustment audit trail
- Attach notes to any transaction item and compensation result



## **MANAGING SALES TRANSACTIONS**

- Duplicate checking
- Exception processing
- Order and line item detail
- Import updates
- Manual or automatic import of transactions
- Automatic archiving of transactions
- Import data into CATS managed tables or extract summary information from external ODBC data sources
- Web-based work flow for transaction exception approval and MBO data capture (requires the CATS Portal)

## **ORGANIZATIONAL MODELING**

- Team selling
- Organization rollup
- Dynamic reorganization
- Territory assignment

## **POSTING**

- Trial posting
- Correcting
- Spot checking
- Promoting

## **TOOLS**

- Compensation Plan Editor
- Query builder

## **PROGRAMMING LANGUAGE**

- Full-featured object-oriented programming language
- Loops, case-statements, if-then statements
- Variable scoping
- Sub-procedures
- Arrays
- Programmatic control (if necessary) of all aspects of plan design and processing

## **TECHNICAL FEATURES**

### **APPLICATION ARCHITECTURE**

- Available in three editions—Workstation, Server, and Enterprise—to meet the different needs of business users
- Built upon our own proprietary Rapid Application Development (RAD) system
- n-tiered application architecture
- Component based
- Microsoft Windows DNA compliant

### **DATA MANAGEMENT**

- Compatible with ODBC report management systems
- Compatible with popular ETL tools: Data Junction and Oberon
- ASCII delimited or fixed record length text
- Table linking
- User-definable tables and records
- Desktop or C/S database
- Import from and export to any ODBC data source



- Import and export support for all tables
- Import and export all CATS tables to and from Microsoft Excel
- Directly connect to existing legacy systems (SAP, DW, CRM)
- Upsize function to move desktop data to C/S
- Downsize function to move C/S data to desktop database

## **SECURITY**

- Roll based and plan based for admin and reporting purposes
- Username and password security

## **PLATFORM SUPPORT**

### **GENERAL**

- 3 platform options: Workstation, Server, Enterprise
- Product is compatible with MS Office 97/2000/XP/2008

### **SERVER**

- Microsoft Windows, Sun Solaris and Linux
- CD-ROM drive for installation

### **CLIENT**

- Microsoft Windows 98/NT/2000/XP/VISTA
- Microsoft Internet Explorer 4.01 or higher (optional)
- Browser based client (optional)
- CD-ROM drive for installation

### **WEB REPORTING CLIENT**

- Microsoft Internet Explorer 4.01 or higher
- Netscape Navigator 4.0 or higher

### **DATABASE**

- Microsoft SQL Server
- Oracle
- Desktop database
- Microsoft MSDE

### **NETWORKING SUPPORT**

- All common network protocols

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